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PeopleSoft Enterprise Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs 9.0 PeopleBook

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PeopleSoft Enterprise Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs 9.0 PeopleBook
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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

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The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system 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 Enterprise 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 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 the W key.
`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.
. . . (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 (|).

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Typographical Convention or Visual Cue	Description
[ ] (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.

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 Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under 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.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

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Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in 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.

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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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

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Oracle's PeopleSoft Enterprise Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs Preface

This preface discusses:

- PeopleSoft products.
- Related documentation.
- Common elements 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, it either requires no additional explanation or it is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- Oracle's PeopleSoft Enterprise Asset Lifecycle Management Portal Pack
- Oracle's PeopleSoft Enterprise Contracts
- Oracle's PeopleSoft Enterprise Expenses
- Oracle's PeopleSoft Enterprise Financials Portal Pack
- Oracle's PeopleSoft Enterprise General Ledger
- Oracle's PeopleSoft Enterprise IT Asset Management
- Oracle's PeopleSoft Enterprise Maintenance Management
- Oracle's PeopleSoft Enterprise Payables
- Oracle's PeopleSoft Enterprise Project Costing
- Oracle's PeopleSoft Enterprise Program Management
- Oracle's PeopleSoft Enterprise Proposal Management
- Oracle's PeopleSoft Enterprise Real Estate Management
- Oracle's PeopleSoft Enterprise Receivables
- Oracle's PeopleSoft Enterprise Resource Management
- Oracle's PeopleSoft Enterprise Treasury Management
- Oracle's PeopleSoft Enterprise Service Automation Portal Pack

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Related Documentation

This PeopleBook provides information about PeopleSoft Financials, Enterprise Service Automation, and Asset Lifecycle Management Portal Packs pagelets. Additional information describing the applications that enable the portal pack pagelets appears in PeopleBooks that are specific to those applications.

Additional information about portals appears in the *PeopleSoft Enterprise Portal Solutions 9.0 PeopleBooks* and the installation guides for portal solutions and portal products that are posted on Oracle's PeopleSoft Customer Connection website.

See Also

PeopleSoft Enterprise Portal Solutions 9.0 PeopleBooks

PeopleSoft Enterprise Portal Solutions 9.0 Installation

Common Elements Used in This PeopleBook

This section lists common elements used in the PeopleSoft Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs 9.0 PeopleBook.

	Click the Customize icon to personalize the appearance of a pagelet. If you do not specify values on a pagelet's personalization page, the pagelet either does not display any data or it uses the default settings configured by your system administrator. This icon does not appear for pagelets that do not have personalization options.
Actual	Displays the amount in thousands that was actually spent during the time period, such as a month or a fiscal quarter.
Budget	Displays the amount in thousands that is budgeted for a specific time period.
Budget Ledger and **Ledger**	Specify the budgeted ledger and actual ledger of the business unit that you want to compare.
Business Unit	Select a business unit associated with your user ID.
ChartField or **ChartField Value Set**	Select ChartField to select all values for a ChartField. Select ChartField Value Set to select a specific value.
Commitment Control	Select to see a journal that compares budget and actual ledgers within a Commitment Control ledger group.
Display Currency and **Rate Type**	Indicates the currency you want to use for the pagelet and the type of exchange rate for converting currency amounts.
Field Name, Value By, or **Field Value**	Select criteria to narrow the search to all values for a field name, a specific field value, or a ChartField value set.
Include Encumbrance	Select to see ledger entries that show the amount you are authorized to spend, not the actual transactions.
Include Pre-Encumbrance	Select to see ledger entries that show the amount you expect to spend, not any actual transactions.

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Variance Amount	Displays the positive or negative difference between actual and budgeted amounts along with the currency.

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PART 1

Configuring PeopleSoft Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs

Chapter 1
Getting Started with PeopleSoft Financials, Enterprise Service Automation, ALM Portal Packs

Chapter 2
Setting Up PeopleSoft Financials Portal Pack

Chapter 3
Setting Up PeopleSoft Enterprise Service Automation Portal Pack

Chapter 4
Setting Up PeopleSoft Asset Lifecycle Management Portal Pack

CHAPTER 1

Getting Started with PeopleSoft Financials, Enterprise Service Automation, ALM Portal Packs

This chapter discusses:

- PeopleSoft Financials, Enterprise Service Automation, and Asset Lifecycle Management Portal Packs overview.
- PeopleSoft Financials, Enterprise Service Automation, and Asset Lifecycle Management Portal Packs implementation.

PeopleSoft Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs Overview

The PeopleSoft Financials Portal Pack, Enterprise Service Automation Portal Pack, and Asset Lifecycle Management Portal Pack each provide a collection of pagelets that you can individually select to appear on a corporate intranet or extranet homepage. The individual pagelets provide information from various PeopleSoft Financials, Enterprise Service Automation, and Asset Lifecycle Management applications.

These three portal packs can be delivered to users through the Enterprise Portal or through the application portal in the Financials database. The portal packs contain pagelets that provide at-a-glance access to key financial and operational data. They supplement the PeopleSoft Financials, Enterprise Service Automation, and Asset Lifecycle Management applications and other portal applications with content-rich pagelets.

The PeopleSoft Financials, Enterprise Service Automation, and Asset Lifecycle Management Portal Packs are targeted for multiple roles in the organization. These are functional roles and may not be delivered PeopleTools roles:

- The PeopleSoft Financials Portal Pack focuses specifically on the C-level executive (CEO, CFO, and COO), controller, financial executive, and department manager.

  These roles should be associated with employees in your organization.

- The PeopleSoft Enterprise Service Automation Portal Pack is intended for project managers, program managers, services controllers, and department managers.

  This portal pack supports roles that are associated with employees, and roles that are associated with projects.

- The PeopleSoft Asset Lifecycle Management Portal Pack is intended for roles that are associated with IT asset valuation and maintenance costs, asset inventory, leases, contracts, work order task assignments, and work order backlog.

  This portal pack is used by multiple roles such as CIOs, property or IT accountants, IT asset managers, lease administrators, portfolio managers, technicians, and schedulers.

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Some pagelets can be personalized to filter and format the data. You can click links on the pagelets to access application pages, such as a page in PeopleSoft Contracts or PeopleSoft Receivables, to view more detailed transaction information. If a graph appears on a pagelet, move the mouse pointer over a portion of the graph to view details such as the name of a department or the exact amount that the graph element represents.

PeopleSoft Financials, Enterprise Service Automation, Asset Lifecycle Management Portal Packs Implementation

All three portal packs deliver pagelets that provide summary views of data that currently exists in the system. Each pagelet is associated with a PeopleSoft Financials, Enterprise Service Automation, or Asset Lifecycle Management product (such as PeopleSoft General Ledger, Project Costing, or Maintenance Management) and the appropriate portal registry structures. The enabling application provides the data that appears in the pagelet. If you have not licensed the enabling application, the pagelet will not work.

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CHAPTER 2

Setting Up PeopleSoft Financials Portal Pack

This chapter discusses:

- Prerequisites for PeopleSoft Financials Portal Pack.
- Using roles and permission lists for the PeopleSoft Financials Portal Pack.

Prerequisites for the PeopleSoft Financials Portal Pack

Before you can view and use the pagelets in the PeopleSoft Financials Portal Pack, you must:

1. Install the Financials database on your system.
2. Install the enabling Financial application.

   To find a pagelet's enabling application, refer to the table in the section titled Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack.
3. Specify pagelet security for each user ID on the ChartField Pagelet Security page to access information on the PeopleSoft General Ledger Actual vs Budgeted pagelet.

   See Chapter 6, "Using Pagelets Enabled by PeopleSoft General Ledger," page 21.

   Note. ChartField pagelet security applies only to the General Ledger Actual vs Budgeted pagelet. For each user ID that can view pagelet information, specify values for the DEPTID (department ID) and OPERATING_UNIT ChartFields.
4. Ensure that required prerequisite job processes appear on the portal menu navigation.

   For the Payables CFO Portal Job Application Engine process (AP_CFOP_JOB), navigate to PeopleTools, Portal, Structure and Content. In the Folders grid, click *Accounts Payable, Batch Processes, Vouchers.* In the Content References grid, click the Edit link for AP CFO Portal Job to access the Content Reference Administration component (PORTAL_CREF_ADM). On the Content Ref Administration page, clear the *Hide from portal navigation* option.

   For the Receivables Update Pagelet Statistics Application Engine process (AR_CFOLOAD), navigate to PeopleTools, Portal, Structure and Content. In the Folders grid, click *Accounts Receivable, Receivables Update.* In the Content References grid, click the Edit link for Update Pagelet Statistics to access the Content Reference Administration component. On the Content Ref Administration page, clear the *Hide from portal navigation* option.
5. Grant security access to run a prerequisite process by navigating to PeopleTools, Security, Permission & Roles, Permission Lists.

   Select the desired permission list, navigate to the Pages tab, and scroll to the appropriate menu name. Click the Edit Components link and select the Authorized check box for the component that runs the required process.

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- For the Payables CFO Portal Job process, the menu name is *ENTER_VOUCHER_INFORMATION* and the component is *AP_CFOP_JOB*.
- For the Receivables Update Pagelet Statistics process, the menu name is *MAINTAIN_RECEIVABLES* and the component is *AR_CFOLOAD*.

6. If you use PeopleSoft Receivables, run the Receivables Update Pagelet Statistics Application Engine process (AR_CFOLOAD) as required to create summary data that is used by PeopleSoft Receivables portal pagelets.
7. If you use PeopleSoft Payables, run the Payables CFO Portal Job Application Engine process (AP_CFOP_JOB) as required to create data that is used by PeopleSoft Payables portal pagelets.
8. Users specify the default settings on a personalization page (if a pagelet has a personalization page) before they use the pagelet.

   The system uses these settings to retrieve the transactional information that appears on the pagelet. To open a personalization page, click the Customize icon in the upper right corner of the pagelet.

   Note. When you select a pagelet to appear on the homepage, the system informs you if you need to set up personalization settings for the pagelet. A message appears on the pagelet such as *There is no information in Personalization page.*

See Also

Enterprise PeopleTools 8.48 PeopleBook: Internet Technology

PeopleSoft Enterprise Portal Solutions 9.0 PeopleBooks

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Enterprise Portal Solutions 9.0 Installation on Oracle's PeopleSoft Customer Connection website

Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack

The PeopleSoft Financials Portal Pack delivers sample roles and permission lists in the Financials database that you can use as an example to configure your security.

When you install a portal pack, pagelets are available for authorized users from both the Enterprise Portal homepage and the Financials database application homepage. Because pagelets are assigned to specific permission lists instead of to specific roles, when you log in the system matches your role (that is associated with your user ID) to the appropriate permission lists to display authorized pagelets.

This table lists the enabling Financials applications and their associated pagelets and sample permission lists:

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Enabling Financials Application	Pagelet	Permission List
PeopleSoft Payables	Average Days in Payables Payables Discounts Top Vendors by Expenditure	EPAP1400
PeopleSoft General Ledger	Actual vs Budgeted Expense Variance Expiring Projects Gross Margin Lapsing of Appropriation My Budget Alert Operating Budget Variance Project Revenue Variance	EPCF1300
PeopleSoft Receivables	Aging Summary Average Time to Resolve Bad Debt Write-off by Customer Days Sales Outstanding Deduction by Dollar Amount Deduction by Reason Outstanding Balances Past Due Balances Sales New/Existing Customers Top Customer Sales Balances Write-off Trends	EPAR8000
PeopleSoft Treasury Management	Bank Contacts Reconciliation Aging	EPCF1200
PeopleSoft Contracts	Top Five Contracts	EPCA5000

To add pagelets to your PeopleSoft homepage, click the Personalize Content link on your homepage to access a list of pagelets to which you have access, and select one or more pagelets.

To personalize the pagelet layout on your PeopleSoft homepage, click the Layout link on the homepage.

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CHAPTER 3

Setting Up PeopleSoft Enterprise Service Automation Portal Pack

This chapter discusses:

- Prerequisites for the PeopleSoft Enterprise Service Automation Portal Pack.
- Using roles and permission lists.

Prerequisites for the PeopleSoft Enterprise Service Automation Portal Pack

Before you can view and use the pagelets in the PeopleSoft Enterprise Service Automation Portal Pack, you must complete these steps:

1. Install the Financials database.
2. Install the enabling Financial applications.

   To find a pagelet's enabling application, refer to the table in the section titled Using Roles and Permission Lists for the PeopleSoft Enterprise Service Automation Portal Pack.
3. Use PeopleTools security to assign pagelet permission lists to the roles that need access to each PeopleSoft Enterprise Service Automation Portal Pack pagelet.

   The section titled Using Roles and Permission Lists for the PeopleSoft Enterprise Service Automation Portal Pack identifies the permission lists that are authorized to use each PeopleSoft Enterprise Service Automation Portal Pack pagelet.
4. Specify the PeopleSoft Enterprise Service Automation Portal Pack pagelet default values at the administrator level so that users can access most of the PeopleSoft Enterprise Service Automation Portal Pack pagelets without the need to personalize each one.

   The system applies these values to retrieve transactional information that appears on the pagelet. To establish system default values at the administrator level, navigate to Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults. Users can override the default values at an individual level.
5. (Optional) To reflect unique personal preferences, users can personalize the settings for each pagelet on a corresponding personalization page.

   To open a personalization page, click the Customize icon in the upper right corner of the pagelet.
6. (Optional) If you use PeopleSoft Expenses, schedule the Expenses Pagelet Processing Application Engine process (EX_PAGELET).

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This process converts expense data to various currencies so that the Total Expense Costs Operational Threshold Alert (OTA) and Transactions in Progress pagelets can provide data in a currency that is meaningful to each user and render data more rapidly. This process is scheduled by navigating to the ESA Portal Pack Pagelet Default Administration page at Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults. Select Total Expense Costs in the Operational Threshold Alerts group box, click Go to Expenses Pagelet Processing, and launch a recurring process from the Expenses Pagelet Processing page.

7. (Optional) If you use the Services Forecasting feature of PeopleSoft Program Management, define the rules for calculating resource capacity and utilization for each human resource business unit.

   The utilization calculations for a business unit only include resources that are associated with job codes that are specified in the utilization definition for the business unit.

   See Chapter 13, "Using Pagelets Enabled by PeopleSoft Program Management," page 123.

8. (Optional) If you use the Services Forecasting feature of PeopleSoft Program Management, schedule the Utilization and Capacity Application Engine process (RS_AGG_ENG) to create resource utilization and capacity data.

   This process creates resource utilization and capacity data for the Forecast Utilization OTA and Actual to Forecast Utilization OTA.

   See *PeopleSoft Enterprise Program Management 9.0 PeopleBook*, "Analyzing Resource Utilization," Updating Resource Utilization Data.

9. (Optional) If you implement PeopleSoft Resource Management and use the Resources Needing Assignments pagelet, each user must set up options in the My Workbench Options component (RS_MYWKBNCH_OPT) in PeopleSoft Resource Management.

   See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Managing Resource Utilization," Specifying Staffing Workbench and Resource Utilization Options.

   Because there are no PeopleSoft Enterprise Service Automation Portal Pack system defaults available for this pagelet, each user must do *one* of the following:

   - Navigate to Resource Management, Define User Options, My Workbench Options and specify the appropriate parameters.
   - Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet to access the My Workbench Options component and specify the appropriate parameters.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Internet Technology

PeopleSoft Enterprise Portal Solutions 9.0 PeopleBooks

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Enterprise Portal Solutions 9.0 Installation on Oracle's PeopleSoft Customer Connection website

Using Roles and Permission Lists for the PeopleSoft Enterprise Service Automation Portal Pack

The PeopleSoft Enterprise Service Automation Portal Pack delivers sample roles and permission lists in the Financials database that you can use as an example to configure your security.

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When you install a portal pack, pagelets are available for authorized users from both the Enterprise Portal homepage and the Financials database application homepage. Because pagelets are assigned to specific permission lists instead of to specific roles, when you log in the system matches your role (that is associated with your user ID) to the appropriate permission lists to display authorized pagelets.

This table lists the enabling Enterprise Service Automation applications and their associated pagelets and sample permission lists:

Enabling Enterprise Service Automation Application	Pagelet	Permission List
PeopleSoft Enterprise Service Automation Portal Pack	All personalization pages for the pagelets that use this permission list Media Sources Operational Threshold Alert Operational Threshold Chart	EPCO8000
PeopleSoft Contracts	All pagelets and personalization pages for PeopleSoft Contracts	EPCA5000
PeopleSoft Expenses	All pagelets and personalization pages for PeopleSoft Expenses	EPCF1100
PeopleSoft Program Management	All pagelets and personalization pages for PeopleSoft Program Management	EPPG7100
PeopleSoft Project Costing	All pagelets and personalization pages for PeopleSoft Project Costing	EPPG7100
PeopleSoft Proposal Management	All pagelets and personalization pages for PeopleSoft Proposal Management	EPPM2000
PeopleSoft Resource Management	All pagelets and personalization pages for PeopleSoft Resource Management	EPRS6000

To add pagelets to your PeopleSoft homepage, click the Personalize Content link on your homepage to access a list of pagelets to which you have access, and select one or more pagelets.

To personalize the pagelet layout on your PeopleSoft homepage, click the Layout link on the homepage.

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CHAPTER 4

Setting Up PeopleSoft Asset Lifecycle Management Portal Pack

This chapter discusses:

- Prerequisites for the PeopleSoft Asset Lifecycle Management Portal Pack.
- Using roles and permission lists.

Prerequisites for the PeopleSoft Asset Lifecycle Management Portal Pack

Before you can view and use the pagelets in the PeopleSoft Asset Lifecycle Management Portal Pack, you must complete these steps:

1. Install the Financials database.
2. Install the enabling Financial applications.

   To find a pagelet's enabling application, refer to the table in the section titled Using Roles and Permission Lists for the PeopleSoft Asset Lifecycle Management Portal Pack.
3. If you use PeopleSoft Maintenance Management, run the Update Work Order Portal Data (WM_PE) and Update Most Costly Asset Data (WM_PE_ASSET) Application Engine processes as required to create data that is used by Maintenance Management portal pagelets.
4. If you use PeopleSoft Real Estate Management, run the Real Estate Portal Data Collector Application Engine process (RE_PGLT_DATA) as required to create data that is used by PeopleSoft Real Estate Management portal pagelets.
5. Specify PeopleSoft Real Estate Management Portal Pack pagelet default values at the administrator level so that users can access most of the PeopleSoft Real Estate Management pagelets without the need to personalize each one.

   The system applies these values to retrieve transactional information that appears on the pagelet. Users can override the default values by personalizing their settings. To establish system default values at the administrator level, navigate to Setup Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Portal Pack Default Administration - Real Estate Management.
6. If you use PeopleSoft IT Asset Management, display data in the portal by running the Generate Metrics Application Engine process (IT_METRICS), which summarizes data created by primary PeopleSoft IT Asset Management processes and third party integration. The primary PeopleSoft IT Asset Management processes are Request Discovery Data (IT_DISCO_RUN) and Compare Asset Repositories (IT_RECON_RUN).

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7. (Optional) To reflect unique personal preferences, users can personalize the settings for each pagelet on a corresponding personalization page.

   The system uses these personalized settings to retrieve transactional information that appears on the pagelet. To open a personalization page, click the Customize icon in the upper right corner of the pagelet.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Internet Technology

PeopleSoft Enterprise Portal Solutions 9.0 PeopleBooks

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Enterprise Portal Solutions 9.0 Installation on Oracle's PeopleSoft Customer Connection website

Using Roles and Permission Lists for the PeopleSoft Asset Lifecycle Management Portal Pack

The PeopleSoft Asset Lifecycle Management Portal Pack delivers sample roles and permission lists in the Financials database that you can use as an example to configure your security.

When you install a portal pack, pagelets are available for authorized users from both the Enterprise Portal homepage and the Financials database application homepage. Because pagelets are assigned to specific permission lists instead of to specific roles, when you log in the system matches your role (that is associated with your user ID) to the appropriate permission lists to display authorized pagelets.

This table lists the enabling PeopleSoft Asset Lifecycle Management applications and their associated pagelets and sample permission lists:

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Enabling Asset Lifecycle Management Application	Pagelet	Permission List
PeopleSoft IT Asset Management	Asset Financial Statistics Assets Not Reporting Hardware Inventory Hardware Progress Report Inventory Exceptions Lease End Metric Related Links Software Device Monitor Software Inventory Monitor Software Pending Requisitions Software Progress Report Software Renewal Pagelet	These sample permission lists are included at installation: EPIT1000 (ITAM all permissions) EPIT2000 (ITAM portal setup permission) EPIT3000 (ITAM run and view reports) EPIT4000 (ITAM portlet view-only) EPIT5000 (Software Devices) The key page in each list is PORTAL_COMPONENTS_EP. Include this page in any list to provide access to PeopleSoft IT Asset Management pagelets to users of that list.
PeopleSoft Maintenance Management	Backlog by Work Order Type Unassigned Work Order Tasks Reviewed Work Order Tasks Scheduled Work Order Tasks Scheduler's Work Orders My Assigned Work Orders Most Costly Assets To Maintain Top 5 Problem Codes My Service Requests	For the My Assigned Work Orders pagelet, use EPWM1008 (Maintenance Technician Pagelets). For the My Service Requests pagelet, use EPWM1012 (Self-Service Service Request). For all other PeopleSoft Maintenance Management pagelets, use EPWM1005 (Planner and Scheduler's Pagelets).
PeopleSoft Real Estate Management	Property Statistics My Tasklist My Lease Portfolio Lease Costs Lease Statistics Lease Revenue Lease Optimization Space Utilization	EPRE1000 (Real Estate Configuration) EPRE2000 (Lease Administration) EPRE3000 (Real Estate Portal Administration) EPRE3500 (Real Estate Portal User)

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To add pagelets to your PeopleSoft homepage, click the Personalize Content link on your homepage to access a list of pagelets to which you have access, and select one or more pagelets.

To personalize the pagelet layout on your PeopleSoft homepage, click the Layout link on the homepage.

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PART 2

Using PeopleSoft Financials Portal Pack

Chapter 5
Using Pagelets Enabled by PeopleSoft Contracts

Chapter 6
Using Pagelets Enabled by PeopleSoft General Ledger

Chapter 7
Using Pagelets Enabled by PeopleSoft Payables

Chapter 8
Using Pagelets Enabled by PeopleSoft Receivables

Chapter 9
Using Pagelets Enabled by PeopleSoft Treasury Management

CHAPTER 5

Using Pagelets Enabled by PeopleSoft Contracts

This chapter discusses how to personalize and view the top five contracts.

Viewing the Top Five Contracts

This section discusses how to view the top five contracts.

Pages Used to View the Top Five Contracts

Page Name	Object Name	Navigation	Usage
Top Five Contracts pagelet	CA_PE_TOPCON_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Top Five Contracts.	View the five largest contracts that meet the filtering criteria specified on the Top Five Contracts Personalization page.
Personalization Top Five Contracts	CA_PE_TOPCON_PRS	Click the Customize icon on the Top Five Contracts pagelet.	Define default display information for the Top Five Contracts pagelet.
Contract General	CA_HDR_PNL	Click a contract number displayed on the Top Five Contracts pagelet.	View details for a specific contract shown on the Top Five Contracts pagelet.

Viewing Top Five Contracts

Access the Top Five Contracts pagelet.

See Chapter 11, "Using Pagelets Enabled by PeopleSoft Contracts," Viewing Top Five Contracts, page 85.

Personalizing Top Five Contracts

Access the Personalization Top Five Contracts page.

See Chapter 11, "Using Pagelets Enabled by PeopleSoft Contracts," Personalizing Top Five Contracts, page 86.

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CHAPTER 6

Using Pagelets Enabled by PeopleSoft General Ledger

This chapter discusses how to:

- View expense variances.
- View gross margins.
- View lapsing of appropriation.
- View budget alerts.
- View the operating budget variance.
- View project revenue variances.
- View unbilled balances to projects expiring.
- View actual versus budgeted information.

Viewing Expense Variances

This section discusses how to:

- View expense variances.
- Personalize expense variance.
- Compare standard ledgers.
- View Commitment Control budget overviews.

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Pages Used to View Expense Variances

Page Name	Object Name	Navigation	Usage
Expense Variance pagelet	GL_PE_02	Click the Personalize Content link on the PeopleSoft homepage. Select Expense Variance.	View the top five expense variances between amounts budgeted and actual expenses.
Expense Variance Personalization	GL_PE_02_PRS	Click the Customize icon on the Expense Variance pagelet.	Define default display information for the Expense Variance pagelet.
Compare Across Ledgers (for standard ledgers)	INQ_COMPARE_PNL	Click a ChartField value that is displayed on the Expense Variance pagelet.	Specify the ledger data you want to compare by period and view comparison results.
Budget Overview (for Commitment Control ledgers)	KK_INQ_BD_OVW	Click a ChartField value that is displayed on the Expense Variance pagelet.	The search page is populated with values from the selected ChartField. Click the Search icon to view the Budget Overview page.

Viewing Expense Variances

Access the Expense Variance pagelet.

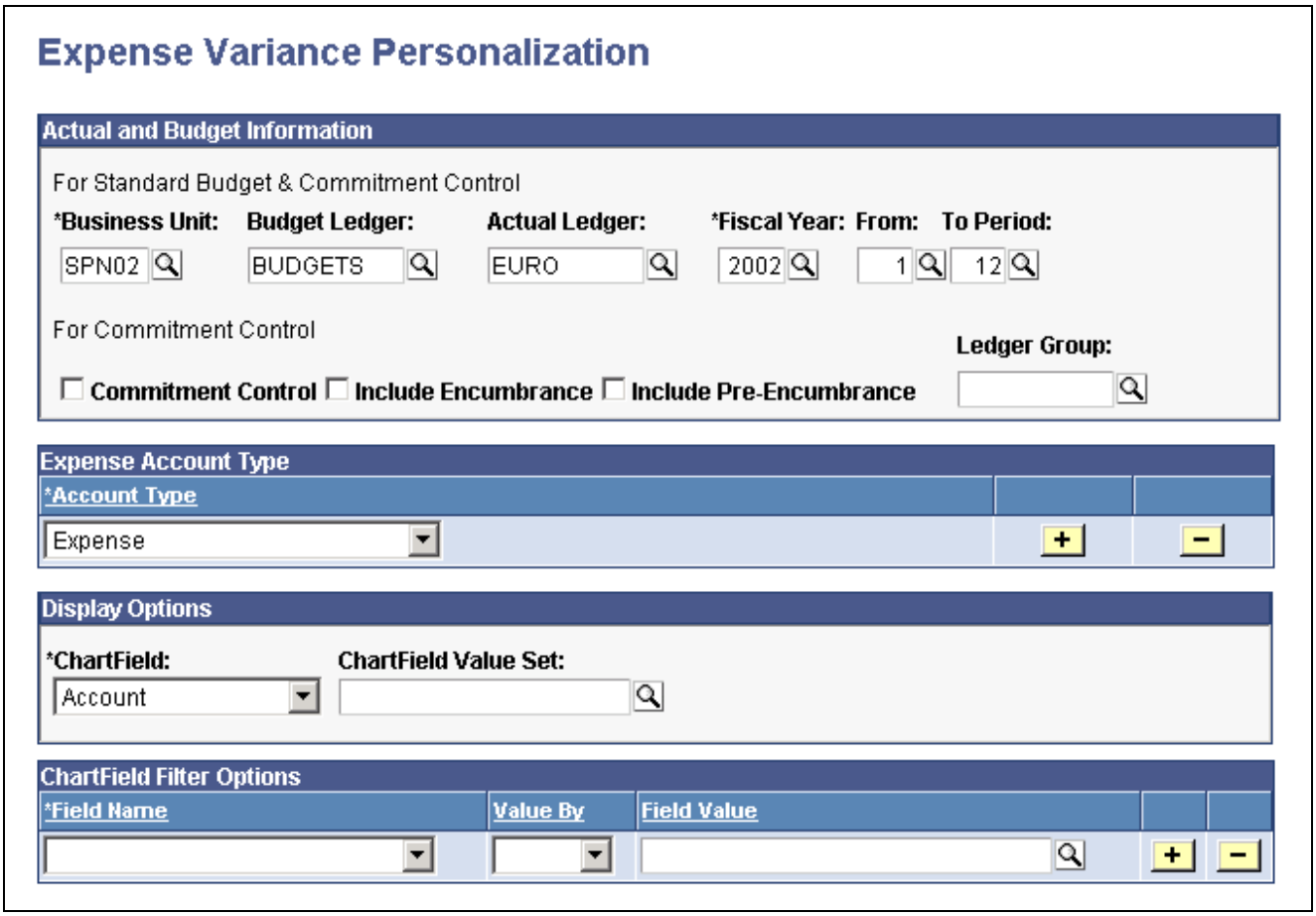
Account Displays up to the top five ChartField values (for example, *Account, Department, Fund Code,* and so on) with the most expense variances based on the ChartField or ChartField Value Set you select on the Expense Variance Personalization page.

Variance Percentage Displays the difference between actual and budgeted amounts as a positive or negative percentage.

Personalizing Expense Variance

Access the Expense Variance Personalization page.

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Expense Variance Personalization page

Budget Ledger Specify a standard budget ledger of the business unit. The ledger group to which this ledger belongs must be *Budget.*

Actual Ledger Specify an actual ledger of the business unit.

From and **To Period** Select a range of ledger accounting periods for the specified year.

Ledger Group Select a specific Commitment Control ledger group.

Account Type Select the account type that identifies expense accounts.

ChartField Select the ChartField that you want to display on the pagelet.

ChartField Value Set Select the ChartField Value Set that defines the scope of the ChartField values that you want to include. The ChartField Value Set must define values for only one ChartField.

Fieldname Select the field on which you want to add an additional filter.

Value by Select how you want to limit the scope of the field values, either by *Set* (ChartField Value Set), or *Value* (a single value).

Field Value Enter the scoping ChartField Value Set or single value to limit the scope of the field.

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Comparing Standard Ledgers

Access the Compare Across Ledgers page.

See Also

PeopleSoft Enterprise General Ledger 9.0 PeopleBook, "Reviewing Financial Information," Comparing Across Ledgers

Viewing Commitment Control Budget Overviews

Access the Budget Overview page.

See Also

PeopleSoft Enterprise Commitment Control 9.0 PeopleBook, "Inquiring on Budgets and Transaction Activities," Creating and Reviewing Budget Overview Inquiries

Viewing Gross Margins

This section discusses how to:

- View gross margins.
- Personalize gross margins.
- View ledger details.

Pages Used to View Gross Margins

Page Name	Object Name	Navigation	Usage
Gross Margin pagelet	GL_PE_04	Click the Personalize Content link on the PeopleSoft homepage. Select Gross Margin.	View a bar graph that shows the top five or bottom five gross margins.
Gross Margin Personalization	GL_PE_04_PRS	Click the Customize icon on the Gross Margin pagelet.	Define default display information for the Gross Margin pagelet.
Ledger Inquiry	INQ_DETAIL_LEDGER	On the pagelet graph, click the bar that represents the department for which you want to view ledger details.	View ledger details for the department represented in the bar graph.

Viewing Gross Margins

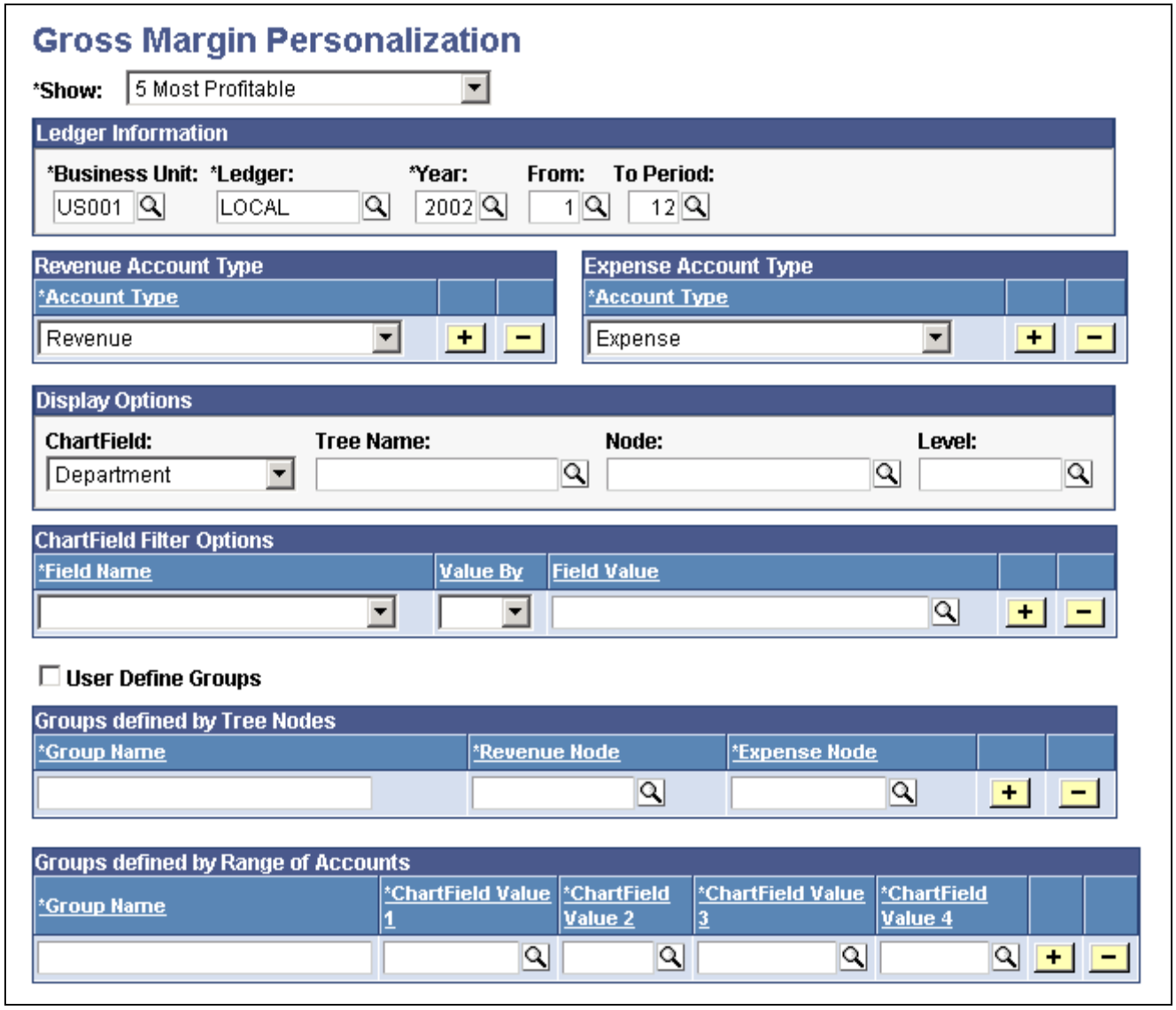
Access the Gross Margins pagelet.

The bar graph scale adjusts to fit both positive and negative data. Hold your cursor over a bar to see the name of the department (or any display ChartField you chose) and the exact gross margin percent.

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Personalizing Gross Margins

Access the Gross Margin Personalization page.



Gross Margin Personalization page

Show — Select whether the pagelet displays the *5 Least Profitable* or *5 Most Profitable* gross margins.

From and **To Period** — Select a range of ledger accounting periods for the specified year. If you enter a range with more than five accounting periods, the Gross Margin pagelet displays only the five most profitable or least profitable departments.

Revenue Account Type and **Expense Account Type** — Select the account types that correspond to revenue and expense.

ChartField, Tree Name, Node, or **Level** — Use these fields as needed to narrow the display to a PeopleSoft internal ChartField, or to a ChartField and its associated Tree Name, Node, or Level or a combination of these. You can leave a field blank or enter a valid value.

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	If you leave the Tree Name, Node, or Level field blank, the system uses all of the values for that ChartField.
Field Name, Value By, or **Field Value**	Use these fields to narrow the search to all values for a field name, a specific field value, or a ChartField ValueSet.
User Define Groups	Select to create a new user-defined group.
Groups defined by Tree Nodes or **Groups defined by Range of Accounts**	If you selected the User Define Groups option, use these group boxes to create either a group defined by a tree node or a group defined by a range of accounts.

Viewing Ledger Details

Access the Ledger Inquiry page.

See Also

PeopleSoft Enterprise General Ledger 9.0 PeopleBook, "Reviewing Financial Information," Viewing the Ledger Details

Viewing Lapsing of Appropriation

This section discusses how to:

- View the lapsing of appropriation.
- Personalize lapsing of appropriation.

Pages Used to View the Lapsing of Appropriation

Page Name	Object Name	Navigation	Usage
Lapsing of Appropriation pagelet	GL_PE_08	Click the Personalize Content link on the PeopleSoft homepage. Select Lapsing of Appropriation.	View a list of projects according to their expiration dates and the total amount unbilled.
Lapsing of Appropriation Personalization	GL_PE_08_PRS	Click the Customize icon on the Lapsing of Appropriation pagelet.	Define default display information for the Lapsing of Appropriation pagelet.

Viewing the Lapsing of Appropriation

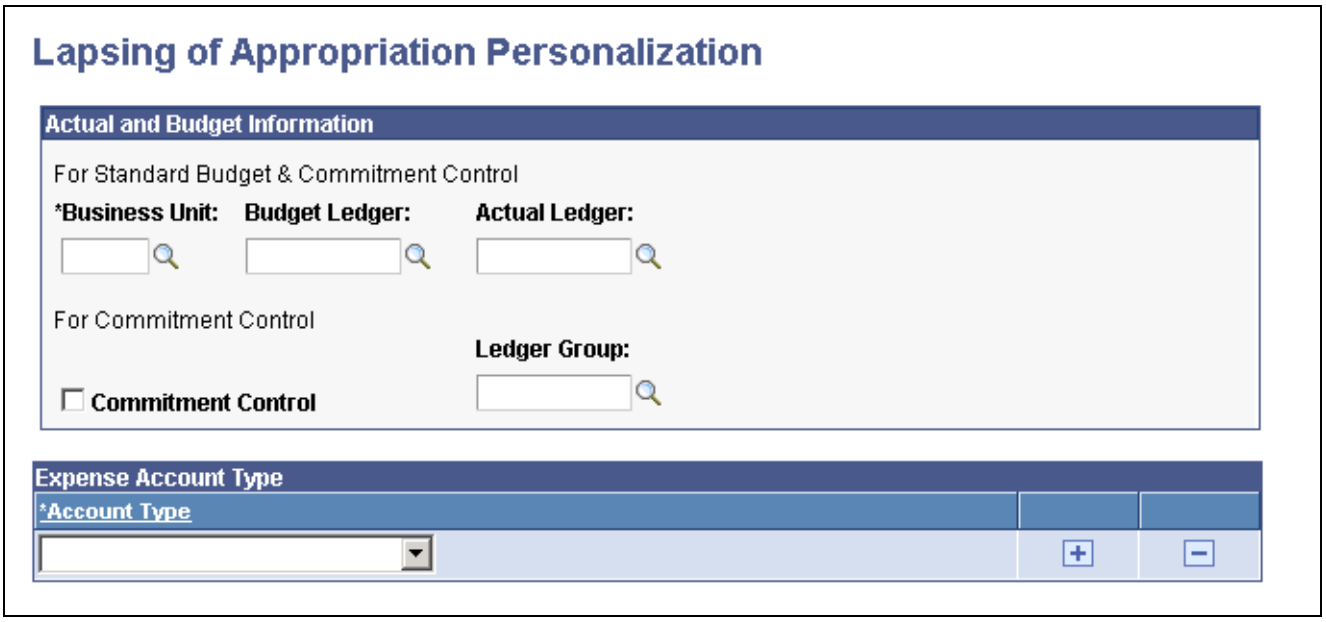
Access the Lapsing of Appropriation pagelet.

Unbilled Amount	The total amount of the balance that has not been billed.

Personalizing Lapsing of Appropriation

Access the Lapsing of Appropriation Personalization page.

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Lapsing of Appropriation Personalization page

Commitment Control and **Ledger Group**

Select the Commitment Control option to calculate the unbilled appropriation in a Commitment Control ledger group.

Use Ledger Group to select a specific Commitment Control ledger group.

Expense Account Type

Select the account used for expenses that you want to view.

Viewing Budget Alerts

This section discusses how to:

- View budget alerts.
- Personalize my budget alerts.
- View budget details.

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Pages Used to View Budget Alerts

Page Name	Object Name	Navigation	Usage
My Budget Alert pagelet	GL_PE_03	Click the Personalize Content link on the PeopleSoft homepage. Select My Budget Alert.	View the top five alerts by the actual amount or by the percentage remaining in the budget.
My Budget Alert Personalization	GL_PE_03_PRS	Click the Customize icon on the My Budget Alert pagelet.	Define default display information for the My Budget Alert pagelet.
Commitment Control Budget Details	KK_INQ_BDT_STATUS	Click a ChartField value on the My Budget Alert pagelet.	The search page is populated with values from the selected ChartField. Click the Search button to display the Commitment Control Budget Details page.

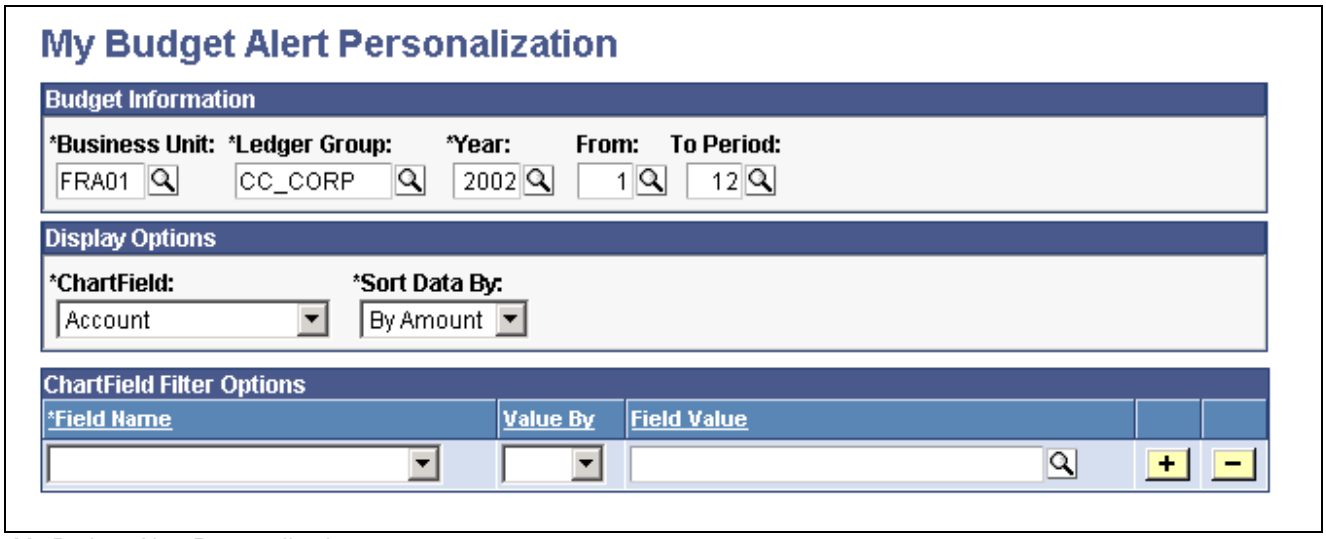
Viewing My Budget Alerts

Access the My Budget Alert pagelet.

Refresh Click to update the data that appears on the page.

Personalizing My Budget Alerts

Access the My Budget Alert Personalization page.



My Budget Alert Personalization page

Ledger Group Select a specific Commitment Control ledger group.

Sort Data By Select whether pagelet data is sorted *By Amount* or *By Percent.*

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Viewing Budget Details

Access the Commitment Control Budget Details page.

See Also

PeopleSoft Enterprise Commitment Control 9.0 PeopleBook, "Inquiring on Budgets and Transaction Activities," Viewing Budget Details and Transaction Activity

Viewing Operating Budget Variances

This section discusses how to:

- View the operating budget variance.
- Personalize operating budget variance.
- Compare standard ledgers.
- View Commitment Control budget overviews.

Pages Used to View Operating Budget Variances

Page Name	Object Name	Navigation	Usage
Operating Budget Variance pagelet	GL_PE_06	Click the Personalize Content link on the PeopleSoft homepage. Select Operating Budget Variance.	View the top five variances between budgeted amounts and actual expenses. This pagelet can display the amount budgeted, actual amount spent, variance amount, and variance percentage.
Operating Budget Variance Personalization	GL_PE_06_PRS	Click the Customize icon on the Operating Budget Variance pagelet.	Define default display information for the Operating Budget Variance pagelet.
Compare Across Ledgers (for standard ledgers)	INQ_COMPARE_PNL	Click a ChartField value on the Operating Budget Variance pagelet.	Specify the ledger data you want to compare by period and view comparison results.
Budget Overview (for Commitment Control ledgers)	KK_INQ_BD_OVW	Click a ChartField value on the Operating Budget Variance pagelet.	The search page is populated with values from the selected ChartField. Click the Search button to view the Budget Overview page.

Viewing Operating Budget Variances

Access the Operating Budget Variance pagelet.

Account Displays up to the top five ChartFields (for example, *Account, Department, Fund Code,* and so on) with the most expense variances based on the

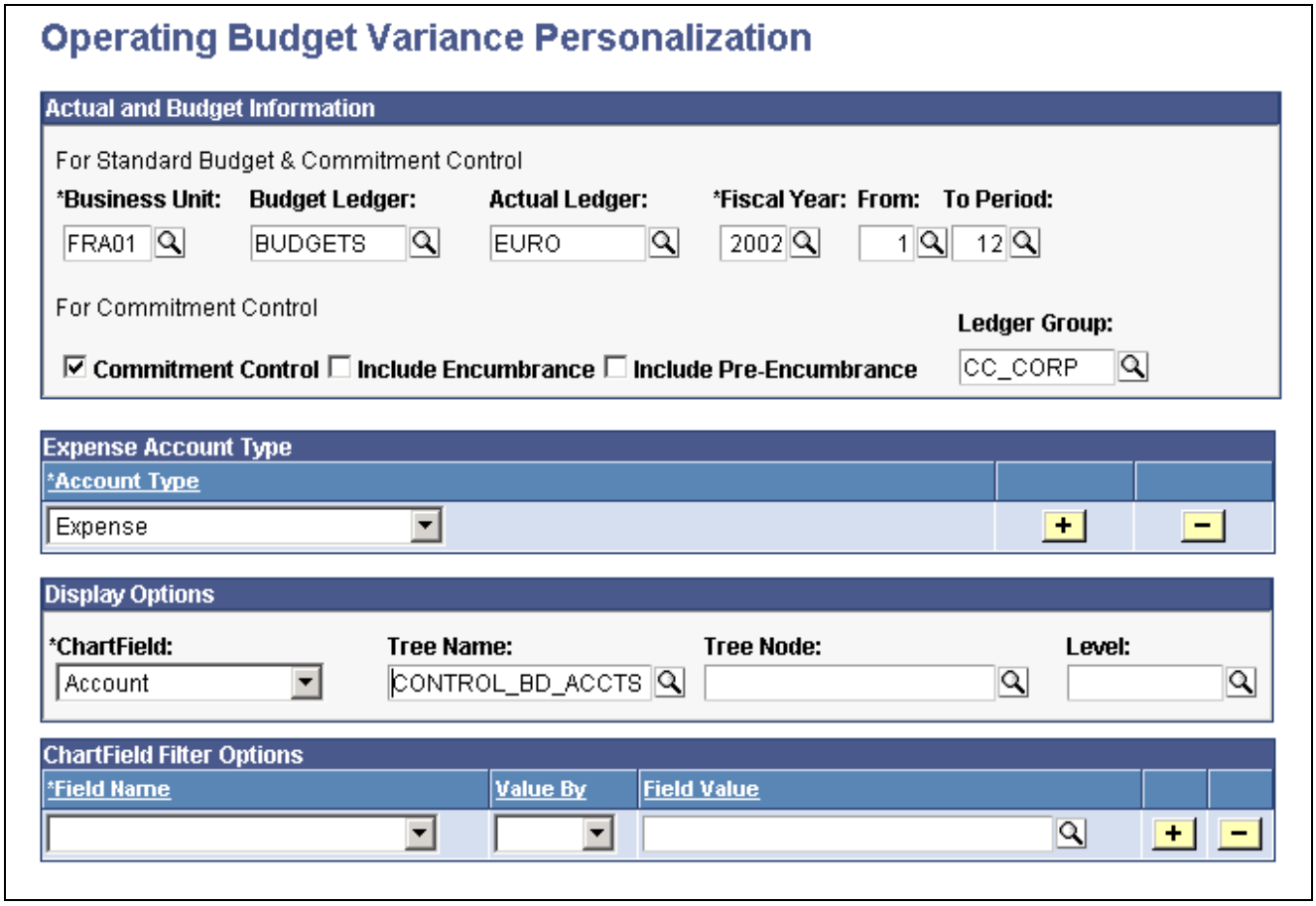
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ChartField, ChartField Value Set, or both, that you selected on the personalization page.

Variance Percentage Displays the difference as a percentage.

Personalizing Operating Budget Variance

Access the Operating Budget Variance Personalization page.



Operating Budget Variance Personalization page

From and **To Period** Select a range of ledger accounting periods for the specified year.

Ledger Group Select a commitment control ledger group.

Expense Account Type Select the account type that is associated with expenses.

Comparing Standard Ledgers

Access the Compare Across Ledgers page.

See Also

PeopleSoft Enterprise General Ledger 9.0 PeopleBook, "Reviewing Financial Information," Comparing Across Ledgers

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Viewing Commitment Control Budget Overviews

Access the Budget Overview page.

See Also

PeopleSoft Enterprise Commitment Control 9.0 PeopleBook, "Inquiring on Budgets and Transaction Activities," Creating and Reviewing Budget Overview Inquiries

Viewing Project Revenue Variances

This section discusses how to:

- View project revenue variances.
- Personalize project revenue variance.
- Compare standard ledgers.
- View Commitment Control budget overviews.

Pages Used to View Project Revenue Variances

Page Name	Object Name	Navigation	Usage
Project Revenue Variance pagelet	GL_PE_05	Click the Personalize Content link on the PeopleSoft homepage. Select Project Revenue Variance.	View the top five variances between budgeted amounts for a project and actual expenses.
Project Revenue Variance Personalization	GL_PE_05_PRS	Click the Customize icon on the Project Revenue Variance pagelet.	Define default display information for the Project Revenue Variance pagelet.
Compare Across Ledgers (for standard ledgers)	INQ_COMPRE_PNL	Click a ChartField value on the Project Revenue Variance pagelet.	Specify the ledger data that you want to compare by period and view comparison results.
Budget Overview (for Commitment Control ledgers)	KK_INQ_BD_OVW	Click a ChartField value on the Project Revenue Variance pagelet.	The search page is populated with values from the selected ChartField. Click the Search button to view the Budget Overview page.

Viewing Project Revenue Variances

Access the Project Revenue Variance pagelet.

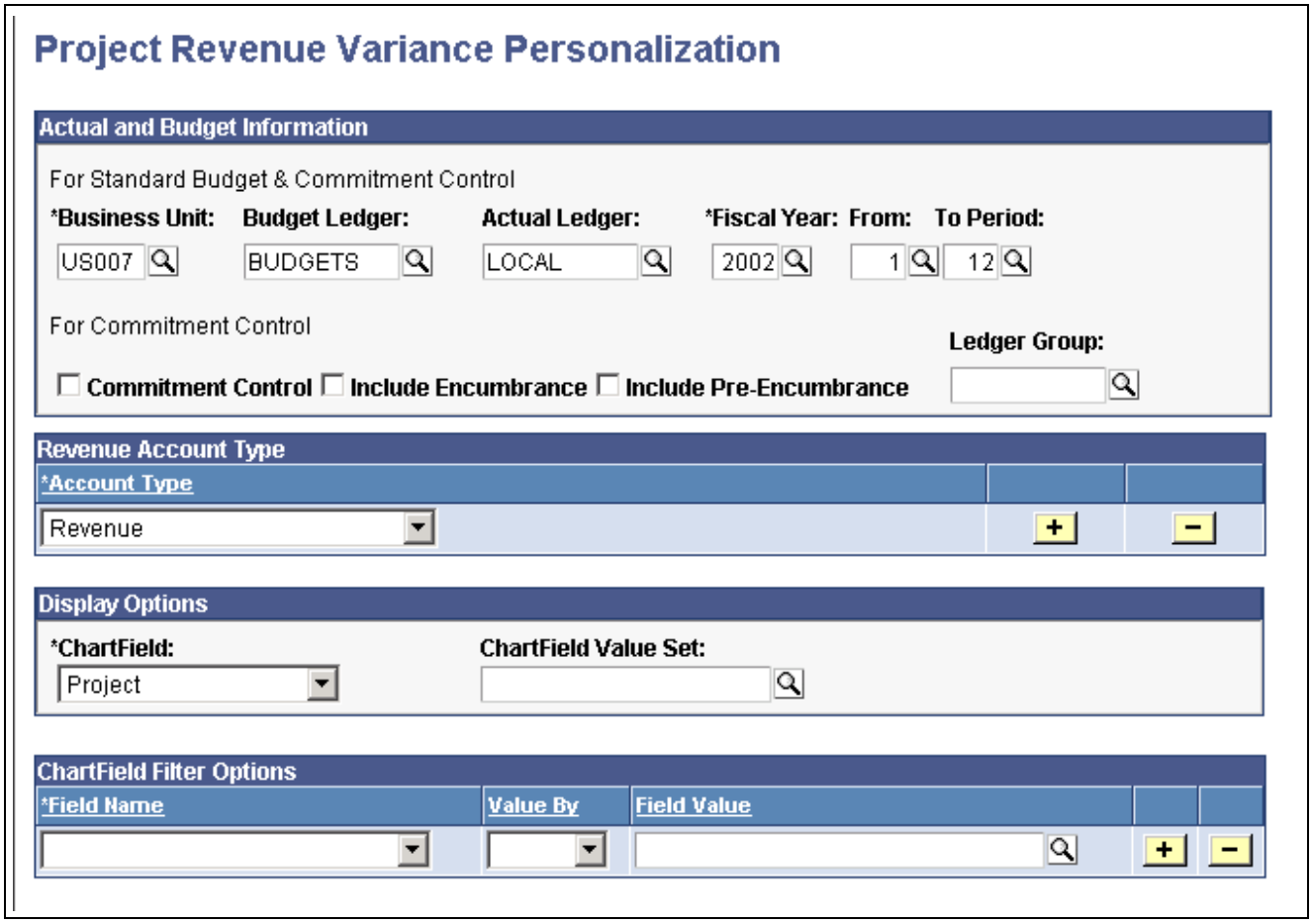
Project Displays up to the top five ChartFields (for example, *Project, Department, Fund Code,* and so on) with the most revenue variances based on the ChartField, ChartField Value Set, or both, that you select on the personalization page.

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Variance Percentage Displays the difference as a percentage.

Personalizing Project Revenue Variance

Access the Project Revenue Variance Personalization page.



Project Revenue Variance Personalization page

ChartField Although you can select any ChartField, it is recommended that you select *Project* because this personalization page specifically sets up a pagelet to display project revenue variance data.

From and **To Period** Select a range of ledger accounting periods for the specified year.

Ledger Group Select a specific Commitment Control ledger group.

Revenue Account Type Select the account type that is associated with revenue.

Comparing Standard Ledgers

Access the Compare Across Ledgers page.

See Also

PeopleSoft Enterprise General Ledger 9.0 PeopleBook, "Reviewing Financial Information," Comparing Across Ledgers

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Viewing Commitment Control Budget Overviews

Access the Budget Overview page.

See Also

PeopleSoft Enterprise Commitment Control 9.0 PeopleBook, "Inquiring on Budgets and Transaction Activities," Creating and Reviewing Budget Overview Inquiries

Viewing Unbilled Balances to Projects Expiring

This section discusses how to:

- View unbilled balances to projects expiring.
- Personalize unbilled balances to projects expiring.

Pages Used to View Unbilled Balances

Page Name	Object Name	Navigation	Usage
Expiring Projects pagelet	GL_PE_07	Click the Personalize Content link on the PeopleSoft homepage. Select Expiring Projects.	View a list of projects, the amounts unbilled, and project expiration dates.
Unbilled Balances to Projects Expiring Personalization	GL_PE_07_PRS	Click the Customize icon on the Expiring Projects pagelet.	Define default display information for the Expiring Projects pagelet.

Viewing Expiring Projects

Access the Expiring Projects pagelet.

Unbilled Amount The amount of the balance that has not been billed.

Expiration Date The date a project ends. This date was entered when the project was added to the system.

Personalizing Unbilled Balances to Projects Expiring

Access the Unbilled Balances to Projects Expiring Personalization page.

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Unbilled Balances to Projects Expiring Personalization page

Ledger Group The Expiring Projects pagelet retrieves data only from Commitment Control ledgers. Select a specific Commitment Control ledger group.

Projects Expire in (days) Enter the number of days before the project expires. The system uses this information to select only projects that expire within the number of specified days.

Viewing Actual Versus Budgeted (Standard Budget) Information

To define ChartField security for the Actual vs Budgeted pagelet, use the ChartField Pagelet Security component (GL_PE_CF_SEC_COMP).

This section discusses how to:

- Apply ChartField security for actual versus budgeted information.
- View actual versus budgeted information.
- Personalize the actual versus budget view.
- Compare ledger details.

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Pages Used to Access and View Actual Versus Budgeted Information

Page Name	Object Name	Navigation	Usage
ChartField Pagelet Security	GL_PE_CF_SEC_PAGE	Set Up Financials/Supply Chain, Security, ChartField Pagelet Security, ChartField Pagelet Security	Enable additional security for the Actual vs Budgeted pagelet by restricting data access to specified department IDs and operating units.
Actual vs Budgeted pagelet	GL_PE_ACTVBUD	Click the Personalize Content link on the PeopleSoft homepage. Select Actual vs Budgeted.	View actual amount compared to budgeted amount for a specified time period, and view the positive or negative variance.
Actual vs Budgeted Personalization	GL_PE_ACTVBUD_PRS	Click the Customize icon on the Actual vs Budgeted pagelet.	Define default display information for the Actual vs Budgeted pagelet.
Compare Across Ledgers	INQ_COMPARE_PNL	Click an account on the Actual vs Budgeted pagelet.	Specify the ledger data you want to compare by period and view comparison results.

Applying ChartField Security for Actual Versus Budgeted Information

Access the ChartField Pagelet Security page.

Field Name Associates a user ID with selected department IDs and operating unit ChartField values. Your role determines how many department IDs or operating units are accessible to your user ID. For each user ID, and for every department ID and operating unit associated with a particular user ID, you must register the ChartField value information on this page to enable desired pagelet access for the user, including blank values. When users sign in to the portal, information that appears on the pagelets is limited to the specified values.

For example, the following table contains ChartField values for department IDs and operating units that are associated with a specific user ID. Prior to applying ChartField pagelet security, you may want to create a similar table as an implementation guide, noting all user IDs in your organization that require pagelet access and their associated department IDs and operating units.

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User ID	Department ID	Operating Unit
VP1	100 200 300 400	CALIFORNIA NEW YORK LONDON TOKYO
VP2	200 400	NEW YORK CALIFORNIA
VP3	300 400	LONDON CALIFORNIA
VP4	400	CALIFORNIA

When you set up security for pagelet data, users can use only the specified department IDs and operating units ChartField values. This limitation enables you to exercise specific controls over the data that a user sees on the pagelet. However, the security that you set up on the ChartField Pagelet Security page applies only to the Actual vs Budgeted pagelet data and not to the General Ledger that provides data to the pagelet.

Pagelet security is more restrictive than application security. Once a user accesses an application page, that user uses the security that is set up for the application.

See Chapter 2, "Setting Up PeopleSoft Financials Portal Pack," Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack, page 6.

Viewing Actual vs Budgeted Information

Access the Actual vs Budgeted pagelet.

This pagelet displays the actual amount versus the budgeted amount (in standard budget, not commitment control budget). We strongly recommend that you use the Expense Variance pagelet in place of this pagelet, as the Expense Variance pagelet allows you to define a more precise scope for comparison purposes.

Account Displays the top five accounts based on selections from the personalization page.

Personalizing the Actual Versus Budget View

Access the Actual vs Budgeted Personalization page.

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Actual vs Budgeted Personalization page

Actuals Ledger and **Budget Ledger** — Specify the actual and budgeted (standard budget) ledgers of the business unit that you want to compare. Unlike other pagelets, which qualify budget ledger by the ledger group type, this pagelet qualifies the budget ledger by ledger template. The ledger template associated with the budget ledger must be *BUDGET*.

From and **To Period** — Select a range of ledger accounting periods for the specified year.

Comparing Ledger Details

Access the Compare Across Ledgers page.

The system uses the information that you specify in the inquiry and ChartField Criteria sections to compare summary total amounts for the selected ChartField Account for the ledger and for the indicated time period. Be aware that options set in the inquiry section are derived from options specified on the Actual vs Budgeted Personalization page.

See Also

PeopleSoft Enterprise General Ledger 9.0 PeopleBook, "Reviewing Financial Information," Comparing Across Ledgers

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CHAPTER 7

Using Pagelets Enabled by PeopleSoft Payables

This chapter discusses how to:

- Set up PeopleSoft Payables for the PeopleSoft Financials Portal Pack.
- View average days in payables.
- View payables discounts.
- View top payables vendors by expenditure.

Setting Up PeopleSoft Payables for the PeopleSoft Financials Portal Pack

This section provides an overview of setup and lists the page used to set up PeopleSoft Payables for the PeopleSoft Financials Portal Pack.

Understanding Setup

If you are currently using PeopleSoft Payables and want to use the PeopleSoft Payables pagelets in the PeopleSoft Financials Portal Pack, you must schedule and run the Payables CFO Portal Job Application Engine process (AP_CFOP_JOB). The Payables CFO Portal Job process summarizes transaction data by month and converts different currency amounts to the currency specified on the run control. The data is stored in summary tables and appears on pagelets according to your personalized settings.

Note. Run the Payables CFO Portal Job process before customizing personalization pages to obtain field data. Depending on your data volume, it is recommended to run the CFO Portal Job process independent from other processes to minimize data contention.

Page Used to Set Up PeopleSoft Payables for the PeopleSoft Financials Portal Pack

Page Name	Object Name	Navigation	Usage
AP CFO Portal Job	AP_CFOP_JOB_RQST	Accounts Payable, Batch Processes, Vouchers, AP CFO Portal Job	Specify a run control ID, currency, and rate type and run the Payables CFO Portal Job process, which creates summary data used by PeopleSoft Payables pagelets in the PeopleSoft Financials Portal Pack.

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Viewing Average Days in Payables

This section discusses how to:

- View average days in payables.
- Personalize average days.
- View average days information by business unit.

Pages Used to View Average Days in Payables

Page Name	Object Name	Navigation	Usage
Average Days in Payables pagelet	AP_CFOP_AVG_MAIN	Click the Personalize Content link on the PeopleSoft homepage. Select Average Days in Accounts Payable.	View a bar graph that displays average days for the periods specified on the Average Days Personalization page.
Average Days in AP Personalization	AP_CFOP_AVG_PERS	Click the Customize icon on the Average Days in Payables pagelet.	Define default display information for the Average Days in Payables pagelet.
Average Days by Business Unit	AP_CFOP_AVG_DTLS	Click a bar on the graph displayed on the Average Days in Payables pagelet.	View details of each period shown on the bar graph, such as the name of the business unit and the average days per business unit.

Viewing Average Days in Payables

Access the Average Days in Payables pagelet.

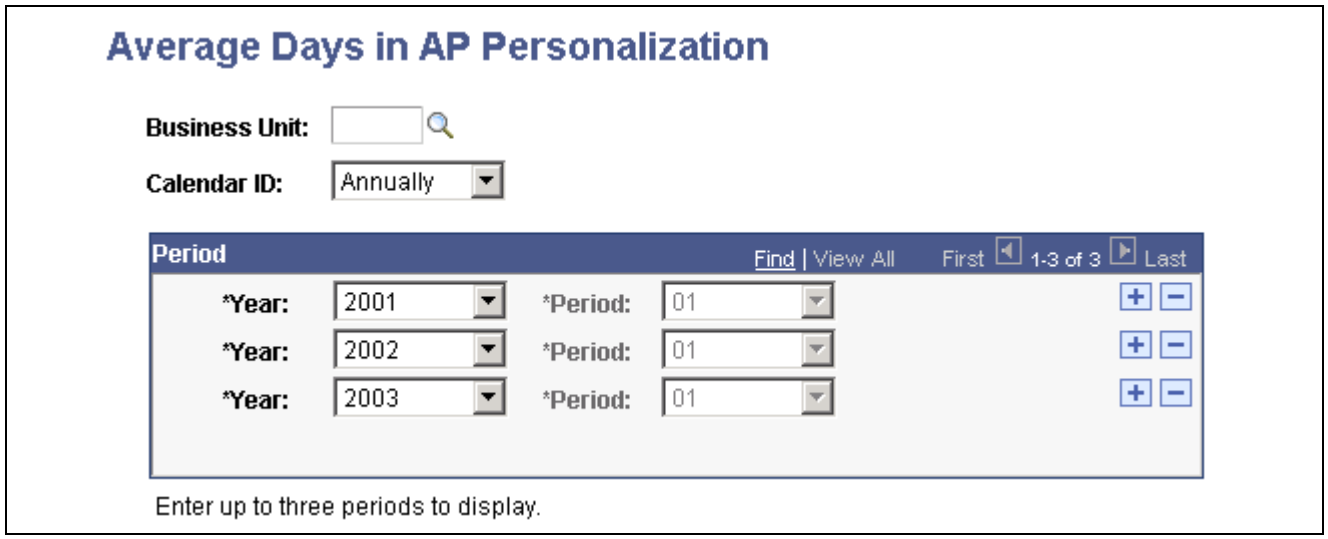
This pagelet displays the average number of days it takes to pay invoices for the periods specified on the Average Days Personalization page. Average days are determined by calculating the difference between the invoice date and payment date on all paid vouchers for the specified periods.

Click a bar on the graph to view details.

Personalizing Average Days

Access the Average Days in AP Personalization page.

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Average Days in AP Personalization page

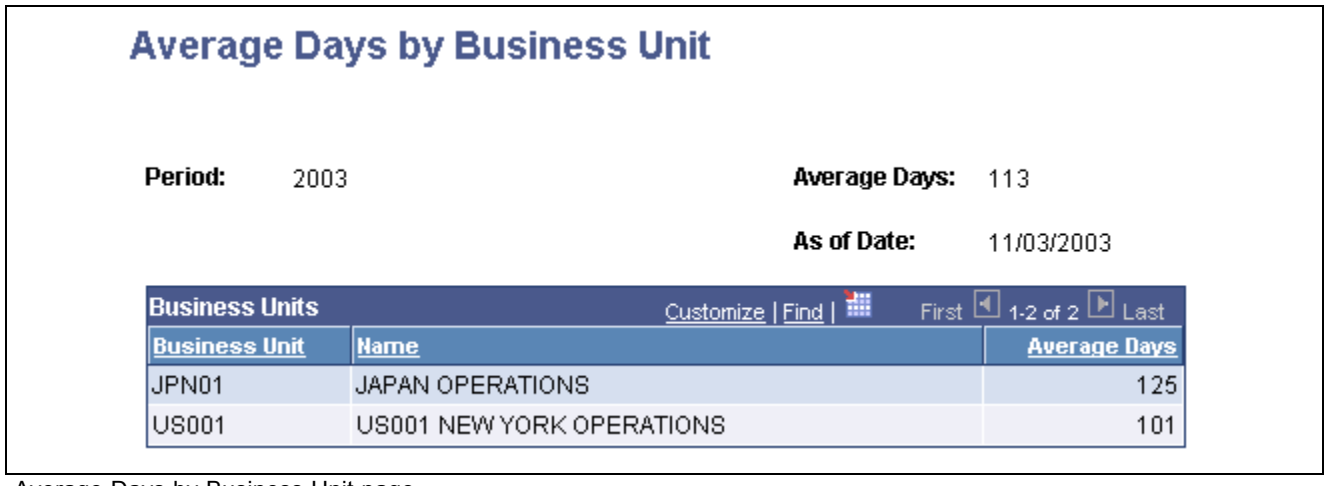
Business Unit Enter a business unit or leave the field blank to view average days for all business units. Leave the field blank to view all business units on the Average Days by Business Unit page.

Calendar ID Select *Annually, Monthly,* or *Quarterly.* This will affect the type of period that appears in each Period field.

Year and **Period** Define up to three accounting periods to display on the Average Days in Payables pagelet.

Viewing Average Days Information by Business Unit

Access the Average Days by Business Unit page.



Average Days by Business Unit page

Note. The Business Unit field on the Average Days in AP Personalization page must be blank in order to access this page.

Average Days Number of average days represented by a bar on the bar graph.

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Click the column headings to sort data in ascending or descending order.

Viewing Payables Discounts

This section discusses how to:

- View payables discounts.
- Personalize payables discounts.
- View discounts by business unit.

Pages Used to View Payables Discounts

Page Name	Object Name	Navigation	Usage
Payables Discounts pagelet	AP_CFOP_DSCNT_MAIN	Click the Personalize Content link on the PeopleSoft homepage. Select Payables Discounts in Accounts Payable.	View a bar graph that displays the discount taken or lost amounts per business unit for the periods specified on the Discounts Personalization page.
Discounts Personalization	AP_CFOP_DSCNT_PERS	Click the Customize icon on the Payables Discounts pagelet.	Define default display information for the Payables Discounts pagelet.
Discounts by Business Unit	AP_CFOP_DSCNT_DTLS	Click a bar on the graph displayed on the Payables Discounts pagelet.	View details on discounts and vouchers.

Viewing Payables Discounts

Access the Payables Discounts pagelet.

The value of the discount lost or taken can be displayed as a percentage or as an amount. If it is displayed as a percentage, the sum of the percentage lost and the percentage taken is 100 percent.

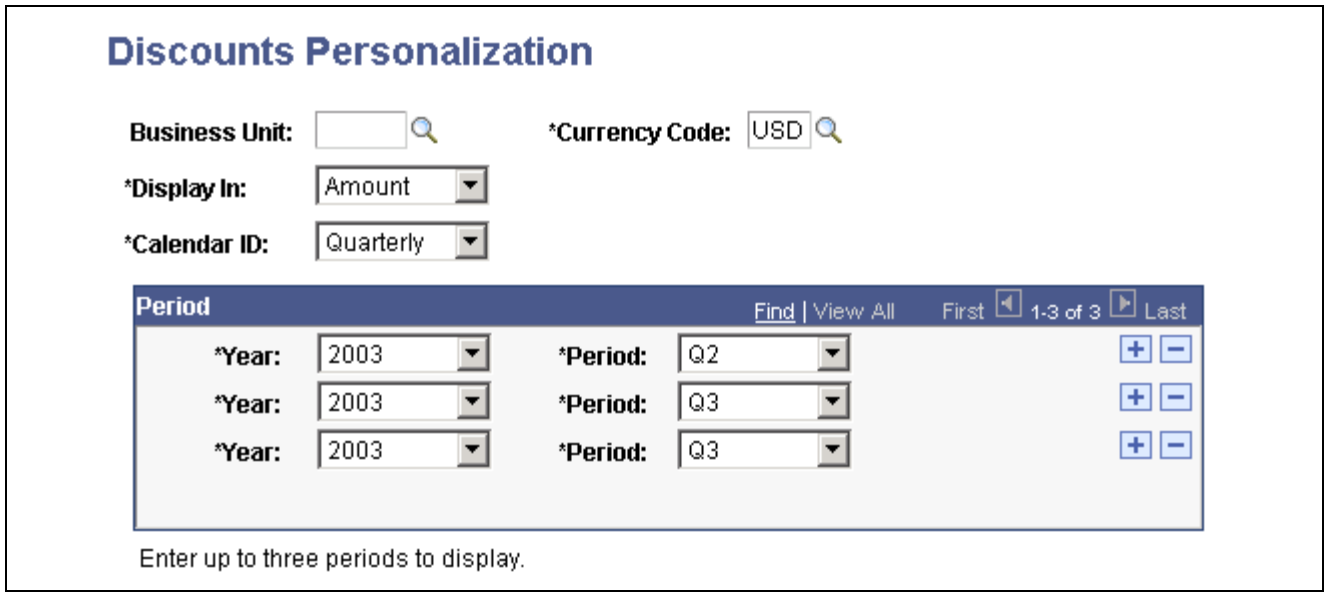
Click a bar on the graph to view details for a business unit.

Note. You can only drill down to view business unit details if there are multiple business units.

Personalizing Payables Discounts

Access the Discounts Personalization page.

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Discounts Personalization page

Business Unit Enter a business unit or leave the field blank to view discounts lost and taken for all business units. Leave the field blank to view all business units on the Discounts by Business Unit page.

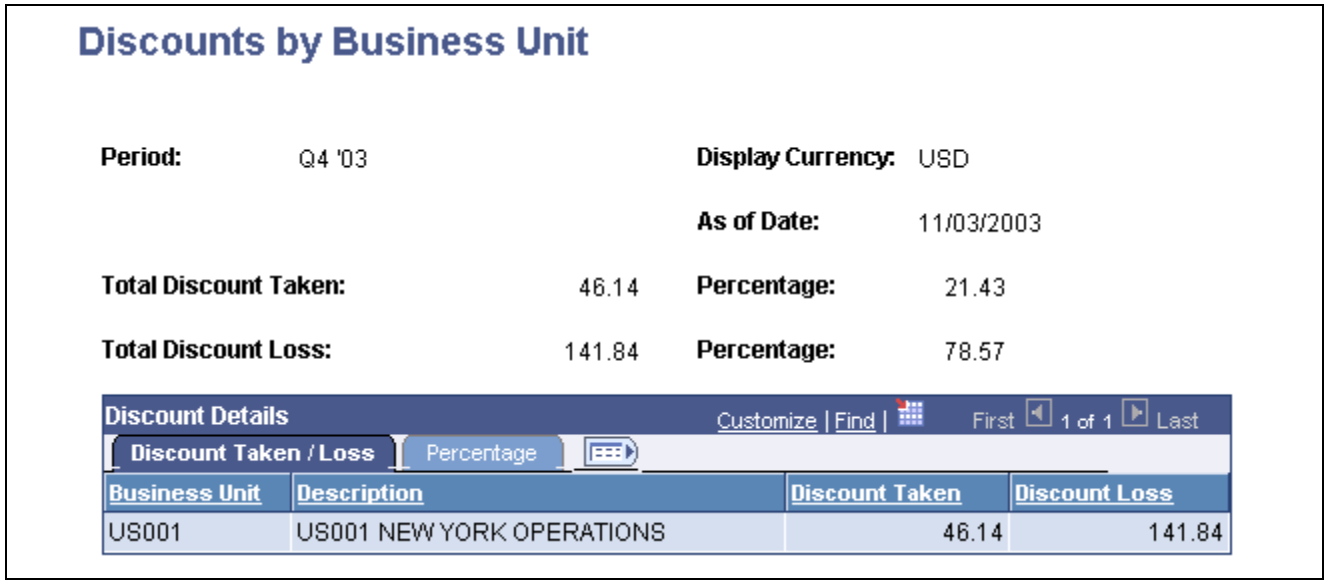
Display In Select *Amount* or *Percentage.*

Calendar ID Select *Annually, Monthly,* or *Quarterly.* This will affect the type of period that appears in the Period field.

Year and **Period** Define up to three accounting periods to display on the Payables Discounts pagelet.

Viewing Discounts by Business Unit

Access the Discounts by Business Unit page.



Discounts by Business Unit page

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Note. The Business Unit field on the Discounts Personalization page must be blank in order to access this page.

On the Discount Taken / Loss tab, view the total discounts taken and lost for each business unit. Click the Percentage tab to view the percentage of vouchers taken and lost.

Viewing Top Payables Vendors by Expenditure

This section discusses how to:

- View top payables vendors by expenditure.
- Personalize top vendors.
- View top vendor details.

Pages Used to View Top Payables Vendors by Expenditure

Page Name	Object Name	Navigation	Usage
Top Vendors by Expenditure pagelet	AP_CFOP_VNDR_MAIN	Click the Personalize Content link on the PeopleSoft homepage. Select Top Vendors by Expenditure in Accounts Payable.	View expenditure amounts for the top five PeopleSoft Payables vendors over the periods specified on the Top Vendors Personalization page.
Top Vendors Personalization	AP_CFOP_VNDR_PERS	Click the Customize icon on the Top Vendors by Expenditure pagelet.	Define default display information for the Top Vendors by Expenditure pagelet.
Top Vendors Details	AP_CFOP_VNDR_DTLS	Click the name of the vendor or the Details button on the Top Vendors by Expenditure pagelet.	View vouchers for any vendor.

Viewing Top Payables Vendors by Expenditure

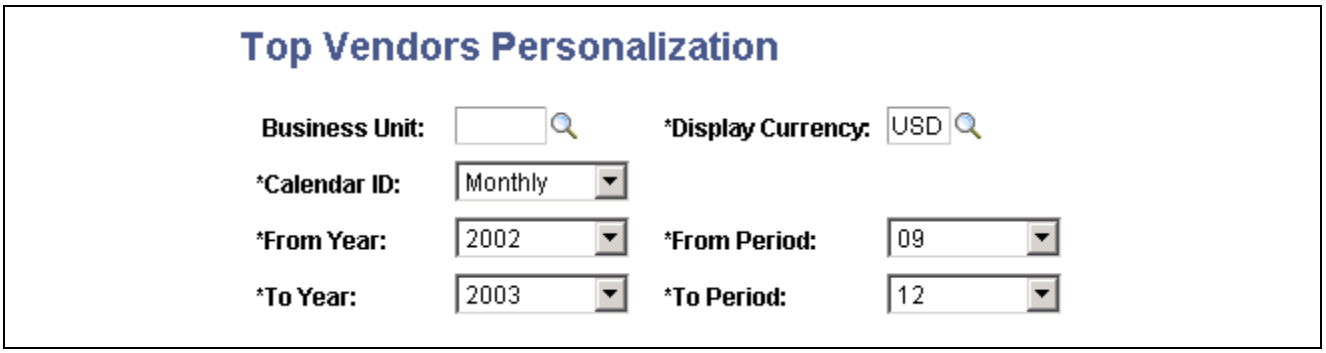
Access the Top Vendors by Expenditure pagelet.

This page displays the top five payables vendors and their amounts sorted from highest to lowest. You can also view total expenditures from additional vendors by clicking the Other Vendor link.

Personalizing Top Vendors

Access the Top Vendors Personalization page.

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Top Vendors Personalization page

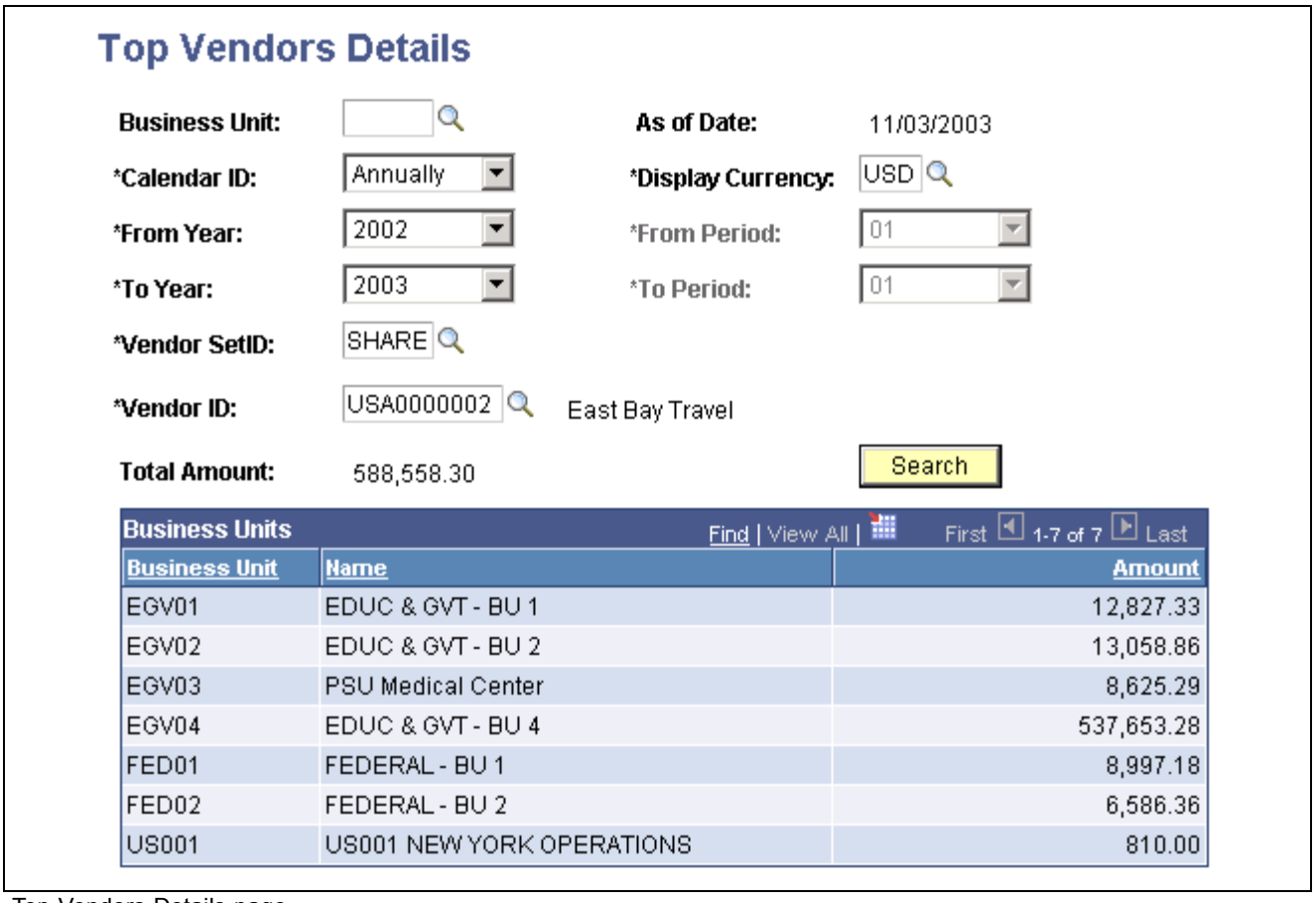
Business Unit Enter a business unit or leave the field blank to view top vendors for all business units.

Calendar ID Select a calendar option: *Annually, Monthly,* or *Quarterly.*

From Year and **To Year** Select the range for which you want to display the data.

Viewing Top Vendor Details

Access the Top Vendors Details page.



Business Unit	Name	Amount
EGV01	EDUC & GVT - BU 1	12,827.33
EGV02	EDUC & GVT - BU 2	13,058.86
EGV03	PSU Medical Center	8,625.29
EGV04	EDUC & GVT - BU 4	537,653.28
FED01	FEDERAL - BU 1	8,997.18
FED02	FEDERAL - BU 2	6,586.36
US001	US001 NEW YORK OPERATIONS	810.00

Top Vendors Details page

Change the field values as needed to view details on a different business unit, currency, time period, or vendor. When you click the Search button, the system retrieves and displays vouchers that meet your criteria.

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Vendor ID Enter a different vendor ID to see details on a different vendor. To see details on all vendors, leave this field blank.

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CHAPTER 8

Using Pagelets Enabled by PeopleSoft Receivables

This chapter discusses how to:

- Set up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack.
- View aging summary information.
- View average days to resolve deductions.
- View days sales outstanding (DSO).
- View deductions by amount.
- View deductions by reason.
- View outstanding and past due balances.
- View sales for new and existing customers.
- View top customer sales balances.
- View top customer write-offs.
- View write-off trends.

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

This section provides an overview of setup and lists the page used to set up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack.

Understanding Setup

If you are currently using PeopleSoft Receivables and want to use the PeopleSoft Receivables pagelets in the PeopleSoft Financials Portal Pack, you must schedule and run the Receivables Update Pagelet Statistics Application Engine process (AR_CFOLOAD). The Update Pagelet Statistics process summarizes transaction data and converts different currency amounts to the currency specified on the run control. PeopleSoft Receivables stores the data in summary tables and displays it on pagelets based on your personalized settings.

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Page Used to Set Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Page Name	Object Name	Navigation	Usage
Update Pagelet Statistics	AR_CFOLOAD_RQST	Accounts Receivable, Receivables Update, Update Pagelet Statistics	Run a process that creates summary data used by PeopleSoft Receivables pagelets in the PeopleSoft Financials Portal Pack. Select the currency and rate type used to display the data on pagelets.

Viewing Aging Summary Information

This section discusses how to:

- View aging summary information.
- Personalize aging summary.

Pages Used to View Aging Summary Information

Page Name	Object Name	Navigation	Usage
Aging Summary pagelet	AR_PE_AGING_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Aging Summary.	View a bar graph that shows the total aging amount in up to five aging categories.
Aging Summary Personalization	AR_PE_AGSUM_PRS	 Click the Customize Aging Summary icon on the Aging Summary pagelet.	Define default display information for the Aging Summary pagelet.

Viewing Aging Summary

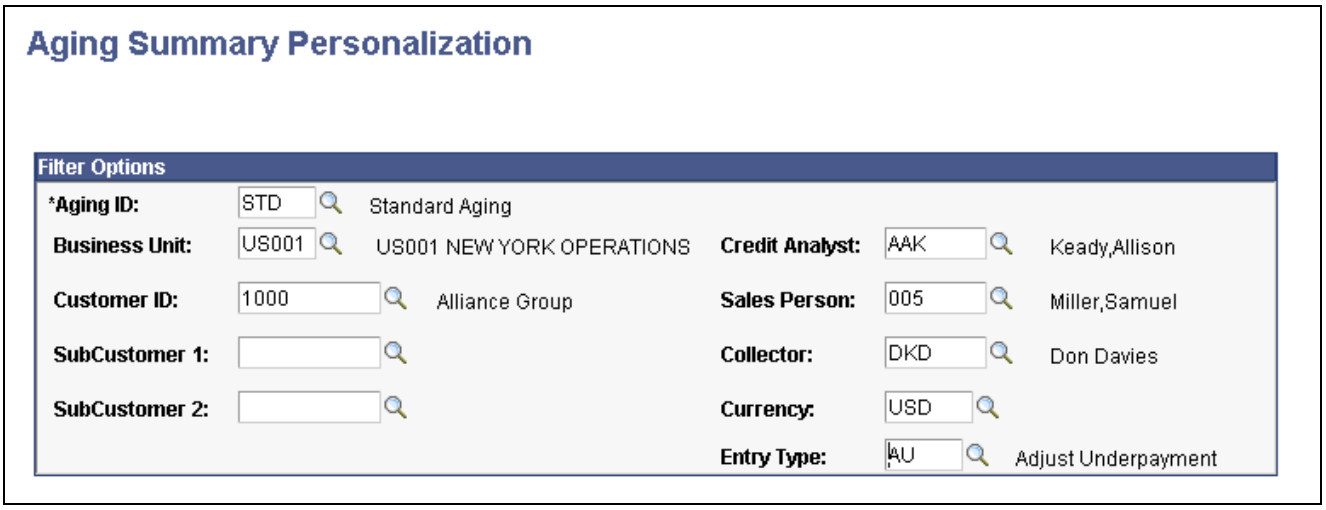
Access the Aging Summary pagelet.

This pagelet uses a bar graph to display the total aging amount by aging category. The system filters the data based on the parameters on the Aging Summary Personalization page.

Personalizing Aging Summary

Access the Aging Summary Personalization page.

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Aging Summary Personalization page

Aging ID Select an aging category to display items that are part of the age range specified by the aging ID.

Entry Type Select an entry type to display the items for an entry type in a category.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

Viewing Average Time to Resolve Deductions

This section discusses how to:

- View average time to resolve deductions.
- Personalize average time to resolve.

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Pages Used to View Average Time to Resolve Deductions

Page Name	Object Name	Navigation	Usage
Average Time to Resolve pagelet	AR_PE_DEDAVG_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Average Time to Resolve.	Display the average time to resolve a deduction over a user-defined period using a bar graph.
Average Time to Resolve Personalization	AR_PE_DEDAVG_PRS	Click the Customize Average Time to Resolve icon on the Average Time to Resolve Deduction pagelet.	Define default display information for the Average Time to Resolve Deduction pagelet.

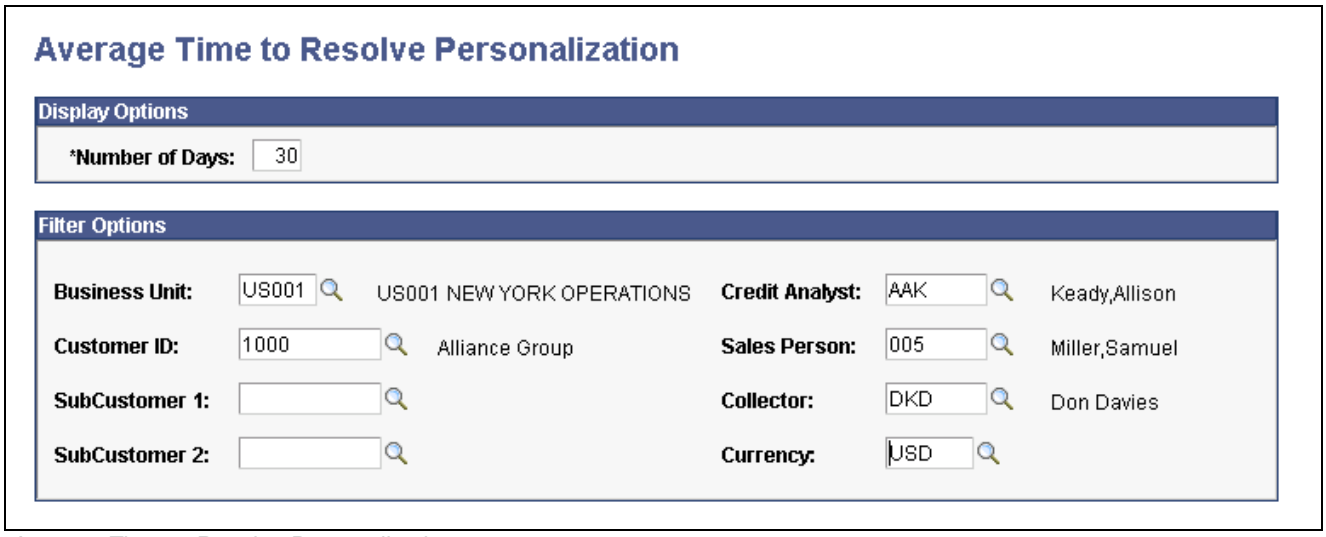
Viewing Average Time to Resolve Deductions

Access the Average Time to Resolve pagelet.

This pagelet uses a bar graph to display the average number of days it took to resolve deductions in each time period. For example, if each time period is 30 days, it shows the average resolution time over the last 30 days, the next 31 to 60 days, and so on.

Personalizing Average Time to Resolve

Access the Average Time to Resolve Personalization page.



Average Time to Resolve Personalization page

Number of Days Enter the number of days for each period in the Time Frame axis.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

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Viewing Days Sales Outstanding

This section discusses how to:

- View days sales outstanding.
- Personalize days sales outstanding.

Pages Used to View Days Sales Outstanding

Page Name	Object Name	Navigation	Usage
Days Sales Outstanding pagelet	AR_PE_DSO_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Days Sales Outstanding.	View a bar graph that shows the days sales outstanding for up to five time periods.
DSO Personalization	AR_PE_DSO_PRS	 Click the Customize Days Sales Outstanding icon on the Days Sales Outstanding pagelet to access the DSO Personalization (days sales outstanding personalization) page.	Define default display information for the Days Sales Outstanding pagelet.

Viewing Days Sales Outstanding

Access the Days Sales Outstanding pagelet.

This pagelet uses a bar graph to display the days sales outstanding by time frame. The system filters the data based on the parameters on the DSO Personalization page. This table shows the calculations the system uses to display the data in the bar graph:

Calculated Amount	Calculation Method
Ending Customer Balance	Adds all customer balance amounts in the Item table (PS_ITEM) for a given time frame.
Sales in Period	Adds all entry amounts in the Item Activity table (PS_ITEM_ACTIVITY) for all entry types that make up the customer history ID of SALES for a given time frame.
Days Sales Outstanding	Multiplies the ending customer balance by 30 divided by the sales in period.

Personalizing Days Sales Outstanding

Access the DSO Personalization page.

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DSO Personalization page

Number of Days Indicate the number of days you want to see in the Time Frame axis of the bar graph on the Days Sales Outstanding pagelet.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process in order for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

Viewing Deductions by Amount

This section discusses how to:

- View deductions by amount.
- Personalize deduction by amount.

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Pages Used to View Deduction by Amount

Page Name	Object Name	Navigation	Usage
Deduction by Amount pagelet	AR_PE_DEDAMT_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Deduction by Amount.	Display the current deduction amount and the previous year deduction amount over a user defined period on a stacked bar graph.
Deduction by Amount Personalization	AR_PE_DEDAMT_PRS	Click the Customize Deduction by Amount icon on the Deduction by Amount pagelet.	Define default display information for the Deduction by Amount pagelet.

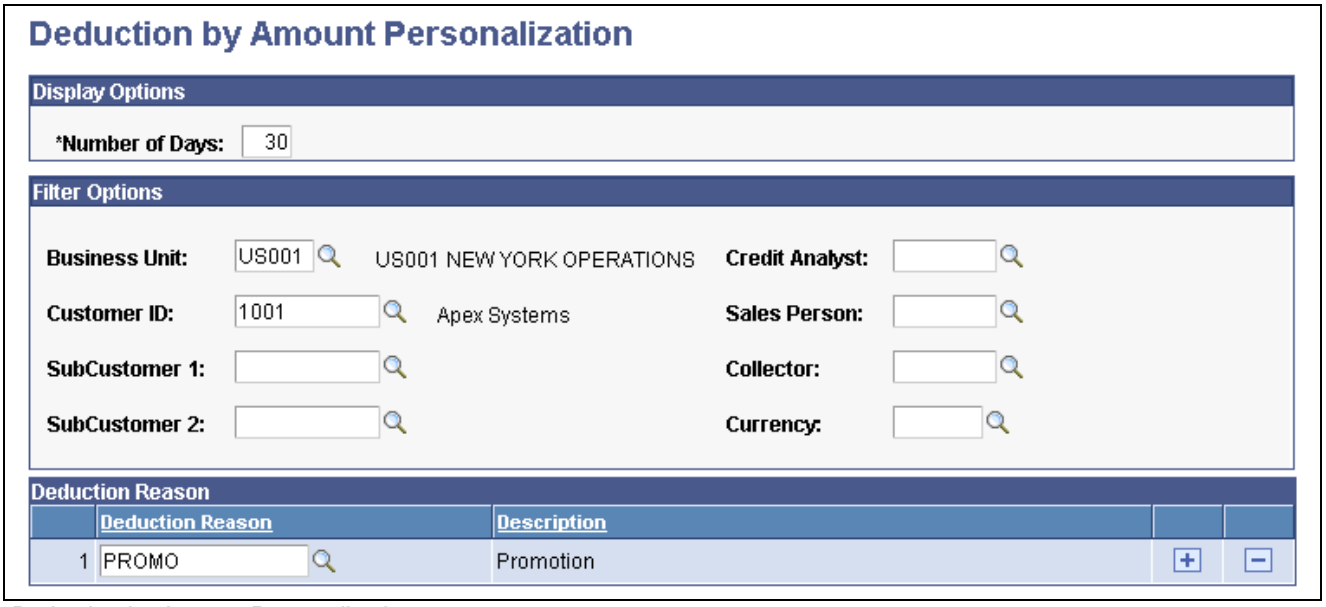
Viewing the Deductions by Amount

Access the Deduction by Amount pagelet.

The deduction amount pagelet displays the total amount of deductions over a user-defined period of time and is compared against the same period in the previous year. The period of time is user-defined on the Deduction by Amount Personalization page.

Personalizing Deduction by Amount

Access the Deduction by Amount Personalization page.



Deduction by Amount Personalization page

Number of Days Enter the number of days for each period. The system subtracts the numbers of days that you enter from the current date to determine the current period and includes deductions created during that period in the amount on the pagelet.

Deduction Reason Enter each deduction reason for the deductions that you want to include in the amount.

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Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

Viewing Deductions by Reason

This section discusses how to:

- View deductions by reason.
- Personalize deductions by reason.

Pages Used to View Deductions by Reason

Page Name	Object Name	Navigation	Usage
Deduction by Reason pagelet	AR_PE_DEDRSN_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Deduction by Reason.	Display deductions by reason in a table format, listing the reason, current amount and currency, count of deductions making up the current amount, and the comparison amount and currency.
Deduction by Reason Personalization	AR_PE_DEDRSN_PRS	 Click the Customize Deduction by Reason icon on the Deduction by Reason pagelet.	Define default display information for the Deduction by Reason pagelet.
Item List - Advanced Search	ITEM_LIST	Click the Deduction Reason link on the Deduction by Reason pagelet.	Update search parameters to create a list of items with a specific deduction reason.

Viewing the Deductions by Reason

Access the Deduction by Reason pagelet.

Deduction Reason Displays the description for the reason. Click a link to access the Item List - Advanced Search page, where you enter search criteria to display a list of items with a specific deduction reason. The system automatically populates the search criteria on the Advanced Search page using the data that you entered on the Deduction by Reason Personalization page. Modify the criteria if necessary.

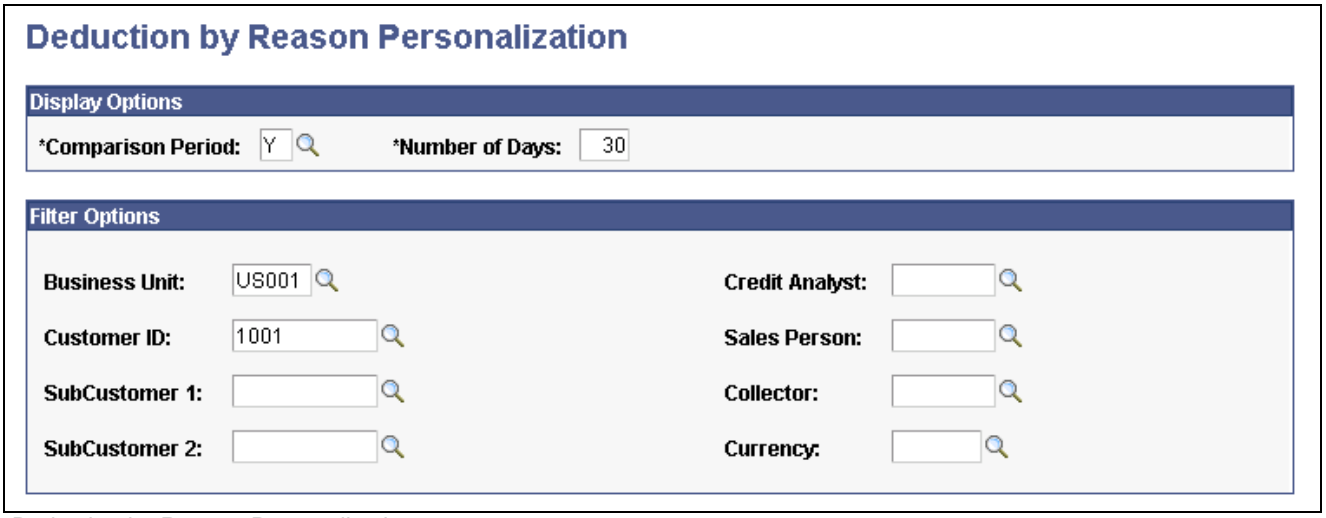
Current Amount and **Count** Displays the total amount and count of deductions in the current period.

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Prior Amount and **Count** Displays the total amount and count of deductions for the previous year or period.

Personalizing Deduction by Reason

Access the Deduction by Reason Personalization page.



Deduction by Reason Personalization page

Comparison Period Select a value that determines the length of the comparison period. Options are:

P (Prior Period): Compares the period of time to prior period of time. For example, if the period of time is 10 days, it compares the past 10 days to the past 11 to 20 days.

Y (Prior Year): Compares the period of time to the same period in the prior year.

Number of Days Enter the number of days for the comparison period.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

Viewing Outstanding and Past Due Balances

This section discusses how to:

- View outstanding balances.
- View past due balances.

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Pages Used to View Outstanding and Past Due Balance Information

Page Name	Object Name	Navigation	Usage
Outstanding Balances pagelet	AR_PE_OUTBAL_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Outstanding Balances.	View customer accounts with large open balances.
Past Due Balances pagelet	AR_PE_PASTDU_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Past Due Balances.	View customer accounts with collection problems.
Account Overview - Balances	CUST_BALANCES_HDR	Click a customer on the Outstanding Balances or Past Due Balances pagelet.	View a wide range of information about a customer's balances and use links to view items that comprise each balance.

Viewing Outstanding Balances

Access the Outstanding Balances pagelet.

Customer Displays up to five customers that have a large outstanding balance. The pagelet displays only corporate customer balances.

Click a customer to access the Account Overview - Balances page, where you view detailed information regarding the outstanding balance.

Amount Displays the total amount owed to your organization regardless of the payment due date.

See Also

PeopleSoft Enterprise Receivables 9.0 PeopleBook, "Researching Customer Accounts," Reviewing Customer Account Information

Viewing Past Due Balances

Access the Past Due Balances pagelet.

Customer Displays up to five customers that have a large unpaid balance past a specified due date. The pagelet displays only corporate customer balances.

Click a customer to access the Account Overview - Balances page, where you view detailed information regarding the outstanding balance.

Amount Displays the total amount of the unpaid balances past the specified due date.

See Also

PeopleSoft Enterprise Receivables 9.0 PeopleBook, "Researching Customer Accounts," Reviewing Customer Account Information

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Viewing Sales for New and Existing Customers

This section discusses how to:

- View sales for new and existing customers.
- Personalize new and existing customers.

Pages Used for View Sales to New and Existing Customers

Page Name	Object Name	Navigation	Usage
Sales New/Existing Customers pagelet	AR_PE_SALES_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Sales New/Existing Customers.	View a bar graph that compares the sales for new and existing customers over a period of time.
New and Existing Customers Personalization	AR_PE_SALES_PRS	 Click the Customize Sales New/Existing Customers icon on the Sales New/Existing Customers pagelet.	Define default display information for the Sales New/Existing Customers pagelet.

Viewing Sales for New and Existing Customers

Access the Sales New/Existing Customers pagelet.

The bar graph's scale adjusts to fit both positive and negative data. Hold your cursor over a bar to see the name of the customer and the exact sales amount.

Amount Displays the amount of sales for new or existing customers. Amounts appear in hundreds, thousands, millions, and so on, depending on the size of the smallest amount.

Timeframe Displays the number of days of sales included in the amount.

The system uses this criteria to determine which sales to include in the amount in the bar graph and how to calculate the amount:

- A customer is considered *new* if the date the customer was added to the system is greater than the cutoff date entered on the New and Existing Customers Personalization page.
- A customer is considered *existing* if the date the customer was added to the system is less than the cutoff date entered on the New and Existing Customers Personalization page.
- The system calculates sales by adding the entry amounts in the Item Activity table (PS_ITEM_ACTIVITY) for all entry types that make up the customer history ID of SALES.

Personalizing Sales for New and Existing Customers

Access the New and Existing Customers Personalization page.

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New and Existing Customers Personalization page

Cutoff Date Enter the cutoff date that the system uses to determine whether a customer is new or existing.

Number of Days Enter the number of days to use in the Time frame axis of the Sales New/Existing Customers pagelet bar graph.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

Viewing Top Customer Sales Balances

This section discusses how to:

- View top customer sales balances.
- Personalize top customers sales balances.

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Pages Used to View Top Customer Sales Balances

Page Name	Object Name	Navigation	Usage
Top Customer Sales Balances pagelet	AR_PE_TOPCST_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Top Customer Sales Balances.	View the sales balances and the percentage of total sales for up to five corporate customers.
Top Customers Personalization	AR_PE_TPCST_PRS	Click the Customize Top Customer Sales Balances icon on the Top Customer Sales Balances pagelet.	Define default display information for the Top Customer Sales Balances pagelet.
Account Overview - Balances	CUST_BALANCES_HDR	Click a customer on the Top Customer Sales Balances pagelet.	Use to view a wide range of information about a customer's outstanding balance or past due balance and use links to view items that comprise each balance.

Viewing Top Customer Sales Balances

Access the Top Customer Sales Balances pagelet.

Click a customer link to access the Account Overview - Balances page.

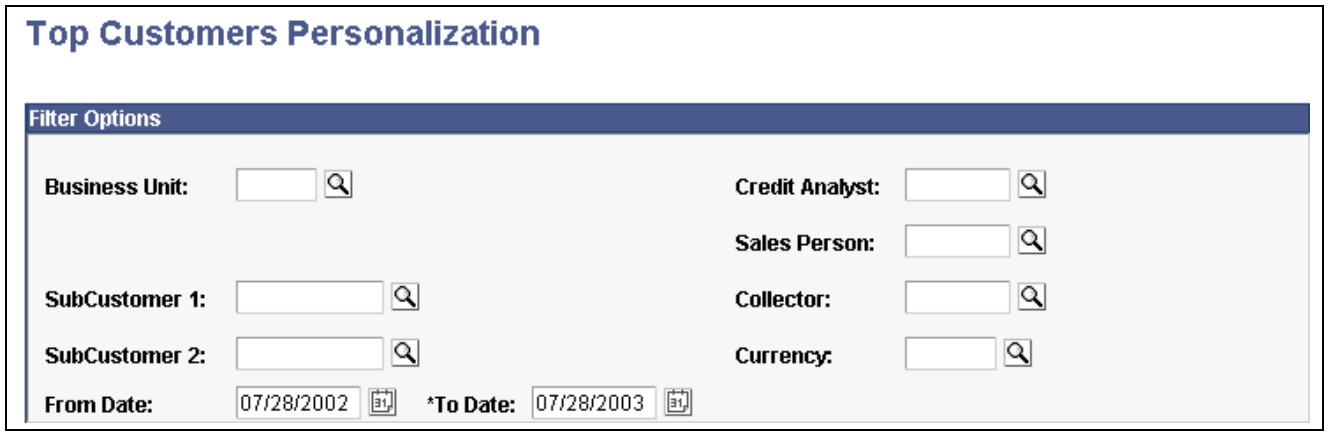
% (percent) Displays the percentage of total sales for the sales period contributed by this customer.

See Also

PeopleSoft Enterprise Receivables 9.0 PeopleBook, "Researching Customer Accounts," Reviewing Customer Account Information

Personalizing Top Customer Sales Balances

Access the Top Customers Personalization page.



Top Customers Personalization page

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From Date and **To Date** Enter a date range for the sales period. The system adds the total sales for each customer in the date range to determine whether they are the top customers.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

Viewing Top Customer Write-offs

This section discusses how to:

- View top customer write-offs.
- Personalize top customer write-offs.

Pages Used to View Top Customer Write-offs

Page Name	Object Name	Navigation	Usage
Bad Debt Write-off by Customer pagelet	AR_PE_DETWO_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Bad Debt Write-off by Customer.	View the balances that have been written off for up to five top corporate customers.
Customer Write-off Personalization	AR_PE_DETWO_PRS	 Click the Customize Bad Debt Write-off by Customer icon on the Bad Debt Write-off by Customer pagelet.	Define default display information for the Bad Debt Write-off by Customer pagelet.
Account Overview - Balances	CUST_BALANCES_HDR	Click a customer on the Bad Debt Write-off by Customer pagelet.	View a wide range of information about a customer's outstanding balance or past due balance and use links to view items that comprise each balance.

Viewing the Top Customer Write-offs

Access the Bad Debt Write-off by Customer pagelet.

Click a customer link to access the Account Overview - Balances page, where you view various customer balances and use links to view a list of items included in each balance.

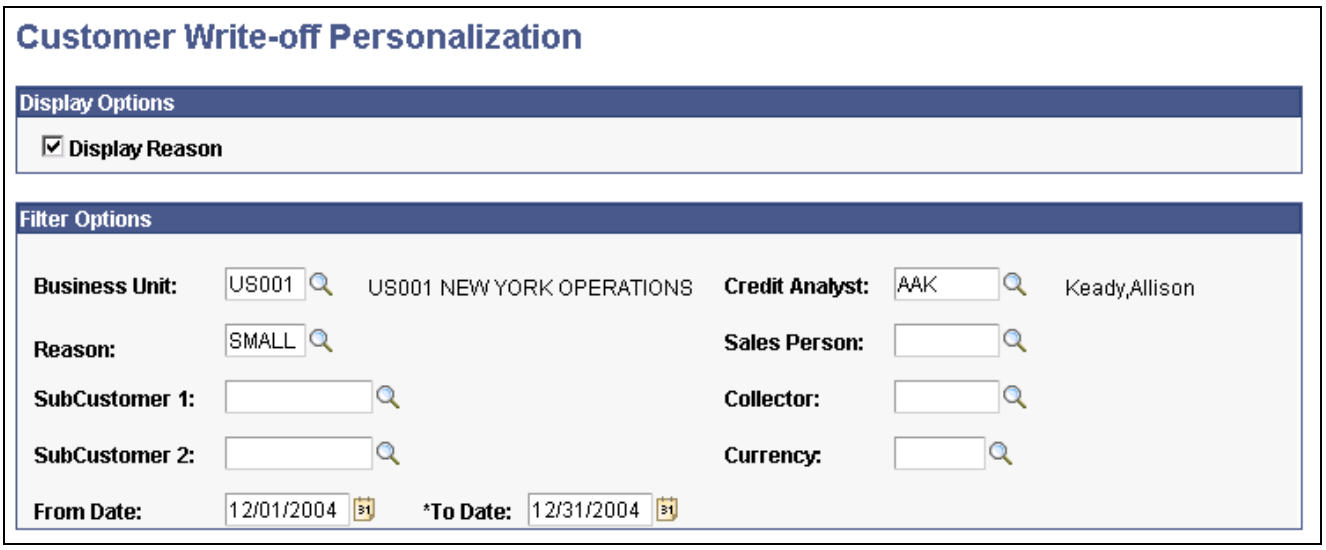
See Also

PeopleSoft Enterprise Receivables 9.0 PeopleBook, "Researching Customer Accounts," Reviewing Customer Account Information

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Personalizing Top Customer Write-offs

Access the Customer Write-off Personalization page.



Customer Write-off Personalization page

Display Reason Select this option to display the write-off reason on the pagelet broken down by customer and reason code. Clear this option if you do not want to display the write-off reason. In this case, the amount is broken down by customer only.

From Date and **To Date** Enter the date range of the write-off items to include in the pagelet. This field is required.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

See Also

Chapter 8, "Using Pagelets Enabled by PeopleSoft Receivables," Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

Viewing Write-off Trends

This section discusses how to:

- View write-off trends.
- Personalize write-off trends.

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Pages Used to View Write-off Trends

Page Name	Object Name	Navigation	Usage
Write-off Trends pagelet	AR_PE_WO_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Write-off Trends.	Display the amount written off over a user-defined period using a bar graph.
Write-off Trends Personalization	AR_PE_WO_PRS	Click the Customize Write-off Trends icon on the Write-off Trends pagelet.	Define default display information for the Write-off Trends pagelet.

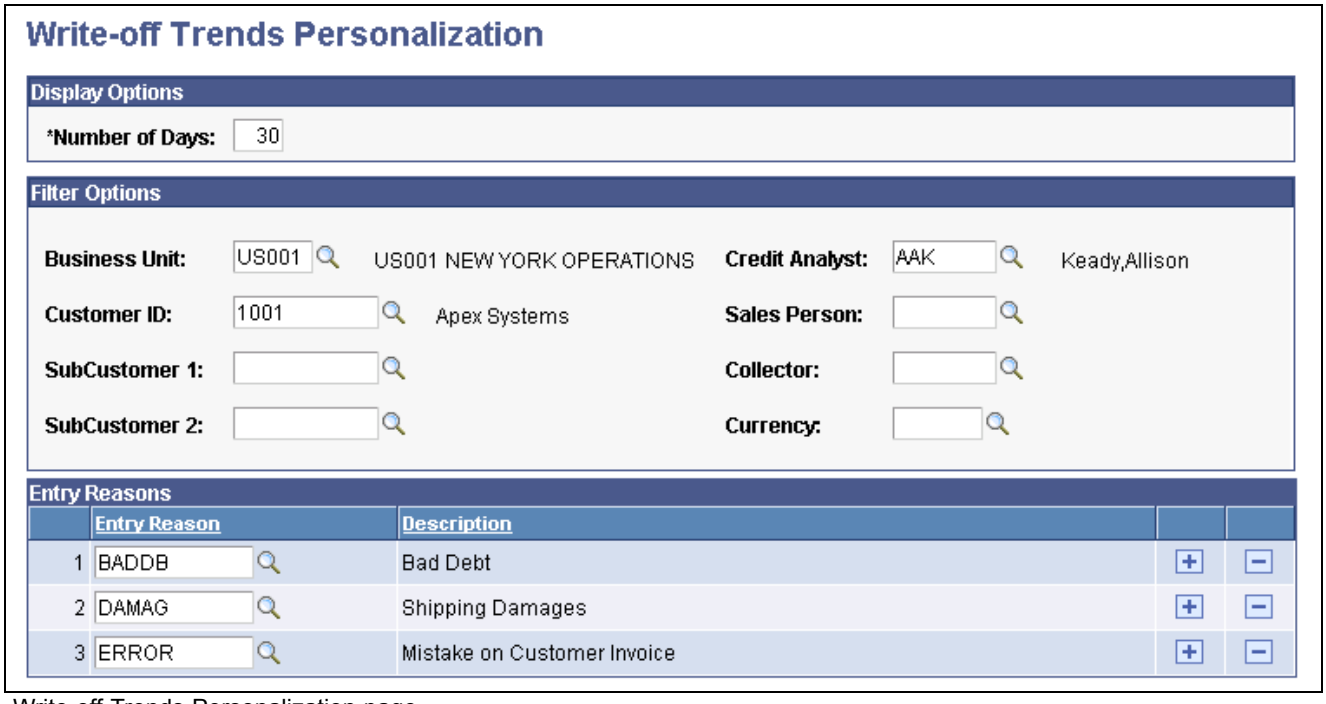
Viewing Write-off Trends

Access the Write-off Trends pagelet.

The graph displays the amount written off over a user-defined period. For example, if the period is 30 days, it shows the total amount of items written off in the past 30 days, the next 31 to 60 days, and so on.

Personalizing Write-off Trends

Access the Write-off Trends Personalization page.



Write-off Trends Personalization page

Number of Days Enter the number of days for each period of time.

Entry Reason Enter each entry reason for the write-off items that you want to include in the amount.

Note. When you change any personalization options, you must run the Update Pagelet Statistics process for the pagelet to display the correct data.

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See Also

Chapter 8, “Using Pagelets Enabled by PeopleSoft Receivables,” Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack, page 47

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CHAPTER 9

Using Pagelets Enabled by PeopleSoft Treasury Management

This chapter discusses how to:

- View bank contacts.
- View bank statement reconciliation aging information.

Viewing Bank Contacts

This section discusses how to:

- View bank contacts.
- Personalize bank contacts.
- Review financial contact information.

See Also

PeopleSoft Enterprise Banks Setup and Processing 9.0 PeopleBook, "Setting Up Banks," Defining Financial Contacts

Pages Used to View Bank Contacts

Page Name	Object Name	Navigation	Usage
Bank Contacts pagelet	TR_PE_BANK_CONTACT	Click the Personalize Content link on the PeopleSoft homepage. Select Bank Contacts.	View information for an individual bank contact as defined on the Bank Contacts Personalization page.
Bank Contacts Personalization	TR_PE_BNKCPRS	Click the Customize icon on the Bank Contacts pagelet.	Define default display information for the Bank Contacts pagelet.
Financial Contacts	TR_CONTACT_PNL	Click the name of a bank contact on the Bank Contacts pagelet.	View and edit information about bank contacts.

Viewing Bank Contacts

Access the Bank Contacts pagelet.

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You can maintain up to five bank contacts for each user ID.

Name Click a bank name link to access the Financial Contacts page, where you can view and update information. If you edit a bank contact, the system stores the changes to that contact in a table specific to the user ID, and only that user ID can view the contact information.

Note. No information appears for this pagelet until you define default bank contact information on the Bank Contacts Personalization page. However, once defined, your personalization settings are stored in the system indefinitely. If you deactivate this pagelet from your homepage, then reactivate it at a later time, you do not need to redefine your personalization settings.

Personalizing Bank Contacts

Access the Bank Contacts Personalization page.

Select up to five contacts to display on the Bank Contacts pagelet.

Because contacts are tied to bank codes and bank codes are associated with setIDs, you can only access contacts that are associated with the setIDs assigned to your user ID.

Reviewing Financial Contact Information

Access the Financial Contacts page.

Viewing Bank Statement Reconciliation Aging Information

This section discusses how to:

- View bank statement reconciliation aging information.
- Personalize bank statement reconciliation aging information.
- Review bank statement information.

See Also

PeopleSoft Enterprise Banks Setup and Processing 9.0 PeopleBook, "Reconciling Statements," Reviewing Bank Statement Information

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Pages Used to View Bank Statement Reconciliation Aging Information

Page Name	Object Name	Navigation	Usage
Reconciliation Aging pagelet	TR_PE_RCNAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Reconciliation Aging.	View unreconciled items grouped by number of days the item has been unreconciled and the total unreconciled amount of each group.
Bank Reconciliation Aging Personalization	TR_PE_RCNPERS	Click the Customize icon on the Reconciliation Aging pagelet.	Define default display information for the Reconciliation Aging pagelet.
Bank Statement Inquiry	BNK_RCN_STMT_GEN	Click a Group link on the Bank Reconciliation Aging pagelet.	View detailed information for unreconciled transactions and generate an Account Register report. To view the resulting report, navigate to the Process Monitor.

Viewing Bank Statement Reconciliation Aging

Access the Reconciliation Aging pagelet.

The page displays up to four groups of unreconciled transaction information categorized by Group.

Group A transaction is grouped by the number of days it has had an unreconciled status. Group categories are *0-30, 30-60, 60-90,* and *90+*.

Count Total number of unreconciled transactions.

Amount Total dollar amount of unreconciled transactions.

Note. No information appears for this pagelet until you define default bank contact information on the Bank Reconciliation Aging Personalization page. However, once defined, your personalization settings are stored in the system indefinitely. If you deactivate this pagelet from your homepage, then reactivate it at a later time, you do not need to redefine your personalization settings.

Personalizing Bank Statement Reconciliation Aging

Access the Bank Reconciliation Aging Personalization page.

Specify the Bank ID and Account # (account number) for the unreconciled items that you want to display on the Reconciliation Aging pagelet.

Reviewing Bank Statement Information

Access the Bank Statement Inquiry page.

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PART 3

Using PeopleSoft Enterprise Service Automation Portal Pack

Chapter 10
Understanding Enterprise Service Automation Pagelets

Chapter 11
Using Pagelets Enabled by PeopleSoft Contracts

Chapter 12
Using Pagelets Enabled by PeopleSoft Expenses

Chapter 13
Using Pagelets Enabled by PeopleSoft Program Management

Chapter 14
Using Pagelets Enabled by PeopleSoft Project Costing

Chapter 15
Using Pagelets Enabled by PeopleSoft Proposal Management

Chapter 16
Using the Pagelet Enabled by PeopleSoft Resource Management

CHAPTER 10

Understanding Enterprise Service Automation Pagelets

This chapter provides an overview of Enterprise Service Automation pagelet types and discusses how to:

- Administer system defaults for PeopleSoft Enterprise Service Automation Portal Pack Pagelets.
- View Operational Threshold Alerts (OTAs).
- View the Media Sources pagelet.
- View Enterprise Service Automation Navigation Collection pagelets.

Understanding Enterprise Service Automation Pagelet Types

Enterprise Service Automation pagelets provide a variety of data derived from Enterprise Service Automation applications. Pagelets are grouped in functional classifications based on the type of information displayed, the purpose and use of the information, and how pagelet values are calculated.

This section lists common elements and discusses:

- Operational summary pagelets
- OTAs
- Transactions in progress (TIP)

Common Elements Used in This Chapter

Calendar ID Select a calendar identifier to indicate the types of periods to use for the analysis. For example, a pagelet may give a user the option to view data according to a quarterly calendar or monthly calendar.

My Projects Select this option to view and analyze only projects listed on the PeopleSoft Project Costing My Projects page for the user.

Number of Prior Periods Enter the number of prior calendar periods over which an analysis occurs.

Restore Defaults Click this button to reinstate the administrator default settings for a pagelet or OTA personalization page.

Show Only if Alert Select this option to indicate that an OTA will appear only if the measurement reaches the threshold at which an alert is triggered.

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Specify Select this option to use a particular business unit, and enter the business unit in the provided field. This option is available if you do not want to use the default business unit value that is established as the user preference for your user ID.

Alert Threshold Enter the tolerance value that triggers an alert, using the unit of measure that appears in parentheses. When a measurement reaches the alert threshold, a red visual indicators appears on the OTA pagelet for the OTA. Based on the OTA, the alert can indicate that the measurement is above or below the alert threshold.

User Preferences When this option appears in the Business Unit group box, select it to indicate that the business unit will be based on the default business unit value that is established as the user preference for your user ID.

Visual Indicators Green and red visual indicators provide status information for pagelet data. An indicator that is used for an OTA displays the status of the OTA in relation to the alert threshold defined on the OTA's personalization page.

The system also uses green and red visual indicators to provide priority information:



The green visual indicator appears when the measurement is within a favorable range when compared to the alert threshold defined on the OTA's personalization page.

The system also uses this icon to indicate a low priority.



The red visual indicator appears when the measurement is within an unfavorable range (alert status) when compared to the alert threshold defined on the OTA's personalization page.

The system also uses this icon to indicate a high priority.

Operational Summary Pagelets

Operational summary pagelets provide users with an overview of summarized data for specific applications. Many of these analytics provide a detailed view of indicators that are specific to the application and its business processes.

The operational summary pagelets delivered in PeopleSoft Enterprise Service Automation Portal Pack are:

- Most Recent Contracts (PeopleSoft Contracts)
- Top Five Contracts (PeopleSoft Contracts)
- Contract Milestone Metric (PeopleSoft Contracts)
- Contract Product Grouping Metric (PeopleSoft Contracts)
- Contract Status Metric (PeopleSoft Contracts)
- Total Predicted Expenses (PeopleSoft Expenses)
- Top Projects (PeopleSoft Project Costing)
- Top 5 Issues (PeopleSoft Program Management)
- Top 5 Risks (PeopleSoft Program Management)
- Change Control Analysis (PeopleSoft Program Management)
- Forecast to Complete (PeopleSoft Program Management)

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- Critical Issues by Project (PeopleSoft Program Management)
- My Program (PeopleSoft Program Management)
- Issues by Priority (PeopleSoft Program Management)
- Issues by Priority by Project (PeopleSoft Program Management)
- Proposal Operational Summary (PeopleSoft Proposal Management)
- Proposal Resource Demand (PeopleSoft Proposal Management)
- Proposal Revenue Pipeline (PeopleSoft Proposal Management)
- Resources Needing Assignments (PeopleSoft Resource Management)

Operational Threshold Alerts

OTAs provide managers with real-time feedback and advance warning about processes that may not be generating expected results. OTAs identify information that is specific to an application and enable real-time monitoring according to tolerance levels that are defined by the user. Although OTAs are enabled by specific modules, the data they provide often span multiple Enterprise Service Automation applications. OTAs appear on the Operational Threshold Alert pagelet, and some OTAs can also appear on the Operational Threshold Chart pagelet.

The OTAs delivered in PeopleSoft Enterprise Service Automation Portal Pack are:

- Contract Revenue Forecast (PeopleSoft Contracts)
- Contract Sales (PeopleSoft Contracts)
- Total Expense Costs (PeopleSoft Expenses)
- Budget to Forecast Time (PeopleSoft Program Management)
- Projects Predicted to be Late (PeopleSoft Program Management)
- Actual to Forecast Utilization (PeopleSoft Program Management)
- Forecast Utilization (PeopleSoft Program Management)
- Budget to Actual Cost (PeopleSoft Project Costing)
- Budget to Actual Time (PeopleSoft Project Costing)
- Gross Margin (PeopleSoft Project Costing)
- Projects Over Budget (PeopleSoft Project Costing)

Transactions in Progress

TIP pagelets are tools to help managers easily identify work that is currently under way. By monitoring TIP pagelets, executives and managers can gain insight into potential problem areas and take the necessary actions to resolve any issues.

The TIP pagelets delivered in PeopleSoft Enterprise Service Automation Portal Pack are:

- Expenses Not Submitted (PeopleSoft Expenses)
- Expenses Recorded/Not Approved (PeopleSoft Expenses)
- Expenses Approved/Not Paid (PeopleSoft Expenses)
- Time Reports Not Submitted (PeopleSoft Expenses)

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- Time Recorded/Not Approved (PeopleSoft Expenses)
- Unpriced in Progress (PeopleSoft Project Costing)
- Payables in Progress (PeopleSoft Project Costing)
- Expenses in Progress (PeopleSoft Project Costing)
- Inventory in Progress (PeopleSoft Project Costing)
- Purchasing in Progress (PeopleSoft Project Costing)
- Expenses Time in Progress (PeopleSoft Project Costing)

Administering System Defaults for PeopleSoft Enterprise Service Automation Portal Pack Pagelets

You must define and filter the data that appears on a pagelet before you can use it. Most pagelets obtain their data from one or more Enterprise Service Automation applications, and there are system rules that you can establish to define how PeopleSoft Enterprise Service Automation Portal Pack pagelets display data by default to users. By defining default settings at the system level, you can ensure that relevant data appears on a pagelet when users select it for viewing. Each user can override the system settings and modify, or personalize, the filtering rules to control the data that appears on the pagelet.

This section discusses how to define default values for Enterprise Service Automation pagelets.

Note. Not all PeopleSoft Enterprise Service Automation Portal Pack pagelets use default values at the system level, and these pagelets do not appear on the ESA Portal Pack Pagelet Default Administration page. Pagelets that do not allow for an administrator to enter default filters can be set up and personalized by clicking the Customize icon in the top right corner of the pagelet.

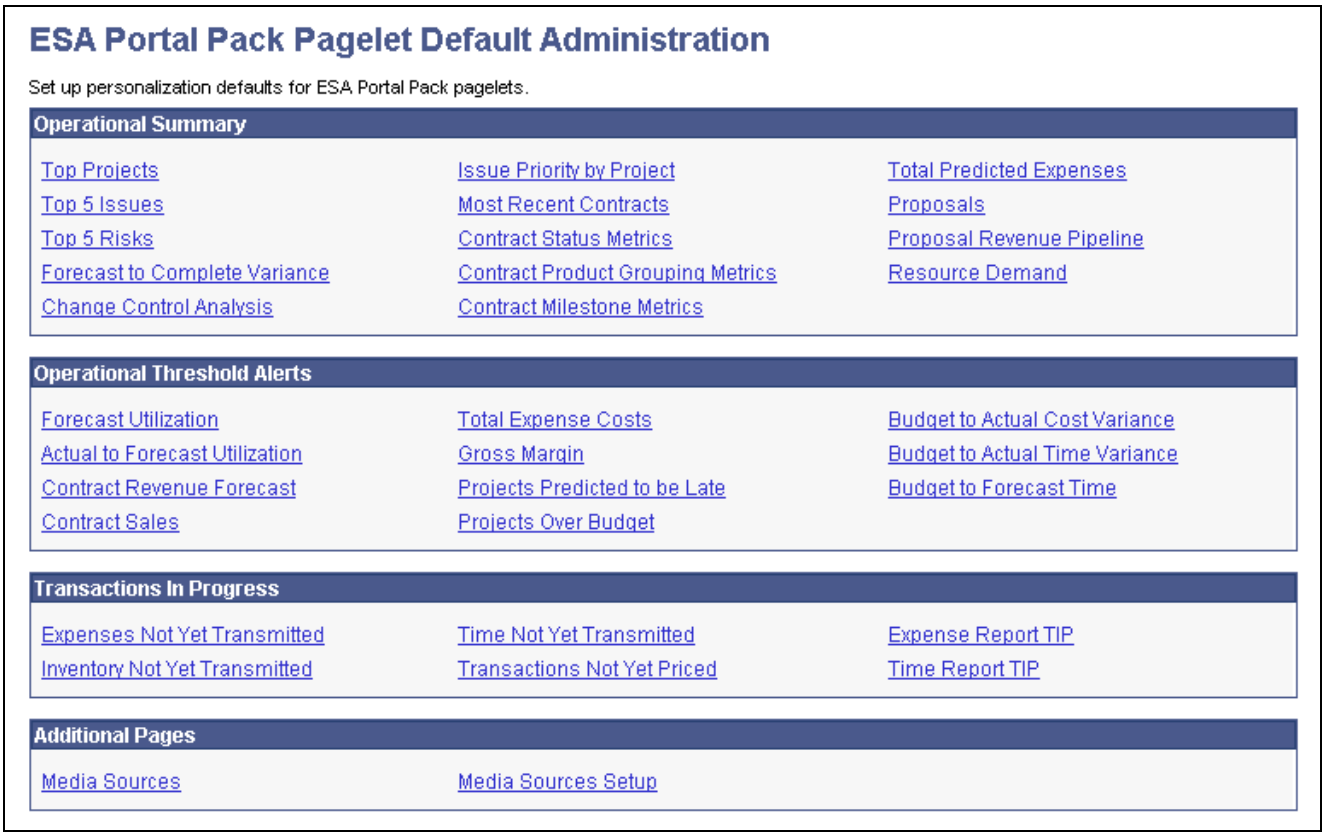
Page Used to Administer System Defaults for PeopleSoft Enterprise Service Automation Portal Pack Pagelets

Page Name	Object Name	Navigation	Usage
ESA Portal Pack Pagelet Default Administration	PC_ESA_PPACK_ADMIN	Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration	Access pages to define default personalization settings for PeopleSoft Enterprise Service Automation Portal Pack pagelets.

Defining Default Values for Enterprise Service Automation Pagelets

Access the ESA Portal Pack Pagelet Default Administration page.

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ESA Portal Pack Pagelet Default Administration page

This page is a starting point to define a set of filtering rules for each PeopleSoft Enterprise Service Automation Portal Pack pagelet. These rules apply to all pagelet users, regardless of their business units or roles.

Pagelets typically display up to five rows of data. Specific setup information for each pagelet is available in the chapter of this PeopleBook that discusses portal pagelets for each enabling application. For example, the enabling application for the Top Projects pagelet is PeopleSoft Project Costing, so you can find the necessary setup information in the chapter titled "Using Pagelets Enabled by PeopleSoft Project Costing."

On the ESA Portal Pack Default Administration page, pagelets are grouped by type: Operational Summary pagelets, Operational Threshold Alerts (OTAs), Transactions in Progress, and Additional Pages.

Operational Summary

Click a link in the Operational Summary group box to access a page where you define the default filtering rules for the data that appears on the corresponding pagelet.

Operational Threshold Alerts

Click a link in the Operational Threshold Alerts group box to access a page where you define each OTA's filtering rules. To display an OTA, each user must click the Customize Operational Threshold Alert icon on the Operational Threshold Alert pagelet, and select the desired OTAs on the Personalize Operational Threshold Alerts page.

Note. When you set up filtering rules for an individual OTA, you are not personalizing the Operational Threshold Alert pagelet itself. You are only setting up data for *one* of the alerts that a user can choose to appear on the Operational Threshold Alert pagelet.

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Transactions in Progress

Click a link in the Transactions in Progress group box to access a page where you define the default filtering rules for the data that appears on the corresponding pagelet.

Additional Pages

Click the Media Sources link to access the Personalize Media Sources page, where you can select up to five links to URLs that will be listed on the pagelet by default.

Click the Media Sources Setup link to access the Media Sources Setup page, where you can add links to new online publications or web addresses and modify or inactivate existing ones.

Viewing OTAs

OTAs display data that identifies and monitors real-time information based on tolerance levels that you define. Specific setup information for each OTA is available in the chapter of this PeopleBook that discusses portal pagelets for each enabling application. For example, the enabling application for the Contract Sales OTA is PeopleSoft Contracts, so you can find the necessary setup information in the chapter titled "Using Pagelets Enabled by PeopleSoft Contracts."

This section discusses how to:

- Set up OTAs.
- Use the Operational Threshold Alert pagelet.
- Use the Operational Threshold Chart pagelet.
- Personalize OTAs.

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Pages Used to View OTAs

Page Name	Object Name	Navigation	Usage
Operational Threshold Alert pagelet	PC_PE_OTA_LIST	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Alert on the Personalize Content page and return to the PeopleSoft homepage.	View up to five OTAs that display real-time monitoring data based on tolerance levels that you define.
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Chart on the Personalize Content page and return to the PeopleSoft homepage.	View an OTA in a chart format that monitors data based on tolerance levels that you define.
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	• Click the Customize Operational Threshold Alert icon on the Operational Threshold Alert pagelet. • Click the Customize Operational Threshold Chart icon on the Operational Threshold Chart pagelet.	Select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.

Setting Up OTAs

The overall tasks to set up OTAs are:

- Define default filter values at the system level for each OTA by accessing the OTA's personalization page from the ESA Portal Pack Pagelet Default Administration page.
- Select Operational Threshold Alert on the Personalize Content page and return to the PeopleSoft homepage.
- Click the Customize Operational Threshold Alert icon on the Operational Threshold Alert pagelet to access the Personalize Operational Threshold Alerts page and select up to five OTAs that you want to appear on the Operational Threshold Alert pagelet.

  You can also select one OTA to appear on the Operational Threshold Chart pagelet.

See Also

Chapter 10, "Understanding Enterprise Service Automation Pagelets," Defining Default Values for Enterprise Service Automation Pagelets, page 74

Using the Operational Threshold Alert Pagelet

Access the Operational Threshold Alert pagelet.

View a list of up to five OTAs that are selected on the Personalize Operational Threshold Alerts page. The data that appears is based on the tolerance level parameters that you set up on each OTA's personalization page.

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Threshold Alert	Displays the title of the OTA that you selected on the Personalize Operational Threshold Alerts page. If the title appears as a link, click the link to access a page in the enabling application that contains further details.
Target	The target threshold alert value, expressed as a percentage or as an amount, that is specified in each OTA's personalization settings. When a measurement goes beyond the alert threshold, a red alert visual indicator appears on the Operational Threshold Alert pagelet, which indicates that the measurement is not within an acceptable range. When a measurement has not reached, or is equal to, the alert threshold, a green visual indicator appears on the Operational Threshold Alert pagelet, which indicates that the measurement is within an acceptable range.
Actual	Displays a calculated value for the OTA based on the OTA's personalization settings.
Curr (currency)	Displays the currency code of the actual amount.
% Variance or **Variance Percentage**	Displays a calculated value based on the formula ((Target - Actual) ÷ Target) × 100.
Visual Indicators	Displays a red Alert Status icon or green Within Range icon based on the OTA's variance percentage.
As of Date	Displays the date that data was last summarized. The date appears for OTAs that are calculated based on summary data from a batch process.
	Click the Customize Operational Threshold Alert icon to access the Personalize Operational Threshold Alerts page to select up to five OTAs to appear on the pagelet.

If administrators or users do not specify personalization options for an OTA, a message appears on the pagelet for the corresponding OTA. Users can specify that only selected OTAs that are in an alert status appear on the pagelet. If you specify that only OTAs in an alert status appear on the pagelet, and none of the selected OTAs are in an alert status, a message appears indicating that all of the selected OTAs are within acceptable tolerances.

Using the Operational Threshold Chart Pagelet

You can view a bar chart for an OTA that you select on the Personalize Operational Threshold Alerts page. The data appears in the chart results from the tolerance level parameters that you set up on the individual OTA's personalization page. Only one OTA can appear on the chart pagelet at a time.

If an administrator or user do not specify personalization options for the OTA, a message appears on the chart pagelet.

Click the Customize Operational Threshold Chart icon to access the Personalize Operational Threshold Alerts page to select an OTA to appear on the chart pagelet.

Personalizing OTAs

Access the Personalize Operational Threshold Alerts page.

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Personalize Operational Threshold Alerts page

Select Select up to five OTAs that you want to appear on the Operational Threshold Alert pagelet.

Chart Select one OTA to appear on the Operational Threshold Chart pagelet.

 Click the Personalize icon to access the corresponding OTA's personalization page, where you can specify the tolerance level parameters for the OTA.

Viewing the Media Sources Pagelet

The Media Sources pagelet can display not only data from PeopleSoft applications, but also links to any content that is accessible to users by using a URL. You must create and maintain the links in PeopleTools to make them available to appear on the Media Sources pagelet.

This section discusses how to:

- Set up media sources.
- Personalize media sources.
- View the Media Sources pagelet.

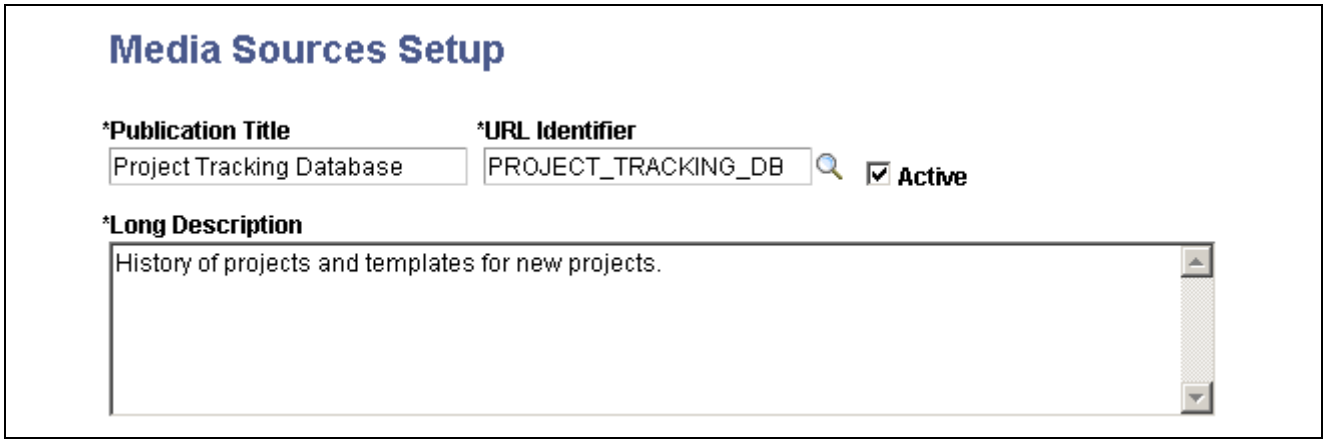
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Pages Used to View the Media Sources Pagelet

Page Name	Object Name	Navigation	Usage
Media Sources Setup	GM_PE_3RD_ADMIN	Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Media Sources Setup link on the ESA Portal Pack Pagelet Default Administration page.	Set up a content link so that it can be available to appear on the Media Sources pagelet.
Personalize Media Sources	GM_PE_3RD_MEDIAPRS	• Click the Media Sources link on the ESA Portal Pack Pagelet Default Administration page to access this page as an administrator. •  Click the Customize Media Sources icon on the Media Sources pagelet to access this page as a user.	Select up to five online publications to appear by default on the Media Sources pagelet.
Media Sources	GM_PE_3RD_MEDIA	Click the Personalize Content link on the PeopleSoft homepage. Select Media Sources on the Personalize Content page and return to the PeopleSoft homepage.	View the Media Sources pagelet that contains up to five links to publications or other content.

Setting Up Media Sources

Access the Media Sources Setup page.



Media Sources Setup page

Use this page to update or add links that provide access to various information sources that are either internal or external to your organization.

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Publication Title	Enter the title to appear as a link on the Media Sources pagelet.
URL Identifier	Select a URL for this media source from the available URLs that are created by using the PeopleTools URL Maintenance page.
	Note. You must create a link by using the URL Maintenance page before you can select it in the URL Identifier field. To access the URL Maintenance page, go to PeopleTools, Utilities, Administration, URLs.
Active	Select this option if you want this media source to be available for users to select on the Personalize Media Sources page. Clear this option to inactivate this media source, in which case it does not appear for selection on the Personalize Media Sources page.
Long Description	Enter text to describe the media source content. This text appears on the Personalize Media Sources page to help users determine if the media source is of interest.

Note. You cannot delete a media source, but you can replace it by modifying the Publication Title and URL Identifier field values, or by inactivating the media source.

See Also

Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration, "Using PeopleTools Utilities"

Personalizing Media Sources

Access the Personalize Media Sources page.

An administrator uses this page to select up to five default media sources to appear on the Media Sources pagelet. The selections that an administrator makes on this page appear when the pagelet first appears on a user's PeopleSoft homepage. Users can retain the system default publication links that the administrator specifies on this personalization page, or modify the list by clicking the Customize Media Sources icon on the Media Sources pagelet.

You can add or remove available selections on this page by using the Media Sources Setup page.

Viewing the Media Sources Pagelet

Access the Media Sources pagelet.

This pagelet displays up to five links from which you can access online media. Click the Customize Media Sources icon to access the Personalize Media Sources page, where you can modify the list of links that appear on the pagelet.

Viewing Enterprise Service Automation Navigation Collection Pagelets

This section provides an overview of Navigation Collection pagelets and discusses how to set up navigation collections.

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Understanding Navigation Collection Pagelets

Navigation collections are sets of links into Financials database that support the users' ability to perform key business processes in a services organization. PeopleSoft Enterprise Service Automation Portal Pack delivers Navigation Collection pagelets to facilitate the performance of key business processes. The primary users of Navigation Collection pagelets are directors, resource supervisors, project and program managers, resources, and contract and billing administrators. System administrators can modify a Navigation Collection pagelet to include links to any component or page in the Financials database.

Navigation Collection pagelets support these business processes:

- Managing proposals.
- Managing contracts.
- Managing departments.
- Managing a practice.
- Managing project accounting.
- Managing programs and projects.
- Resource self-service.

Pages Used to View Enterprise Service Automation Navigation Collection Pagelets

Page Name	Object Name	Navigation	Usage
Navigation Collections - Find an Existing Collection	PTPP_SCSRCH	PeopleTools, Portal, Portal Utilities, Navigation Collections	Search for an existing Navigation Collection that you want to edit or delete. Access pages that you can use to create new Navigation Collections.
Maintain Collection - Navigation Collection	PTPP_SCMAINTCOLL	Click the Edit link for an existing Navigation Collection on the Navigation Collections - Find an Existing Collection page.	Maintain Navigation Collection pagelets.

Viewing Navigation Collections

Enterprise Service Automation Navigation Collections are public Navigation Collections that users can select to appear on their homepage.

To view a Navigation Collection pagelet:

1. Click the Personalize Content link on the PeopleSoft homepage to access the Personalize Content page.
2. Select one or more of the Navigation Collection pagelets in the Cross-Financials group box.

In PeopleTools Security, permission lists are associated with user roles in the Financials database, which determines the pages to which users have access. If a user does not have access to a component or page that appears on the Navigation Collection pagelet, the link to the component or page does not appear in the pagelet.

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Maintaining Navigation Collections

Administrators can modify Navigation Collection pagelets as follows:

1. Access the Navigation Collections - Find an Existing Collection page at PeopleTools, Portal, Portal Utilities, Navigation Collections.
2. Search for the navigation collection that identifies the business process that you want to modify.
3. Click the Edit link corresponding to the Navigation Collection.
4. Add or edit links or folders on the Maintain Collection - Navigation Collection page.

See *Enterprise PeopleTools 8.48 PeopleBook: Internet Technology,* "Working With Navigation Pages."

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CHAPTER 11

Using Pagelets Enabled by PeopleSoft Contracts

This chapter discusses how to:

- View the top five contracts.
- View most recent contracts.
- View contract status metrics.
- View contract milestone metrics.
- View contract product group metrics.
- Use Operational Threshold Alerts (OTAs) for PeopleSoft Contracts.

Viewing the Top Five Contracts

This section discusses how to:

- View the five largest contracts.
- Personalize the Top Five Contracts pagelet.

Pages Used to View the Top Five Contracts

Page Name	Object Name	Navigation	Usage
Top Five Contracts pagelet	CA_PE_TOPCON_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Top Five Contracts.	View the five largest contracts that meet the filtering criteria specified on the Top Five Contracts Personalization page.
Personalization Top Five Contracts	CA_PE_TOPCON_PRS	Click the Customize icon on the Top Five Contracts pagelet.	Define default display information for the Top Five Contracts pagelet.
Contract General	CA_HDR_PNL	Click a contract number displayed on the Top Five Contracts pagelet.	View details for a specific contract shown on the Top Five Contracts pagelet.

Viewing Top Five Contracts

Access the Top Five Contracts pagelet.

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This pagelet displays the largest five contracts, their amounts, and the corresponding customer name. The contracts display in descending order based on the contract amount and filtering criteria set up on the personalization page. If more than five contracts meet the filtering criteria due to several contracts having the same amount, the contracts with the most recent contract sign dates display.

Contract Number Click this link to access the Contract General page for a specific contract. This link is not available if you do not have authorization to access the page.

Amount Displays the contract amount which equals the current total amount minus discounts plus non-inclusive prepaids.

Personalizing Top Five Contracts

Access the Personalization Top Five Contracts page.



Personalization Top Five Contracts page

Business Unit Select a business unit for the contracts that you want to display on the Top Five Contracts pagelet.

Currency Code Select the currency code in which to display the contract amount on the Top Five Contracts pagelet. The system uses the value that you select to filter the contracts that display. For example, if you select *USD,* contracts with a contract currency other than *USD* will not appear on the page.

From Sign Date and **To Sign Date** Define the range of contract sign dates for which you want to display data on the Top Five Contracts pagelet.

You can optionally filter the contracts that display on the Top Five Contracts pagelet by specifying values for the following fields:

- Legal Entity
- Region Code
- Contract Type

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- Contract Status
- Sold To Customer
- Contract Class (contract classification)
- SubCustomer 1
- SubCustomer 2

See Also

PeopleSoft Enterprise Contracts 9.0 PeopleBook, "Creating Contracts"

Viewing Most Recent Contracts

This section discusses how to:

- View the most recent contracts.
- Personalize the Most Recent Contracts pagelet.

Pages Used to View Most Recent Contracts

Page Name	Object Name	Navigation	Usage
Most Recent Contracts pagelet	CA_PE_RCNT_W (wide), CA_PE_RCNT_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Most Recent Contracts.	View the most recently signed contracts that meet the filtering criteria specified on the Personalize Most Recent Contracts page.
Most Recent Contracts	CA_PE_RCNT_MORE	Click the More link on the Most Recent Contracts pagelet.	View additional recently signed contracts that meet your filter criteria.
Contract Summary	CA_CONTR_SUM_PNL	Click a contract number displayed on the Most Recent Contracts pagelet.	View details for a specific contract shown on the Most Recent Contracts pagelet.
Personalize Most Recent Contracts	CA_PE_RCNT_PRS	• Click the Customize icon on the Most Recent Contracts pagelet. • Click the Most Recent Contracts link on the ESA Portal Pack Pagelet Default Administration page.	Define default display information for the Most Recent Contracts pagelet.

Viewing Most Recent Contracts

Access the Most Recent Contracts pagelet.

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This pagelet displays the five contracts with the most recent sign date. The contract number, signed on date, and contract status display. The contracts display in descending order based on the contract sign date and the filtering criteria set up on the personalization page.

Contract Number Click this link to access the Contract Summary page for a specific contract. This link is not available if you do not have authorization to access this page.

More Click to access the Most Recent Contracts page where you can view all contracts meeting the filtering criteria. This link appears on the page if more than five contracts meet the filtering criteria specified on the personalization page.

Viewing Additional Details

Access the Most Recent Contracts page.

This page displays all contracts meeting the filtering criteria set up on the Most Recent Contracts Personalization page. In addition to the contract number, signed on date, and contract status, the contract description, customer, and contract amount display.

Amount Displays the contract amount which equals the revised gross amount minus revised discounts plus non-inclusive prepaids.

Personalizing Most Recent Contracts

Access the Personalize Most Recent Contracts page.



Personalize Most Recent Contracts page

Depending on your role, you access this page in one of two ways:

- Administrators access the Personalize Most Recent Contracts page by clicking the Most Recent Contracts link on the ESA Portal Pack Pagelet Default Administration page. The administrator uses this page to set up default filtering criteria for all Enterprise Service Automation pagelets.
- Other users access this page by clicking the Customize icon on the Most Recent Contracts pagelet.

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Business Unit

You can view contracts on the Most Recent Contracts pagelet from your user preference's business unit or select a different business unit.

From User Preference Select to view only those contracts with the contracts business unit specified in your user preferences.

Specify Select to view contracts from a business unit other than the contracts business unit specified in your user preferences. If you select Specify, you must specify a business unit value.

Region Code

You can view contracts on the Most Recent Contracts pagelet from your region code or select a different region code.

From User Preference Select to view only those contracts with the region code specified in your user preferences.

Specify Select to view contracts from a region code other than the region code specified in your user preferences. You can specify a new region code or leave this field blank. If you leave this field blank, the system searches all regions when selecting the contracts to display on the Most Recent Contracts pagelet.

Processing Status

You can view contracts with a specific processing status or select multiple statuses.

Pending Select to view contracts with a processing status of *Pending*.

Active Select to view contracts with a processing status of *Active*.

Closed Select to view contracts with a processing status of *Closed*.

You can optionally filter the contracts that display on the Most Recent Contracts pagelet by specifying values for the following fields:

- Contract Type
- Contract Class (contract classification)
- Legal Entity
- Contract Status
- Sold To

My Contracts Click to indicate that the Most Recent Contracts pagelet should display only those contracts that you have designated as part of your My Contracts list. If you do not have any contracts in your My Contracts list, the system does not display any data on the Most Recent Contracts pagelet.

Restore Defaults Click to restore the default selection criteria set by the pagelet administrator. This button does not display if you accessed this page through the ESA Portal Pack Pagelet Default Administration page.

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Viewing Contract Status Metrics

This section discusses how to:

- View the contract status metric information.
- Personalize the Contract Status Metric pagelet.

Pages Used to View Contract Status Metrics

Page Name	Object Name	Navigation	Usage
Contract Status Metric pagelet	CA_TICS_METR_STAT	Click the Personalize Content link on the PeopleSoft homepage. Select Contract Status Metric.	View and analyze the status of your contracts.
Personalize Contract Status Metric	CA_TICS_OPR_STAT	Click the pagelet's Customize icon.	Define default display information for the Contract Status Metric pagelet.

Viewing Contract Status Metrics

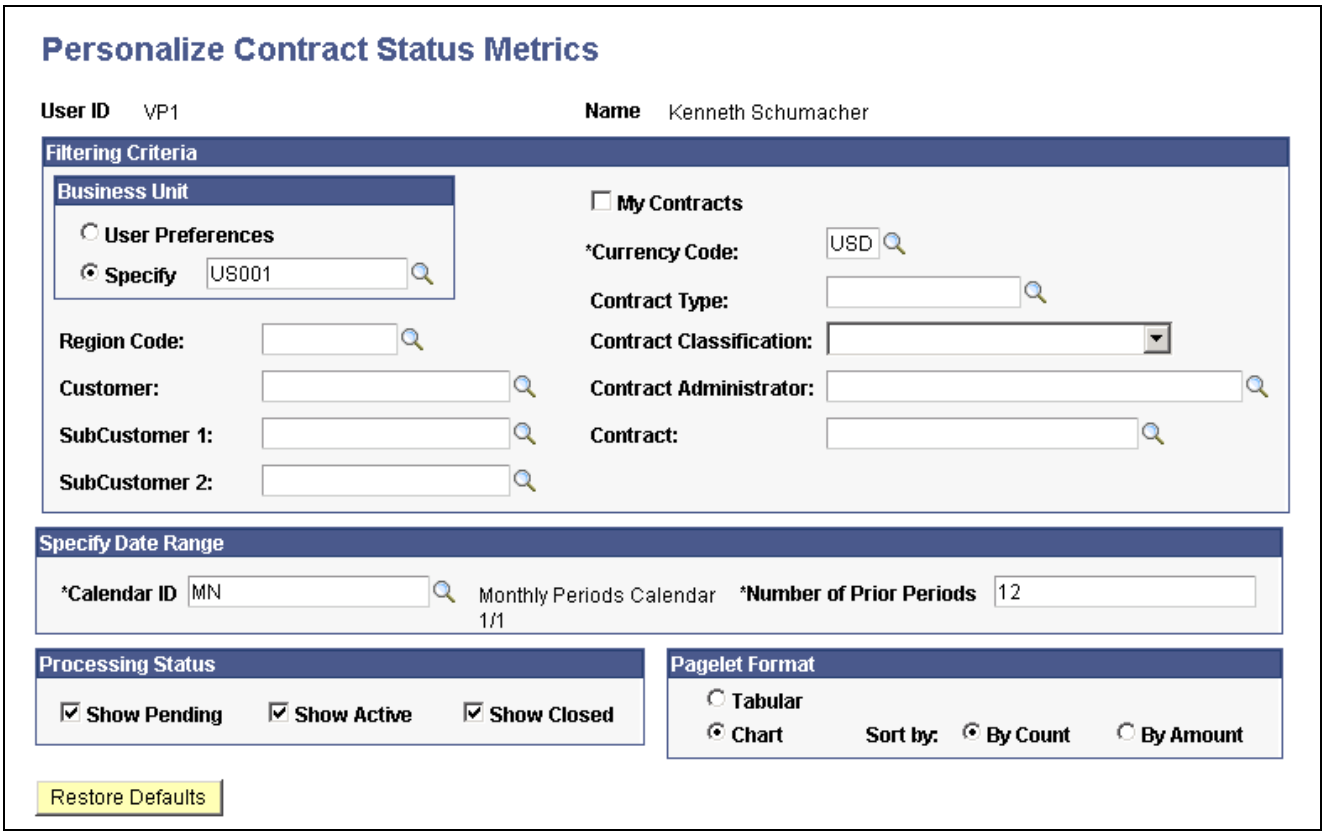
Access the Contract Status Metric pagelet.

Here you can view the current contract count by status.

Personalizing Contract Status Metrics

Access the Personalize Contract Status Metrics page.

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Personalize Contract Status Metrics page

Filtering Criteria

Use the fields to filter the contracts that you want to display. You can view contracts on the Contract Status Metric pagelet from your user preference's business unit or select a different business unit.

Specify Date Range

Select the calendar and period over which the system displays contract status.

Calendar ID Select a calendar for the system to use when displaying contracts on the pagelet.

Number of Prior Periods Enter a number of periods for the system to use to obtain the contract status that will appear on the pagelet. The system will start from the prior period and count backward for the specified number of periods. The system requires this field in order to display the contract status on the pagelet. The system uses the contract sign date to compare with the date ranges specified by the number of periods.

Processing Status

Select the contract processing statuses for the system to display on the Contract Status Metric pagelet.

Pagelet Format

Select either Tabular or Chart to indicate how the system should display the contract milestones on the pagelet. If you choose Chart, specify whether the system should sort the data by count or amount.

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Viewing Contract Milestone Metrics

This section discusses how to:

- View the contract milestone metric information.
- Personalize the Contract Milestone Metric pagelet.

Pages Used to View Contract Milestone Metrics

Page Name	Object Name	Navigation	Usage
Contract Milestone Metric pagelet	CA_TICS_METR_MS	Click the Personalize Content link on the PeopleSoft homepage. Select Contract Milestone Metric.	View and analyze the status for each milestone for all of your contracts that are in *active* status.
Personalize Contract Milestone Metrics	CA_TICS_OPR_MS	Click the pagelet's Customize icon.	Define default display information for the Contract Milestone Metric pagelet.

Viewing Contract Milestone Metrics

Access the Contract Milestone Metric pagelet.

The Contract Milestone Metric pagelet provides you with information on the contract's impact on billing and revenue.

Note. The Contract Milestone Metric pagelet selects data from active contracts only.

Milestone Status Up to date status on milestones associated with contracts. The status may be *Pending* or *Ready.*

Contract Count Total number of contracts.

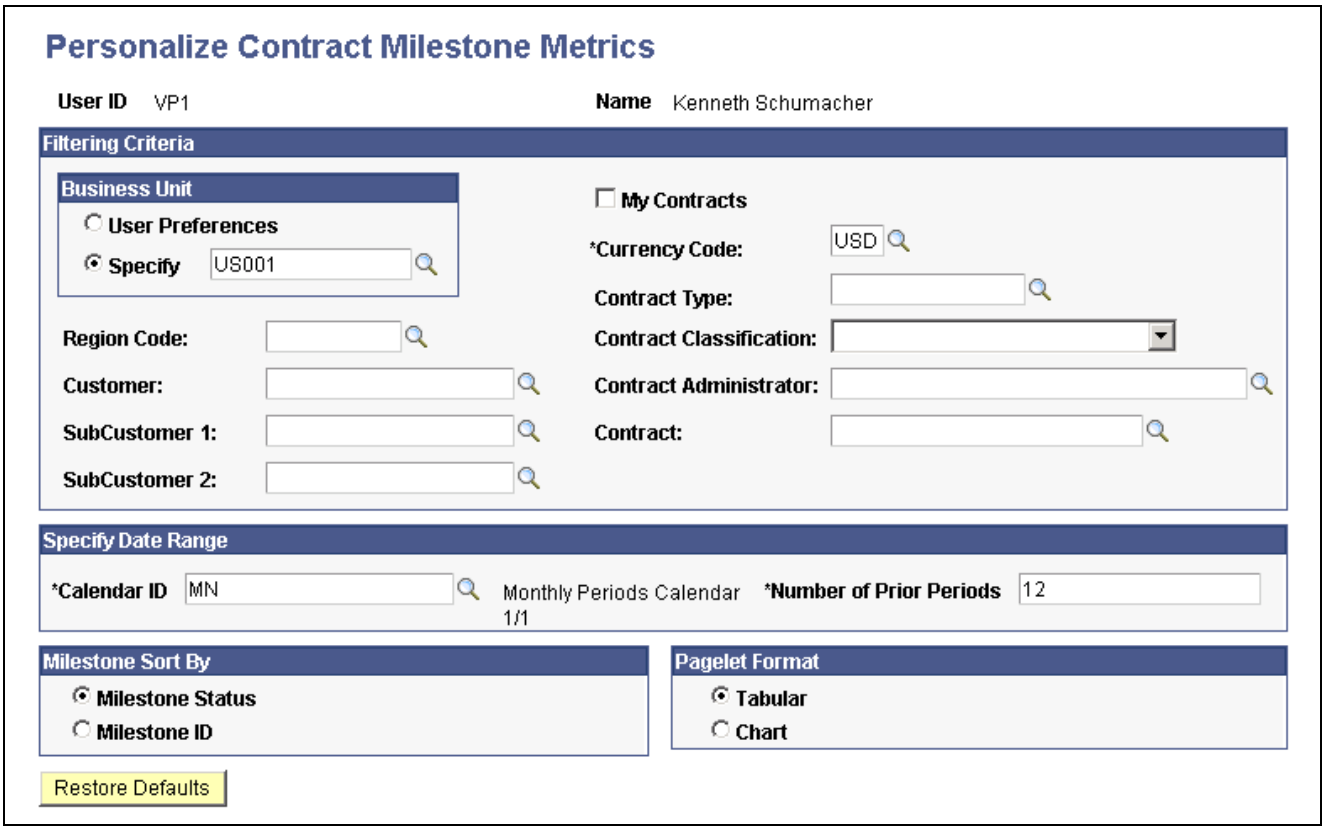
Revenue Plan Impact Count Provides the number of existing milestones that impact revenue.

Billing Plan Impact Count Provides the number of existing milestones that impact billing.

Personalizing Contract Milestone Metrics

Access the Personalize Contract Milestone Metrics page.

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Personalize Contract Milestone Metrics page

Filtering Criteria

Use the fields to filter the contracts that you want to display. You can view contracts on the Contract Milestone Metric pagelet from your user preference's business unit or select a different business unit.

Specify Date Range

Select the calendar and period over which the system displays contract milestones.

Calendar ID Select a calendar for the system to use when displaying contract milestones on the pagelet.

Number of Prior Periods Enter a number of periods for the system to use to obtain the contract milestones that will appear on the pagelet. The system will start from the prior period and count backward for the specified number of periods. The system requires this field in order to display the contract status on the pagelet. The system uses the contract sign date to compare with the date ranges specified by the number of periods.

Milestone Sort By

Select either Milestone Status or Milestone ID to indicate how the system should order the contract milestones on the pagelet.

Pagelet Format

Select either Tabular or Chart to indicate how the system should display the contract milestones on the pagelet.

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Viewing Contract Product Group Metrics

This section discusses how to:

- View the contract product group metric information.
- Personalize the Contract Product Group Metric pagelet.

Pages Used to View Contract Product Group Metrics

Page Name	Object Name	Navigation	Usage
Contract Product Group Metric pagelet	CA_TICS_METR_PROD	Click the Personalize Content link on the PeopleSoft homepage. Select Contract Product Group Metric.	View and analyze product group information for all of your contracts that are in *active* status.
Personalize Contract Product Grouping Metrics	CA_TICS_OPR_PROD	Click the pagelet's Customize icon.	Define default display information for the Contract Product Group Metric pagelet.

Viewing Contract Product Group Metrics

Access the Contract Product Group Metric pagelet.

The Product Group Metric pagelet provides you with information on the number of products and services sold by product grouping and the total value of those sales.

Note. The Contract Product Group Metric pagelet select data from active contracts only.

Product Group Provides the product grouping name per contract.

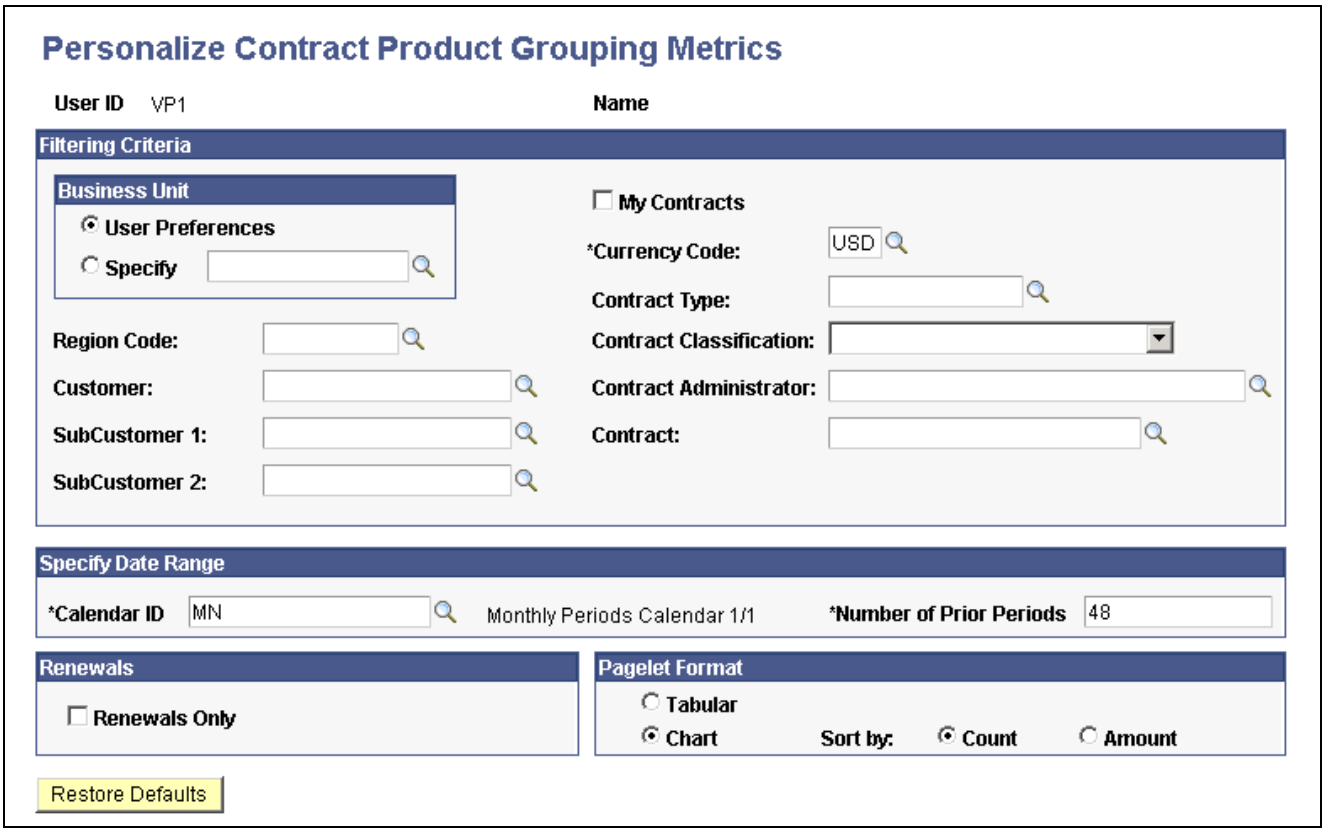
Number of Records Provides the number of products and services sold by product grouping.

Amount Total value of sales by product grouping.

Personalizing Contract Product Group Metrics

Access the Personalize Contract Product Grouping Metrics page.

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Personalize Contract Product Grouping Metrics page

Filtering Criteria

Use the fields to filter the contracts that you want to display. You can view contracts on the Contract Milestone Metric pagelet from your user preference's business unit or select a different business unit.

Specify Date Range

Select the calendar and period over which the system displays contract milestones.

Calendar ID Select a calendar for the system to use when displaying contract milestones on the pagelet.

Number of Prior Periods Enter a number of periods for the system to use to obtain the contract milestones that will appear on the pagelet. The system will start from the prior period and count backward for the specified number of periods. The system requires this field in order to display the contract status on the pagelet. The system uses the contract sign date to compare with the date ranges specified by the number of periods.

Renewals

Select the Renewals Only check box to have the system display only renewable products on the pagelet.

Pagelet Format

Select either Tabular or Chart to indicate how the system should display the contract milestones on the pagelet. If you choose Chart, specify whether the system should sort the data by count or amount.

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Using OTAs for PeopleSoft Contracts

This section discusses OTA calculations and how to personalize:

- Contract Revenue Forecast.
- Contract Sales.

An OTA must be selected on the Personalize Operational Threshold Alert page before it is displayed on a pagelet. OTAs are viewed on the Operational Threshold Alert pagelet with data that is personalized at the system administrator level or by the user. One of the PeopleSoft Contracts OTAs—Contract Revenue Forecasting—can also be viewed on the Operational Threshold Chart pagelet.

Understanding OTA Calculations in PeopleSoft Contracts

This section discusses calculations for these operational threshold alerts:

- Contract Revenue Forecast.
- Contract Sales.

Calculating Contract Revenue Forecast

The Contract Revenue Forecast Operational Threshold Alert provides a projection of future revenue.

The system pulls future revenue from the Contracts Forecast table. The system calculates the forecast revenue number by summing the values in the amount field. This forecast excludes forecasts for recurring fee revenues and for renewal products not yet renewed.

Note. If contracts business unit security is enforced and if the contracts business unit is not specified on the personalization page, the system calculates only the forecast pertaining to the contracts business unit to which the user has security access.

Calculation Contract Sales

The Contract Sales Threshold Alert provides the total amount of sales for selected contracts.

The sales amount is the total of the gross amount minus any discounts, plus any surcharges, and plus any non-inclusive prepaids. For each contract, where the contract signed date falls with the specified period, the system subtracts the discounts and add surcharges from the revised gross amount.

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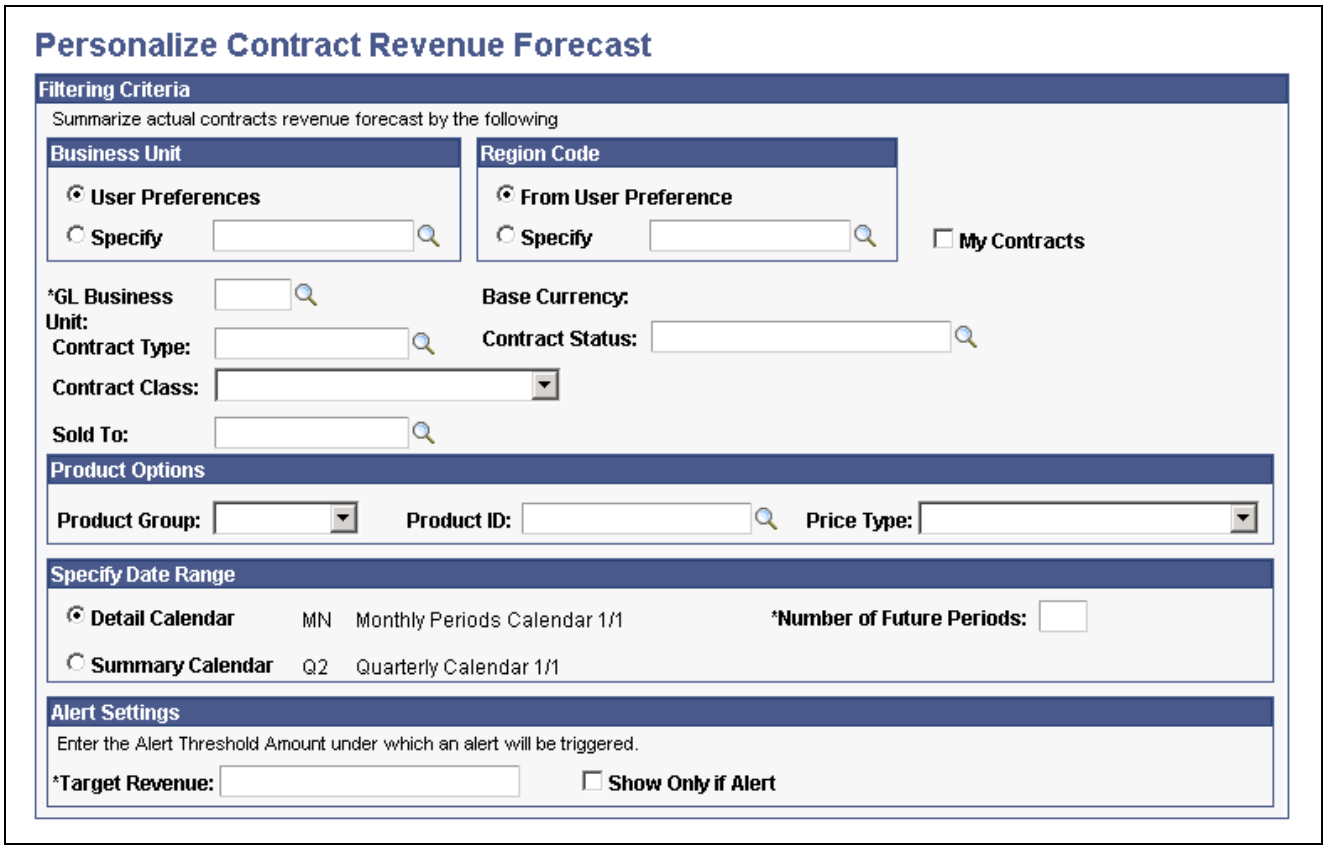
Pages Used to Personalize OTAs for PeopleSoft Contracts

Page Name	Object Name	Navigation	Usage
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	• Click the Customize icon on the Operational Threshold Alert pagelet • Click the Customize icon on the Operational Threshold Chart pagelet	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page used to personalize individual OTA tolerance levels.
Operational Threshold Alert pagelet	PC_PE_OTA_LIST (wide), PC_PE_OTA_LIST_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Alert.	View up to five Operational Threshold Alerts that display real-time monitoring data according to tolerance levels that you define.
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Chart.	View an Operational Threshold Alert that displays a real-time monitoring chart according to tolerance levels that you define.
Personalize Contract Revenue Forecast	CA_PE_CFR_PRS	• Click the Contract Revenue Forecast link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Specify the business unit, region code, product options, date range, and alert settings for the Contract Revenue Forecast OTA. The Contract Revenue Forecast Operational Threshold Alert provides a projection of future revenue.
Personalize Contract Sales	CA_PE_SALES_PRS	• Click the Contract Sales link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Specify the business unit, region code, date range, and alert settings for the Contract Sales OTA.

Personalizing Contract Revenue Forecast

Access the Contract Revenue Forecast Personalization page.

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Personalize Contract Revenue Forecast page

This Operational Threshold Alert (OTA) provides a projection of future revenue.

Business Unit

You can view forecasted contract revenue on the OTA pagelet from your user preference's business unit or select a different business unit.

User Preferences Select to have the system display forecasted revenue for only those contracts with the contracts business unit specified in your user preferences.

Specify Select to have the system display forecasted revenue for contracts from a business unit other than the contracts business unit specified in your user preferences. You can specify a new business unit or leave this field blank. If you leave this field blank, the system searches for contracts under all business units to which you have permission to access according to your security setting.

Region Code

You can view forecasted contract revenue on the OTA pagelet from your region code or select a different region code.

From User Preference Select to view forecasted revenue for only those contracts with the region code specified in your user preferences.

Specify Select to view forecasted revenue for contracts from a region code other than the region code specified in your user preferences. You can specify a new

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region code or leave this field blank. If you leave this field blank, the system searches all regions when selecting the contracts to display on the OTA pagelet.

My Contracts Click to indicate that the Contract Revenue Forecast pagelet should display only those contracts that you have designated as part of your My Contracts list.

GL Business Unit (General Ledger business unit) Select a General Ledger business unit to filter contracts based on a specific GL business unit.

Base Currency Displays the base currency for the selected GL Business Unit.

Contract Type Select to view forecasted revenue for contracts of a specific contract type. Selecting a contract type is optional.

Contract Status Select to view forecasted revenue for contracts with a specific contract status. Selecting a contract status is optional. Contract status values include: *Active* and *Pending.*

Contract Class (contract classification) Select to view forecasted revenue for contracts with a specific contract classification. Values include: *Standard, Internal, Government,* and *Federal Reimbursable Agreement.*

Sold To Select to view forecasted revenue for contracts with a specific sold to customer. Selecting a sold to customer is optional.

Product Options

Product Group Select to view forecasted revenue for contract lines containing a specific product group.

Product ID Select to view forecasted revenue for contract lines containing a specific product ID.

Price Type Select to view forecasted revenue for contract lines containing specific price types. Price type values include: *Rate, Percent, Amount,* and *Recurring.*

Specify Date Range

Select the calendar and period over which the system should forecast contract revenue. You must select either Detail Calendar or Summary Calendar. Depending on this selection, the system uses the appropriate calendar ID from the Installation table (INSTALLATION_CA).

Detail Calendar Select to use the periods defined in the detail calendar to sum and display forecasted revenue on OTA pagelet or chart. If you select Detail Calendar, the system uses CALENDAR_ID_2 from the Installation table.

Summary Calendar Select to use the periods defined in the summary calendar to sum and display forecasted revenue on the OTA pagelet or chart. If you select Summary Calendar, the system uses CALENDAR_ID from the Installation table.

Number of Future Periods Select the number of future periods, as defined in the detail or summary calendar, over which the system should forecast contract revenue. This field is required. The system uses the contract's accounting date to compare with the date ranges specified by the number of periods.

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Alert Settings

Target Revenue Enter the target alert threshold that will trigger a red alert visual indicator to appear on the OTA pagelet if the contract revenue forecast falls under the target revenue value. A green indicator appears in the OTA pagelet if the revenue forecast equals or exceeds the target revenue indicating that the revenue forecast is acceptable.

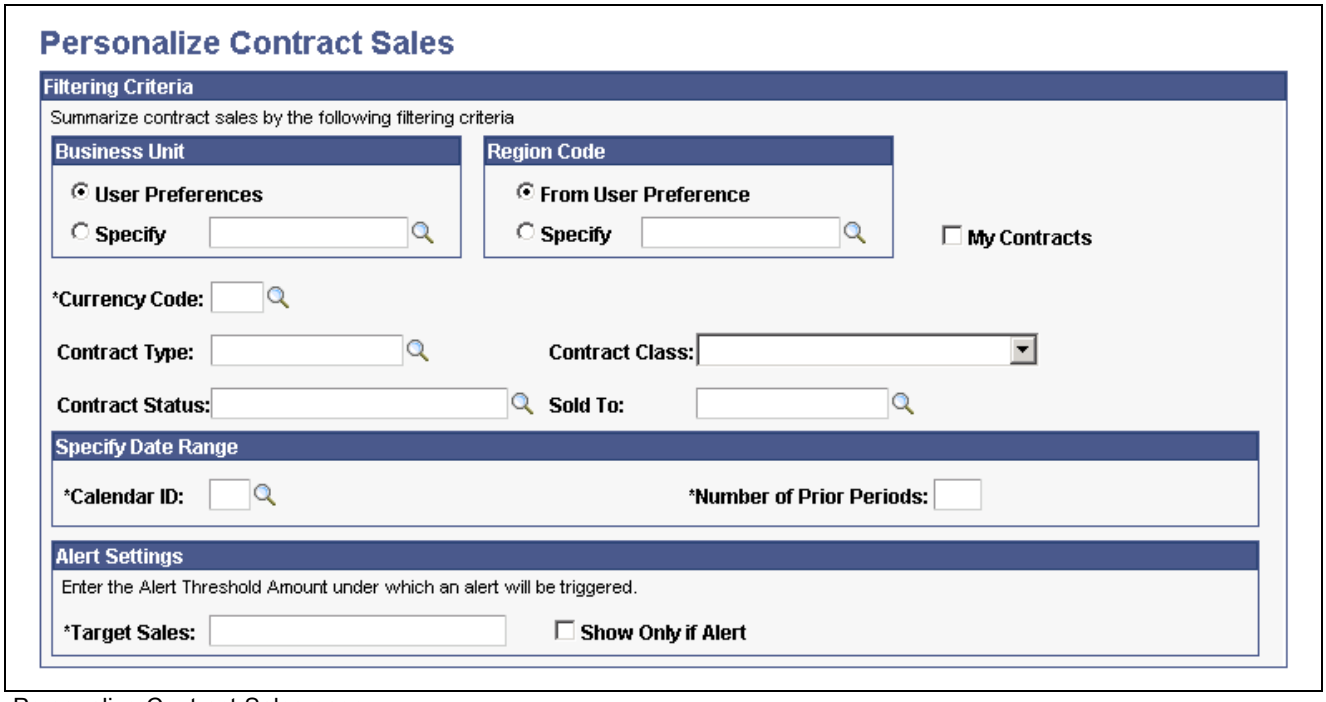
Show Only if Alert Select this option for the OTA to appear on the OTA pagelet only if the revenue forecast falls under the alert threshold. Clear this option for the OTA to appear on the pagelet if the revenue forecast falls above, equals, or falls below the target revenue value.

See Also

PeopleSoft Enterprise Contracts 9.0 PeopleBook, "Managing Revenue Recognition"

Personalizing Contract Sales

Access the Contract Sales Personalization page.



Personalize Contract Sales page

This Operational Threshold Alert (OTA) provides the total amount of sales for selected contracts. The total contract sales amount displayed includes the revised gross amount minus revised discounts, plus non-inclusive prepaids.

Business Unit

You can view contract sales on the OTA pagelet from your user preference's business unit or select a different business unit.

User Preferences Select to have the system display contract sales for only those contracts with the contracts business unit specified in your user preferences.

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Specify Select to have the system display contract sales for contracts from a business unit other than the contracts business unit specified in your user preferences. If you select Specify, you must specify a business unit value.

Region Code

You can view contract sales on the OTA pagelet from your region code or select a different region code.

From User Preference Select to view contract sales for only those contracts with the region code specified in your user preferences.

Specify Select to view contract sales for contracts from a region code other than the region code specified in your user preferences. You can specify a new region code or leave this field blank. If you leave this field blank, the system searches all regions when selecting the contracts to display on the pagelet.

My Contracts Click to indicate that the OTA pagelet should display contract sales for only those contracts that you have designated as part of your My Contracts list.

Currency Code Select a currency for the system to use when displaying contract sales amounts on the OTA pagelet. The system uses the value that you select to filter the contracts that display. For example, if you select *USD,* contracts with a contract currency other than *USD* will not appear on the page.

Contract Type Select to view contract sales for contracts of a specific contract type. Selecting a contract type is optional.

Contract Class Select to view contract sales for contracts with a specific contract classification. Values include: *Standard, Internal, Government,* and *Federal Reimbursable Agreement.*

Contract Status Select to view contract sales for contracts with a specific contract status. Selecting a contract status is optional.

Sold To Select to view contract sales for contracts with a specific sold to customer. Selecting a sold to customer is optional.

Specify Date Range

Select the calendar and period over which the system should calculate contract sales.

Calendar ID Select a calendar for the system to use to calculate the total contract sales for displaying on the OTA pagelet.

Number of Prior Periods Enter a number of periods for the system to use to obtain the total contract sales that will appear on the OTA pagelet. The system will start from the prior period and count backward for the specified number of periods. The system requires this field in order to display the contract sales on the Operational Threshold Alert pagelet. The system uses the contract sign date to compare with the date ranges specified by the number of periods.

Alert Settings

Target Sales Enter the target alert threshold that will trigger a red alert visual indicator to appear on the OTA pagelet if the contract sales fall under the target sales value. A green indicator appears in the OTA pagelet if the contract sales

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forecast equals or exceeds the target sales indicating that the contract sales forecast is acceptable.

Show Only if Alert Select this option for the OTA to appear on the OTA pagelet only if the contract sales fall under the alert threshold. Clear this option for the OTA to appear on the pagelet if the contract sales fall above, equal, or fall below the target sales value.

See Also

PeopleSoft Enterprise Contracts 9.0 PeopleBook, "Managing Revenue Recognition"

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CHAPTER 12

Using Pagelets Enabled by PeopleSoft Expenses

This chapter provides an overview of pagelets in PeopleSoft Expenses and discusses how to:

- View Total Predicted Expenses.
- Use Operational Threshold Alerts (OTAs) for PeopleSoft Expenses.
- View Transactions in Progress (TIP) for PeopleSoft Expenses.

Understanding the Pagelets Designed for PeopleSoft Expenses

There are three types of pagelets designed for PeopleSoft Expenses:

- Operational Summary pagelet for total predicted expenses.
- Operational Threshold Alert pagelet for total expense costs.
- Transactions in Progress pagelets for expense reports and time reports.

All PeopleSoft Expenses pagelets display data based on filter criteria defined on an administrator setup page or a user personalization page. What appears on the PeopleSoft Expenses pagelet also depends on which view the administrator or user selects: by department ID or by project ID. If PeopleSoft Expenses is set up to display data based on a department view, then PeopleSoft Expenses will filter by GL business unit and department ID. If PeopleSoft Expenses is set up to display data based on a project view, then PeopleSoft Expenses will filter by project business unit and project ID. You can also choose specific project IDs or filter by My Projects or Project Manager.

Note. Before PeopleSoft Expenses can display data in the Total Predicted Expense pagelet or an OTA pagelet, the administrator must define the calendar ID and the number of periods that the Expenses Pagelet Processing process uses to populate the summary tables.

The Expenses Pagelet Processing process converts expense data to various currencies so that the PeopleSoft Expenses pagelets can provide data in a currency that is meaningful to each user. The process also summarizes the information, which renders data in pagelets more rapidly.

Schedule this process by navigating to Travel and Expenses, Real-Time Analysis, Update Expenses Pagelet Info.

See Chapter 12, "Using Pagelets Enabled by PeopleSoft Expenses," Administering Expense Report and Time Report Pagelets, page 120.

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Common Elements Used in This Chapter

Calendar ID

Select a calendar to use in conjunction with Number of Future Periods or Number of Past Periods to define the date range for PeopleSoft Expenses to retrieve pagelet data. Valid values are monthly, depending on how it is defined in the Budget Period Calendar (CAL_DEFN_TBL and CAL_BP_TBL).

PeopleSoft Expenses requires this field to display the Total Predicted Expenses pagelet and only the administrator can set it up. This information applies to both Total Predicted Expenses and OTA. However, in OTA, Calendar ID is used in conjunction with Number of Past Periods.

No. of Future Periods (number of future periods) or **No. of Past Periods** (number of future periods)

Enter a number of future periods for PeopleSoft Expenses to obtain the total travel authorization amounts that appear on the Total Predicted Expenses pagelet. The maximum number of periods is 12.

Enter a number of past periods for PeopleSoft Expenses to obtain the expense line detail amounts that appear on the OTA pagelet. The maximum number of periods is 12.

PeopleSoft Expenses requires this field to display the Total Predicted Expenses pagelet or the OTA, and only the administrator can set it up.

View by Department

Select to set the default view for the pagelet to filter by GL Business Unit and Department ID. If selected, the GL business unit defaults from the employee profile. The administrator cannot specify a department ID; employees must enter this information from their personalization page.

PeopleSoft Expenses automatically selects the View by Department option if PeopleSoft Project Costing is not installed.

GL Business Unit

Select to use the GL business unit defined in the user profile or specify a different business unit. You can change the business unit according to your role-level security rules.

GL ChartFields

The ChartField list varies, depending on the ChartFields used by the customer.

View by Project

Select to set the default view for the pagelet to filter by PC Business Unit and Project ID. If selected, you must also select a PC business unit.

If PeopleSoft Project Costing is not installed, PeopleSoft Expenses does not display the View by Project option.

PC Business Unit

If you selected to view by project, then you must indicate a project business unit for PeopleSoft Expenses to use. Select Projects User Preferences to use the project business unit stored in the user profile or select Specify to enter a different business unit to filter on.

If PeopleSoft Project Costing is not installed, PeopleSoft Expenses does not display these options.

Project Filters

Select Project ID to filter by one or more projects. The administrator cannot specify a project ID; employees must enter this information on their personalization page.

Select Project Manager to filter by project managers and project business unit. If selected, the project ID will be pulled from the project manager table (PS_PROJECT_MGR) based on the operator ID (OPRID) of the user logged

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	in. Only project managers who have projects under the specified project business unit will appear as valid choices. Select My Projects to filter projects based on the My Projects list and project business unit. The project ID will be defaulted based on what the user enters on their My Projects list (PC_OPRID_PRJACT). Select No Additional Filters to indicate that you only want to filter on a PC business unit. If PeopleSoft Project Costing is not installed, PeopleSoft Expenses does not display these options.
	Click to customize the criteria used to filter on for the pagelet.
Search	Click to search the criteria specified and obtain the listing of TIP data.
Reset	Clears all search criteria and any transaction results.
Restore Defaults	Select to erase any user settings made on the page and return to the defaults that the administrator established.
Transaction Inquiry Page	Click this link to access the Transaction in Progress page to view details about the transactions that appear on the pagelet.
Go to Expenses Pagelet Processing	Click to run the Expenses Pagelet Processing process. Before PeopleSoft Expenses can display data in a pagelet, run the Expenses Pagelet Processing process to populate the summary tables with precalculated amounts. In addition, the monetary currency for project filtered data displays in the currency set for that particular project business unit. The Expenses Pagelet Processing process also pulls travel authorization data from within the periods defined by the administrator. This link is found only on the Administer pages, not the Personalization pages.
Return to Homepage	Click to return to the portal main menu where the pagelet resides with the updated filtered results.

Viewing Total Predicted Expenses

This section provides an overview of total predicted expenses and discusses how to:

- Set up defaults for the Total Predicted Expenses pagelet.
- View total predicted expenses.
- View the Total Predicted Expenses Summary page.
- Personalize your Total Predicted Expenses pagelet.

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Understanding Total Predicted Expenses

The Total Predicted Expenses pagelet displays travel authorization data based on filter criteria entered on an administrator setup page (Administer Total Predicted Expenses) or a user personalization page (Personalize Total Predicted Expenses). What PeopleSoft Expenses displays on the pagelet also depends on which view the administrator or employee selects—by department ID or project ID. If PeopleSoft Expenses is set up to display travel authorization data based on a department view, then PeopleSoft Expenses filters by GL business unit and department ID. If PeopleSoft Expenses is set up to display travel authorization data based on a project view, then PeopleSoft Expenses filters by PC business unit and project ID. Employees can also choose specific project IDs or filter by My Projects or Project Manager.

The administrator accesses the Administer Total Predicted Expenses page through the portal main menu to set and store the defaults for all users. Only the administrator can set the defaults for the Calendar ID and Number of Future Periods fields, and these fields are display-only on the employee's Personalize Total Predicted Expenses page. The administrator also sets the default view (by department or by project).

Click the Customize icon in the title bar of the Total Predicted Expenses pagelet to access the Personalize Total Predicted Expenses page and specify project IDs or department IDs in which to filter on. PeopleSoft Expenses initially populates the Personalize Total Predicted Expenses page with defaults provided from the Administer Total Predicted Expenses page. PeopleSoft Expenses checks user security at the PeopleSoft Expenses business unit level to insure that employees can only select or see data in the business unit to which they are authorized to access. Click the Restore Default button on the Personalize Total Predicted Expenses page and PeopleSoft Expenses restores the filter criteria back to what is set on the Administrator Total Predicted Expenses page.

The Total Predicted Expenses Summary page allows further filtering before PeopleSoft Expenses displays total authorized travel amounts. Employees can change or refine their search by filtering by Expenses Billing Code, My Projects, Project Manager, and various ChartFields. The travel authorizations listed as a result of the search with the filtering criteria are linked to allow you to drill down to a specific travel authorization for further analysis.

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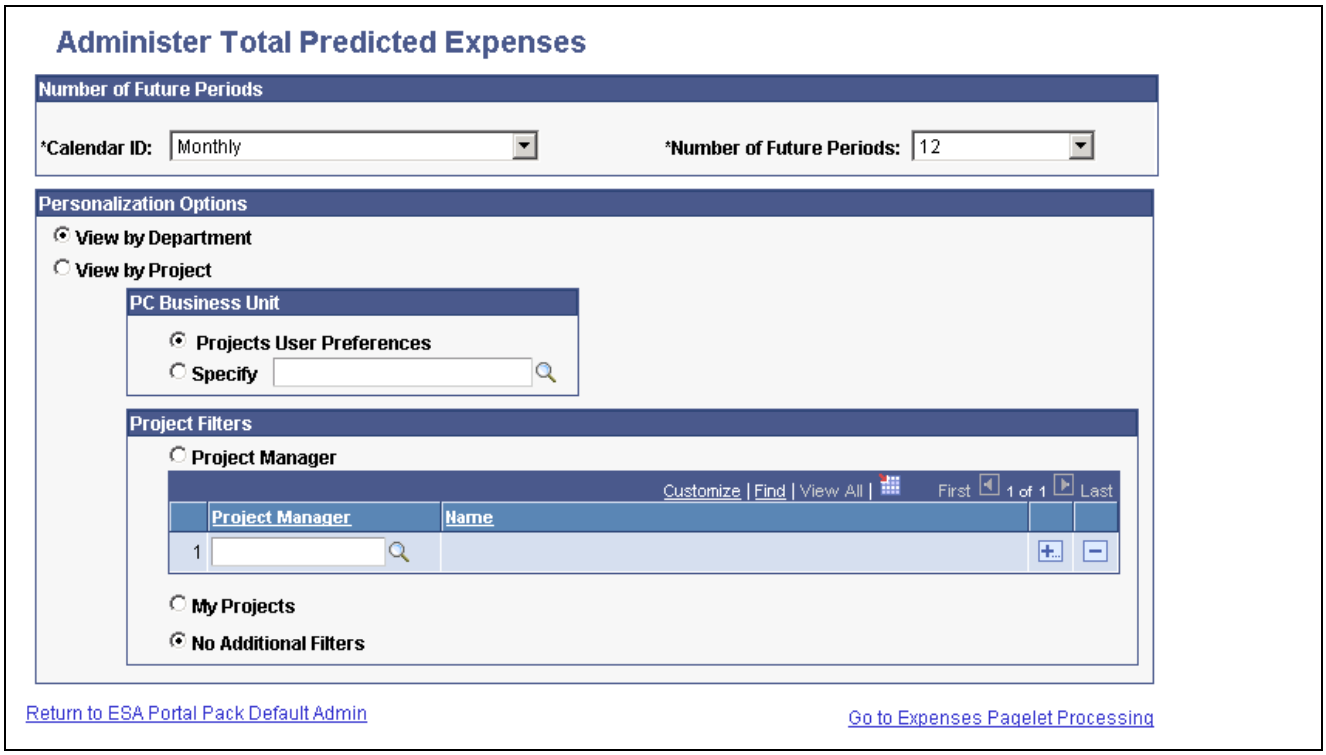
Pages Used to View Total Predicted Expenses

Page Name	Object Name	Navigation	Usage
Administer Total Predicted Expenses	EX_PE_PRED_PRS	Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Total Predicted Expenses	Set up defaults and define the calendar ID and periods to filter on for the Total Predicted Expenses pagelet.
Total Predicted Expenses pagelet	EX_PE_PRED_TA_WD, EX_PE_PRED_TA_NR	Click the Personalize Content link on the PeopleSoft homepage. Select Total Predicted Expenses.	Displays travel authorization data based on filter criteria set up by the system administrator and the user. **Note.** The size of the pagelet depends on if you have personalized the layout for your portal homepage for two columns or three columns. To view billable, non-billable, and internal travel authorization amounts, use a wide layout.
Total Predicted Expenses	EX_PE_PRED_MOR	Click the More link on the Total Predicted Expenses pagelet.	Displays more travel authorization data. **Note.** PeopleSoft Expenses displays only the More link if there are more than five Department IDs or Project IDs, depending on how you set up your system.
Total Predicted Expenses Summary	EX_PE_PRED_SUM	• Depending on how you set up your system, click a Department ID or Project ID link on the Total Predicted Expenses pagelet. • Travel and Expenses, Real-Time Analysis, Predicted Expenses Summary	Enter more filter criteria (optional) and click Go to view list of travel authorizations.
Personalize Total Predicted Expenses	EX_PE_PRED_PRS	Click the Customize icon on the Total Predicted Expenses pagelet.	Set up user-specific defaults to filter on for the Total Predicted Expenses pagelet.

Setting Up Defaults for the Total Predicted Expenses Pagelet

Access the Administer Total Predicted Expenses page.

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Administer Total Predicted Expenses page

This page uses fields that are common to other pages discussed in this chapter. Refer to the beginning of the chapter to review descriptions of these common elements.

Viewing Total Predicted Expenses

Access the Total Predicted Expenses pagelet.

Department or **Project** Click on the link in the Department or Project column to access the Total Predicted Expenses Summary page and drill down to a specific travel authorization.

PeopleSoft Expenses displays the total amount of approved travel authorizations, which is a result of the filtering criteria from the Administer Total Predicted Expenses and Personalize Total Predicted Expenses pages. PeopleSoft Expenses sorts the rows based on amounts and displays the highest amount first. PeopleSoft Expenses also displays the base currency for the business unit.

The pagelet displays information about the criteria PeopleSoft Expenses used to derive the total predicted expenses:

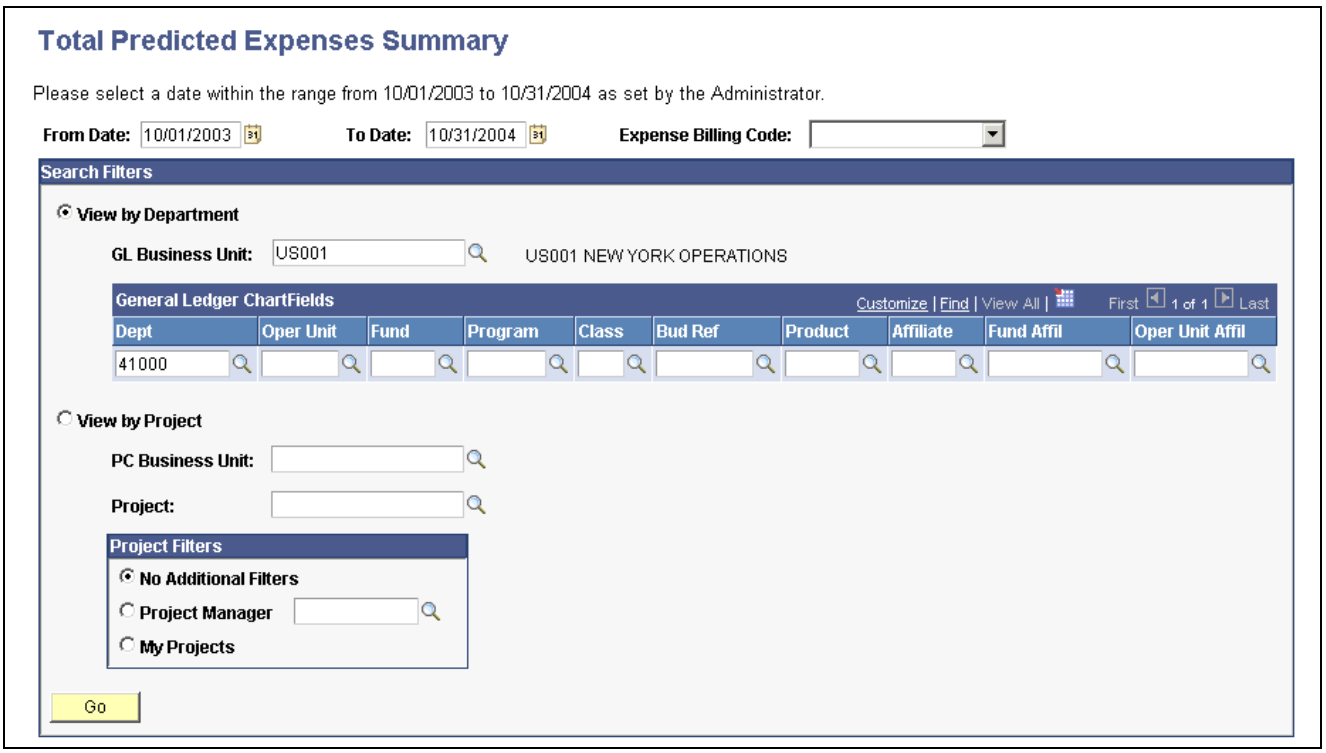
- GL business unit.
- Date when the Expenses Pagelet Processing process was last executed (for example, the data is only current up to the date displayed).
- View type (department or project). This message changes, depending on what filter criteria was selected.

Note. PeopleSoft Expenses only displays five rows of data. If there are additional rows, PeopleSoft Expenses displays a More link that takes you to an expanded view of the Total Predicted Expenses pagelet.

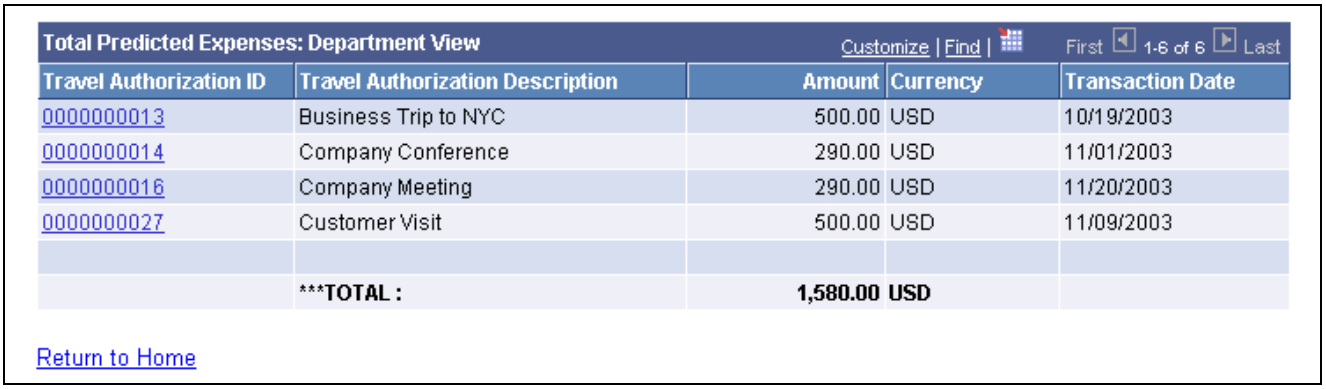
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Viewing the Total Predicted Expenses Summary Page

Access the Total Predicted Expenses Summary page.



Total Predicted Expenses Summary page (1 of 2)



Total Predicted Expenses Summary page (2 of 2)

From Date and **To Date** — Enter dates to filter on. You can only filter within the dates set by the administrator. If you enter dates outside the range, a message notifies you that it is not a valid date. The date is pre-populated with the date range that the administrator defined in the Administrator page.

Expense Billing Code — Enter a billing code to filter on. If none is specified, PeopleSoft Expenses retrieves all billing codes.

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Search Filters

PeopleSoft Expenses automatically populates information in this section based on the filtering criteria used on the Total Predicted Expenses pagelet; however, you can modify the fields to obtain a different listing of travel authorizations to search on. If PeopleSoft Project Costing is not installed, PeopleSoft Expenses does not display any project-related fields.

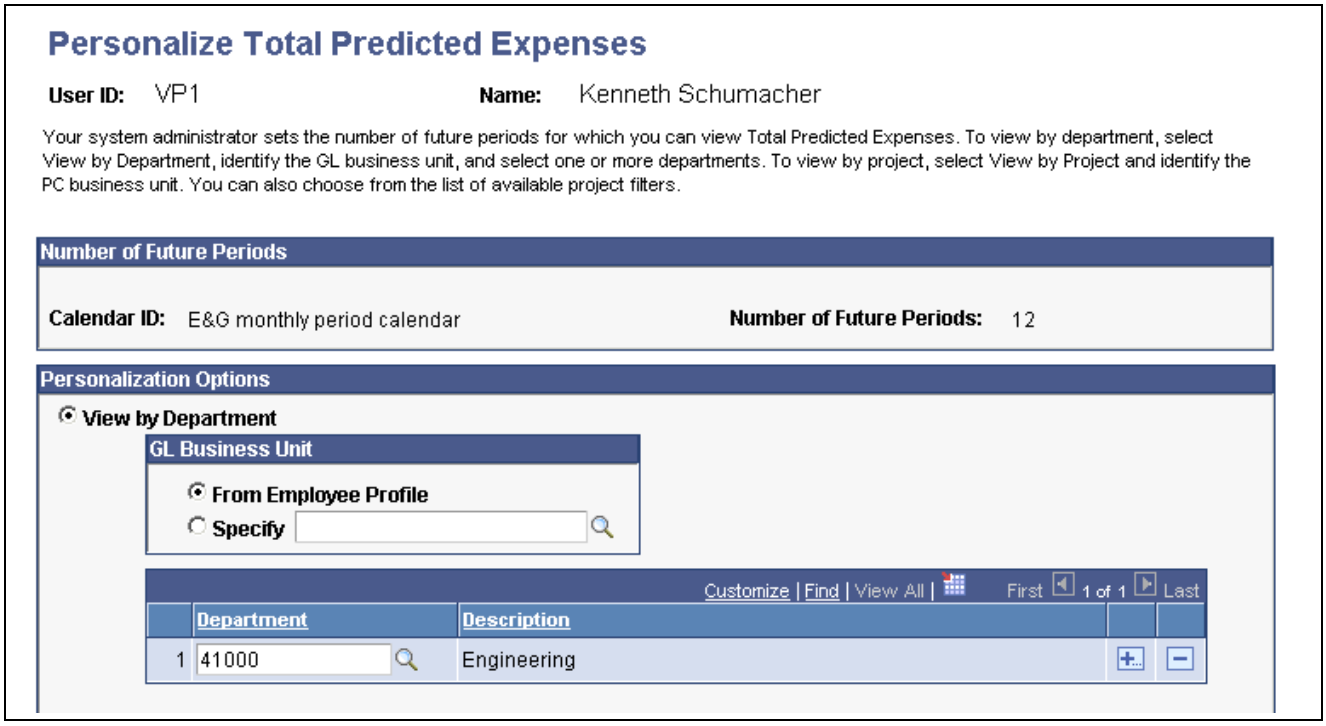
Go Click to display a list of total approved travel authorizations that fall within your selection criteria.

Total Predicted Expenses: Department View or Project View

Travel Authorization ID Click a link in the column to drill down to a specific travel authorization report for further analysis. PeopleSoft Expenses displays the Travel Authorization - Travel Authorization Summary page in display-only mode for the travel authorization you selected. From the Travel Authorization - Travel Authorization Summary page, PeopleSoft Expenses provides a Return to Predicted Expenses link, which returns you to the Total Predicted Expenses Summary page.

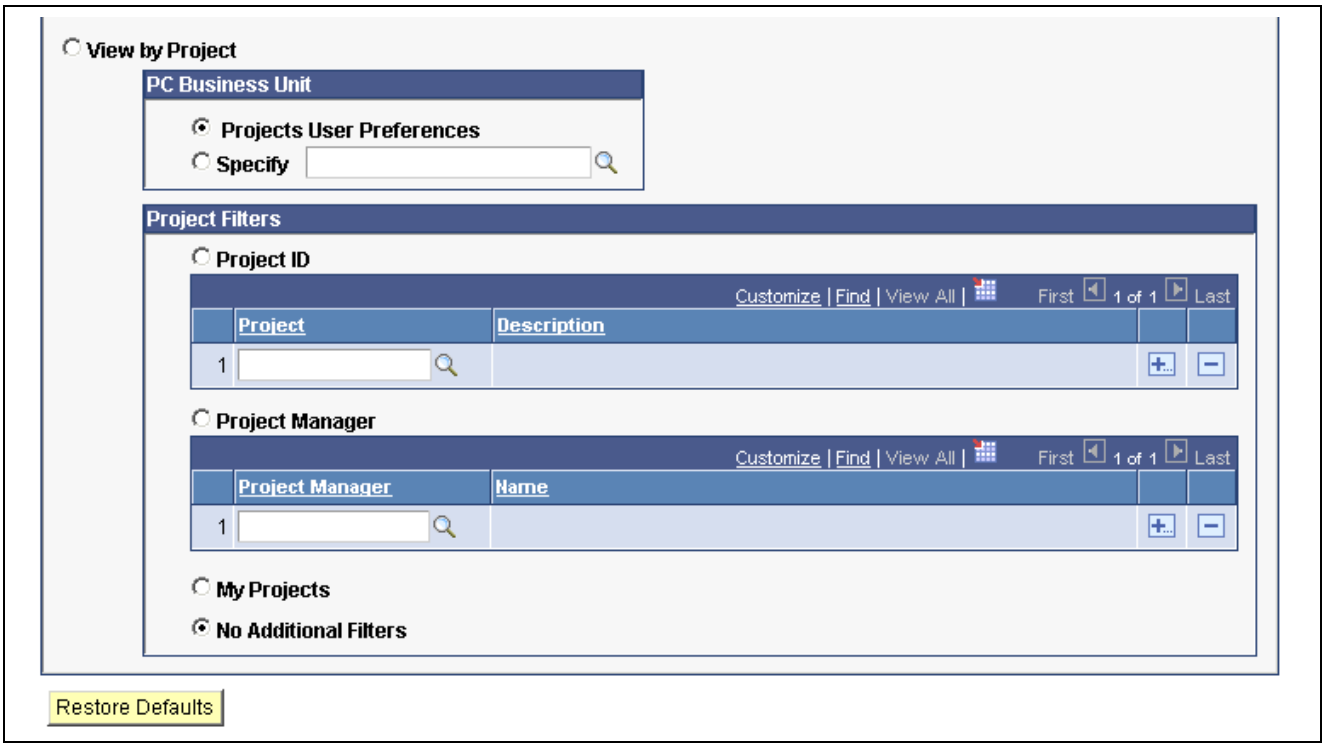
Personalizing Your Total Predicted Expenses Pagelet

Access the Personalize Total Predicted Expenses page.



Personalize Total Predicted Expenses page (1 of 2)

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Personalize Total Predicted Expenses page (2 of 2)

This page uses fields that are common to other pages discussed in this chapter. Refer to the beginning of the chapter to review descriptions of these common elements.

Note. If PeopleSoft Project Costing is not installed, the View by Project option, PC Business Unit and Project Filters are hidden.

Using Operational Threshold Alerts (OTA) for PeopleSoft Expenses

This section provides an overview of personalizing operational threshold alerts and discusses how to personalize and view the Total Expense Costs OTA pagelet.

Understanding the Total Expense Costs OTA

The Total Expense Cost OTA reflects the total amount of all pending, submitted, approved, partially approved, staged, paid, on hold, and posted expense lines within PeopleSoft Expenses. PeopleSoft Expenses ignores expense lines with a status of closed or denied and ignores expenses that are not reimbursable.

You must select the Total Expense Costs OTA on the Personalize Operational Threshold Alerts page before PeopleSoft Expenses displays the information on the pagelet. View OTAs on the Operational Threshold Alert pagelet with data personalized by an administrator or user.

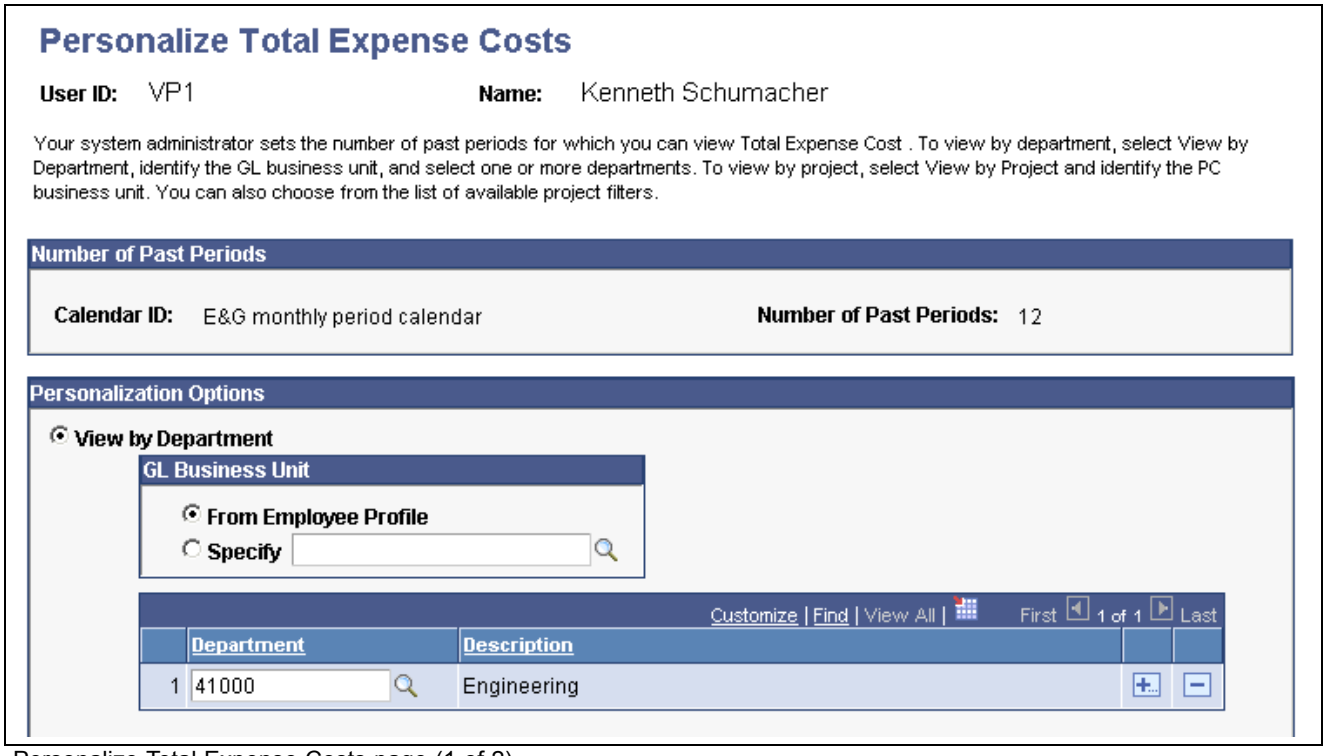
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Pages Used to Personalize OTAs for PeopleSoft Expenses

Page Name	Object Name	Navigation	Usage
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	• Click the Customize icon on the Operational Threshold Alert pagelet. • Click the Customize icon on the Operational Threshold Chart pagelet.	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.
Operational Threshold Alert pagelet	PC_PE_OTA_LIST	Click the Personalize Content link on the PeopleSoft homepage.	View up to five Operational Threshold Alerts that display real-time monitoring data according to tolerance levels that you define.
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage.	View an Operational Threshold Alert that displays a real-time monitoring chart according to tolerance levels that you define.
Personalize Total Expense Costs	EX_PE_TEXP_PRS	Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Total Expense Costs OTA.

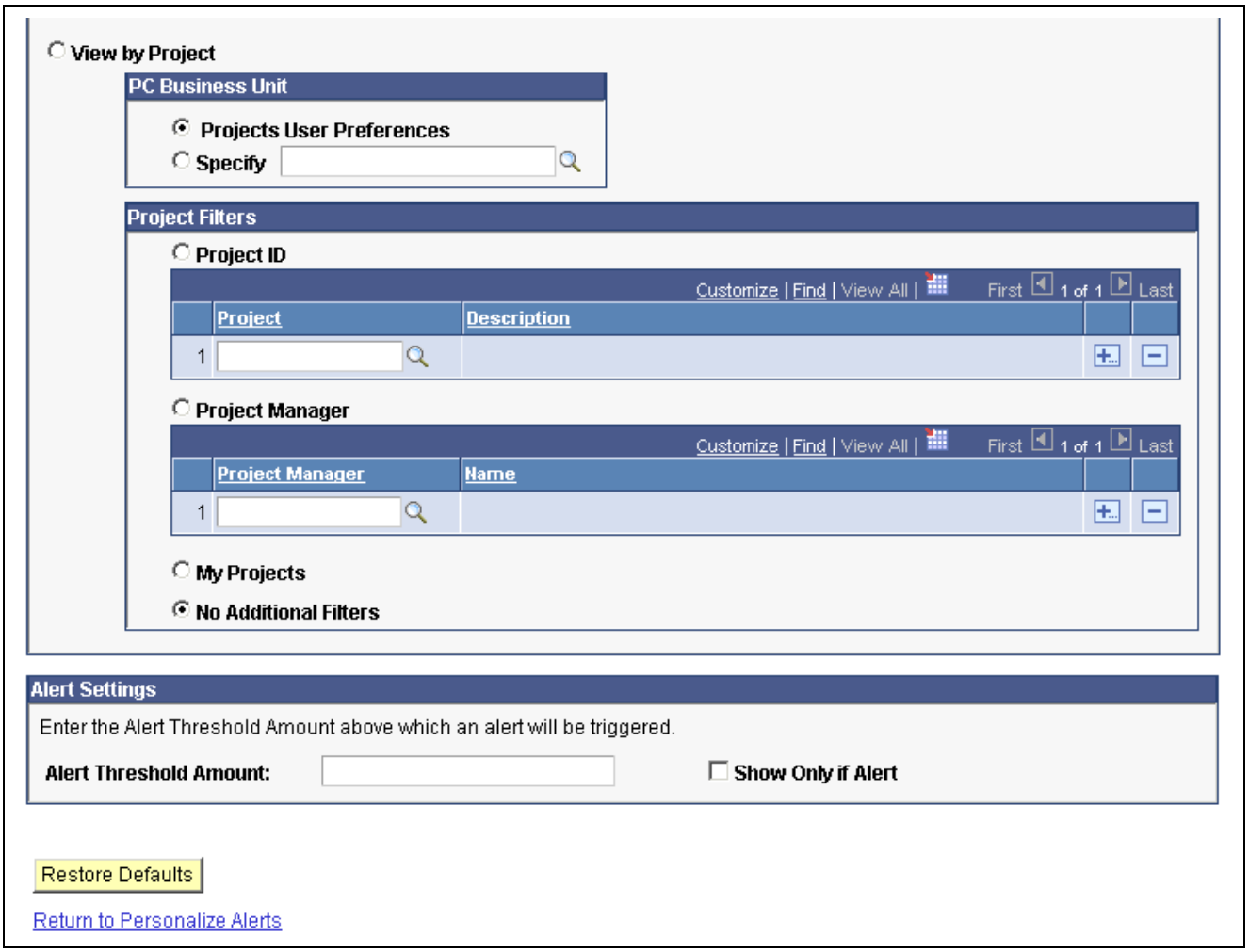
Personalizing Total Expense Cost

Access the Personalize Total Expense Costs page.



Personalize Total Expense Costs page (1 of 2)

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Personalize Total Expense Costs page (2 of 2)

This page uses fields that are common to other pages discussed in this chapter. Refer to the beginning of the chapter to review descriptions of these common elements.

Alert Threshold Amount Enter an Alert Threshold dollar amount that triggers an alert. When the PeopleSoft Expenses dollar amount exceeds the target threshold, the OTA page displays a red indicator.

Show Only if Alert Select to indicate that an OTA displays only if the measurement threshold reaches the level at which an alert or warning is triggered.

Return to Personalize Alerts Click to return to the Personalize Operational Threshold Alerts page.

Note. You can only set the Alert Settings under the User Personalization page. The fields are hidden to the administrator.

Viewing Transactions in Progress (TIP)

This section provides an overview of Transactions in Progress (TIP) and discusses how to:

- View expense and time report data.

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- Personalize TIP pagelets.
- Administer TIP pagelets.

Understanding Transactions in Progress

PeopleSoft Expenses is comprised of transactions that are in various stages. PeopleSoft Expenses provides a tool for executives, managers, and auditors to easily identify and track transactions in progress so that they can gain insight into potential problem areas. TIP data focuses attention on what needs to be resolved to ensure that your expenses system runs smoothly.

The TIP functionality selects expense report and time report data based on filter criteria specified on the search and the personalization pages. While TIP pages provide detail data using robust selection criteria, the pagelets provide a quick glance, on your homepage, of the progress of time reporting and expense processing.

The Transactions in Progress page consists of three parts: the TIP Stage is listed at the top, for example, *Time recorded / not approved;* the TIP Search part of the page enables you to specify the parameters of a search; and the TIP List displays the expense reports or the time reports that make up the transactions in progress data.

TIP Stages

TIP stages are transactions that have not gone through the entire business process. A series of TIP stages exists for each product: PeopleSoft Project Costing and PeopleSoft Expenses. TIP stages are dependent upon installed applications.

There are five TIP stages for PeopleSoft Expenses:

1. PeopleSoft Expenses estimated but actual expenses not submitted. This stage identifies expense reports with a status of *pending.* (EXESTNE)
2. PeopleSoft Expenses recorded but not approved. This stage identifies expense reports with a status of *submitted, partially approved,* and *approved.* (Still pending a final approval for payment.) (EXRECNA)
3. PeopleSoft Expenses approved but not paid or reimbursed. This stage identifies expense reports in *approved for payment* status. (EXAPRNP)
4. Time estimated but actual time not entered. This stage identifies time reports with a status of *pending.* (TEESTNE)
5. Time recorded but not approved. This stage identifies time reports with a status of *submitted* and *partially approved.* (TERECNA)

For TIP stages 1 and 4, targeted at pending transactions, PeopleSoft Expenses uses the creation date to calculate the days inactive amount. There is no need to evaluate the approval level in this instance because the TIP stage refers to pending transactions.

For TIP stages 2 and 5, targeted at transactions in the approval process, PeopleSoft Expenses uses the submission date to calculate the days inactive amount. This is true for all approval levels. The only exception is that if the approval level is *None*, then the transaction is not a part of this TIP stage because the transaction goes from pending to approved for payment automatically. There is no approval process for those transactions with approval level of *None.*

For TIP stage 3, targeted at transactions in the payment process, PeopleSoft Expenses uses the last approval date or the submission date to calculate the days inactive amount.

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Viewing and Personalizing Transactions in Progress

This section discusses how to:

- Understanding how to search for transactions in progress.
- View transactions in progress detail.
- View transactions in progress charts.

Pages Used to View and Personalize Transactions in Progress

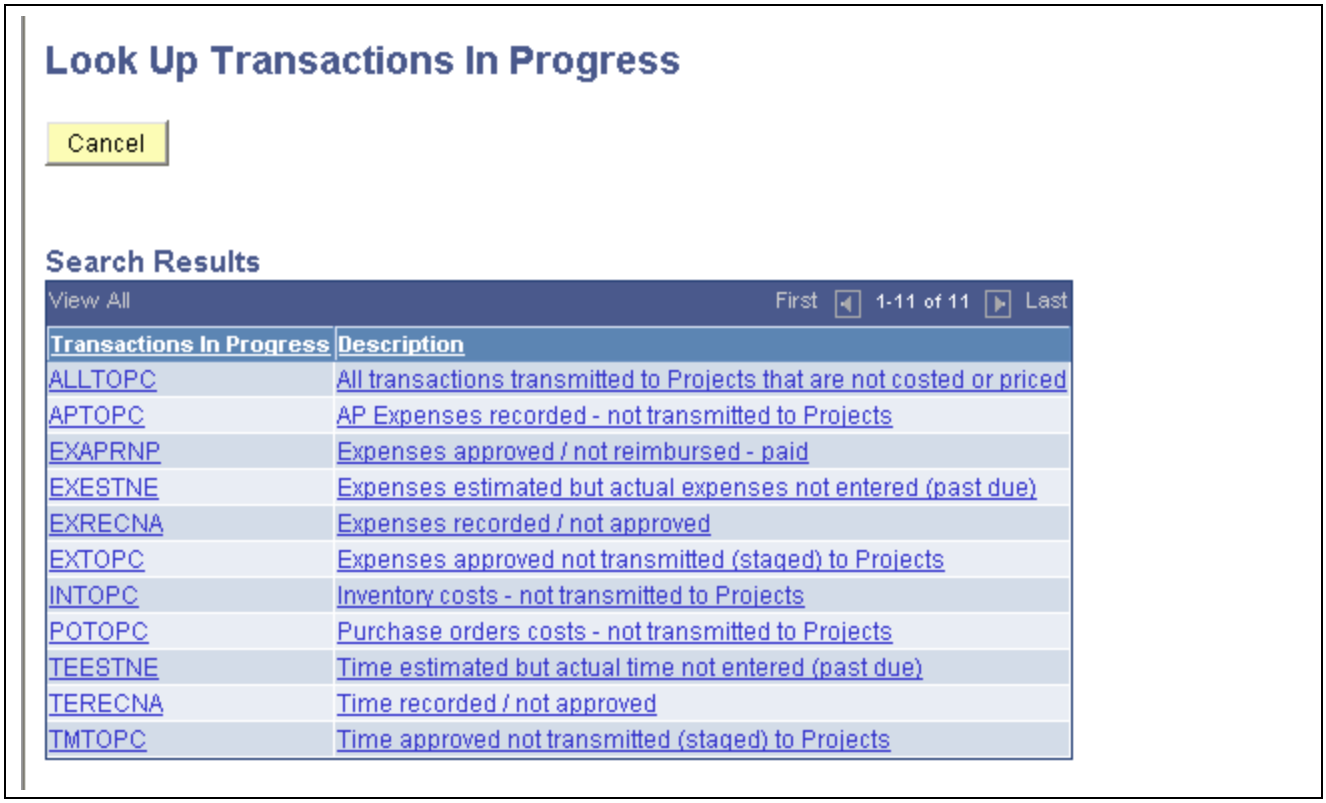
Page Name	Object Name	Navigation	Usage
Transactions in Progress - Expenses (Details)	EX_TIP	Travel and Expenses, Real-Time Analysis, Review Transaction in Progress Manager Self-Service, Travel and Expenses Center, Analysis, View Transactions in Progress	Add a transactions in progress, specify criteria, and click Search to display a list of expense and time report transactions in progress.
Transactions in Progress - Expenses (Graphical)	EX_TIP2	Travel and Expenses, Real-Time Analysis, Review Transaction in Progress, click the Graphical View link Manager Self-Service, Travel and Expenses Center, Analysis, View Transactions in Progress, click Search, then the Graphical View link.	Uses the search criteria to display a graphical view of expense and time report transactions in progress.
Personalize TIP for Expense Reports	EX_PE_TIP_PRS	Click the Customize icon on a TIP pagelet for expense reports. To access the administrator pages, click Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Expense Report TIP link.	Define default display information for TIP pagelets for expense reports.
Personalize TIP for Time Reports	EX_PE_TIPTE_PRS	Click the Customize icon on a TIP pagelet for time reports. To access the administrator pages, click Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Time Report TIP link.	Define default display information for TIP pagelets for time reports.

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Page Name	Object Name	Navigation	Usage
Expenses Pagelet Processing	RUN_EX_PORTAL_AE	• Travel and Expenses, Real-Time Analysis, Update Expenses Pagelet Info, Expenses Pagelet Processing • Click the Go to Expenses Pagelet Processing link on the Administer TIP for Time Reports page. • Click the Go to Expenses Pagelet Processing link on the Administer TIP for Expense Reports page.	Run the Expenses Pagelet Processing process to convert expense data to various currencies and summarize the information.

Understanding How to Search for Transactions in Progress

To view PeopleSoft Expenses TIP pagelets, you must add a TIP stage type for each of the 5 expense reports and time reports. Click the Add a New Value link, and then use the Look up button to obtain the search results. After selecting a TIP stage type, you can specify your search criteria defaults in the Transactions in Progress - Expenses (Details) page. Note that though there are 11 TIP stages listed; only 5 belong to PeopleSoft Expenses.



Look Up Transactions In Progress search results page

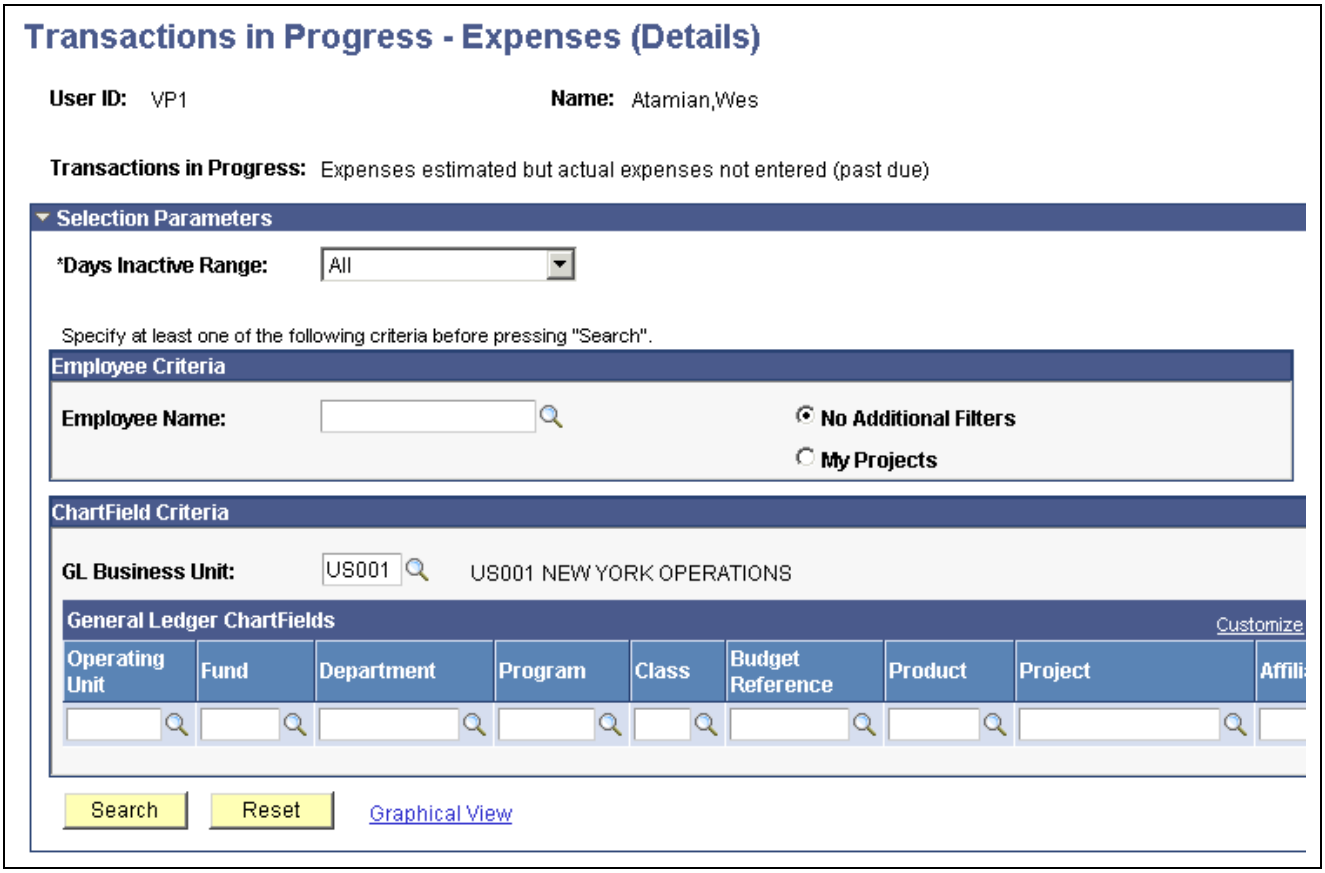
Choose a TIP link, click the Add button, and select the link again from the search results to go to the (Details) Page and specify your default search criteria.

Note. If you select a PeopleSoft Project Costing TIP stage, the Project Costing TIP inquiry page appears.

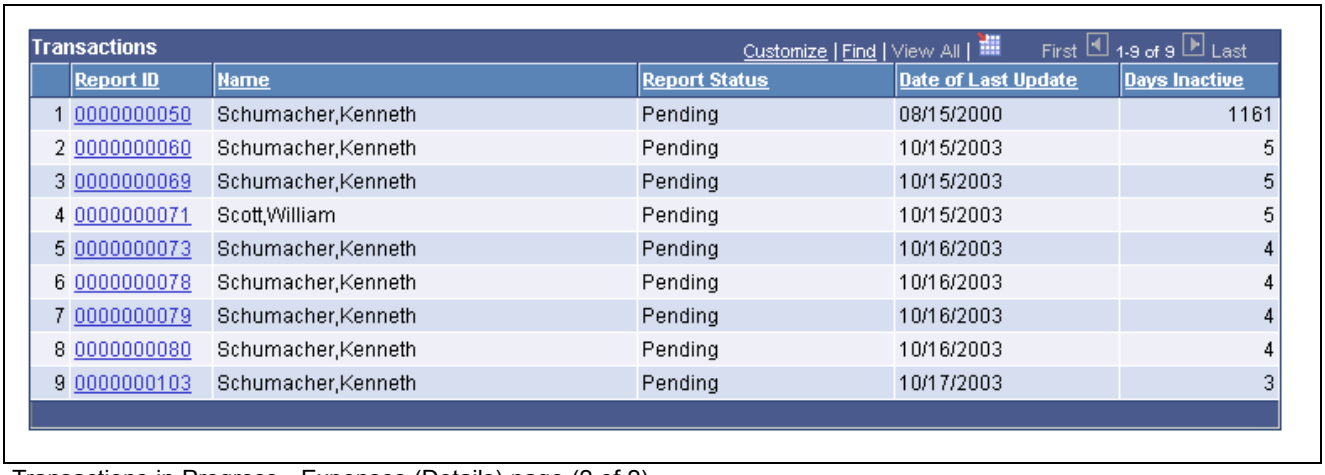
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Viewing Transactions in Progress (Details)

Access the Transactions in Progress - Expenses (Details) page.



Transactions in Progress - Expenses (Details) page (1 of 2)



	Report ID	Name	Report Status	Date of Last Update	Days Inactive
1	0000000050	Schumacher,Kenneth	Pending	08/15/2000	1161
2	0000000060	Schumacher,Kenneth	Pending	10/15/2003	5
3	0000000069	Schumacher,Kenneth	Pending	10/15/2003	5
4	0000000071	Scott,William	Pending	10/15/2003	5
5	0000000073	Schumacher,Kenneth	Pending	10/16/2003	4
6	0000000078	Schumacher,Kenneth	Pending	10/16/2003	4
7	0000000079	Schumacher,Kenneth	Pending	10/16/2003	4
8	0000000080	Schumacher,Kenneth	Pending	10/16/2003	4
9	0000000103	Schumacher,Kenneth	Pending	10/17/2003	3

Transactions in Progress - Expenses (Details) page (2 of 2)

This page uses fields that are common to other pages discussed in this chapter. Refer to the beginning of the chapter to review descriptions of these common elements.

You must specify at least one of the following fields in order to process your search: GL Business Unit, Project Costing Business Unit, My Projects, Project Manager, or Employee Name.

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Days Inactive Range

Displays the number of days since the last activity.

Select *31 to 60, 61 to 90, <31, >90,* or *All.*

PeopleSoft Expenses calculates days inactive using the:

- Creation date for Expenses not Submitted and for Time Reported but not Submitted.
- Submission date for Expenses Recorded but not Approved and for Time Recorded but not Approved.
- Last approval date or submission date for Expenses Approved but not Paid, depending on the approval rules. If the transaction is not approved, PeopleSoft Expenses uses the submission date; if it is approved or partially approved, PeopleSoft Expenses uses the last approval date.

Enter the remaining search criteria to filter transactions in progress. Click the Search button for PeopleSoft Expenses to retrieve and display a list of transactions in progress.

Note. PeopleSoft Expenses saves your selection criteria (by User ID and TIP stage) so you do not need to re-enter the criteria each time you access this page.

Graphical View

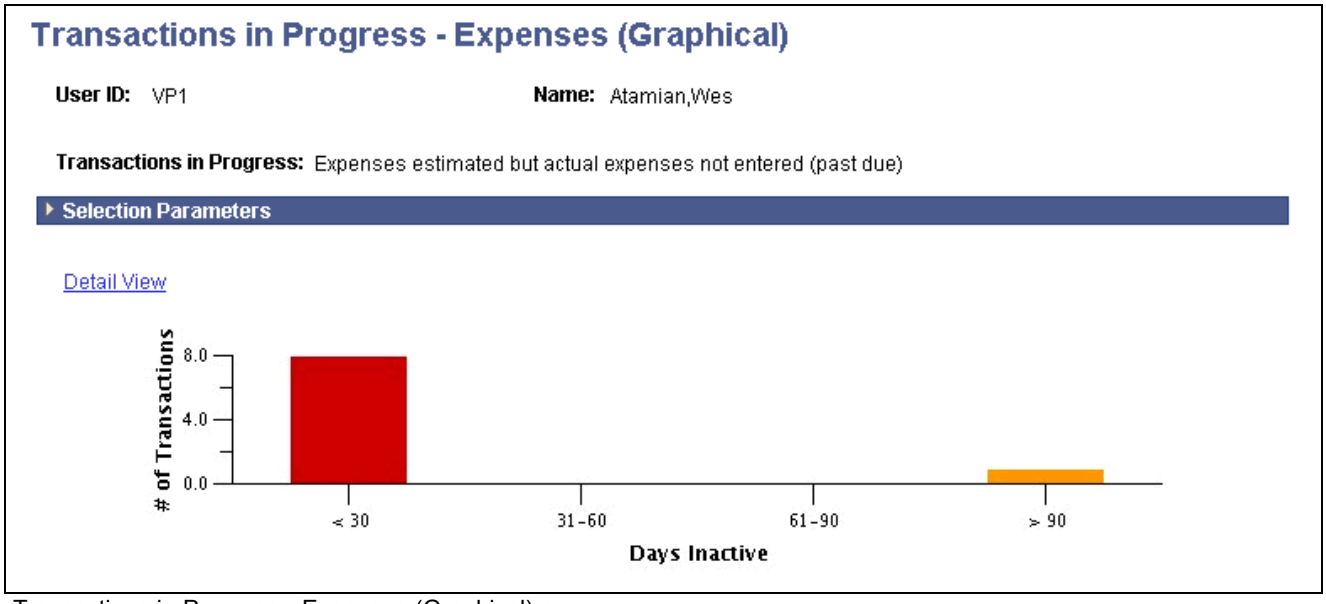
Click to see the Transactions in Progress - Expenses (Graphical) page. This link only appears if there is data in the Transactions grid.

Report ID

Click to drill down to the Expense Reports or Time Reports Detail page. Click the Return to TIP Inquiry Page link to return to the TIP Inquiry page.

Viewing Transactions in Progress Charts

Access the Transactions in Progress - Expenses (Graphical) page



Transactions in Progress - Expenses (Graphical) page

This page uses fields that are common to other pages discussed in this chapter. Refer to the beginning of the chapter to review descriptions of these common elements.

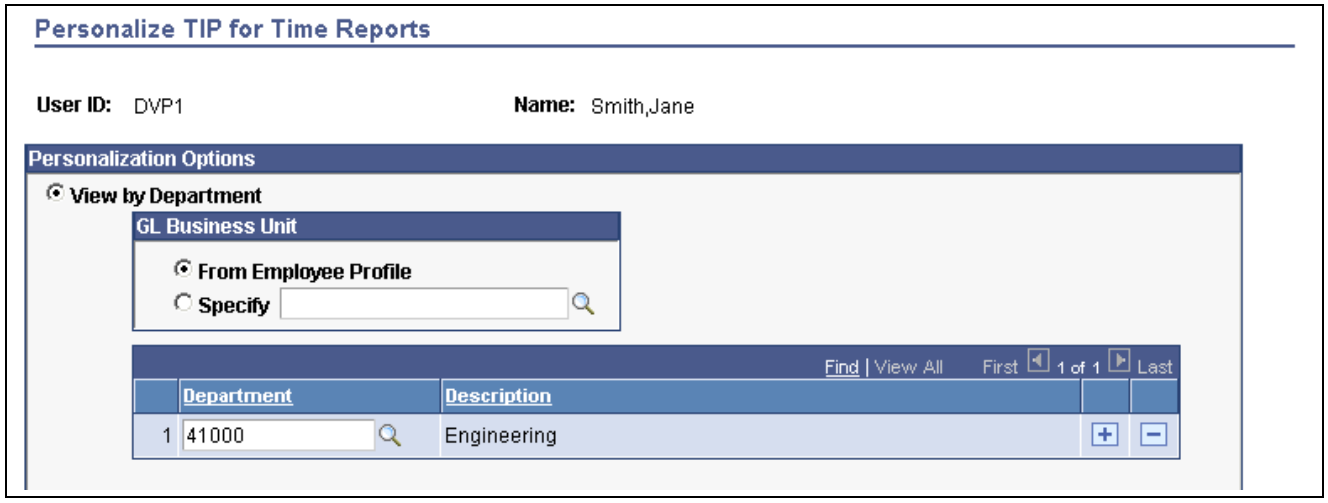
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Expand Selection Parameters to display the filtering options that were used to select the transactions in progress for the chart. Note that those parameters are now read-only.

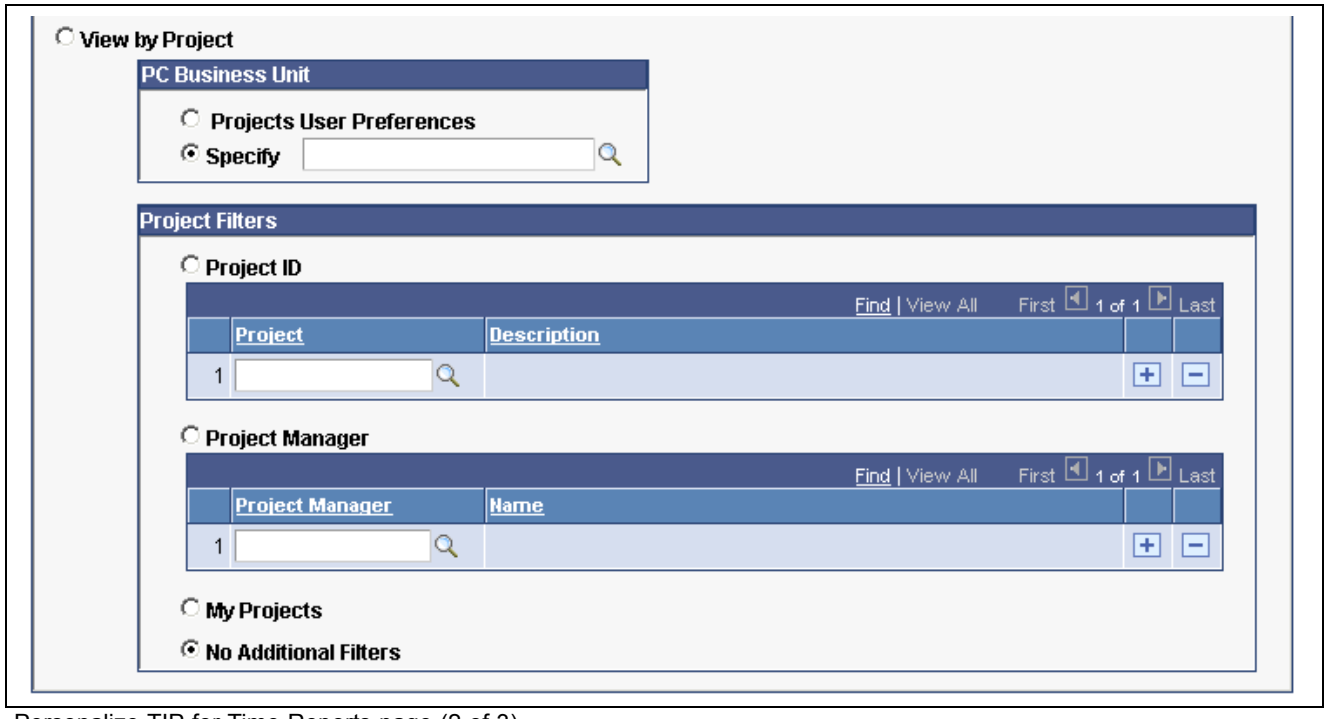
Click the Detail View link to go back to the Transactions in Progress - Expenses (Details) page.

Personalizing Transactions in Progress

Access the Personalize TIP for Time Reports or the Personalize TIP Expense Reports page.

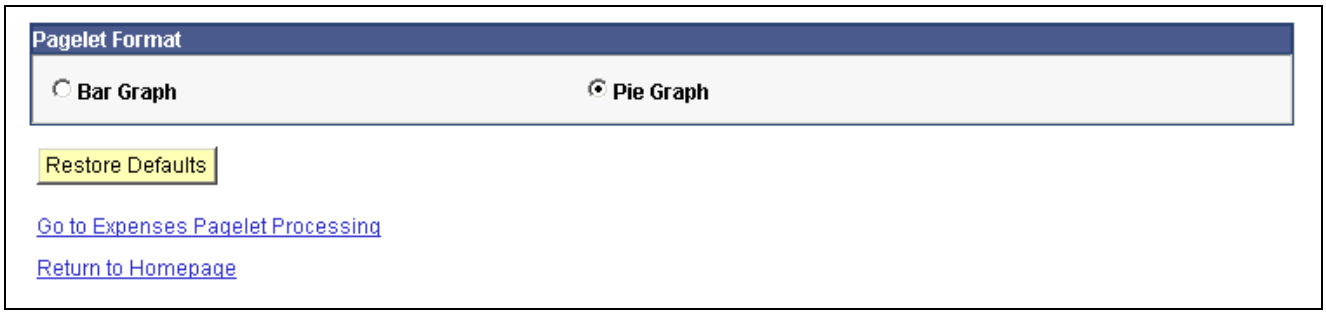


Personalize TIP for Time Reports page (1 of 3)



Personalize TIP for Time Reports page (2 of 3)

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Personalize TIP for Time Reports page (3 of 3)

This page uses fields that are common to other pages discussed in this chapter. Refer to the beginning of the chapter to review descriptions of these common elements.

This page automatically populates with defaults provided from the system administrator personalization page. The parameters specified on this page filter and define the default data that PeopleSoft Expenses displays on a TIP pagelet.

Bar Graph Select to view search results as a bar graph.

Pie Graph Select to view search results as a pie graph.

Note. The administrator sets the defaults for displaying TIP pagelets as a Bar Graph or a Pie Graph.

If a user personalizes a time report pagelet and changes the default selection for Bar Graph or Pie Graph, the two time report pagelets will be displayed the same way. That is, both time report pagelets can be displayed either as a bar graph or as a pie graph, not one of each.

Similarly, if a user personalizes an expense report pagelet and changes the default selection for Bar Graph or Pie Graph, the three expense report pagelets will be displayed the same way. That is, the three expense report pagelets can only be displayed either as a bar graph or as a pie graph, not one of each.

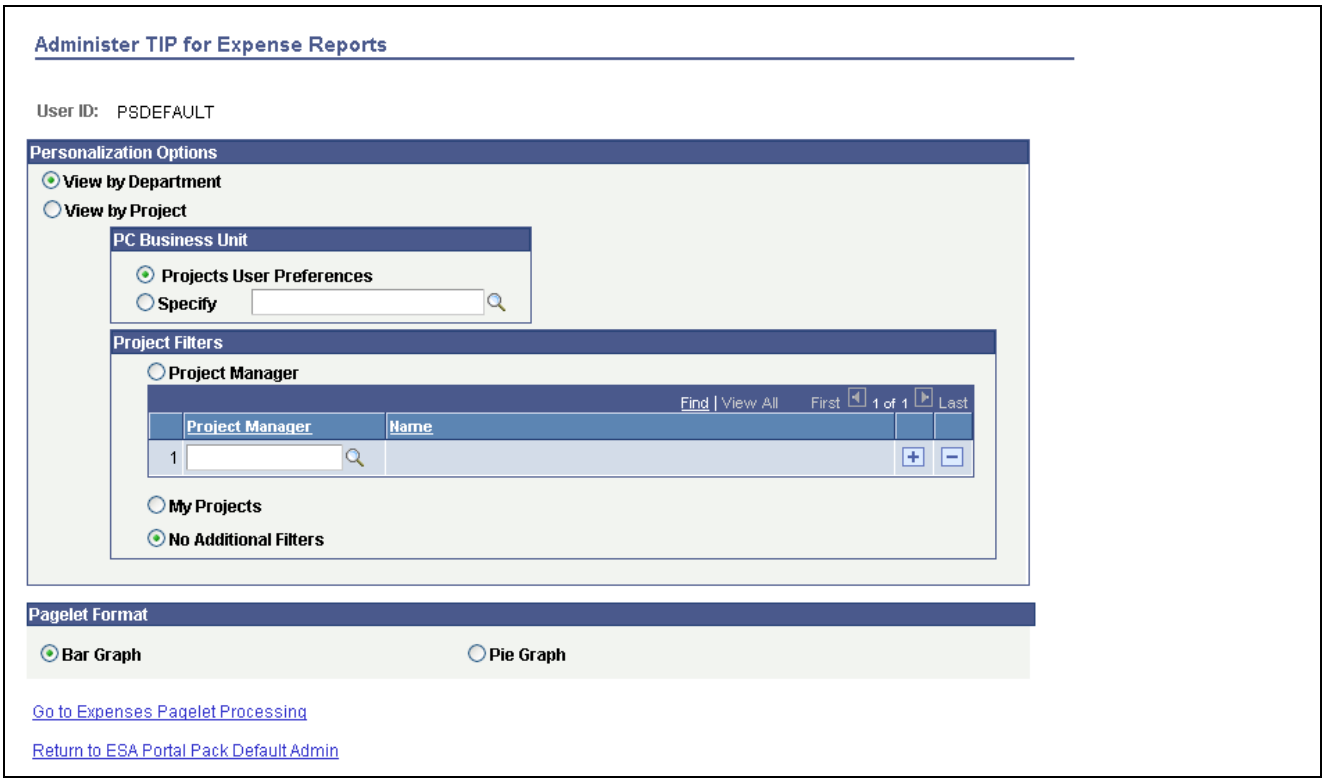
Administering Expense Report and Time Report Pagelets

Access the Administer TIP for Expense Reports or the Administer TIP for Time Reports page.

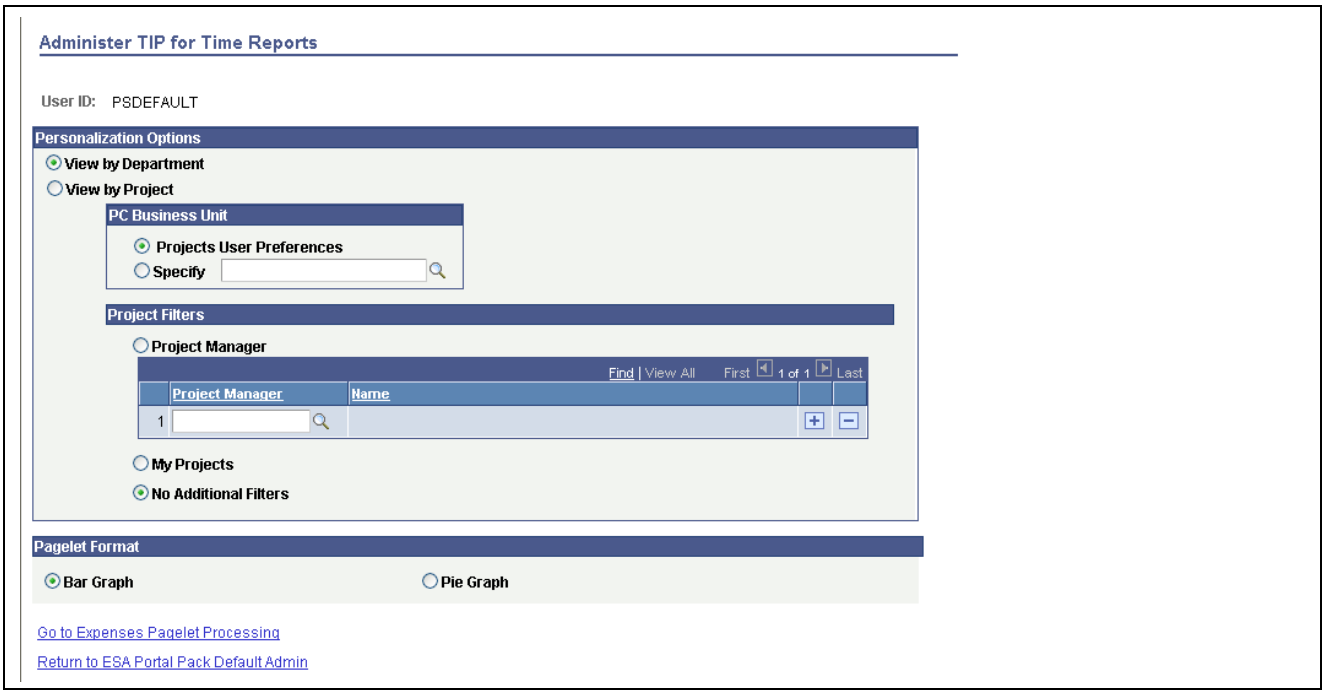
To obtain data for PeopleSoft Expenses pagelets, an administrator must define filter criteria and then run the Expenses Pagelet Processing process. This process converts expense data to various currencies so that the Total Expense Costs Operational Threshold Alert (OTA) and Transactions in Progress pagelets can provide data in a currency that is meaningful to each user and render data more rapidly. This process is scheduled by navigating to Travel and Expenses, Real-Time Analysis, Update Expenses Pagelet Info.

The administration and processing functionality is the same for Expense Report pagelets and for Time Report pagelets.

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Administer TIP for Expense Reports page



Administer TIP for Time Reports page

This page uses fields that are common to other pages discussed in this chapter. Refer to the beginning of the chapter to review descriptions of these common elements.

Note. In the Administer TIP for Time Reports page, users will only see the View by Project and No Additional Filters options.

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Go to Expenses Pagelet Processing	Click to run the process that populates the tables that enable you to view transactions in progress data and pagelets.

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CHAPTER 13

Using Pagelets Enabled by PeopleSoft Program Management

This chapter discusses how to:

- View change control analysis.
- View critical issues by project.
- View forecast to complete information.
- View issues by priority.
- View issues by priority by project.
- View programs.
- View top five issues.
- View top five risks.
- Use Operational Threshold Alerts (OTAs) for PeopleSoft Program Management.

Viewing Change Control Analysis

This section discusses how to:

- View change control analysis information.
- Personalize the Change Control Analysis pagelet.

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Pages Used to View Change Control Analysis

Page Name	Object Name	Navigation	Usage
Change Control Analysis pagelet	PC_PE_CHG_ANALYSIS	Click the Personalize Content link on the PeopleSoft homepage. Select Change Control Analysis.	View the top five projects with the highest number of changes.
Personalize Change Control Analysis	PC_PE_CHC_PRS	• Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Change Control Analysis link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Change Control Analysis icon on the Change Control Analysis pagelet.	Define default display information for the Change Control Analysis pagelet.

Viewing Change Control Analysis Information

Access the Change Control Analysis pagelet.

The pagelet displays a list of the top five projects that have the highest number of changes.

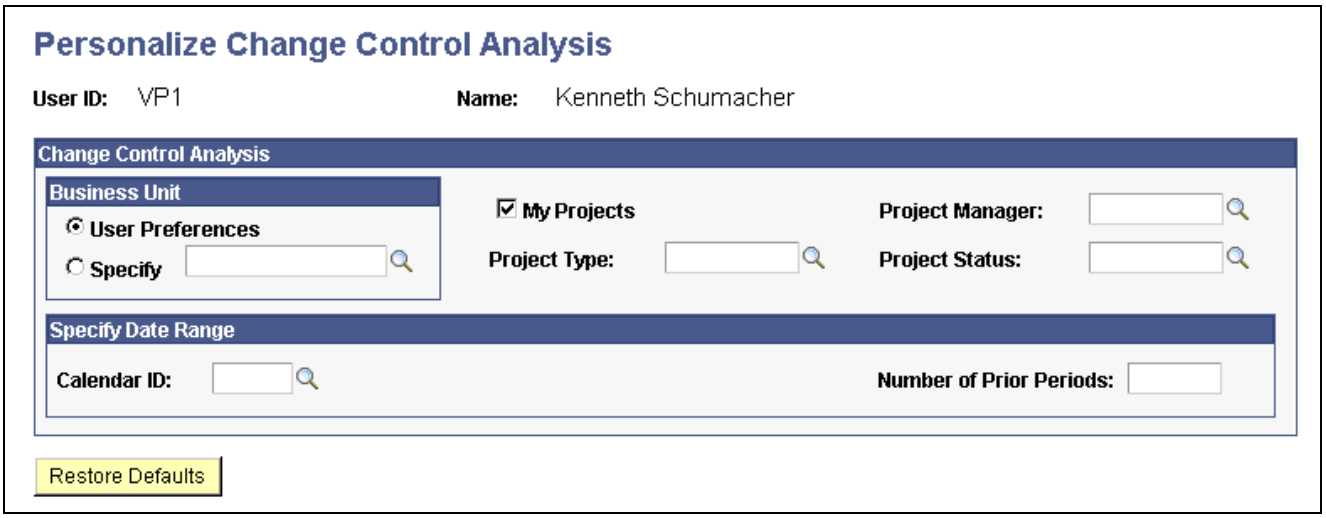
<Project ID> Click the project ID link to access the Change Control Monitor page in PeopleSoft Program Management to view a list of changes to projects and activities for which change control is enabled.

Show All / Enhanced Click to access the Change Control Analysis page in PeopleSoft Program Management, which contains more details about project changes.

Personalizing the Change Control Analysis Pagelet

Access the Personalize Change Control Analysis page.

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Personalize Change Control Analysis page

The parameters specified on this page filter the projects that appear on the Change Control Analysis pagelet.

Depending on your role, you access this page in one of two ways:

- Administrators access the Personalize Change Control Analysis page by clicking the Change Control Analysis link on the ESA Portal Pack Pagelet Default Administration page.

  The administrator uses the ESA Portal Pack Pagelet Default Administration page to set up default filter criteria for all Enterprise Service Automation portal pagelets.

- Other users access this page by clicking the Customize Change Control Analysis icon on the Change Control Analysis pagelet.

User Preferences Select to analyze change control for only those projects with the project business unit that is specified in your user preferences.

Specify Select to analyze change control for projects in a project business unit other than the business unit that is specified in your user preferences. If you select Specify, you must enter a business unit value.

My Projects Select for the Change Control Analysis pagelet to display only those projects that you designate as part of your My Projects list. If you do not have any projects in your My Projects list, no data appears on the Change Control Analysis pagelet.

You can optionally filter the projects that appear on the Change Control Analysis pagelet by specifying values for these fields:

- Project Manager
- Project Type
- Project Status
- Calendar ID
- Number of Prior Periods

Restore Defaults Click to restore the default selection criteria that the administrator establishes on the ESA Portal Pack Pagelet Default Administration page. The Restore

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Defaults button appears if you access this page by clicking the Customize Change Control Analysis link on the Change Control Analysis pagelet.

Viewing Critical Issues by Project

This section discusses how to:

- View critical issues by project.
- Personalize the Critical Issues by Project pagelet.

Pages Used to View Critical Issues by Project

Page Name	Object Name	Navigation	Usage
Critical Issues by Project pagelet	PC_PE_CRIT_BY_PROJ	Click the Personalize Content link on the PeopleSoft homepage. Select Critical Issues by Project.	View a maximum of the top five projects that have the most open critical issues.
Personalize Critical Issues by Project	PC_PE_CRIT_PRS	Click the Customize Critical Issues by Project icon on the Critical Issues by Project pagelet.	Define default display information for the Critical Issues by Project pagelet.

Viewing Critical Issues by Project

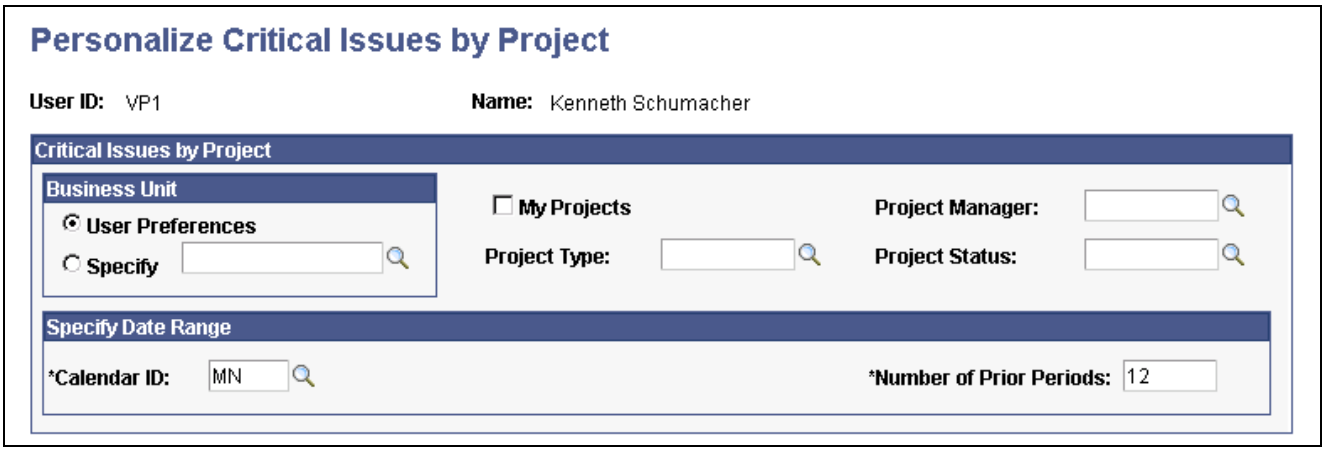
Access the Critical Issues by Project pagelet.

This pagelet displays the top five projects that have the greatest number of unresolved issues designated as high priorities. Each project ID appears as a link that accesses the Issue Management component of the selected project ID. This enables users to view and update various elements of the issue.

Personalizing the Critical Issues by Project Pagelet

Access the Personalize Critical Issues by Project page.

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Personalize Critical Issues by Project page

Specify parameters to filter the projects that you want to appear on the Critical Issues by Project pagelet.

Viewing Issues by Priority

This section discusses how to view issues by priority.

Page Used to View Issues by Priority

Page Name	Object Name	Navigation	Usage
Issues by Priority pagelet	PC_PE_ISU_CNT_PRIO	Click the Personalize Content link on the PeopleSoft homepage. Select Issues by Priority.	View a chart that displays all the high, medium, and low issues that are assigned to the user.

Viewing Issues by Priority

Access the Issues by Priority pagelet.

A bar chart appears that depicts the number of open issues assigned to the user ID. Each issue priority is represented by a colored bar that functions in two ways:

- Move the mouse pointer to a bar to view the alternate text about the number of issues for that priority level.
- Click a bar to access the Resource Workbench page, from which you can view and update any issues.

Viewing Issue Priority by Project

This section discusses how to:

- View issues by priority by project.
- Personalize the Issue Priority by Project pagelet.

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Pages Used to View Issues by Priority by Project

Page Name	Object Name	Navigation	Usage
Issue Priority by Project pagelet	PC_PE_PRIO_BY_PROJ	Click the Personalize Content link on the PeopleSoft homepage. Select Issue Priority by Project.	View a maximum of the top five projects that have the greatest number of open issues.
Personalize Issue Priority by Project	PC_PE_PRIO_PRS	• Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Issue Priority by Project link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Issue Priority by Project icon on the Issue Priority by Project pagelet.	Define default display information for the Issue Priority by Project pagelet.

Viewing Issues by Priority by Project

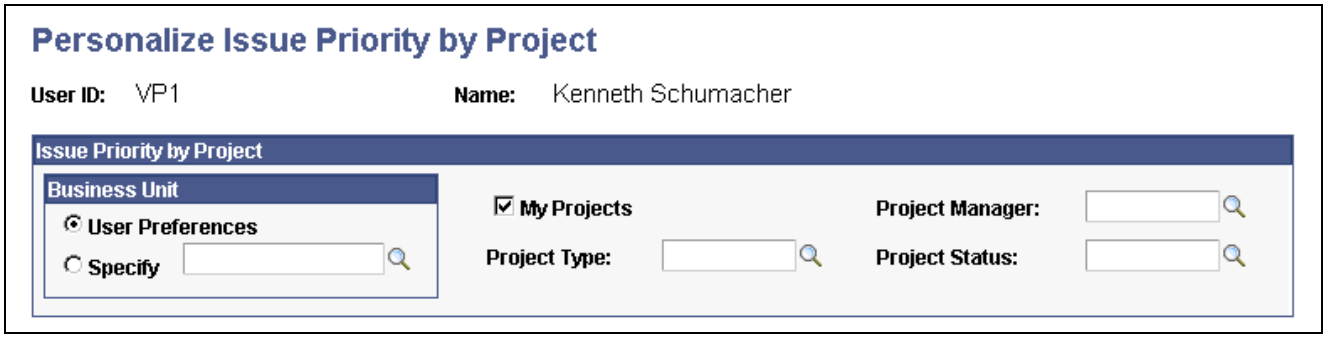
Access the Issue Priority by Project pagelet.

This pagelet displays the top five projects that have the greatest number of issues and sorts the issues by priority. Each project ID appears as a link that accesses the Flexible Analysis page.

Click one of the visual indicators that represents a high, medium, or low priority to access the Issue Management component (PC_IM_ISSUE) for the selected project and issue priority. If there is only one issue at that priority level, the Issue Management component appears. When there is more than one issue, a list of links appears for you to select a particular issue.

Personalizing the Issue Priorities by Project Pagelet

Access the Personalize Issue Priority by Project page.



Personalize Issue Priority by Project page

Specify parameters to filter the projects that you want to appear on the Issue Priority by Project pagelet.

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Click Restore Defaults to restore the default selection criteria that the pagelet administrator establishes on the ESA Portal Pack Pagelet Default Administration page. The Restore Defaults button appears if you access this page by clicking the Customize Issue Priority by Project link on the Issue Priority by Project pagelet.

Viewing Top Five Issues

This section discusses how to:

- View the top five issues.
- Personalize the Top 5 Issues pagelet.

Pages Used to View Top Five Issues

Page Name	Object Name	Navigation	Usage
Top 5 Issues pagelet	PGM_PE_TISU (wide), PGM_PE_TISU_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Top 5 Issues.	View up to five projects or programs that have the highest number of open high priority issues.
Personalize Top 5 Issues	PGM_PE_TISU_PRS	• Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Top 5 Issues link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Top 5 Issues icon on the Top 5 Issues pagelet.	Define default display information for the Top 5 Issues pagelet.

Viewing the Top Five Issues

Access the Top 5 Issues pagelet.

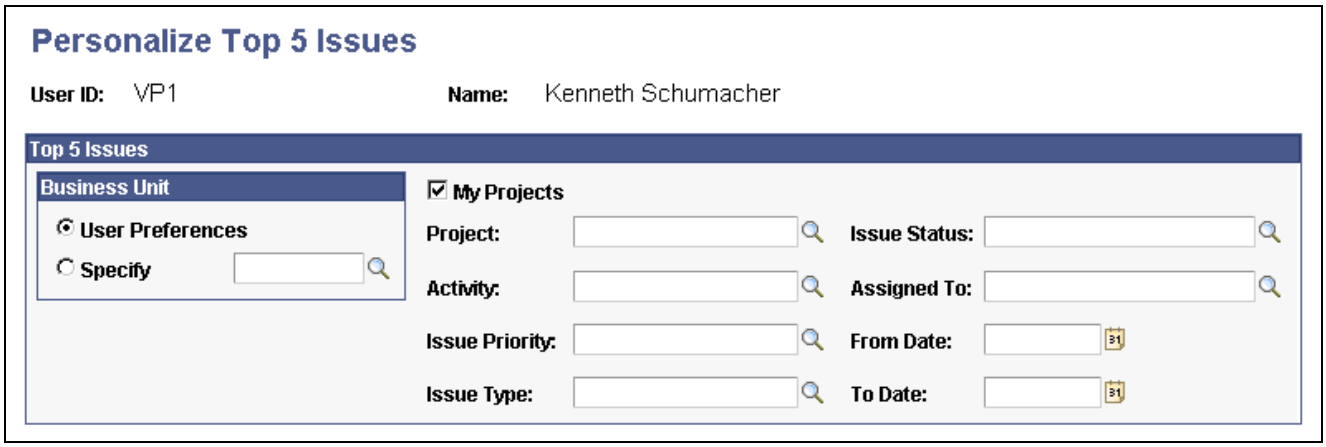
You select the program or project to monitor, and the Top 5 Issues pagelet displays the top five issues that it encounters in the specific project or program. The system determines the top five issues by first selecting the issues with the highest priority from the options of high, medium, and low. Then the system selects the oldest issues, according to the Issue Entered Date. Only issues without resolutions appear.

Click the issue ID link to access the Issue page in PeopleSoft Program Management.

Personalizing the Top 5 Issues Pagelet

Access the Personalize Top 5 Issues page.

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Personalize Top 5 Issues page

Specify parameters to filter the projects or programs and issues that you want to appear on the Top 5 Issues pagelet.

Click Restore Defaults to restore the default selection criteria that the pagelet administrator establishes on the ESA Portal Pack Pagelet Default Administration page. The Restore Defaults button appears if you access this page by clicking the Customize Top 5 Issues link on the Top 5 Issues pagelet.

Viewing Top Five Risks

This section discusses how to:

- View the top five risks.
- Personalize the Top 5 Risks pagelet.

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Pages Used to View Top Five Risks

Page Name	Object Name	Navigation	Usage
Top 5 Risks pagelet	PGM_PE_TOP_RISK (wide), PGM_PE_TOP_RISK_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Top 5 Risks.	View up to five active or potential risks in order of the risk status and priority.
Personalize Top 5 Risks	PGM_PE_TOP_RSK_PRS	• Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Top 5 Risks link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Top 5 Risks icon on the Top 5 Risks pagelet.	Define default display information for the Top 5 Risks pagelet.

Viewing the Top Five Risks

Access the Top 5 Risks pagelet.

You select the program or project to monitor, and the Top 5 Risks pagelet lists the top five active or potential risks in order of the risk status and priority. Click a risk summary link to access the Project Risk page to view and modify the risk.

Personalizing the Top 5 Risks Pagelet

Access the Personalize Top 5 Risks page.



Personalize Top 5 Risks page

Specify parameters for the Top 5 Risks pagelet to include risks from projects in a specified business unit or in the My Projects list. To narrow the selection criteria you can specify risks that belong to a project and activity or that have a specific value for attributes such as the risk type or the person assigned to the risk.

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Click Restore Defaults to restore the default selection criteria that the pagelet administrator establishes on the ESA Portal Pack Pagelet Default Administration page. The Restore Defaults button appears if you access this page by clicking the Customize Top 5 Risks link on the Top 5 Risks pagelet.

Viewing Forecast to Complete Information

This section discusses how to:

- View forecast to complete information.
- Personalize the Forecast to Complete pagelet.

Pages Used to View Forecast to Complete Information

Page Name	Object Name	Navigation	Usage
Forecast to Complete pagelet	PC_PE_ETC_VARIANCE	Click the Personalize Content link on the PeopleSoft homepage. Select Forecast to Complete.	View the forecast to complete date variance for a maximum of five projects with the greatest variance.
Personalize Forecast to Complete	PC_PE_ETC_PRS	• Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Forecast to Complete Variance link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Forecast to Complete icon on the Forecast to Complete pagelet.	Define default display information for the Forecast to Complete pagelet.

Viewing Forecast to Complete Information

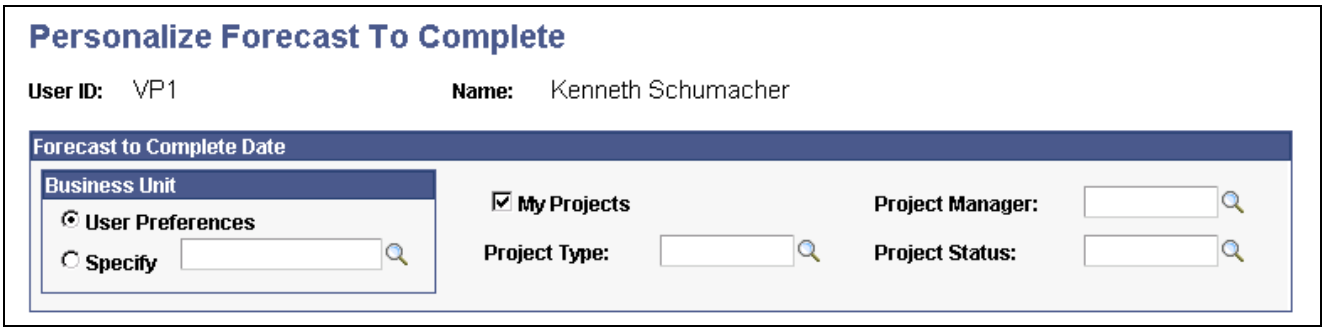
Access the Forecast to Complete pagelet.

The pagelet displays a bar graph of a maximum of five projects with the greatest variance. Click the Show All / Enhanced link to access the Forecast to Complete Variance page, which contains more details about date and time variance.

Personalizing the Forecast to Complete Pagelet

Access the Personalize Forecast to Complete page.

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Personalize Forecast to Complete page

Specify parameters to filter the projects that you want to appear on the Forecast to Complete pagelet.

Viewing Programs

This section discusses how to:

- View My Program.
- Personalize the My Program pagelet.

Pages Used to View Programs

Page Name	Object Name	Navigation	Usage
My Program pagelet	PGM_PE_MYPGM (wide), PGM_PE_MYPGM_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select My Program.	View the specified program and the top four worst health projects.
Personalize My Program	PGM_PE_MYPGM_PRS	Click the Customize My Program icon on the My Program pagelet.	Define default display information for the My Program pagelet.

Viewing My Program

Access the My Program pagelet.

This pagelet displays the selected program and the top four projects that have the worst health within the program selected on the pagelet's personalization page. The projects that appear are one level down from the selected program on the Enterprise Program Tree.

Project (ID) Click this link for the selected program to access the Review Program page, which provides more detailed information about the program and projects under the program.

When you click a link for one of the projects under the program, the pagelet transfers you to the Flexible Analysis page for the selected Project ID. This provides cost drilldown functionality and the ability to reconfigure flexible analysis cost columns.

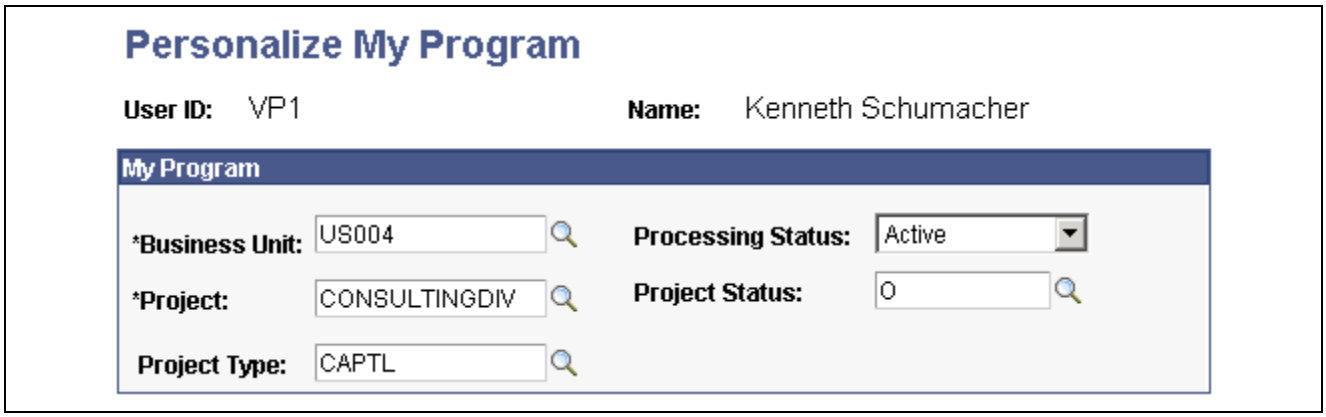
Program Indicates if it is a program or a project.

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Process Status	Displays the processing status of the project. Available values are: *Pending, Active,* or *Inactive.*
Project Manager	Displays the current project manager.
Project Type	Indicates the project type.
Project Status	Displays the state of the project in its progress toward completion.
% Complete (percent complete)	Displays the percentage of the project work that is complete. This value can be entered by a project team member or automatically calculated by the system.
Health	Displays a visual indicator based on the health of the project. Available indicators are: Good (green diamond) Fair (yellow triangle) Poor (red square)

Personalizing the My Program Pagelet

Access the Personalize My Program page.



Personalize My Program page

Use the fields to filter the program and projects that you want to appear on the My Program pagelet.

Using OTAs for PeopleSoft Program Management

This section provides an overview of OTAs in PeopleSoft Program Management and discusses how to:

- Personalize the Budget to Forecast Time Variance OTA.
- Personalize the Projects Predicted to be Late OTA.
- Personalize the Actual to Forecast Utilization OTA.
- Personalize the Forecast Utilization OTA.

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An OTA must be selected on the Personalize Operational Threshold Alerts page for it to appear on a pagelet. OTAs are viewed on the Operational Threshold Alert pagelet with data that is personalized at the system administrator level or by the user. Two of the PeopleSoft Program Management OTAs—Forecast Utilization and Actual to Forecast Utilization—can also be viewed on the Operational Threshold Chart pagelet.

See Also

Chapter 3, "Setting Up PeopleSoft Enterprise Service Automation Portal Pack," page 9

Understanding OTA Calculations in PeopleSoft Program Management

This section discusses calculations for these OTAs:

- Budget to Forecast Time Variance
- Projects Predicted Late to be Late
- Forecast Utilization
- Actual to Forecast Utilization

Calculating Budget to Forecast Time Variance

The calculations for the Budget to Forecast Time Variance OTA are:

Variable	Calculation Method
Budget Hours	Sum of the values in the Project Summary table RESOURCE_QUANTITY field for rows belonging to the Projects Budget analysis group.
Estimated Remaining Hours	Sum of the values from the Forecasting Detail table (TOTAL_HOURS + REMAINING_HRS) for rows in the most current forecast horizon.
Actual Hours	Sum of the values in the Project Summary table RESOURCE_QUANTITY field for rows belonging to the Projects Cost analysis group.
Estimated Hours	Estimated Remaining Hours + Actual Hours
Percent Variance	((Estimated Hours – Budget Hours) / Budget Hours) x 100

For this OTA, the unit of measure is converted to hours, or the row is excluded from the calculation if the unit of measure cannot be converted to hours.

Calculating Projects Predicted to be Late

The calculation for the Projects Predicted to be Late OTA is:

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Variable	Calculation Method
Project Estimated Completion Date	The maximum COMPLETION_DATE on the Forecasting Detail table for the most current forecast horizon for each project.
Number of Projects Predicted to be Late	Count of the projects where the Estimated Completion Date is less than the value in the Project End Date field on the Project table.

Calculating Actual to Forecast Utilization

The Actual to Forecast Utilization OTA compares actual utilization with forecasted utilization for a specified group of resources and period of time. This table lists the calculations for the Actual to Forecast Utilization OTA:

Variable	Calculation Method
Actual Utilization	A percentage equal to the actual resource hours entered, that are not denied, in PeopleSoft Expenses for the specified period of time, divided by resource capacity for that period of time.
Forecast Utilization	A percentage equal to the forecasted resource utilized hours for the specified period of time entered in Services Forecasting divided by the resource capacity for that period of time.
Actual to Forecast Utilization Variance	The actual utilization percentage minus the forecast utilization percentage. The system compares the absolute value of the variance to the alert variance threshold percentage value that is specified by an administrator or personalized by each user. If the variance is less than or equal to the alert variance threshold percentage, a green visual indicator appears on the OTA pagelet. If the variance exceeds the alert variance threshold percentage, a red alert visual indicator appears on the OTA pagelet. For example, if actual utilization is *70%* and forecast utilization is *85%,* the variance is *–15%.* If the alert variance threshold percentage value is *10%,* a red alert visual indicator appears because the absolute value of the variance is greater than the alert variance threshold.

You can click Actual to Forecast Utilization in the Operational Threshold Alert pagelet to access the Utilization Parameters - Business Units or Organizational Units page in the PeopleSoft Program Management Services Forecasting feature to launch a resource utilization interactive report. You can filter the report by HR business unit, department, location, job code, employee ID, and range of weeks to include in the report.

Calculating Forecast Utilization

The Forecast Utilization OTA compares forecasted utilization with capacity for a specified group of resources and period of time. This table lists the calculations for the Forecast Utilization OTA:

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Variable	Calculation Method
Forecasted Hours	The estimated total number of project and personal hours for the specified period of time that are entered in Services Forecasting that a resource plans to engage in activity that the organization treats as *utilized* time.
Capacity Hours	The standard hours less company holiday hours for the resources that are included in the utilization analysis.
Forecast Utilization	The total number of hours that a resource plans to engage in activity that the organization treats as *utilized* time divided by the resource's capacity for a given period of time. This percentage is the total forecasted utilized hours divided by the number of capacity hours in the same period.

The system compares the forecast utilization percentage to the alert threshold percent value that is specified by an administrator or personalized by each user. If the forecast utilization equals or exceeds the alert threshold, a green visual indicator appears on the OTA pagelet. If the forecast utilization is below the alert threshold, a red alert visual indicator appears on the OTA pagelet.

Each user can determine the scope of the Forecast Utilization OTA by adjusting the OTA's personalization settings. The OTA allows for filtering resources by requiring the user to select a human resources (HR) business unit and the number of future weeks over which the analysis is to take place. The user has the option of further filtering the scope of the analysis by specifying one or more locations or one or more departments within the HR business unit.

Click Forecast Utilization in the Operational Threshold Alert pagelet to access the Utilization Parameters - Business Units or Organizational Units page in the PeopleSoft Program Management Services Forecasting feature to launch a resource utilization interactive report. You can filter the interactive report by HR business unit, department, location, job code, employee ID, and range of weeks to include in the report.

Note. Time reporting codes that qualify as utilized time are specified in the Utilization Definition component (RS_AGG_DEF) in PeopleSoft Program Management.

Pages Used to Personalize OTAs for PeopleSoft Program Management

Page Name	Object Name	Navigation	Usage
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	• Click the Customize icon on the Operational Threshold Alert pagelet. • Click the Customize icon on the Operational Threshold Chart pagelet.	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page used to personalize individual OTA tolerance levels.
Operational Threshold Alert pagelet	PC_PE_OTA_LIST (wide), PC_PE_OTA_LIST_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage.	View up to five OTAs that display real-time monitoring data according to tolerance levels that you define.

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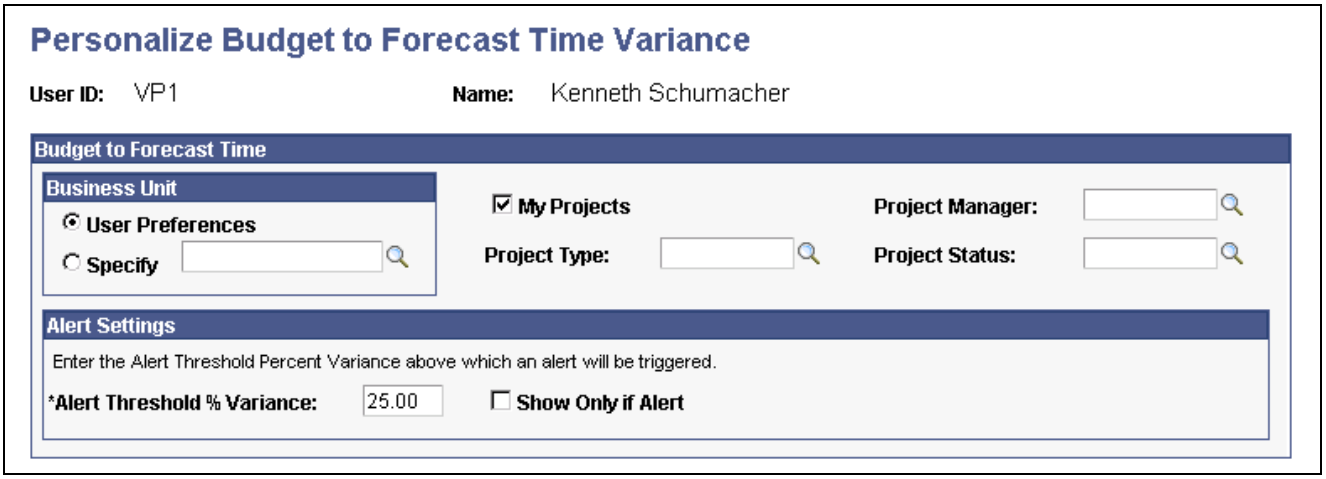
Page Name	Object Name	Navigation	Usage
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage.	View an OTA that displays a real-time monitoring chart according to tolerance levels that you define.
Personalize Budget to Forecast Time Variance	PC_PE_BETV_PRS,	• Click the Budget to Forecast Time Variance link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Budget to Forecast Time Variance OTA.
Personalize Projects Predicted to be Late	PC_PE_PJLT_PRS	• Click the Projects Predicted to be Late link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Projects Predicted to be Late OTA.
Personalize Actual to Forecast Utilization	RS_PE_RSAU_PRS	• Click Actual to Forecast Utilization on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize icon on the Operational Threshold Alert pagelet or Operational Threshold Chart pagelet. Click the Personalize icon on the Actual to Forecast Utilization line on the Personalize Operational Threshold Alerts page.	Specify the business unit, date range, filter, and alert variance threshold percentage for the Actual to Forecast Utilization analysis.

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Page Name	Object Name	Navigation	Usage
Personalize Forecast Utilization	RS_PE_RSFU_PRS	• Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click Forecast Utilization on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize icon on the Operational Threshold Alert pagelet or Operational Threshold Chart pagelet. Click the Personalize icon on the Forecast Utilization row on the Personalize Operational Threshold Alerts page.	Specify the business unit, date range, filter, and alert threshold percentage for the Forecast Utilization OTA.

Personalizing the Budget to Forecast Time Variance OTA

Access the Personalize Budget to Forecast Time Variance page.



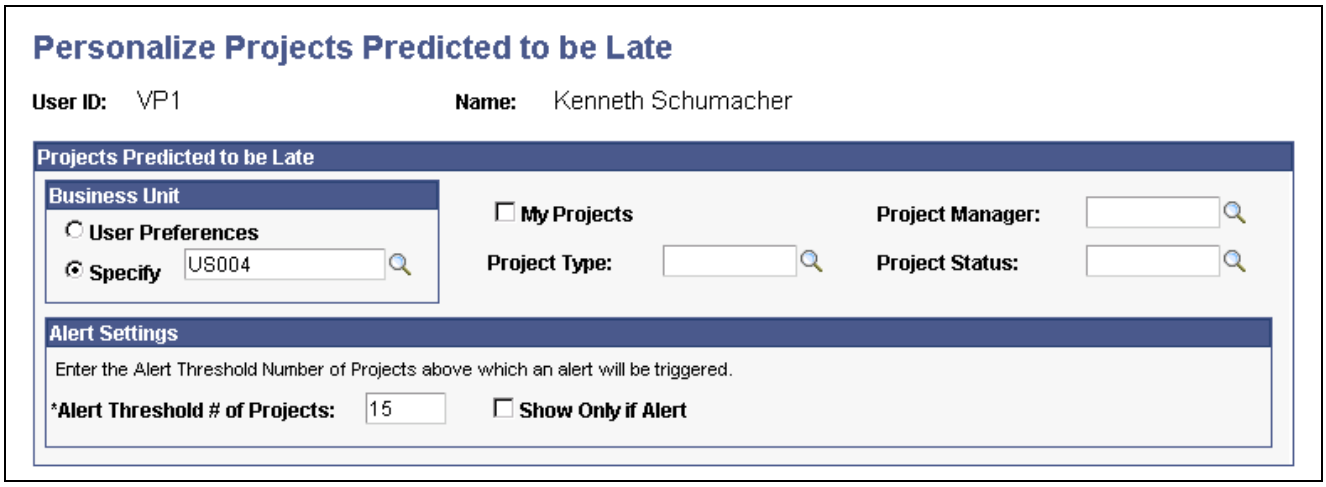
Personalize Budget to Forecast Time Variance page

Define the parameters for calculating and displaying the variance between budgets and forecasted time.

Personalizing the Projects Predicted to be Late OTA

Access the Personalize Projects Predicted to be Late page.

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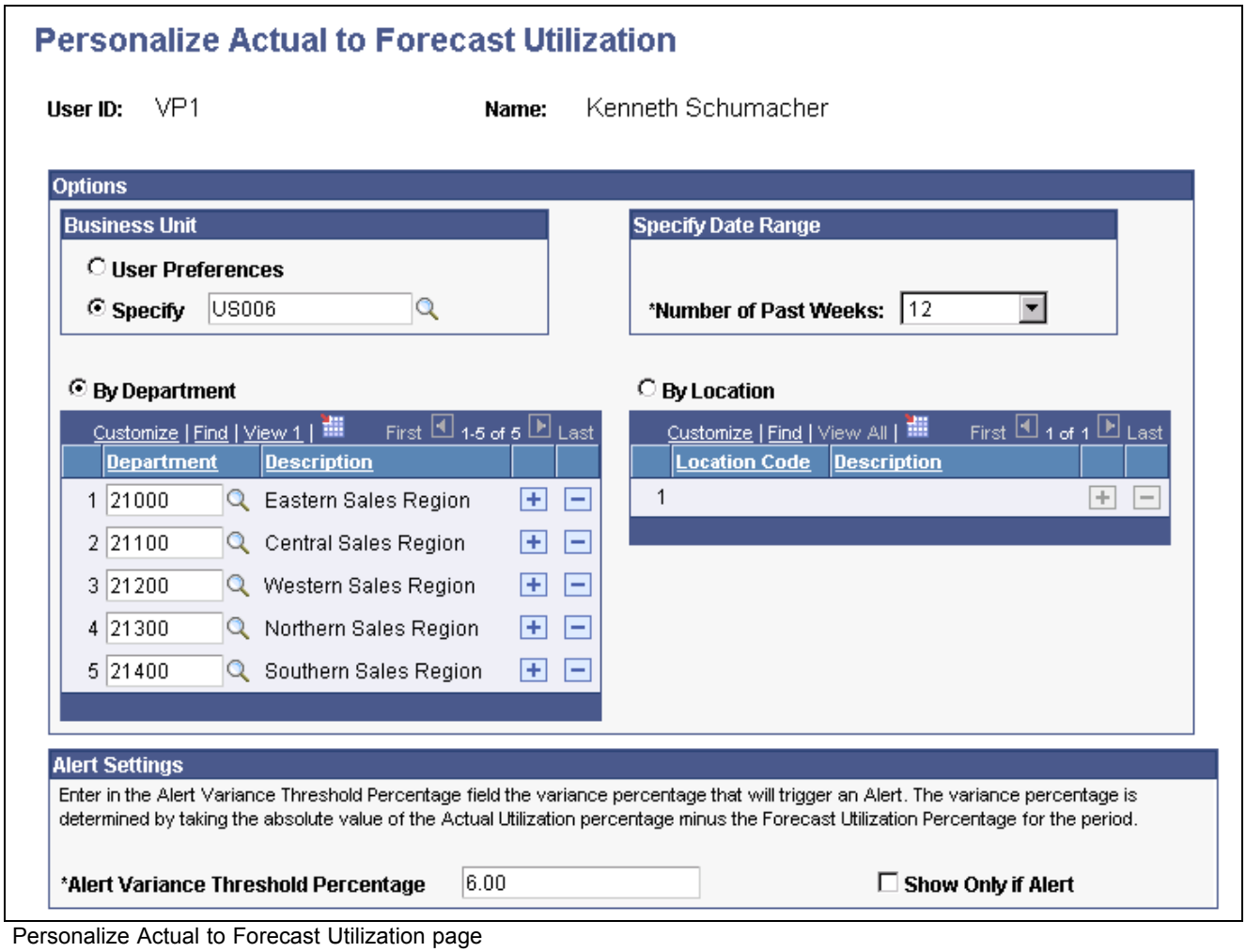


Personalize Projects Predicted to be Late page

Define the parameters for calculating and displaying the projects that are predicted to be late.

Personalizing the Actual to Forecast Utilization OTA

Access the Personalize Actual to Forecast Utilization page.



Personalize Actual to Forecast Utilization page

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You specify business unit, department, and location information in this page in the same way as the Personalize Forecast Utilization page.

Number of Past Weeks Specify the number of past weeks to analyze. The system starts from the previous week and counts back for the specified number of weeks. Utilization is calculated for the entire number of weeks as if it were one rolling period.

Note. The Actual to Forecast Utilization OTA pagelet and chart does not include the current calendar week in the analysis. The most recent calendar week (prior to the current week) counts as *01*.

The maximum number of weeks that can appear on the OTA chart is five weeks.

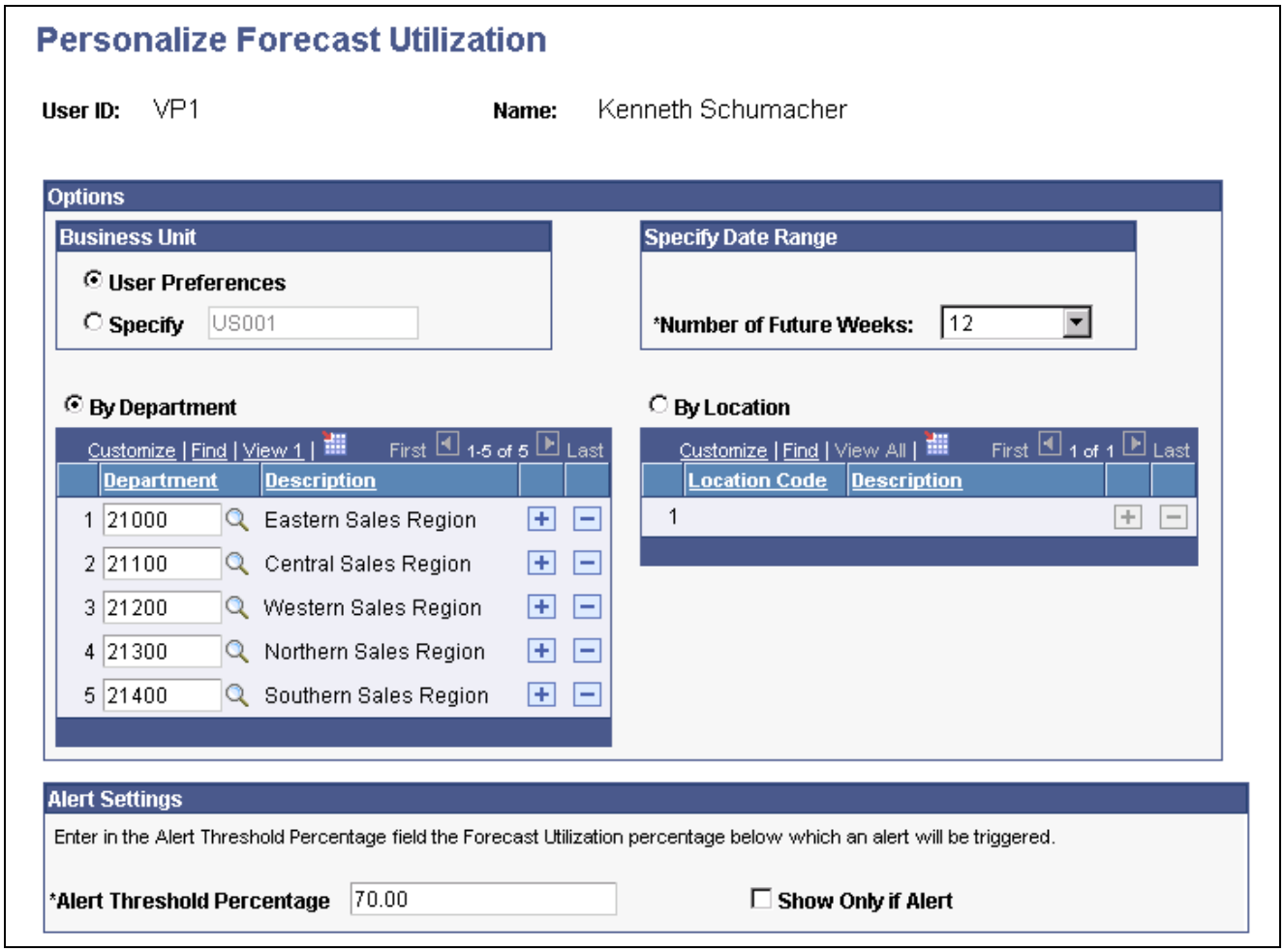
Alert Variance Threshold Percentage Enter the actual to forecast utilization variance percentage that triggers an alert on the OTA pagelet. The variance is the absolute value of the actual utilization percentage minus the forecast utilization percentage. If the variance is less than or equal to the value that you enter, a green visual indicator appears on the OTA pagelet. If the variance exceeds the value that you enter, a red alert visual indicator appears on the OTA pagelet.

Enter the percentage as a whole or mixed number, such as *10* for 10 percent, or *15.5* for 15.5 percent. Enter a positive number.

Personalizing the Forecast Utilization OTA

Access the Personalize Forecast Utilization page.

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Personalize Forecast Utilization page

Administrators establish default values for the Forecast Utilization OTA pagelet and chart for each business unit. Users can overwrite the business unit default values when they personalize the Forecast Utilization OTA.

You must select an HR business unit to identify the resources to evaluate in the OTA pagelet or chart. You can view resources from your HR business unit, or select a different business unit. You can also narrow the list of resources to evaluate based on department or location. If you do not specify a department or location, the system evaluates all resources based on the utilization definition of the business unit that you select.

User Preferences Select to analyze resources from your HR business unit based on the utilization definition.

Note. You define the billing actions, time reporting codes, and job codes that constitute utilized time for each HR business unit in the Utilization Definition component in PeopleSoft Program Management.

Specify Select Specify and enter an HR business unit to analyze resources from a business unit other than the HR business unit that is defined in the utilization definition.

Number of Future Weeks Select the period over which utilization is analyzed. The system starts with the current week and counts forward for the specified number of weeks. Utilization is calculated for the entire number of weeks as if it were one rolling period.

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Note. For the Forecast Utilization OTA, the current calendar week counts as week *01*.

The maximum number of weeks that can appear on the OTA chart is five weeks.

By Department Select By Department to analyze utilization for one department or multiple departments in aggregate. Click Look up Department to choose from a list of departments. Add as many departments as required.

The default value for administrators is the administrator's department and business unit from the Job record (JOB). The default value for individual users is specified by the administrator.

By Location Select By Location to analyze utilization for one location or multiple locations in aggregate. Click Look up Location Code to choose from a list of locations. Add as many locations as required.

The default value for administrators is the administrator's location and business unit from the Job record. The default value for individual users is specified by the administrator.

Alert Threshold Percentage Enter the minimum acceptable forecast utilization percentage. If forecast utilization falls below the alert threshold percentage, a red alert visual indicator appears in the OTA pagelet. If forecast utilization equals or exceeds the alert threshold percentage, a green visual indicator appears in the OTA pagelet indicating that the forecast utilization is acceptable.

Enter the percentage as a whole or mixed number, such as *85* for 85 percent, or *75.5* for 75.5 percent. Enter a positive number.

Show Only if Alert Select for the OTA to appear on the pagelet or chart only if forecast utilization falls below the alert threshold percentage. Clear this option for the OTA to appear on the pagelet or chart if forecast utilization falls above, equals, or falls below the alert threshold percentage.

Restore Defaults Select to restore the values on this page to the global default values that are established by the administrator.

This button does not appear for administrators who access the page from the Setup Financials/Supply Chain folder.

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CHAPTER 14

Using Pagelets Enabled by PeopleSoft Project Costing

This chapter discusses how to:

- View top projects.
- Use Operational Threshold Alerts (OTAs) for PeopleSoft Project Costing.
- View transactions in progress (TIPs) for PeopleSoft Project Costing.

Viewing Top Projects

This section discusses how to:

- View the top projects by budget amount.
- Personalize the Top Projects pagelet.

Pages Used to View Top Projects

Page Name	Object Name	Navigation	Usage
Top Projects pagelet	PC_PE_TOP_PROJS (wide), PC_PE_TOP_PROJS_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Top Projects.	View budget amounts for the top five projects using filter criteria that you specify on the Personalize Top Projects page.
Personalize Top Projects	PC_PE_TOP_PRS	• Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Top Projects link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Top Projects icon on the Top Projects pagelet.	Define default information to appear on the Top Projects pagelet.

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Viewing Top Projects by Budget Amount

Access the Top Projects pagelet.

This pagelet displays the top five projects with the largest budgets sorted from high to low.

Project ID — Displays the unique project identifier. Click the link to access the Project Valuation component (PC_VALN_ANALYTICS) search page for the corresponding project.

See *PeopleSoft Enterprise Project Costing 9.0 PeopleBook* , "Analyzing Projects," Setting Up and Using Project Valuation.

% Complete (percent complete) — Displays the progress of the project and is calculated or entered manually based on project setup parameters. This field appears only on the wide version of this pagelet.

Cost Amount — Displays the sum of the values in the Project Business Unit Amount field (RESOURCE_AMOUNT) in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field (AN_GRP_TOT_COSTS) on the Project Costing Definition page for the project.

Budget Total — Displays the sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Cost Budget field (AN_GRP_ACTV_BUD) on the Project Costing Definition page for the project.

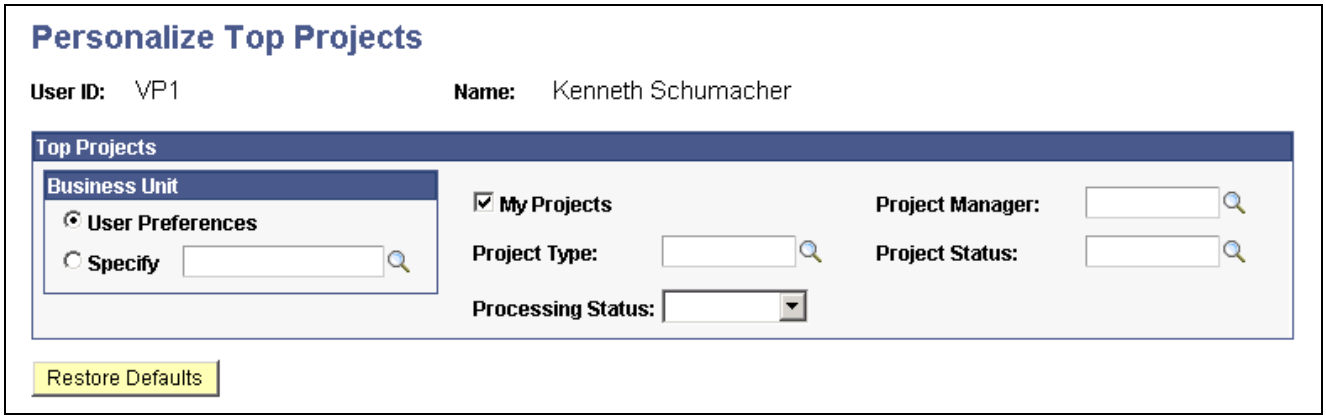
Cost Variance — Displays a value calculated as: (Cost amount – Budget total). This field appears only on the wide version of this pagelet.

Curr (currency) or **Currency Code** — Displays the base currency for the business unit.

Project Status, Health, and **Health As Of** — These fields provide information about the project. They appear only on the wide version of this pagelet.

Personalizing Top Projects

Access the Personalize Top Projects page.



Personalize Top Projects page

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You access this page in one of two ways based on your role:

- Administrators access the Personalize Top Projects page by clicking the Top Projects link on the ESA Portal Pack Pagelet Default Administration page. The administrator uses the ESA Portal Pack Pagelet Default Administration page to set up default filter criteria for all Enterprise Service Automation pagelets.
- Other users access this page by clicking the Customize Top Projects icon on the Top Projects pagelet.

User Preferences Select to view only those projects with the project business unit that is specified in your user preferences.

Specify Select to view projects from a business unit other than the project business unit that is specified in your user preferences. If you select Specify, you must enter a business unit value.

My Projects Select to indicate that only those projects that you designate as part of your My Projects list appear on the Top Projects pagelet. If you do not have any projects in your My Projects list, no data appears on the Top Projects pagelet.

You can optionally filter the projects that appear on the Top Projects pagelet by specifying values for these fields:

- Project Manager
- Project Type
- Project Status
- Processing Status

Restore Defaults Click to restore the default selection criteria that the pagelet administrator establishes on the ESA Portal Pack Pagelet Default Administration page. The Restore Defaults button appears if you access this page by clicking the Customize Top Projects link on the Top Projects pagelet.

Using OTAs for PeopleSoft Project Costing

This section provides an overview of OTA calculations for PeopleSoft Project Costing and discusses how to personalize:

- Budget to actual cost variance.
- Budget to actual time variance.
- Gross margin.
- Projects over budget.

You must select an OTA on the Personalize Operational Threshold Alerts for it to appear on the Operational Threshold Alert pagelet. OTAs are viewed on the Operational Threshold Alert pagelet with data that is personalized at the system administrator level or by the user. Additionally, you can select either the Budget to Actual Cost OTA or the Budget to Actual Time OTA to appear on the Operational Threshold Chart pagelet.

See Also

Chapter 3, “Setting Up PeopleSoft Enterprise Service Automation Portal Pack,” page 9

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Understanding OTA Calculations for PeopleSoft Project Costing

This section discusses the calculations for PeopleSoft Project Costing's operational threshold alerts.

Calculating Budget to Actual Cost Variance

This table lists the calculations for the Budget to Actual Cost Variance OTA:

Variable	Calculation Method
Actual cost	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field on the Project Costing Definition page for the project.
Budget cost	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Cost Budget field on the Project Costing Definition page for the project.
Percent variance	((Actual costs – Budget costs) ÷ Budget costs) × 100

Calculating Budget to Actual Time Variance

This table lists the calculations for the Budget to Actual Time Variance OTA:

Variable	Calculation Method
Actual hours	Sum of the values in the Quantity field (RESOURCE_QUANTITY) in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field on the Project Costing Definition page for the project.
Budget hours	Sum of the values in the Quantity field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Cost Budget field on the Project Costing Definition page for the project.
Percent variance	(Actual hours – Budget hours) ÷ Budget hours) × 100

Calculating Gross Margin

This table lists the calculations for the Gross Margin OTA:

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Variable	Calculation Method
Total revenue recognized	Sum of the values in the Project Business Unit Amount field in the summary table for all revenue rows with analysis types in the analysis group of *PSREV* (system revenue) that have been recognized. Rows with recognized revenue have a general ledger distribution status of *D* (distributed). **Note.** To include fixed-amount revenue along with rate-based revenue, add the *FRV* (fixed cost revenue amount) analysis type to the *PSREV* analysis group.
Actual costs	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field on the Project Costing Definition page for the project.
Gross margin	(Total recognized revenue – Actual costs) ÷ Total recognized revenue) × 100

Calculating Projects Over Budget

This table lists the calculations for the Projects Over Budget OTA:

Variable	Calculation Method
Actual cost	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field on the Project Costing Definition page for the project.
Budget cost	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Cost Budget field on the Project Costing Definition page for the project.
Number of projects over budget	Count of the projects in the summary table where actual cost is greater than budget cost.

Pages Used to Personalize OTAs for PeopleSoft Project Costing

Page Name	Object Name	Navigation	Usage
Operational Threshold Alert pagelet	PC_PE_OTA_LIST (wide), PC_PE_OTA_LIST_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Alert on the Personalize Content page and return to the PeopleSoft homepage.	View up to five OTAs that display real-time monitoring data based on tolerance levels that you define.

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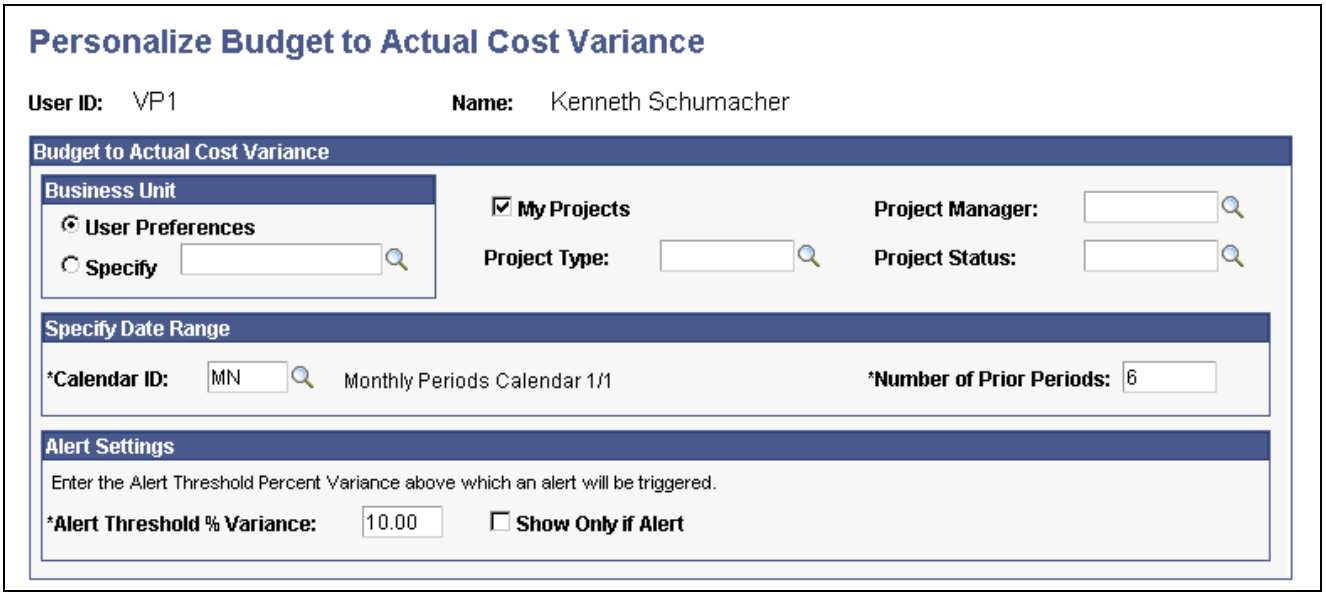
Page Name	Object Name	Navigation	Usage
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Chart on the Personalize Content page and return to the PeopleSoft homepage.	View an OTA that displays a real-time monitoring chart based on tolerance levels that you define.
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	• Click the Customize Operational Threshold Alert icon on the Operational Threshold Alert pagelet. • Click the Customize Operational Threshold Chart icon on the Operational Threshold Chart pagelet.	Select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.
Personalize Budget to Actual Cost Variance	PC_PE_BACV_PRS	• Click the Budget to Actual Cost Variance link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Budget to Actual Cost OTA.
Personalize Budget to Actual Time Variance	PC_PE_BATV_PRS	• Click the Budget to Actual Time Variance link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Budget to Actual Time OTA.
Personalize Gross Margin	PC_PE_GRMG_PRS	• Click the Gross Margin link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Gross Margin OTA.

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Page Name	Object Name	Navigation	Usage
Personalize Projects Over Budget	PC_PE_OVER_PRS	• Click the Projects Over Budget link on the ESA Portal Pack Pagelet Default Administration page. • Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Projects Over Budget OTA.

Personalizing Budget to Actual Cost Variance

Access the Personalize Budget to Actual Cost Variance page.



Personalize Budget to Actual Cost Variance page

The Budget to Actual Cost description appears on the Operational Threshold Alert pagelet as a link that can access the Budget Summary component (PC_BUD_SUMMARY). Budget to Actual Cost can also appear as a bar chart on the Operational Threshold Chart pagelet.

Specify Date Range

Select the calendar and period over which the system displays the budget to actual variance.

Calendar ID Select a calendar for the system to use when displaying the budget to actual variance on the pagelet.

Number of Prior Periods Enter the number of periods for the system to use to obtain the budget to actual variance to appear on the pagelet. The system starts from the prior period and counts backward for the specified number of periods. The system uses the accounting date to compare with the date ranges specified by the number of periods.

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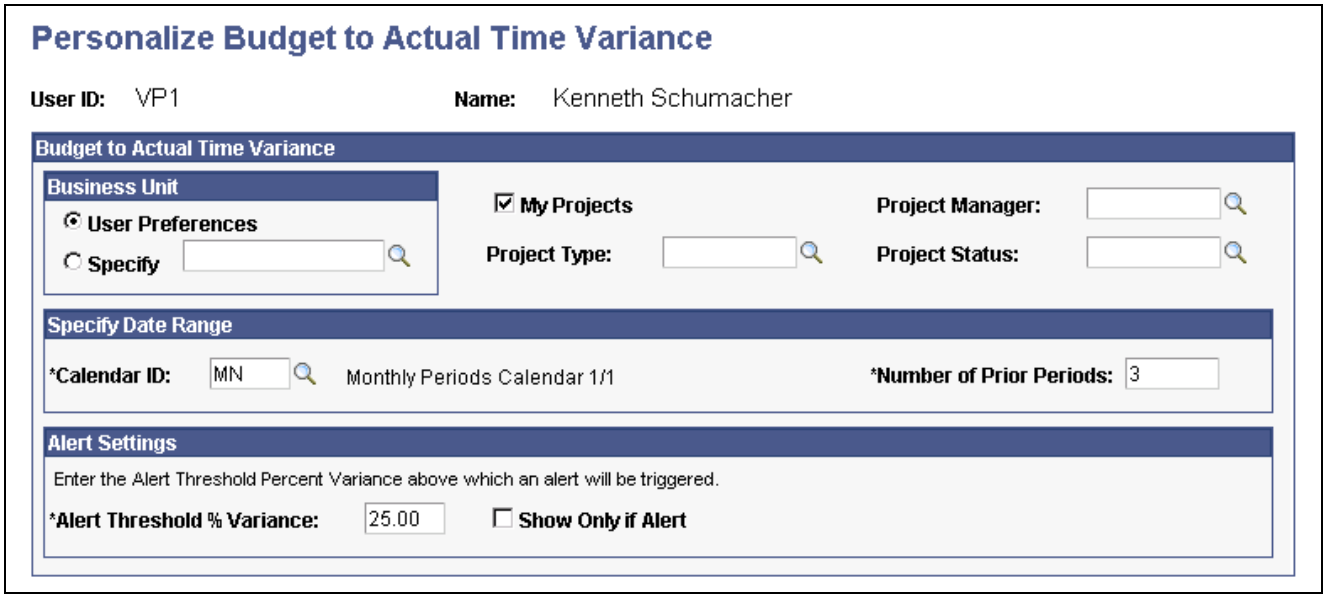
Alert Settings

Alert Threshold % Variance (alert threshold percentage variance) Enter the alert threshold that triggers a red alert visual indicator to appear on the Operational Threshold Alert pagelet if the budget to actual cost variance is greater than the threshold. A green visual indicator appears on the Operational Threshold Alert pagelet if the budget to actual cost variance equals or is less than the threshold, indicating that the variance is acceptable.

Show Only if Alert Select this option for the OTA to appear on the OTA pagelet only if the budget to actual cost variance is greater than the alert threshold. Clear this option for the OTA to appear on the pagelet if the budget to actual cost variance is greater than, equal to, or less than the alert threshold.

Personalizing Budget to Actual Time Variance

Access the Personalize Budget to Actual Time Variance page.



Personalize Budget to Actual Time Variance page

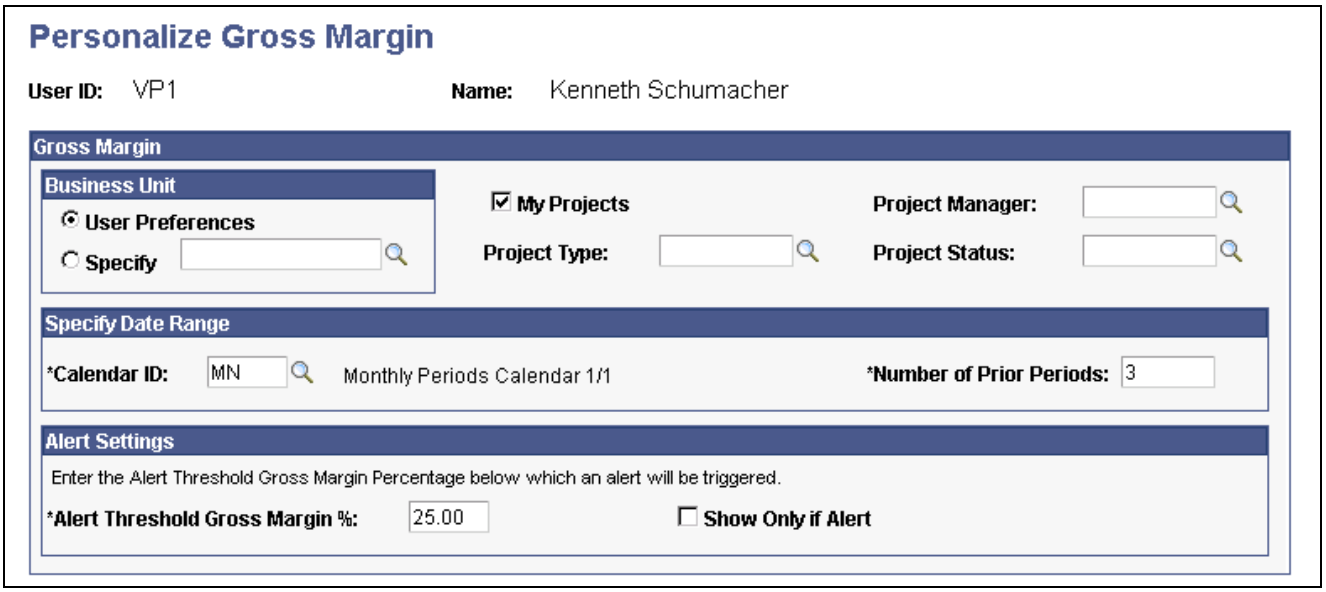
For this OTA, the unit of measure is converted to hours, or the row is excluded from the calculation if the unit of measure cannot be converted.

The Budget to Actual Time description appears on the Operational Threshold Alert pagelet as a link that can access the Budget Summary component. Budget to Actual Time can also appear as a bar chart on the Operational Threshold Chart pagelet.

Personalizing Gross Margin

Access the Personalize Gross Margin page.

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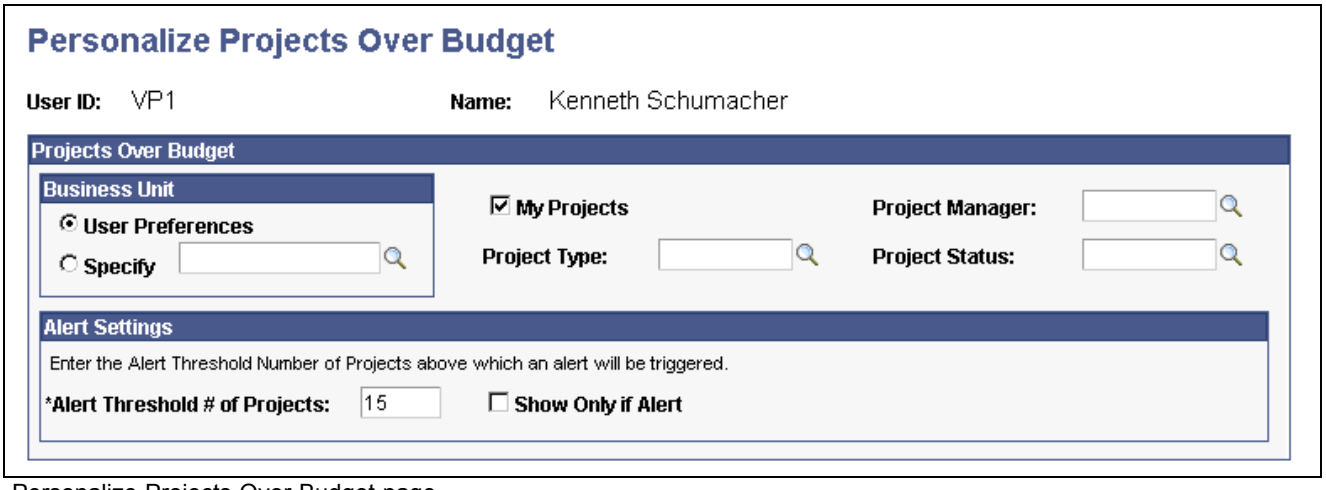


Personalize Gross Margin page

For this OTA, the alert threshold triggers a red alert visual indicator to appear on the Operational Threshold Alert pagelet if the gross margin is less than the threshold. A green visual indicator appears on the Operational Threshold Alert pagelet if the gross margin equals or is greater than the threshold, indicating that the margin is acceptable.

Personalizing Projects Over Budget

Access the Personalize Projects Over Budget page.



Personalize Projects Over Budget page

For this OTA, the alert threshold represents the number of projects that trigger a red alert visual indicator to appear on the Operational Threshold Alert pagelet if the number of projects over budget is greater than the threshold. A green visual indicator appears on the Operational Threshold Alert pagelet if the number of projects over budget is less than the threshold, indicating that the number of projects is acceptable.

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Viewing TIPs for PeopleSoft Project Costing

This section discusses how to view these TIPs:

- Unpriced in progress.
- Payables in progress.
- Expenses in progress.
- Inventory in progress.
- Purchasing in progress.
- Expenses time in progress.

See Also

PeopleSoft Enterprise Project Costing 9.0 PeopleBook , "Pricing Project Costs"

PeopleSoft Enterprise Project Costing 9.0 PeopleBook , "Analyzing Projects," Viewing Transactions in Progress

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Pages Used to View Transactions in Progress for PeopleSoft Project Costing

Page Name	Object Name	Navigation	Usage
Unpriced in Progress pagelet	PC_PE_TIP_ALLTOPC	Click the Personalize Content link on the PeopleSoft homepage. Select Unpriced in Progress.	View a graph showing all expense transactions that are transmitted to PeopleSoft Project Costing that are not yet costed or priced.
Payables in Progress pagelet	PC_PE_TIP_APTOPC	Click the Personalize Content link on the PeopleSoft homepage. Select Payables in Progress.	View a graph showing the number of payable expense transactions that are recorded but not yet transmitted to PeopleSoft Project Costing.
Expenses in Progress pagelet	PC_PE_TIP_EXTOPC	Click the Personalize Content link on the PeopleSoft homepage. Select Expenses in Progress.	View a graph showing the number of expense transactions that are approved but not yet transmitted to PeopleSoft Project Costing.
Inventory in Progress pagelet	PC_PE_TIP_INTOPC	Click the Personalize Content link on the PeopleSoft homepage. Select Inventory in Progress.	View a graph showing the number of inventory cost transactions that are not yet transmitted to PeopleSoft Project Costing.
Purchasing in Progress pagelet	PC_PE_TIP_POTOPC	Click the Personalize Content link on the PeopleSoft homepage. Select Purchasing in Progress.	View a graph showing purchase order cost transactions that are not yet transmitted to PeopleSoft Project Costing.
Expenses Time in Progress pagelet	PC_PE_TIP_TMTOPC	Click the Personalize Content link on the PeopleSoft homepage. Select Expenses Time in Progress.	View a graph showing the number of time entry transactions that are approved but not yet transmitted to PeopleSoft Project Costing.
Personalize Transaction in Progress	PC_PE_TIP_PRS	Click the Customize icon on any Project Costing TIP pagelet.	Define default information to appear on transaction in progress pagelets for PeopleSoft Project Costing reports.

Viewing Unpriced in Progress

Access the Unpriced in Progress pagelet.

Transaction Inquiry Page Click to access the Transaction in Progress page to view details about the TIPs that are graphed on the pagelet.

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Viewing Payables in Progress

Access the Payables in Progress pagelet.

Payables to Projects Click to access the PeopleSoft Payables page to run the Payables to Project Costing Application Engine process (PC_AP_TO_PC) to transmit payable expense transactions to PeopleSoft Project Costing.

Viewing Expenses in Progress

Access the Expenses in Progress pagelet.

Expenses to Projects Click to access the PeopleSoft Expenses page to run the Expenses to Project Costing process to transmit travel expense transactions to PeopleSoft Project Costing.

Viewing Inventory in Progress

Access the Inventory in Progress pagelet.

Inventory to Projects Click to access the Inventory page to run the Inventory to Project Costing Application Engine process (PC_IN_TO_PC) to transmit inventory cost transactions to PeopleSoft Project Costing.

Viewing Purchasing in Progress

Access the Purchasing in Progress pagelet.

Purchasing to Projects Click to access the Purchasing page to run the Purchasing to Project Costing Application Engine process (PC_PO_TO_PC) to transmit purchase order cost transactions to PeopleSoft Project Costing.

Viewing Expenses Time in Progress

Access the Expenses Time in Progress pagelet.

Expenses to Projects Click to access the PeopleSoft Expenses page to run the Expenses to Project Costing Application Engine process (PC_EX_TO_PC) to transmit travel expense transactions to PeopleSoft Project Costing.

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CHAPTER 15

Using Pagelets Enabled by PeopleSoft Proposal Management

This chapter discusses how to:

- View proposal operational summary information.
- View proposal revenue pipeline information.
- View proposal resource demand information.

See Also

PeopleSoft Enterprise Proposal Management 9.0 PeopleBook

Viewing Proposal Operational Summary Information

This section discusses how to:

- View proposal operational summary information.
- Personalize the Proposal Operational Summary pagelet.

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Pages Used to View Proposal Information

Page Name	Object Name	Navigation	Usage
Proposal Operational Summary pagelet	GM_PE_PROPOSAL (narrow) , GM_PE_PROPOSAL_2 (wide)	Click the Personalize Content link on the PeopleSoft homepage. Select Proposal Operational Summary.	View a list of proposals based on criteria specified on the Personalize Proposals Operational Summary page.
Personalize Proposals Operational Summary	GM_PE_PROPOSAL_PRS	• Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Proposals • Click the Customize icon on the Proposal Operational Summary pagelet.	Define default display information for the Proposal Operational Summary pagelet. The default personalization is initially set by the system administrator.
Maintain Proposal	GM_OPPTY_HDR	Click the link under the Proposal field on the Proposal Operational Summary pagelet.	View proposal information. See *PeopleSoft Enterprise Proposal Management 9.0 PeopleBook* , “Preparing, Generating, and Viewing Proposal Information”.

Viewing Proposal Summary Information

Access the Proposal Operational Summary pagelet.

This pagelet displays proposal information based on criteria specified on the Personalize Proposals Operational Summary page. For each proposal you can view a description of the proposal, the proposal status, the confidence percent, and the date the proposal is targeted for completion. The system displays a maximum of five top proposals, which have highest proposed amount.

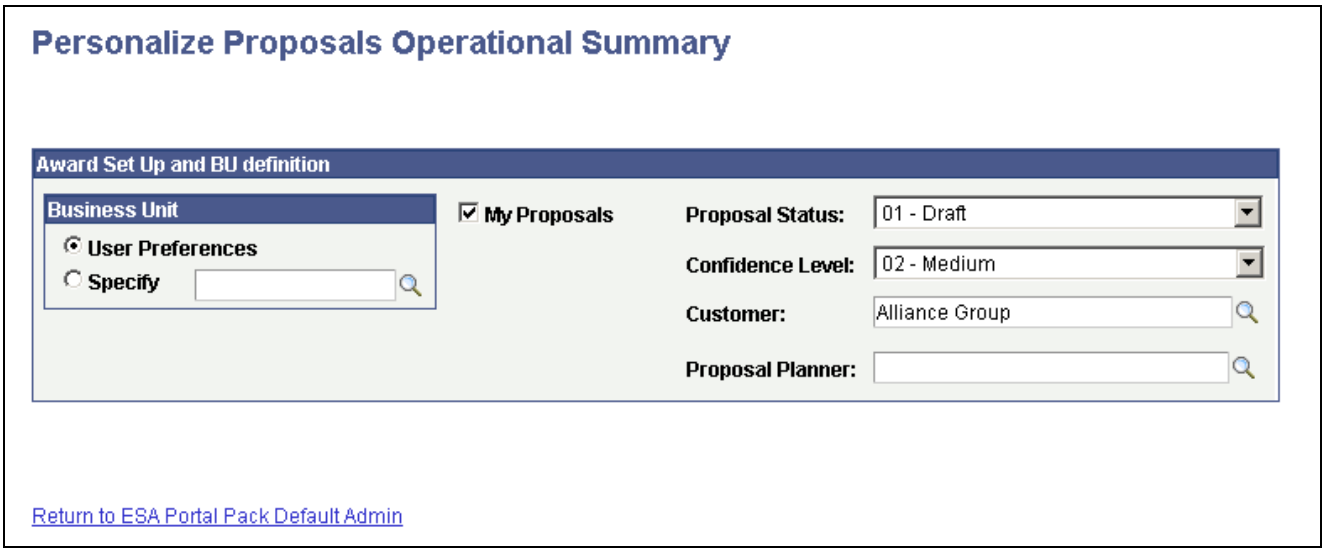
Confidence levels represent the proposal planner’s certainty that the proposal will be approved by the customer. The system displays confidence levels as icons, with a red square representing a low confidence level, a yellow triangle representing a medium confidence level, and a green diamond representing a high confidence level. Confidence levels are set up on the Contracts BU - Confidence Level Setup page.

To view details of the proposal on the Proposal page, click the link under the Proposal field.

Personalizing the Proposal Operational Summary Pagelet

Access the Personalize Proposals Operational Summary page.

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Personalize Proposals Operational Summary page

User Preferences Select to display proposals based on the business unit that was set up in your user preferences profile.

Specify Select to use a specific business unit to display proposals.

My Proposals Select to display proposals that you have designated as your own by clicking the My Proposals button on the Proposal page or by adding proposals to the My Proposal Page in PeopleSoft Proposal Management.

Proposal Status Select a status if you want to view proposals with a specific status only. If you do not specify a proposal status, the system displays proposals with all proposal statuses.

Confidence Level Select a confidence level if you want to view proposals with a specific confidence level only. If you do not specify a confidence level, the system displays proposals with all confidence levels.

Customer Select a customer if you want to view proposals for a specific customer only. If you do not specify a customer, the system displays proposals associated with all customers.

Proposal Planner Select a proposal planner if you want to view proposals for a specific proposal planner only. If you do not specify a proposal planner, the system displays proposals associated with all proposal planners.

Viewing Proposal Revenue Pipeline Information

This section discusses how to:

- View proposal revenue pipeline information.
- Personalize the Proposal Revenue Pipeline pagelet.

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Pages Used to View Proposal Revenue Pipeline Information

Page Name	Object Name	Navigation	Usage
Proposal Revenue Pipeline pagelet	GM_PE_REVEN_PIPE (narrow), GM_PE_REVEN_PIPE_2 (wide)	Click the Personalize Content link on the PeopleSoft homepage. Select Proposal Revenue Pipeline.	View revenue information for future periods by confidence threshold as delineated by the user.
Personalize Proposal Revenue Pipeline	GM_PE_REV_PIPE_PRS	• Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Proposal Revenue Pipeline • Click the Customize icon on the Proposal Revenue Pipeline pagelet.	Define default display information for the Proposal Revenue Pipeline pagelet. The default personalization is initially set by the system administrator.

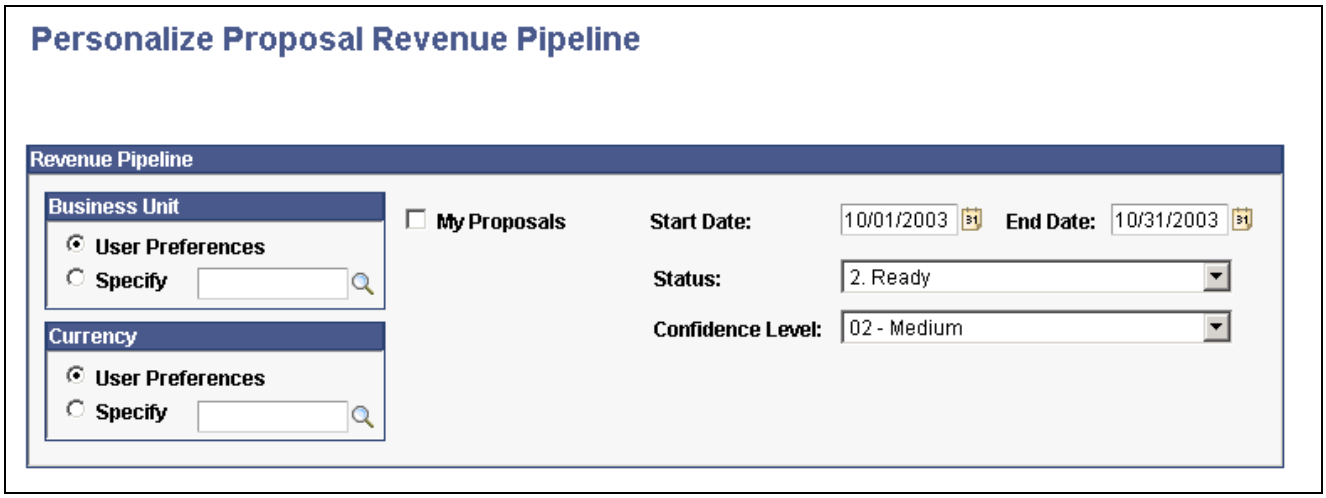
Viewing Proposal Revenue Pipeline Information

Access the Proposal Revenue Pipeline pagelet.

The Proposal Revenue Pipeline analytic shows revenue information for future periods by confidence threshold as delineated by the user. It uses the criteria entered on the Personalization page to select proposal data and display revenue for the given time period. The graph indicates total revenue amounts by confidence level for future time periods in months. The system displays data for a maximum of six months. Information contained in this pagelet can help you make more informed decisions regarding the revenue-related opportunities that your organization may want to pursue.

Personalizing Proposal Revenue Pipeline Information

Access the Personalize Proposal Revenue Pipeline page.



Personalize Proposal Revenue Pipeline page

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Business Unit

User Preferences Select to display proposal revenue based on the business unit that you set up in the user preferences profile.

Specify Select to use a specific business unit to display proposal revenue.

Currency

User Preferences Select to use the currency that you set up in the user preferences profile to display proposal revenue.

Specify Select to use a specific currency to display proposal revenue.

Revenue Pipeline

My Proposals Select to display revenue from proposals that you have designated as your own by clicking the My Proposals button on the Maintain Proposal page or by adding proposals to the My Proposal Page in PeopleSoft Proposal Management.

Start Date and **End Date** Select the beginning and ending dates that you want the system to use to graph proposal revenue. If the target due date on the proposal falls within the date range, then its revenue is included in the graph. If you do not enter any dates, the system uses the current date and then adds six months. The date range cannot exceed six months.

Status Select a status if you want to view proposal revenue with a specific status only. If you do not specify a proposal status, the system displays proposal revenue with all proposal statuses.

Confidence Level Select a confidence level if you want to view proposal revenue with a specific confidence level only. If you do not specify a confidence level, the system displays proposal revenue with all confidence levels.

Viewing Proposal Resource Demand Information

This section discusses how to:

- View proposal resource demand information.
- Personalize the Proposal Resource Demand pagelet.

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Pages Used to View Proposal Resource Demand Information

Page Name	Object Name	Navigation	Usage
Proposal Resource Demand pagelet	GM_PE_RES_DEMAND (narrow), GM_PE_RES_DEMAND_2 (wide)	Click the Personalize Content link on the PeopleSoft homepage. Select Proposal Resource Demand.	Learn what the demand for resources will be in a future time period. The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed.
Personalize Proposal Resource Demand	GM_PE_REDMD_PRS	• Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Resource Demand • Click the Customize icon on the Proposal Resource Demand pagelet.	Define default display information for the Proposal Resource Demand pagelet. The default personalization is initially set by the system administrator.

Viewing Proposal Resource Demand Information

Access the Proposal Resource Demand pagelet.

Use the information generated by this analytic to learn what the demand for resources will be in a future time period. The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed. The system displays a maximum of 10 project roles, generates a unique color for each job role, and displays a legend at the top of the page. Information contained in this pagelet can help you make more informed hiring and training decisions.

Personalizing Proposal Resource Demand Information

Access the Personalize Proposal Resource Demand page.

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Personalize Proposal Resource Demand page

Business Unit

User Preferences Select to display resource demand information based on the business unit that you set up in the user preferences profile.

Specify Select to use a specific business unit to display resource demand information.

Time Configuration

By Hour Select to display resource demand information in hours.

By Day Select to display resource demand information in days.

Resource Demand

My Proposals Select to display resource demand information from proposals that you have designated as your own by clicking the My Proposals button on the Maintain Proposal page or by adding proposals to the My Proposal Page in PeopleSoft Proposal Management.

Start Date and **End Date** Select the beginning and ending dates that you want the system to use to graph resource demand information. If the target due date on the proposal falls within the date range, then its resource demand information is included in the graph. If you do not enter any dates, the system uses the current date and then adds three months.

Status Select a status if you want to view resource demand information from proposals with a specific status only. If you do not specify a proposal status, the system displays resource demand information from proposals with all proposal statuses.

Confidence Level Select a confidence level if you want to view resource demand information from proposals with a specific confidence level only. If you do not specify a confidence level, the system displays resource demand information from proposals with all confidence levels.

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CHAPTER 16

Using the Pagelet Enabled by PeopleSoft Resource Management

This chapter discusses how to view resources that are currently unassigned or soon to be unassigned.

Prerequisite

Before you can view resources needing assignments you must establish a resource group for your user ID. If you select the Resources Needing Assignments pagelet to appear on your PeopleSoft homepage without establishing a resource group, a message appears stating that no data is available for the pagelet.

See *PeopleSoft Enterprise Resource Management 9.0 PeopleBook* , "Managing Resource Utilization," Specifying Staffing Workbench and Resource Utilization Options.

Viewing Resources Needing Assignments

The Resources Needing Assignment pagelet options are shared with the options that are used for the Staffing Workbench in PeopleSoft Resource Management. In PeopleSoft Resource Management you establish resource groups for whom you are responsible so you can manage information about their current assignment status.

This section discusses how to personalize and view resources needing assignments.

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Pages Used to View Resources Needing Assignments

Page Name	Object Name	Navigation	Usage
Resources Needing Assignments pagelet	RS_PE_TOP_MYRES	Click the Personalize Content link on the PeopleSoft homepage. Select the Resources Needing Assignments check box under the Resource Management heading and save the page.	View up to five resources who have been unassigned for the longest period of time or are about to end their assignments. If all resources are assigned, view up to five resources whose assignment end dates are closest to the current date.
My Workbench Options - Workbench	RS_MYWKBNCH_OPT	• Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet. • Resource Management, Define User Options, My Workbench Options, Workbench	Select the group of resources to appear on the Resources Needing Assignments pagelet.
My Workbench Options - Orders	RS_MYWKBNCHREQ_OPT	• Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet. Select the Orders tab. • Resource Management, Define User Options, My Workbench Options, Orders	Select the default method by which you search for resources, using either a resource group or the owning organization on the service order.
My Workbench Options - Utilization	RS_MYWKBNCHRSC_OPT	• Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet. Select the Utilization tab. • Resource Management, Define User Options, My Workbench Options, Utilization	Specify the number of calendar days prior to the end date of an assignment that a warning appears on the Resources Needing Assignments pagelet for the resource.

Personalizing the Resources Needing Assignments Pagelet

To personalize the pagelet:

1. Access the My Workbench Options - Workbench page. Specify the default resource group, then click the Return to HomePage link.

Note. The system uses the selected resource group to determine which resources can appear on the Resources Needing Assignments pagelet.

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2. Access the My Workbench Options - Utilization page.

   Specify the Number of Days prior to the end date of an assignment that a warning appears.

   If there are not five unassigned resources, the pagelet displays resources whose assignment end dates are closest to the current date.

   If resources are on assignments that end in fewer or equal to the number of calendar days that you specify on the My Workbench Options - Utilization page, the resources appear on the Resources Needing Assignments pagelet with a yellow warning visual indicator.

   If resources are on assignments that end in a number of days *greater* than the number of days that you specify, the resources appear on the pagelet with a green visual indicator which represents that the resource is fully staffed.

Note. The values that are used to personalize the Resources Needing Assignments pagelet are the Resource Group ID field (RS_RSRCGRP_NAME) and the Number of Days field (NUM_OF_DAYS) in the My Workbench Options component (RS_MYWKBNCH_OPT). No other field values in the My Workbench Options component affect the display of resources needing assignments on the pagelet.

Viewing Resources Needing Assignments

Access the Resources Needing Assignments pagelet.

Note. Resources appear on this pagelet only if they have an assignment end date. For example, new resources with no assignment history can appear on the Staffing Workbench - Utilization page, but they do not appear on this pagelet.

The resources appear in ascending order of their last assignment end date.

Name Displays the name of the resource that is currently unassigned, or whose assignment end dates are closest to the current date.

Bill Rate Displays the resource's bill rate as specified for the resource's employee ID. If no bill rate is specified for the employee ID, the value is the rate associated with the job code in the Rates by Jobcode record (PC_RATE_JOBC) in PeopleSoft Project Costing. If neither value exists, the bill rate appears as *0.00* on this pagelet.

Currency Displays the bill rate currency as specified for the resource's employee ID. If the bill rate appears as *0.00,* the currency value is blank.

End Date Displays the end date of the resource's current assignment or, if the resource is not currently assigned, the end date of the resource's most recent assignment. If the assignment includes multiple date ranges, the last end date appears.



This red indicator means that the corresponding resource is currently unassigned and requires immediate attention. If the current day is a workday as specified on the resource profile and stored in the Worker table (RS_WORKER_TBL), PeopleSoft Resource Management looks to see if the resource has a task scheduled on that day. If the current day is not a workday, PeopleSoft Resource Management looks at the next workday to see if the resource has a scheduled assignment on that day. If no assignment is scheduled, the resource is treated as unassigned.

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This yellow indicator means that the corresponding resource is currently on an assignment that ends in fewer or equal to the number of days specified on the My Workbench Options - Utilization page.



This green indicator means that the corresponding resource is currently on an assignment that ends in a number of days greater than the number of days specified on the My Workbench Options - Utilization page.

More Click this link to access the Staffing Workbench - Utilization page to view the assignment status for all of the resources in the resource group.

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PART 4

Using PeopleSoft Asset Lifecycle Management Portal Pack

Chapter 17
Using Pagelets Enabled by PeopleSoft IT Asset Management

Chapter 18
Using Pagelets Enabled by PeopleSoft Maintenance Management

Chapter 19
Using Pagelets Enabled by PeopleSoft Real Estate Management

CHAPTER 17

Using Pagelets Enabled by PeopleSoft IT Asset Management

This chapter provides an overview of reporting metrics pagelets and discusses how to:

- Generate metrics.
- Work with progress report.
- Work with reporting metrics pagelets.

Understanding Reporting Metrics

PeopleSoft IT Asset Management (ITAM) organizes enterprise IT assets into a clear presentation of business value, with certifiable accuracy. Valuable business information is expressed in high level, concise metrics that invite users to drill down to any level of detail from the big picture in the portal. The pagelets contain information on total IT asset valuation, hardware and software inventory, missing, misappropriated, and misconfigured inventory, as well as specifying leases and contracts that need attention.

PeopleSoft IT Asset Management provides these metrics pagelets:

Pagelet	Description
Asset Financial Statistics	Displays a snapshot of enterprise IT asset current valuation.
Assets Not Reporting	Displays devices that have failed to report an inventory, allowing managers to investigate the absences.
Hardware Inventory	Counts all IT hardware–by subtype–that appears in the third-party inventory and asset repository databases. It also provides a summary count of IT hardware that appears in one database, but not the other.
Hardware Progress Report	Displays at-a-glance results to date of IT hardware progress achieved against a user defined goal.
Inventory Exceptions	Displays a high level view of the differences between the Asset Repository and the third-party inventory database–the difference between what is on the books and the physical inventory for IT assets.

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Pagelet	Description
Lease End Metric	Displays IT-related leases that will expire within the next n (user-defined) days, providing a reminder to undertake lease-end inventory activities. Users may drill down to the assets associated with those leases.
Software Device Monitor	Displays installed software by software device group ID. This metric is designed for IT Subtypes that are based on Serial ID software authorizations and includes a comparison of installed licenses to authorized software licenses. An alert is displayed by software title when the installed software licenses exceed the authorized software licenses.
Software Inventory Monitor	Provides the counts of total licenses versus installed licenses and displays the counts for authorized and unauthorized users.
Software Pending Requisitions	Displays a running scorecard on software licenses that users need to acquire to keep the enterprise in compliance.
Software Progress Report	Displays at-a-glance results to date of IT software progress achieved against a user defined goal
Software Renewal	Provides alerts to the IT Asset Manager when the contract needs to be renewed or renegotiated.

Generating Metrics

This section discusses how to generate reporting metrics.

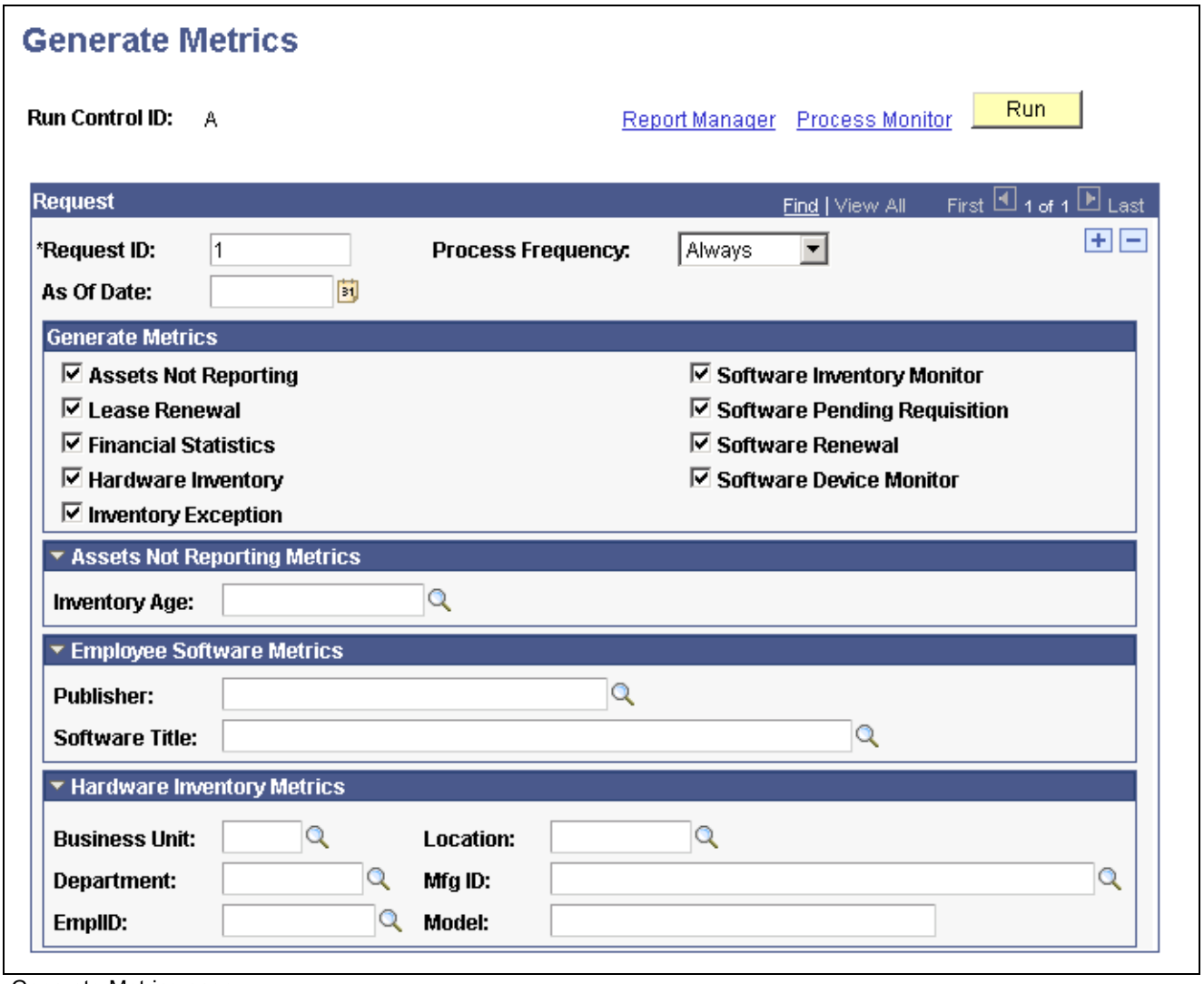
Page Used to Generate Metrics

Page Name	Object Name	Navigation	Usage
Generate Metrics	IT_METRIC_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, IT Asset Management, Generate Metrics, Generate Metrics	Select options to generate metrics that appear in the pagelets.

Generating Metrics

Access the Generate Metrics page.

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Generate Metrics page

Request

Process Frequency Select the frequency for the report to run. Values are: *Always*, *Don't* and *Once*.

Generate Metrics

Select the metrics to be generated.

Assets Not Reporting If you select Assets Not Reporting, the system displays the Assets Not Reporting Metrics group box.

Hardware Inventory If you select Hardware Inventory, the system displays the Hardware Inventory Metrics group box.

Software Inventory Monitor, Software Pending Requisition, and **Software Renewal** If you select any of these metrics, the system displays the Employee Software Metrics group box.

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Software Device Monitor Selecting the Software Device Monitor impacts Software Pending Requisitions and Software Inventory Monitor. The Software Device Monitor calculates the number of licenses associated with devices and needs to update that information in the Software Inventory Monitor as well as Software Pending Requisitions (specifically the Installed column.) The Software Device Monitor is capable of updating the information as it is displayed in Software Device Monitor and Software Pending Requisitions; however, it does not insert new rows into the metric.

If the hierarchy of Software Device Groups is six levels or more, the Software Device Monitor issues a warning with respect to its effect on overall performance. It is recommended that the hierarchy be no greater than five levels. Additionally, a warning is issued about the possibility of double counting when a software device is associated with a software title via two different Software Device Groups. This issue should be corrected immediately by removing the device so that it belongs to only one group for a software title.

Note. There may be software titles that are impacted by the Software Device Monitor that do not already exist in the Software Pending Requisitions or the Software Inventory Monitor. For a completely accurate display of current information, it is recommended that the Software Inventory Monitor as well as the Software Pending Requisition be run whenever the Software Device Monitor runs.

Assets Not Reporting Metrics

Inventory Age Select an inventory age from the Inventory Age table.

Employee Software Metrics

Publisher Select a vendor ID.

Software Title Select a software title.

Working with Progress Reports

This section discusses how to:

- Edit the progress report template.
- Run the progress report.
- Work with progress reports.

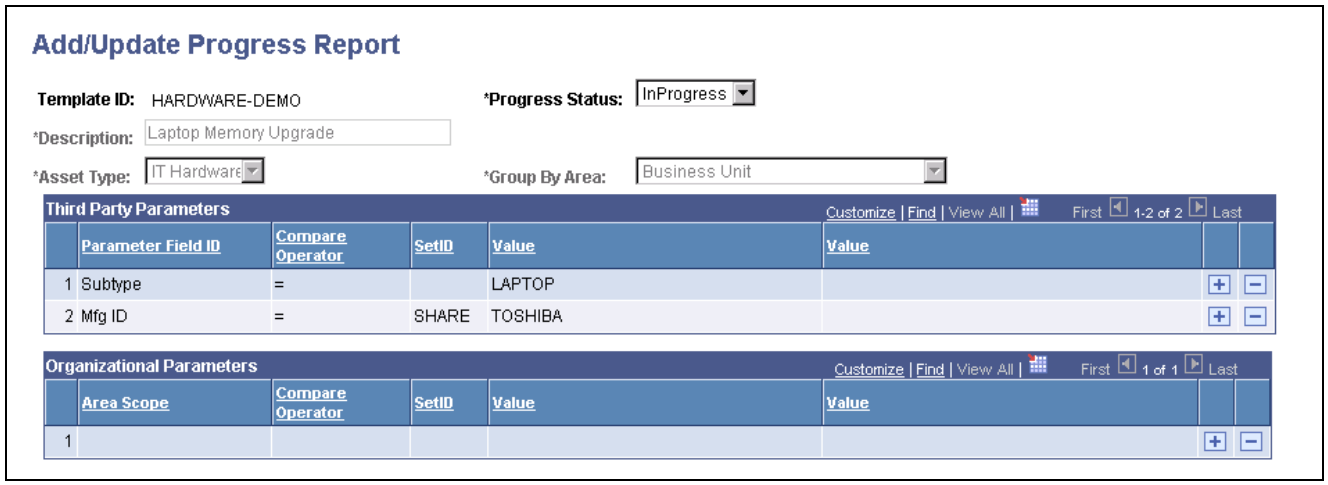
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Pages Used to Work with Progress Reports

Page Name	Object Name	Navigation	Usage
Add/Update Progress Report	IT_PRGS_TMPL	IT Asset Management, IT Asset Management Center, Portal Setup, Edit Progress Report Template, Add/Update Progress Report	Create or edit a progress report template.
Progress Report	IT_PRGS_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, IT Asset Management, Run Progress Report, Progress Report	Run the progress report.
Progress Report Detail	IT_PRGS_DTL	IT Asset Management, Inventory Views, Progress Report Detail, Progress Report Detail	View progress report details.

Editing the Progress Report Template

Access the Add/Update Progress Report page.



Add/Update Progress Report page

Template ID The unique identifier for the progress report.

Progress Status Valid values for Progress Status are: *New, In Progress,* and *Complete.*

If you select *New*, the first time run result is saved as the target number for the Group By Area defined on this page.

If the value is *In Progress*, all other fields are greyed out and not available for modification of any parameters.

If the value is *Complete* and saved, the target numbers are cleared and all results in the detail table are purged.

Description Enter a text description. This description appears in the description column on the pagelet.

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Asset Type Select *IT Hardware* or *IT Software* to identify the pagelet for this report.

Group By Area Select to group the results by area. Values are: *Business Unit, Department ID,* or *Location.*

Third Party Parameters Select parameter fields to define the selection criteria. The Compare Operator is a translate value which includes: *=, <>, Like,* and *Not Like.* Value is a free-form text field. You must enter at least one parameter.

You can list the same attribute multiple times if you use the equal operator. For example if you wanted to search on a manufacturer of TOSHIBA or IBM, you could add another line for MFG ID = IBM. Because the MFG ID attribute is repeated, the condition will be treated as an OR condition. Conditions that are not for the same attribute will be treated as AND conditions. When the attribute is repeated the same operator used in the first instance of that attribute must be repeated.

When the user selects *Software* as a parameter, the valid compare operators are *Exists, Not Exists, Like,* and *Not Like.*

Note. If you are using the User Defined Date field you must enter the date value in the following format: `YYYY-MM-DD`.

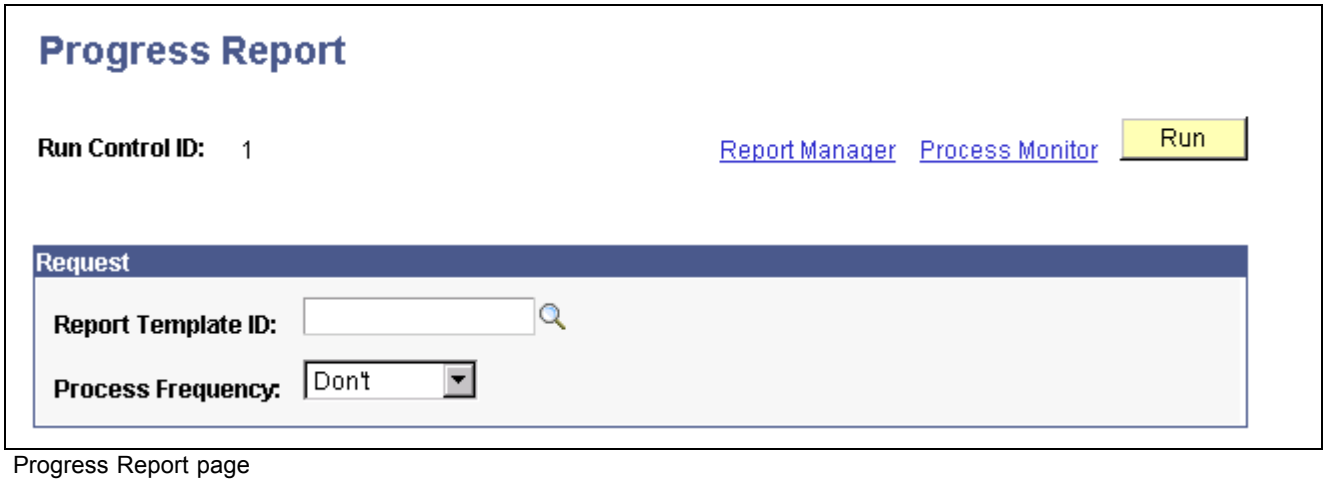
Organizational Parameters Define the Area Scope of the project within the organization. Values include: *Business Unit, Department ID,* or *Location.*

The Compare Operator is a translate value which includes: *>, >=, <, <=, =, <>, Like,* and *Not Like.* Value is a free form text field. Enter at least one parameter.

The organization parameter is not sent to the third party database; rather it is a filtering criteria that is used once the data is sent back to the PeopleSoft application.

Running the Progress Report

Access the Progress Report page.



Progress Report page

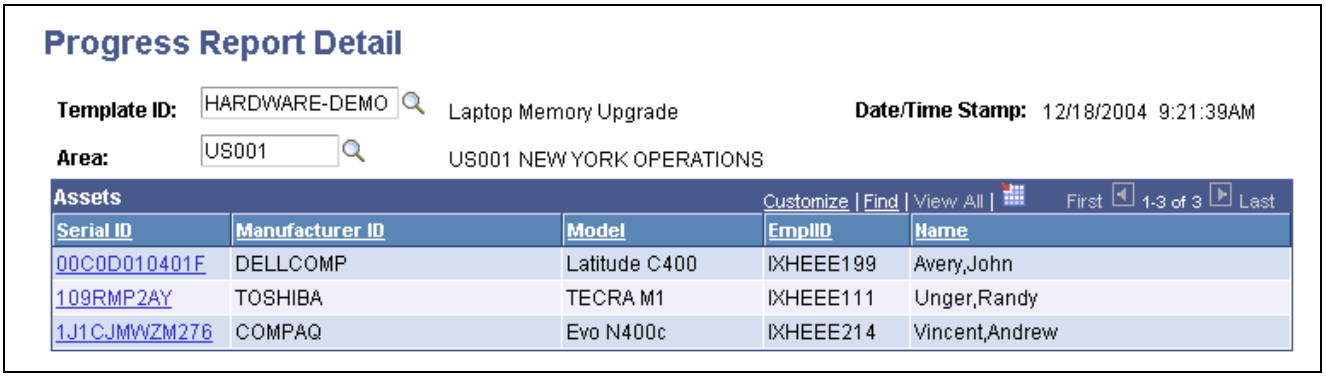
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Report Template ID Select the Report Template ID to run. Only templates with report status of *New* and *In Progress* can be chosen. Leave this field blank to process all report template IDs with a status of *New* or *In Progress*.

Process Frequency Valid values are: *Always, Don't Run,* and *Process Once.*

Working with Progress Reports

Access the Progress Report Detail page.



Progress Report Detail page

This page displays the details for each project. Drill down on the Serial ID to access a printable view of the asset.

Working with Reporting Metrics Pagelets

This section discusses how to:

- View asset financial statistics.
- View non-reporting assets.
- View hardware inventory.
- View hardware progress reports.
- View inventory exceptions.
- View lease end metrics.
- View related links.
- View software device monitor.
- View software inventory.
- View pending software requisitions.
- View software progress reports.
- View software renewal.

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Pages Used to Work with Reporting Metrics Pagelets

Page Name	Object Name	Navigation	Usage
Asset Financial Statistics pagelet	IT_PE_FIN_STAT	Click the Personalize Content link on the PeopleSoft homepage. Select Asset Financial Statistics.	Review a snapshot of enterprise IT asset current valuation.
Assets Not Reporting pagelet	IT_PE_UNDISC	Click the Personalize Content link on the PeopleSoft homepage. Select Assets Not Reporting.	Review the devices that have failed to report an inventory within a specified time period, allowing managers to investigate the absences.
Hardware Inventory pagelet	IT_HRDWR_SUM	Click the Personalize Content link on the PeopleSoft homepage. Select Hardware Inventory.	Count all IT hardware–by subtype–that appears in the third party and asset repository databases. View a summary count of IT hardware that appears in one database, but not the other.
Hardware Progress Report pagelet	IT_PRGS_HWC	Click the Personalize Content link on the PeopleSoft homepage. Select Hardware Progress Report.	Review up-to-date results of IT asset change or upgrade initiatives.
Inventory Exceptions pagelet	IT_PE_INV_EXCEPT	Click the Personalize Content link on the PeopleSoft homepage. Select Inventory Exceptions.	Review a summary of the differences between the Asset Repository and the third-party database.
Lease End Metrics pagelet	AM_LEASE_SUM	Click the Personalize Content link on the PeopleSoft homepage. Select Lease End Metrics.	Review IT-related leases that will expire within the next n days. Drill down to the assets associated with the leases.
Related Links pagelet	IT_PE_THIRDLINK	Click the Personalize Content link on the PeopleSoft homepage. Select Related Links.	Link to frequently accessed URLs.
Software Device Monitor pagelet	IT_PE_SWDG_SUM	Click the Personalize Content link on the PeopleSoft homepage. Select Software Device Monitor..	Review the installed software licenses versus serial ID-based authorized software licenses. An alert displays when installed software licenses exceed the number authorized.

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Page Name	Object Name	Navigation	Usage
Software Inventory Monitor pagelet	IT_SFTWR_INV	Click the Personalize Content link on the PeopleSoft homepage. Select Software Inventory Monitor.	Review the counts of total licenses versus installed licenses, the counts for authorized and unauthorized users.
Software Pending Requisitions pagelet	IT_SFTWR_PEND	Click the Personalize Content link on the PeopleSoft homepage. Select Software Pending Requisitions.	Review a list of software licenses that the company must acquire to keep the enterprise in compliance.
Software Progress Report pagelet	IT_PRGS_SWC	Click the Personalize Content link on the PeopleSoft homepage. Select Software Progress Report.	Review the up-to-date results of IT asset change or upgrade initiatives.
Software Renewal pagelet	IT_SFTWR_RENEW	Click the Personalize Content link on the PeopleSoft homepage. Select Software Renewal.	Review the alerts to the IT Asset Manager when a contract needs to be renewed or renegotiated.

Viewing Asset Financial Statistics

Access the Asset Financial Statistics pagelet.

Avg Life Remaining (average life remaining) — Displays a value that is calculated based on the following algorithm: Sum of (Useful life – Life to Date life) / Quantity of assets with useful life available.

Depending upon the depreciation method, some assets may not have a useful life attached. In those cases, the asset will not be computed for the algorithm. If quantity equals zero, a not applicable (N/A) legend will appear on that field.

Year to Date Depreciation — Displays the algebraic addition of all the assets to be included in the statistics.

Units — Displays the algebraic addition of quantity field for every asset ID to be included in the statistics.

Net Book Value — Displays the algebraic addition of net book value for every asset to be included in the statistics.

Viewing Non-Reporting Assets

Access the Assets Not Reporting pagelet.

See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, “Working with the IT Asset Inventory Tool”.

See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, “Managing Exceptions,” Managing Assets Not Reporting.

Viewing Hardware Inventory

Access the Hardware Inventory pagelet.

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Discovery Displays the number of assets per subtype found in the third party database. Click the link to access the Hardware Inventory page.

On the Hardware Inventory page, the system populates the IT Subtype with the link value that you clicked in the pagelet. The system enters *Discovery DB* as the Source Database.

ARM Displays the number of assets per subtype found in the asset repository. Click the link to access the Hardware Inventory page.

On the Hardware Inventory page, the system populates the IT Subtype with the link value that you clicked in the pagelet. The system enters *Asset Repository* as the Source Database.

Unreconciled The Unreconciled Assets column contains the combined count of those assets that exist in only one of the databases—third party or the asset repository. The system displays the number of assets per subtype that are found in only one database. Click the link to access the Hardware Inventory page.

On the Hardware Inventory page, the system populates the IT Subtype with the link value that you clicked in the pagelet. The system enters *Both ARM and Discovery* as the Source Database. Note that it changes the operator to <> (not equal.) The query returns those assets NOT in ARM ADDED TO the assets NOT in Discovery.

See Also

PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook, "Using Inventory for IT Assets"

Viewing Hardware Progress Reports

Access the Hardware Progress Report pagelet.

Report Defines which template (a container for report parameters) drives this line of data.

Target Displays the total number of expected actions at the outset of a project such as the count of machines that meet the criteria. This number is generated when the report is run for the first time.

To Do Displays the number of outstanding actions in a project. Click to view a list of items for a specific project. On the Progress Report Detail page, you can drill down to the details for each item in the project.

Viewing Inventory Exceptions

Access the Inventory Exceptions pagelet.

Business Rule Displays each of the business rules that will generate an exception. Click the link to access the Manage Exceptions page.

Exceptions Displays the number of exceptions for each business rule.

NBV (Net Book Value) Displays the total NBV of the *financial* assets included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the NBV for each financial asset from the Manage Exceptions page.

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Cost Displays the total cost basis of the *financial* assets that are included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the Cost for each financial asset from the Manage Exceptions page.

FMV (Fair Market Value) Displays the total FMV of the *financial* assets that are included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the FMV for each financial asset from the Manage Exceptions page.

Note. The columns for NBV, Cost and FMV display on the Inventory Exceptions pagelet only when Financial Impact is enabled on the Installation Options - Asset Management page and when the columns are selected for viewing in User Preferences for a given user. A user may select to see one, two or all three of the columns. The aggregate values displayed in these three columns apply to only the financial assets that are included in the total number of exceptions, even though the number of exceptions includes both financial and non-financial assets.

See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, "Setting Up PeopleSoft IT Asset Management Application Settings," Setting Up Business Rules.

Viewing Lease End Metrics

Access the Lease End Metrics pagelet.

Lessor Click the link to access the Lease Summary by Lessor page.

Days Before End Date Displays the number of days before lease expiration in ascending order.

Lease Click the link to access the Link Details page.

See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, "Using Inventory for IT Assets," Working with Leases.

Viewing Related Links

Access the Related Links pagelet.

See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, "Setting Up PeopleSoft IT Asset Management Resource Settings," Creating Related Links.

Viewing Software Device Monitor

Access the Software Device Monitor pagelet.

Software Title Displays the software licenses that are configured for tracking by Software Device Group ID.

The Software Device Group is a grouping of machines that is used to associate a Content Manager (EMPLID) to a group of machines by their Serial ID. Group definitions can contain groups as well as machines.

Alert Displays a warning icon if the number of installed licenses exceeds the number of authorized licenses. Alerts are not displayed for device groups that are defined as count licenses on the Define Software Titles/Users page.

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Installed Displays the count of licenses that are installed based on Serial ID according to the Asset Repository.

Authorized Displays the count of authorized licenses associated with a serial ID. Count license device groups are not included in the count.

Declared Displays the count of licenses that are declared for the Software Device Group based on Serial ID.

Click the link to access the Software Device Inventory page. The search option for the software title and Group ID will be supplied.

Unresolved Displays the number of licenses associated with devices that do not belong to any Software Device Group, or licenses for devices that are not in the Asset Repository. For those devices in the Asset Repository but not in any Software Device Group, the licenses are counted and the number of CPUs are as defined in the Asset Repository. Machines that are not in the Asset Repository are counted as one per device.

Click the link to access the Resolve Device Licenses page. Search by Software Title or by Serial Number.

See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, "Working with the Asset Repository," Resolving Device Licenses.

See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, "Working with the Asset Repository," Defining Software Titles.

Viewing Software Inventory

Access the Software Inventory Monitor pagelet.

Software Title Displays the software licenses that are configured for tracking.

Inventory Displays the count of purchased software licenses. This column includes both employee and device authorizations.

Click the link to access the Software License Inventory page.

Installed Displays the count of users that installed the specific software This column includes both employee and device authorizations.

Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied.

Employee Authorized Displays the count of authorized users who installed the software. This column excludes device authorizations.

Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied as well as the value of Employee Authorized in the Authorized Search option.

Employee Unauthorized Displays the count of unauthorized users who installed the software. This column excludes device authorizations.

Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied as well as the value of Employee Unauthorized in the Authorized Search option.

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See *PeopleSoft Enterprise IT Asset Management 9.0 PeopleBook*, "Using Inventory for IT Assets," Working with Software Inventory.

Viewing Pending Software Requisitions

Access the Software Pending Requisitions pagelet.

Software Title Shows only those software titles that are defined with track requisitions *On* and when the installed copies exceed the purchased copies.

Inventory Displays the number of purchased copies of the software title.

Click the link to access the Software License Inventory page.

Installed Displays the number of installed copies of the software title. This column includes both employee and device authorizations.

Click the link to access the Discover Software Inventory page.

Pending Requisitions Displays the difference between the number of purchased copies and the number of installed copies.

Viewing Software Progress Reports

Access the Software Progress Report pagelet.

Report Defines which template (a container for report parameters) drives this line of data.

Target Displays the total number of expected actions at the outset of a project such as the count of machines that meet the criteria. This number is generated when the report is run for the first time.

To Do Displays the number of outstanding actions in a project. Click to view a list of items for a specific project. On the Progress Report Detail page, you can drill down to the details for each item in the project.

Viewing Software Renewals

Access the Software Renewal pagelet.

Software assets with contracts that have an expiration date, with a status of *Active* and with a Renewal Notice value (that is, the renewal notice is not blank), will be included in the Software Renewal metric if the system date or As of Date of the process is greater than the expiration date minus the number of days entered in the Renewal Notice.

Vendor ID Displays values from the vendor table.

Contract Id Displays the contract number determined during negotiations with vendor.

Contract Type Displays the user-defined contract type.

Expiration Date Displays the end date of the contract.

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CHAPTER 18

Using Pagelets Enabled by PeopleSoft Maintenance Management

This chapter discusses how to:

- Set up PeopleSoft Maintenance Management for the PeopleSoft Asset Lifecycle Management (ALM) Portal Pack.
- View scheduler's work orders.
- View my assigned work orders.
- View my service requests.
- View backlog by work order types.
- View unassigned work order tasks.
- View reviewed work orders tasks.
- View scheduled work order tasks.
- View most costly assets to maintain.
- View top five problem codes.

Setting Up PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack

This section provides an overview of PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack and lists the pages used to set up Maintenance Management for the ALM Portal Pack.

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Understanding PeopleSoft Maintenance Management for PeopleSoft ALM Portal Pack

If you are currently using PeopleSoft Maintenance Management and want to use the Maintenance Management pagelets in the PeopleSoft Asset Lifecycle Management Portal Pack, you must schedule and run the Update Work Order Portal Data Application Engine process (WM_PE) and Update Most Costly Asset Data Application Engine process (WM_PE_ASSET). The Update Work Order Portal Data and Update Most Costly Asset Data processes summarize transaction data in order to improve response times when viewing the pagelets. The data is stored in summary tables and is displayed on pagelets according to your personalized settings. While the Update Work Order Portal Data and Update Most Costly Asset Data process greatly improves response times for reading the data, it also imposes limitations on when changes to the transaction data are reflected in the pagelets. Changes in the transaction data are not reflected in the pagelets in real time. You must periodically rerun the process to refresh the pagelets. We recommend setting up a recurring job to execute the Update Work Order Portal Data and Update Most Costly Asset Data process on a periodic basis. How often you run the collector process depends on a number of factors such as:

- How quickly you need the data updated.
- How much data you have in the system—the longer your system operates, the more data has to be summarized, hence the longer the data loader process can take to execute.
- How many system resources are available to your process scheduler.

Pages Used to Set Up PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack

Page Name	Object Name	Navigation	Usage
Update Work Order Portal Data	WM_PE_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Maintenance Management, Run Work Order Portal Metrics	Run a process that summarizes the transaction data and improves the response time for displaying the service request, work order, backlog, and work order task data on the pagelets for PeopleSoft Maintenance Management in the PeopleSoft ALM portal pack.
Update Most Costly Asset Data	WM_PE_ASSET_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Maintenance Management, Run Asset Related Metrics	Run a process that summarizes the transaction data and improves the response time for displaying the asset data on the Update Most Costly Assets and the Top Five Problems pagelets for PeopleSoft Maintenance Management in the PeopleSoft ALM portal pack.

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Viewing Scheduler's Work Orders

This section discusses how to view the Scheduler's Work Orders pagelet.

Pages Used to View Scheduler's Work Orders

Page Name	Object Name	Navigation	Usage
Scheduler's Work Orders pagelet	EP_WM_MY_WO	Click the Home link at the top of the screen to access the PeopleSoft Home page. Click the Personalize Content link on the PeopleSoft home page. Select Scheduler's Work Orders.	View the work order tasks for which the current logged-in is responsible for scheduling.
Work Order - Schedules	WM_WO_TASK_SCHED	Click a description link on the Scheduler's Work Orders pagelet.	View details for a specific work order shown on the Scheduler's Work Orders pagelet.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the Go to Workbench link on the Scheduler's Work Orders pagelet.	Access and update work order tasks assigned to this scheduler.

Viewing Scheduler's Work Orders

Access the Scheduler's Work Orders pagelet.

This pagelet displays work order tasks that are for the user to schedule.

Description Click this link to access the Work Order - Schedules page for a specific work order. You can view the details associated with the task.

Priority Displays the importance of the tasks assigned.

Required Date Displays the date that the task needs to occur.

Task Status Display the state of the work order task.

Go to Workbench Click this link to access and update the work orders assigned to this scheduler on the Work Order Workbench.

Viewing My Assigned Work Orders

This section discusses how to view the My Assigned Work Orders pagelet.

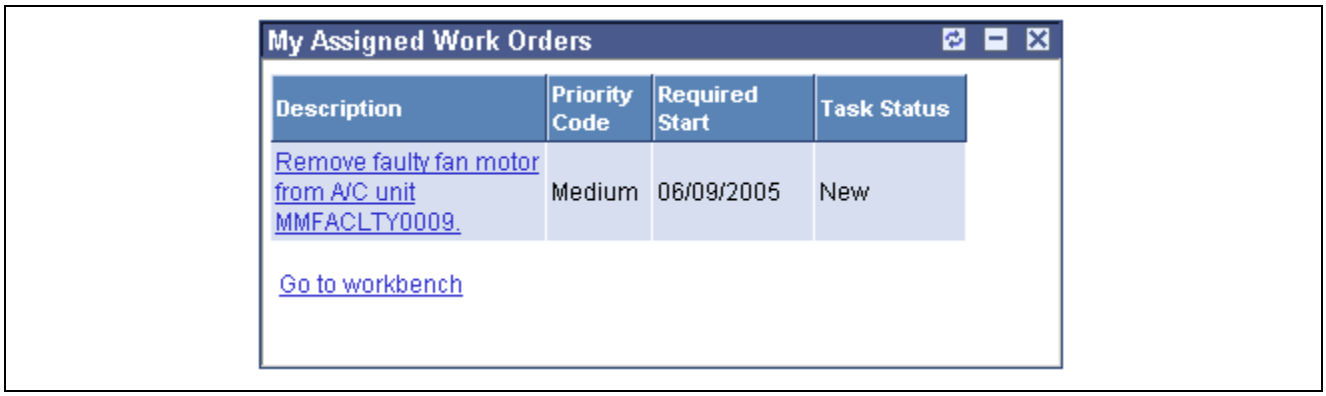
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Pages Used to View My Assigned Work Orders

Page Name	Object Name	Navigation	Usage
My Assigned Work Orders pagelet	EP_WM_MY_WO_TECH	Click the Personalize Content link on the PeopleSoft homepage. Select My Assigned Work Orders.	View the work order tasks that have been assigned to the user currently logged into the system.
Work Order - Schedules	WM_WO_TASK_SCHED	Click a description link on the My Assigned Work Orders pagelet.	View details for a specific work order shown on the My Assigned Work Orders pagelet.
Technician Workbench	WM_WOE_WB	Click the Go to Workbench link.	Access and update the assigned work order tasks for this user.

Viewing My Assigned Work Orders Pagelet

Access the My Assigned Work Orders pagelet.



My Assigned Work Orders page

This pagelet displays the work orders assigned to the user currently logged into the system, the priority of each work order, the required start date of the work order, and the status of each task associated with the work order that is assigned to this user. Click the Go to Workbench link to access the Technician Workbench for this user. The user can update work order tasks on this page as needed.

Viewing My Service Requests

This section discusses how to view the Viewing My Service Requests pagelet.

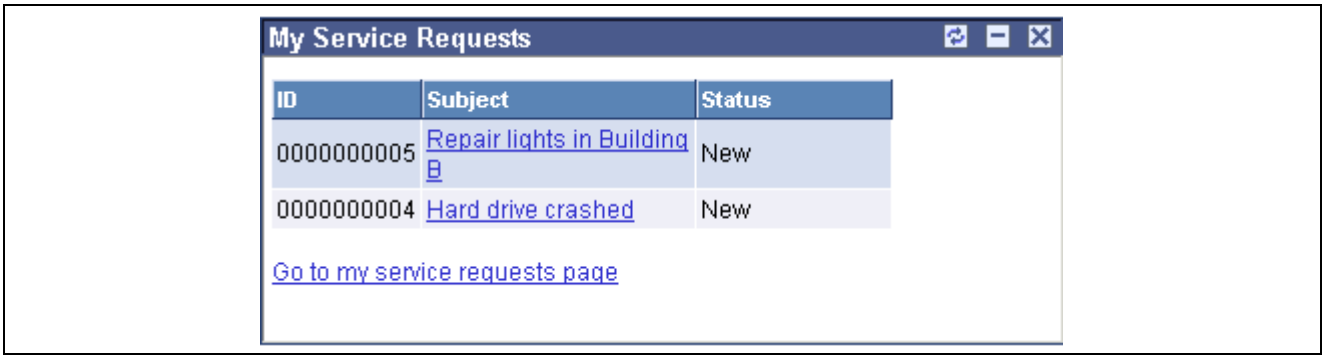
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Pages Used to View My Service Requests

Page Name	Object Name	Navigation	Usage
My Service Requests pagelet	EP_WM_MY_WR	Click the Personalize Content link on the PeopleSoft homepage. Select My Service Request.	View the five most recent work requests that belong to the user logged into the system.
Update Service Request	WM_WORK_REQUEST_SS	Click a service request number that appears on the My Service Requests pagelet.	View details for a specific work request shown on the My Service Requests pagelet.
My Service Requests	WM_MY_REQUESTS	Click Go to my requests page link on My Service Request pagelet.	View all service requests opened by the user logged into the system.

Viewing My Service Requests

Access the My Service Requests pagelet.



My Service Requests page

This pagelet displays the five most recent service requests for the user who is logged into the system. The service request id, subject and status display.

Subject Click this link to access the My Service Request page for a specific Service request. This link is not available if you do not have authorization to access this page. The page identifies the problem or issue that needs to be addressed.

Status Displays the current status of the service request.

Go to my service requests page Click to view all service requests entered by the user logged into the system.

Viewing Backlog by Work Order Type

This section discusses how to:

- View the work order backlog information.
- Personalize the Work Order Portal Personalization page.

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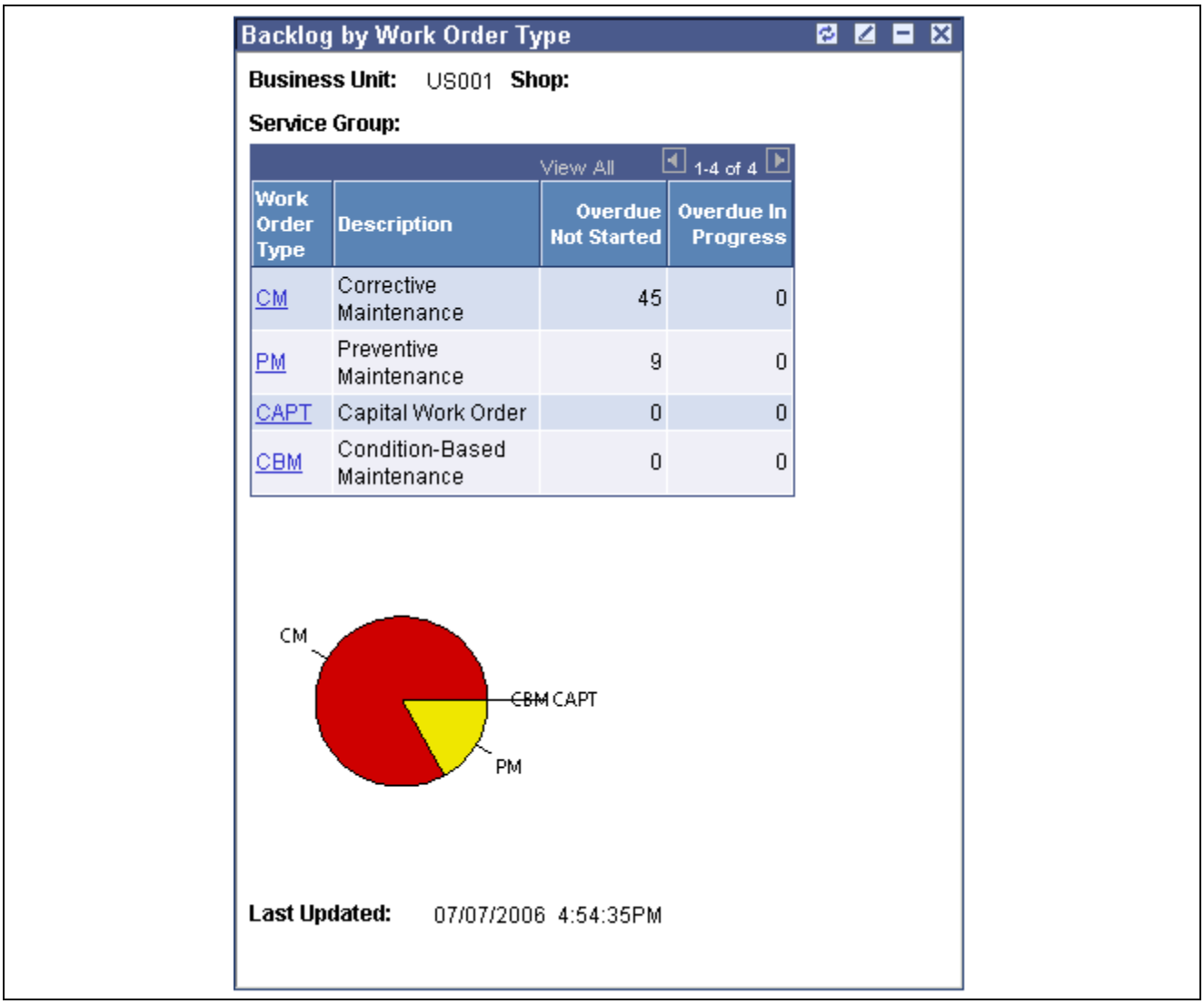
Pages Used to View Backlog by Work Order Type

Page Name	Object Name	Navigation	Usage
Backlog by Work Order Type pagelet	EPWM_PE_BACKLOG_GBL	Click the Home link at the top of the page to access the PeopleSoft home page. Click the Personalize Content link on the PeopleSoft home page. Select Backlog by Work Order Type.	View the backlog of work orders by work order type.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the work order type code link on the Backlog by Work Order Type page.	View the workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Backlog by Work Order Type icon at the top of the Backlog by Work Order Type pagelet.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Viewing Backlog by Work Order Type

Access the Backlog by Work Order Type pagelet.

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Backlog by Work Order Type page

The Backlog by Work Order Type pagelet provides a high-level statistical summary of the overall backlog of work orders, which are broken down into different categories for a particular work order business unit, service group, and/or shop. This backlog is an accumulation of work orders not started or not complete on time. All work orders need to be dealt with directly in PeopleSoft Maintenance Management until the work is completed and the costs applied.

The pie chart is a visual summarization of the total Overdue Not Started and Overdue In Progress broken down by Work Order Type.

By clicking the Work Order Type link, the system navigates to the Work Order Workbench page.

Overdue Not Started Displays the number of work order tasks with a Required End Date that is less than the current date, a status that is not equal to *Complete*, *Closed* or *Cancelled* and the Actual Start Date is null.

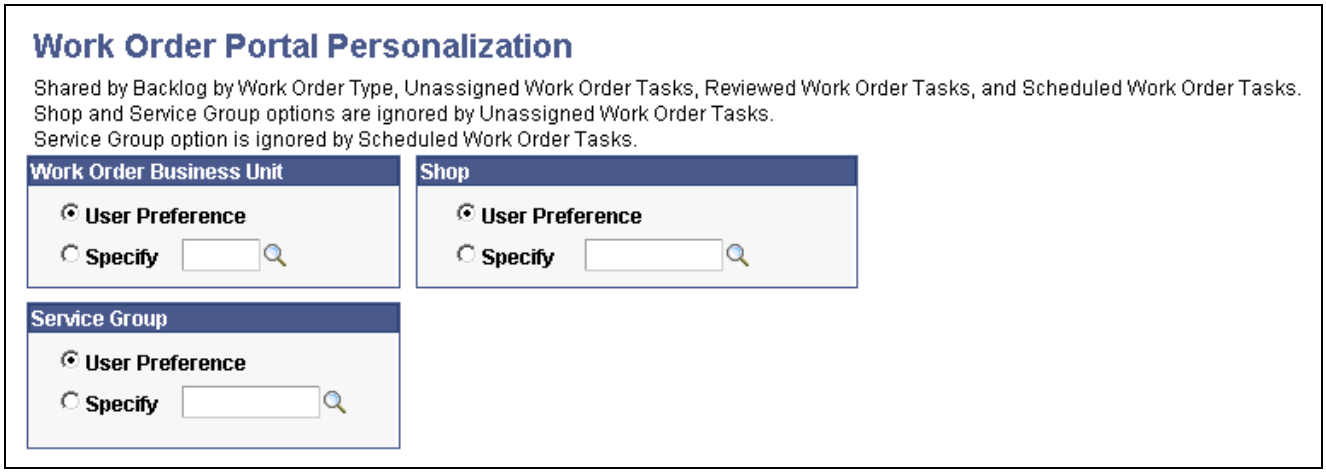
Overdue in Progress Displays the number of work order tasks with a Required End Date that is less than the current date, a status that is not equal to *Complete*, *Closed* or *Cancelled*, the Actual Start Date is not null and the Required End Date is not null, and less than the Run Time Date.

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	Click this icon to refresh the data on the pagelet.
	Click this icon to access the Work Order Portal Personalization page.
	Click this icon to minimize the displaying page.
	Click this icon to remove the pagelet from the display.

Personalizing Backlog by Work Order Type

Access the Work Order Portal Personalization page.



Work Order Portal Personalization page

You can either use the default user preferences or select a value for the work order business unit, service group or shop.

Note. The Work Order Portal Personalization page is shared by the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Shop and service group options are not used by the Unassigned Work Order Tasks pagelet.

The service group option is not used by the Scheduled Work Order Tasks pagelet.

Viewing Unassigned Work Order Tasks

This section provides an overview and discusses how to view unassigned work order tasks information.

It is important to review new work orders in a timely manner. When a work order is first created, the work order is not reviewed and is in an initial stage. The first status of a work order is configurable by the customer. Based on the initial customer defined status, the system infers the work order has not been planned, reviewed, or assigned. Some refer to this view as the *unplanned backlog*, which is often used as a measure of planning efficiency.

This pagelet displays work orders that have an *initial* customer-defined status (unplanned or unassigned) that needs attention and displays the work orders in a prioritized manner, sorted by urgency and age. A count of the work orders is shown for each priority based on age. Each age group is totaled by the end column giving a grand total for the group.

The pie chart is a graphical summarization of the total unassigned work order tasks by priority.

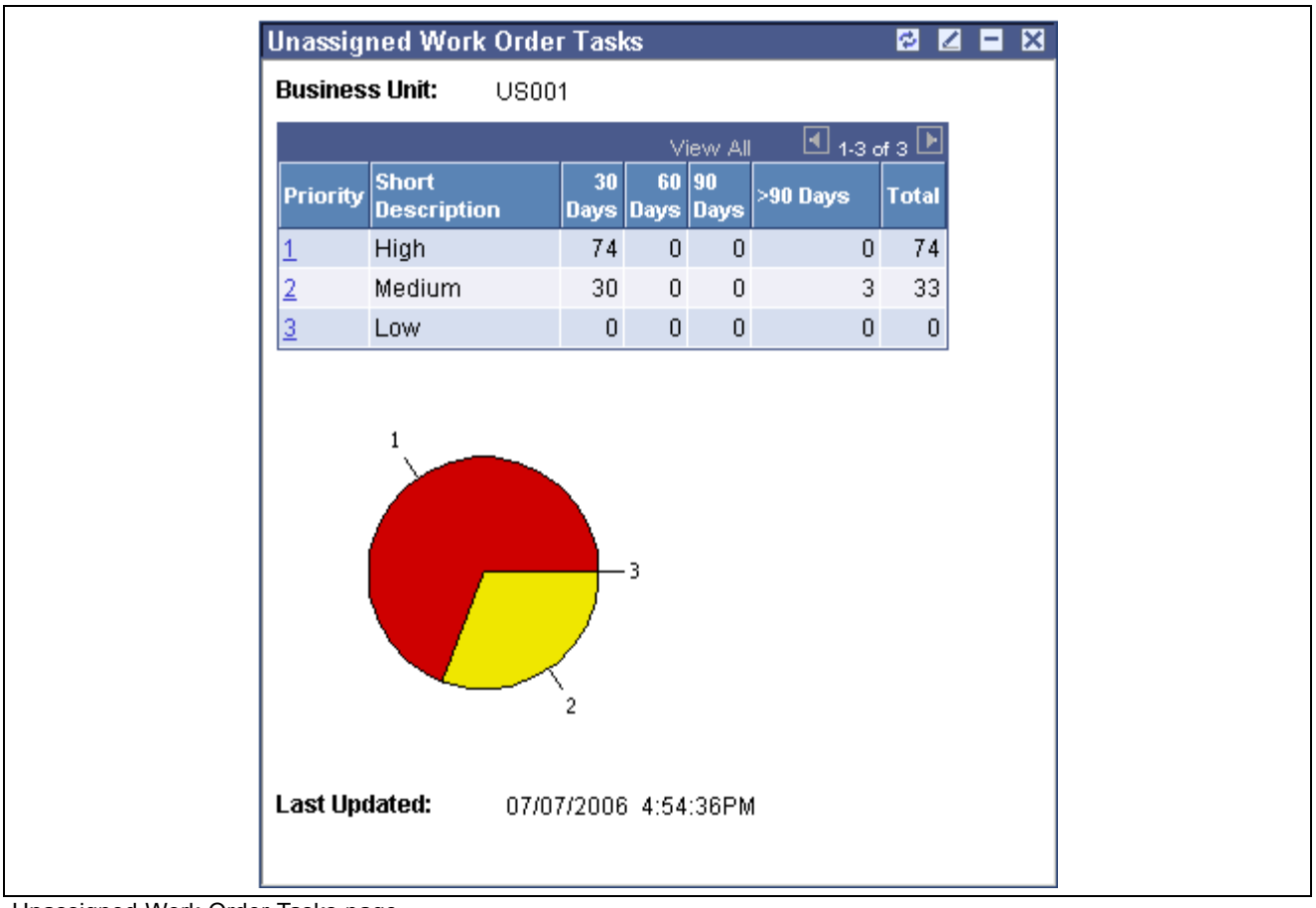
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Pages Used to View Unassigned Work Order Tasks

Page Name	Object Name	Navigation	Usage
Unassigned Work Order Tasks pagelet	EPWM_PE_INITIAL_GBL	Click the Personalize Content link on the PeopleSoft homepage. Select Unassigned Work Order Tasks.	View work order tasks grouped by priority that are *Unassigned* or *Unplanned* status.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the Priority code on the Unassigned Work Order Task page.	View the work order workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Unassigned Work Order Tasks icon on the Unassigned Work Order Tasks pagelet.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Viewing Unassigned Work Order Tasks

Access the Unassigned Work Order Tasks pagelet.



Unassigned Work Order Tasks page

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Priority	Click the Priority link to transfer the Work Order Workbench page to view a list of work orders for the selected priority, sorted by descending date. From the list of work orders on the technician workbench, click the Work Order ID link to view the work order details.
	Note. The Priority field is a configurable value.
30 Days, 60 Days, 90 Days, and **>90 Days** (greater than 90 days)	Displays the number of work orders unassigned by priority and aging days based on the creation date of the work order.
Total	Displays the total of all columns and represents all work orders for the given priority.

Note. This pagelet is dependent on the Initial Status field being set during implementation. The Initial Status field is established during system setup, and work orders cannot be created until the initial status is defined.

Note. This pagelet can only be personalized for the work order business unit. The pagelet is restricted in this way so a user does not accidentally filter out important work orders.

See the Personalizing Backlog by Work Order Type section of this PeopleBook chapter for information on specifying the work order business unit.

Note. Work orders created from preventive maintenance schedules are not included in this pagelet.

Viewing Reviewed Work Order Tasks

This section discusses how to view reviewed work order information.

This pagelet displays work orders that have been reviewed. The work orders are known by the planners, have not been scheduled, but are kept in the system for execution at the appropriate time. The work orders are not cancelled or scheduled, but are in the queue for processing.

These work orders represent a backlog of work that has been identified as necessary, but has not yet been completely planned and scheduled.

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Pages Used to View Reviewed Work Order Tasks

Page Name	Object Name	Navigation	Usage
Reviewed Work Order Tasks pagelet	EPWM_PE_REVIEWED_GBL	Click the Personalize Content link on the PeopleSoft homepage. Select Reviewed Work Order Tasks.	View work orders grouped by priority and age that have been reviewed but not scheduled.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the Priority code on the Unassigned Work Order Task page.	View the work order workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Reviewed Work Order Tasks icon on the Reviewed Work Order Tasks pagelet.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Viewing Reviewed Work Order Tasks

Access the Reviewed Work Orders pagelet.

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Reviewed Work Order Tasks page

Priority Click the Priority link to transfer to the Work Order Workbench page to view a list of work orders for the selected priority, sorted by descending date.

Note. The Priority field is a configurable value.

30 Days, 60 Days, 90 Days, and **>90 Days** (greater than 90 days) Displays the number of work orders reviewed by priority and aging days based on the creation date of the work order.

Total Displays the total of all columns and represents all work orders for the given priority.

Note. See the Personalizing Backlog by Work Order Type section of this PeopleBook chapter for information on personalizing this pagelet.

Note. This pagelet is dependent on the status of the work order. The status must not be equal to an initial status, complete, closed, or cancelled. The Scheduled Start Date is equal to *Null* and the Standing Work Order field is equal to *False.*

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Note. This pagelet is dependent on the Initial Status field being changed to another active status. This requires a business process the user must establish in order to view the complete backlog. If the status is not changed, the work orders are included in the Backlog by Work Order Type pagelet and do not appear in the Reviewed Work Orders pagelet.

Viewing Scheduled Work Order Tasks

This section discusses how to view scheduled work order tasks information.

This pagelet is similar to the Unassigned Work Orders Tasks pagelet displaying the task view and lists work order tasks that are scheduled. The pagelet lists tasks grouped by general work type and service group.

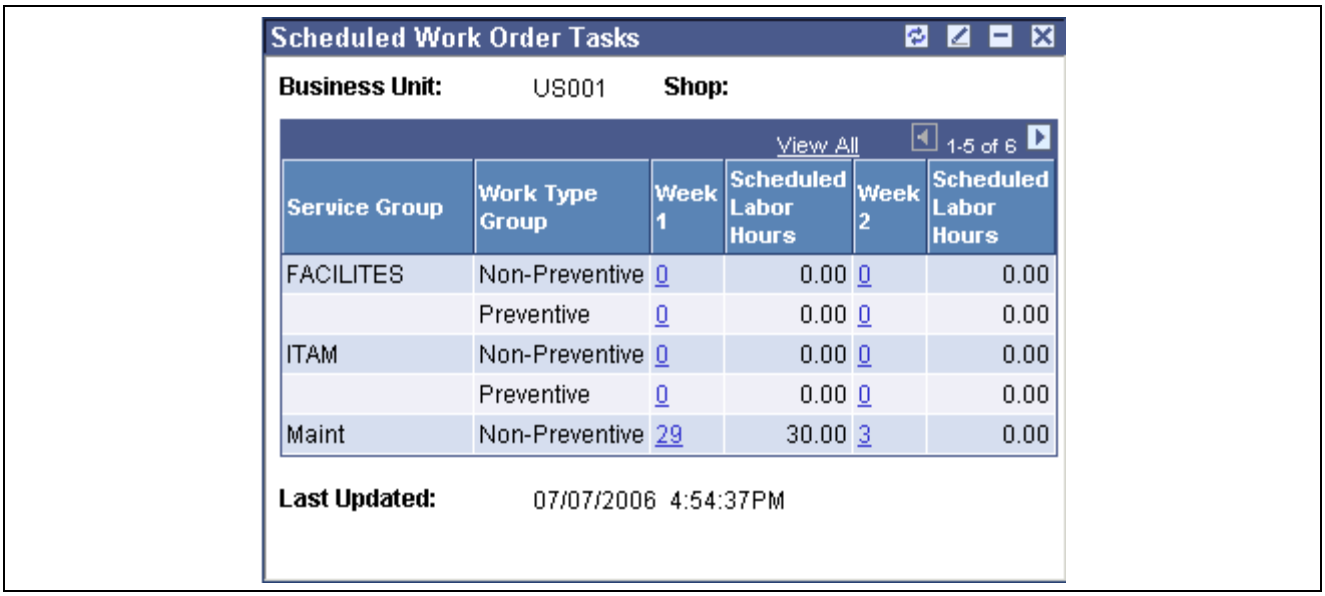
Pages Used to View Scheduled Work Order Tasks

Page Name	Object Name	Navigation	Usage
Scheduled Work Order Tasks pagelet	EPWM_PE_SCHEDULED_GBL	Click the Home link at the top of the screen to access the PeopleSoft home page. Click the Personalize Content link on the PeopleSoft homepage. Select Scheduled Work Order Tasks.	View work orders grouped by general work type and service group that are scheduled.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the link under Week 1 or Week 2 code on the Scheduled Work Order Tasks pagelet.	View the work order workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Scheduled Work Order Tasks icon on the Scheduled Work Order Tasks page.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Viewing Scheduled Work Order Tasks

Access the Scheduled Work Orders pagelet.

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Scheduled Work Order Tasks page

Work Type Group Displays the scheduled work as either preventive or corrective (non-preventive).

Week 1 and **Week 2** Displays the number of tasks that are scheduled to start that week. By clicking the Count link, the system displays the Work Order Workbench page.

Scheduled Labor Hours The total hours of the tasks scheduled for that week.

Note. See the Personalizing Backlog by Work Order Type section of this PeopleBook chapter for information on personalizing this pagelet.

Note. Work order scheduling and shop configuration settings for scheduling labor are required so labor assignments can be made. Labor assignments are required to provide estimated labor hours.

The work order Scheduled Start Date field is required and is within fourteen days of the run time of the pagelet.

Viewing Most Costly Assets to Maintain

This section discusses how to:

- View the most costly assets to maintain.
- Personalize the most costly assets to maintain pagelet.

This pagelet graphically represents the most costly assets based on the user personalization options specified. It displays the five pieces of equipment with the highest maintenance costs for the period specified on the Most costly assets to maintain Personalization page. The display contains for each asset the asset description and total maintenance cost for the period. Clicking a link on any of the five assets takes the user to the Track Service and Repair – Event page.

You can select an AM business unit, asset type, asset subtype, make, model, recent number of months and life to date fields. The date fields enable the user to determine which periods of costs to examine: costs incurred during most recent user-defined number of calendar months (user can select from 1-24) or life to date.

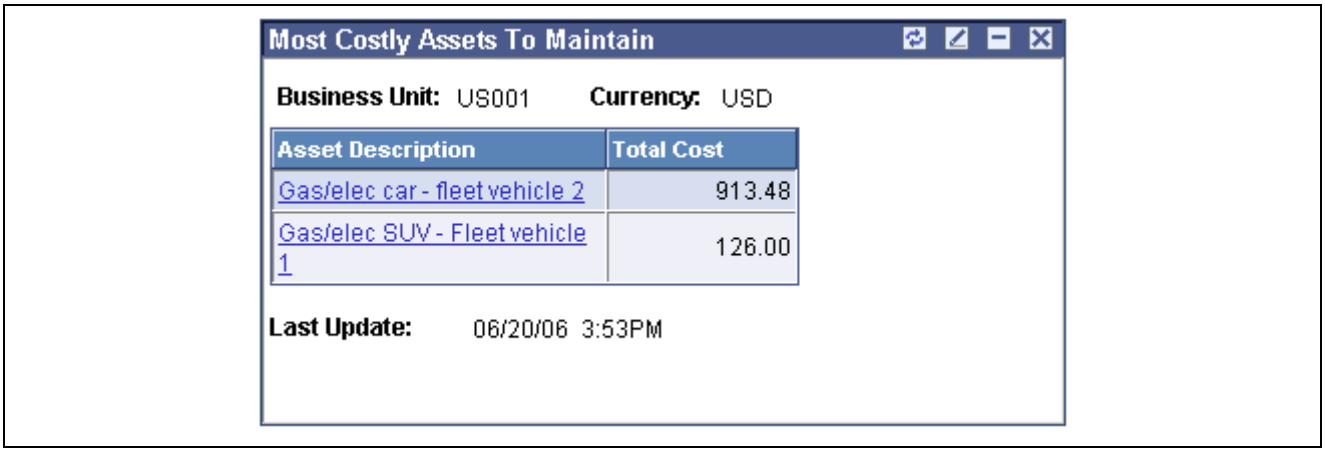
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Pages Used to View Most Costly Assets to Maintain

Page Name	Object Name	Navigation	Usage
Most Costly Assets to Maintain pagelet	WM_TOP_COST_PRS	Click the Home link at the top of the screen to access the PeopleSoft home page. Click the Personalize Content link on the PeopleSoft homepage. Select Most Costly Assets to Maintain.	View the most costly assets to maintain.
Track Service and Repairs	ASSET_MAINT_01	Click the asset link on the Most Costly Assets to Maintain pagelet.	View the service and repair details for that asset.
Most costly assets to maintain Personalization	WM_TOP_COST_PRS	Click the Customize Most Costly Assets to Maintain icon on the Most Costly Assets to Maintain pagelet.	Define default display information for the pagelet.

Viewing Most Costly Assets to Maintain

Access the Most Costly Assets to Maintain pagelet.



Most Costly Assets to Maintain page

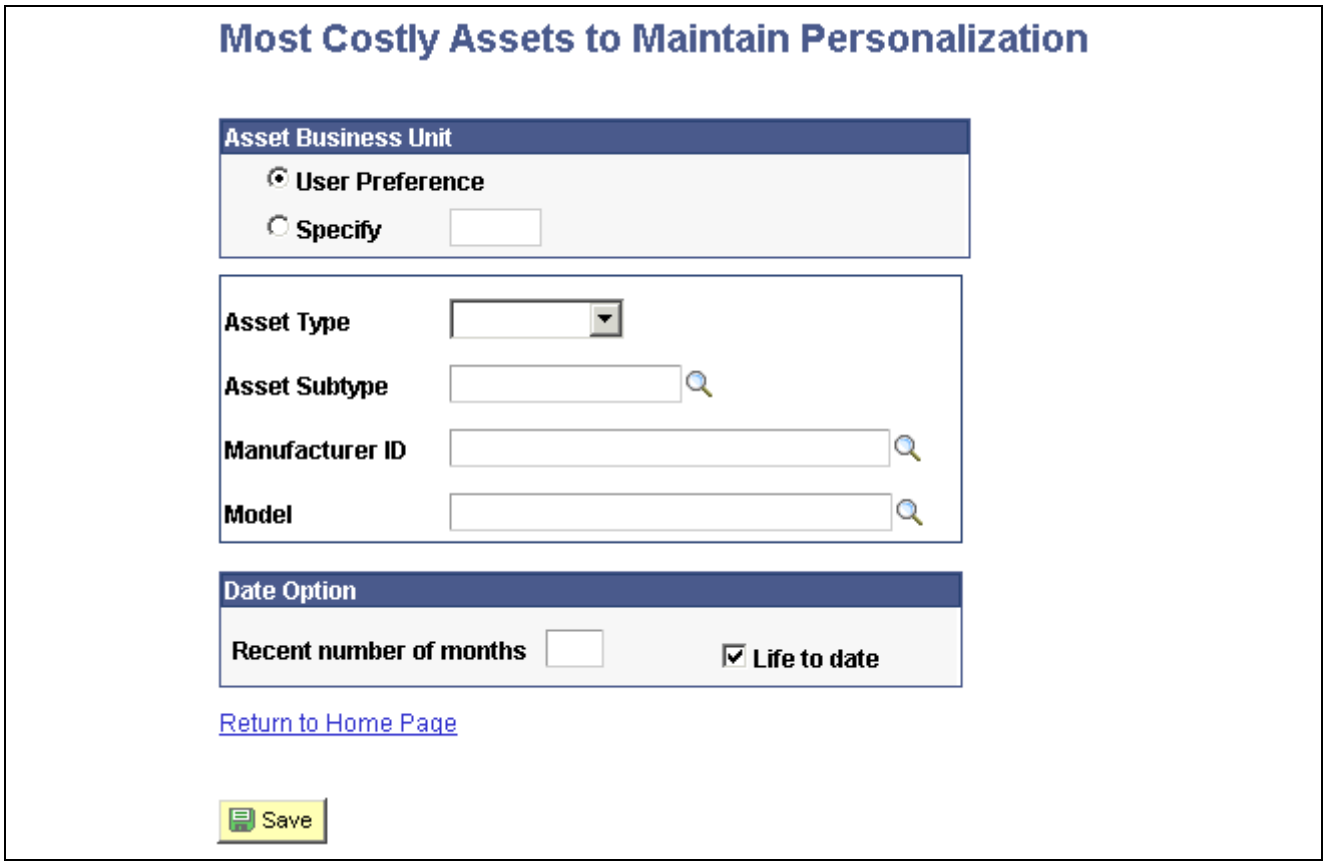
Asset Description Click the asset link to view details of the asset. You can view the detailed service and repair history for this asset.

Total Cost Displays the total cost of service and repairs for this asset.

Viewing Most Costly Assets to Maintain Personalization

Access the Most costly assets to maintain Personalization page.

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Most Costly Assets to Maintain Personalization page

Access the Most costly assets to maintain Personalization page.

Asset Business Unit

You can either use the default user preferences or select a value for the asset business unit

Asset Type Select to filter by an asset type. If nothing is select, the pagelet displays all asset types.

Asset Subtype Select to filter by an asset subtype. You must select an asset type before you can select a subtype.

Manufacturer ID (manufacturer identification) Enter a manufacturer to further filter the data.

Model Enter the model information to further filter the data.

Date Option

Recent number of months Enter the number of months to filter your search. By entering a specific number of months, you can view the costliest asset to maintain based on data for those recent months.

Life to date Select to calculate cost based on all maintenance history data

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Viewing Top Five Problem Codes

The Top 5 Problem Codes pagelet graphically represents the most reported problem codes based on the user personalization options specified. The bars represent a count of work order tasks.

Note. This pagelet requires problem, cause, and resolution codes to be set up and updated appropriately throughout the life cycle of the work order.

This section discusses how to:

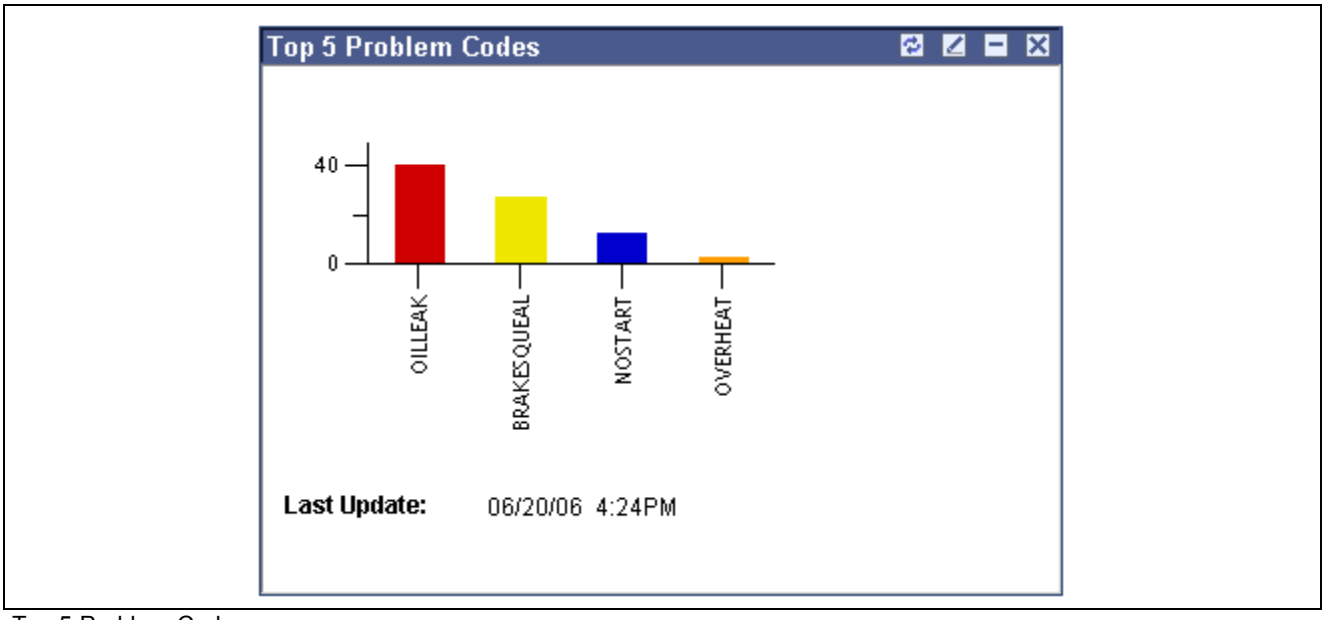
- View the top five problem codes.
- Personalize the Top Five Problem Codes pagelet.

Pages Used to View Top Five Problem Codes

Page Name	Object Name	Navigation	Usage
Top 5 Problem Codes pagelet	EP_WM_TOP_PROBLEMS	Click the Personalize Content link on the PeopleSoft homepage. Select Top 5 Problem Codes.	View the most reported problem codes.
Top 5 Problems Pagelet Personalization	WM_TOP_PROB_PRS	Click the Customize Top 5 Problem Codes icon on the Top 5 Problem Codes pagelet.	Define default display information for the Top 5 Problem Codes pagelet.

Viewing Top 5 Problem Codes

Access the Top 5 Problems Codes pagelet.



Top 5 Problem Codes page

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Personalizing Top 5 Problem Codes

Access the Top 5 Problems Pagelet Personalization page.



Top 5 Problems Pagelet Personalization page

Use the fields to filter which group of problem codes to analyze and which assets the pagelet will examine when counting the frequency of problem occurrences. You can use the default business unit that is set up in User Preferences for this user or select a different PeopleSoft Maintenance Management business unit. You can select a service group, shop, problem group, asset type and asset subtype.

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CHAPTER 19

Using Pagelets Enabled by PeopleSoft Real Estate Management

This chapter discusses how to:

- Set up PeopleSoft Real Estate Management for the PeopleSoft Asset Lifecycle Management Portal Pack.
- Set up portal pack default administration.
- View real property statistics.
- View space utilization.
- View my lease portfolio.
- View lease revenues.
- View lease costs.
- View lease statistics.
- View lease optimization.
- View my tasklist.

Setting Up PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack

This section provides an overview of PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack and lists the page used to set up Real Estate Management for the ALM Portal Pack.

Understanding PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack

If you currently use PeopleSoft Real Estate Management and want to use the PeopleSoft Real Estate Management pagelets in the PeopleSoft ALM Portal Pack, you must schedule and run the Real Estate Portal Data Collector Application Engine process (RE_PGLT_DATA). The Real Estate Portal Data Collector process summarizes transaction data in order to improve response times when viewing the pagelets. The data is stored in summary tables and is displayed on pagelets according to your personalized settings. While the Real Estate Portal Data Collector greatly improves response times for reading the data, it also imposes limitations on when changes to the transaction data are reflected in the pagelets. Changes in the transaction data are not reflected in the pagelets in real time. You must periodically rerun the Real Estate Portal Data Collector process to refresh the pagelets. We recommend setting up a recurring job to execute the Real Estate Portal Data Collector on a periodic basis. How often you run the collector process depends on a number of factors such as:

- How quickly you need the data updated.

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- How much data you have in the system—the longer your system operates, the more data has to be summarized, hence the longer the data loader process can take to execute.
- How many system resources are available to your process scheduler.

Page Used to Set Up PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack

Page Name	Object Name	Navigation	Usage
Load Pagelet Data	RUN_RE_PGLT_DATA	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Data Collector	Run a process that creates summary data used by PeopleSoft Real Estate Management pagelets in the PeopleSoft ALM Portal Pack.

Setting Up Portal Pack Default Administration

This section provides an overview and discusses how to set up portal pack default administration.

Understanding Portal Pack Default Administration

The portal pack default administration page enables you to establish default filters for your pagelets. When setting up the PeopleSoft Real Estate Management system, you need to first identify default filters from an administrative level. The administrative settings provide the default personalization values that individual users inherit if they do not establish their own values. The administration values can only be established at the Administration level. After the administrative default values are defined, each user can establish their own defaults through the Portal Pack Default Administration page.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining User Preferences," Understanding User Preferences.

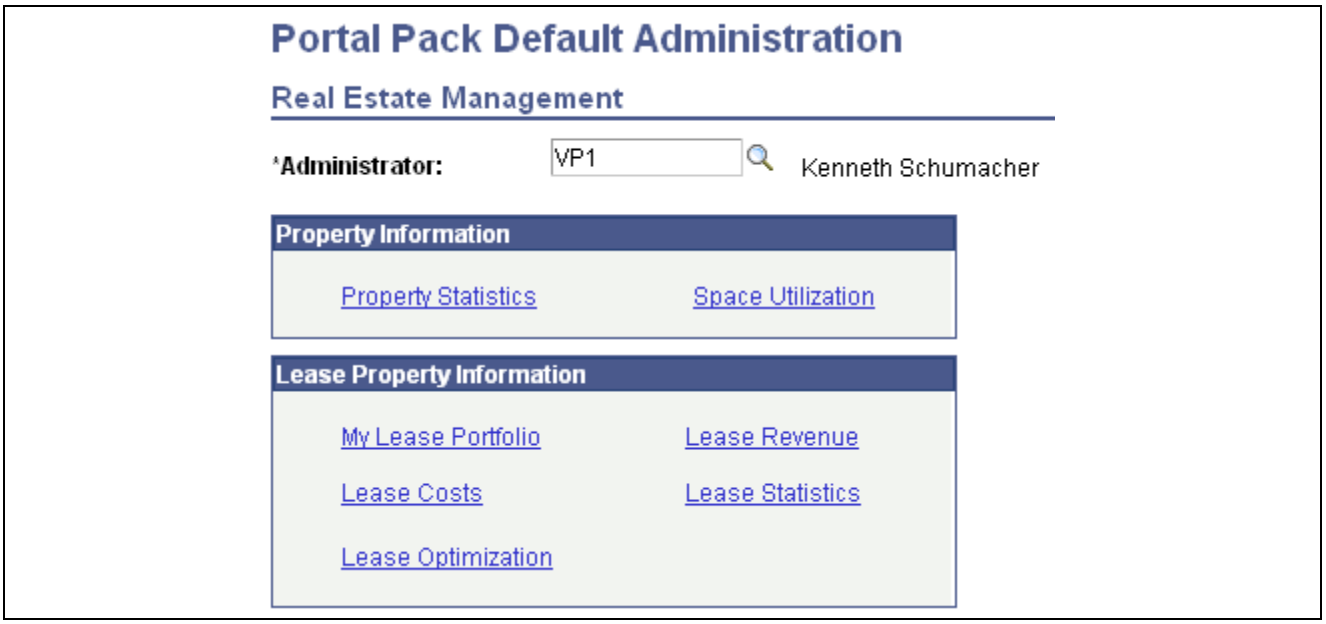
Page Used to Set Up Portal Pack Default Administration

Page Name	Object Name	Navigation	Usage
Portal Pack Default Administration - Real Estate Management	RE_PP_DEF_ADMIN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults	Define user defaults for each pagelet.

Setting Up Portal Pack Default Administration

Access the Portal Pack Default Administration - Real Estate Management page.

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Portal Pack Default Administration - Real Estate Management page

Property Information

Click the links to access the personalization pages used to define pagelet default filters.

Lease Property Information

Click the links to access the personalization pages used to define pagelet default filters.

Viewing Real Property Statistics

This section provides an overview of real property statistics and discusses how to:

- View real property statistics.
- View property breakdown by region.
- Personalize the Property Statistics pagelet.

Understanding Real Property Statistics

Property statistics provides you with an immediate, high-level statistical summary of your overall property holdings broken down by ownership status. This pagelet contains Asset Management-based property information that you can be view whether PeopleSoft Real Estate Management is installed or not. The property statistics pagelet data derives from the area statistics stored in the Asset Repository.

Note. Property statistics data is not dependent on the Computer Aided Facilities Management (CAFM) system.

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Pages Used to View Real Property Statistics

Page Name	Object Name	Navigation	Usage
Property Statistics pagelet	RE_PROPSTATS_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Property Statistics.	View property information such as number of properties, total area and occupancy summarized by business unit, region, and property type.
Property Statistics - Region	RE_PROPSTATS_DTL	Click the Region link on the Property Statistics pagelet.	View property statistic by region.
Personalize Property Statistics - Administration	RE_PROPSTATS_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Property Statistics, Personalize Property Statistics - Administration	Setup default filter criteria for property statistics data.

Viewing Property Statistics

Access the Property Statistics pagelet.

Owned/Leased Displays whether the property is owned or leased.

Region Click this link to view the property detail page within that region.

Properties Displays the total number of properties in that region.

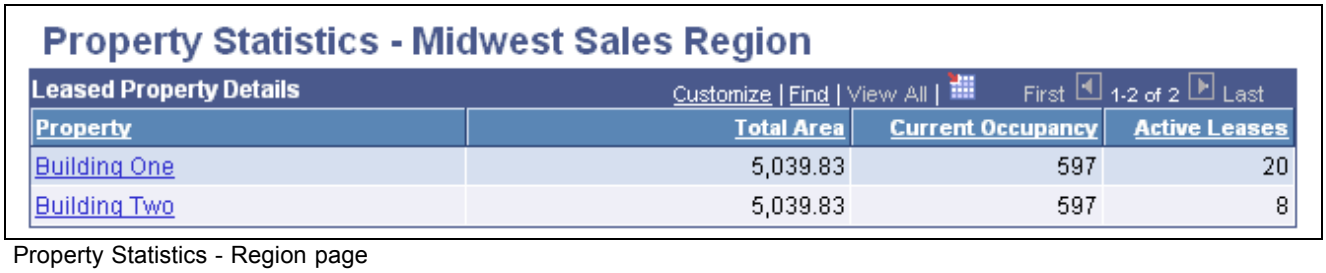
Total Area (x1000) (total area in thousands) Displays the total area of the property in thousands.

Current Occupancy Displays the total current number of occupants residing on the property.

Viewing Property Breakdown by Region

Access the Property Statistics - Region page.

Click the Region link to view details on the Property Statistics page.



Property Statistics - Region page

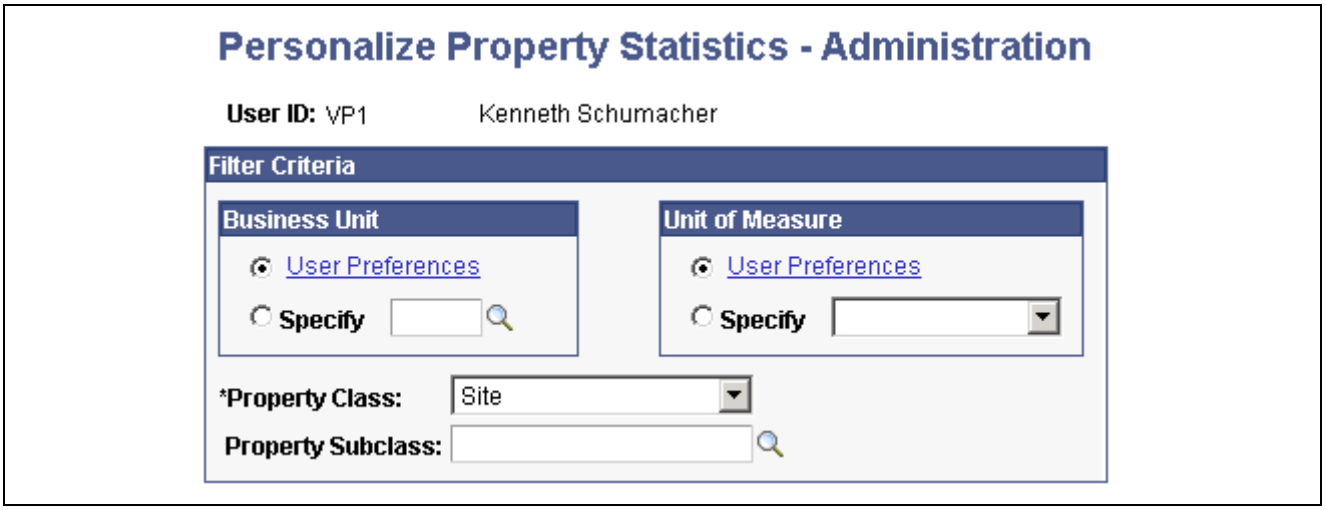
Property Click the link to view detailed property data stored in the asset repository.

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Active Leases Displays the number of active leases associated with the property. This column is visible only if the Property Class filter is set to *Site* or *Building*. This total includes all child properties for the site or building.

Personalizing the Property Statistics Pagelet

Access the Personalize Property Statistics - Administration page.



Personalize Property Statistics - Administration page

Business Unit

User Preferences Select to have the system display property statistics for only those properties with the business unit that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display property statistics for properties from a business unit other than the business unit that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must enter a business unit value.

Unit of Measure

User Preferences Select to have the system display property statistics in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display property statistics in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Property Class Select to filter by a specific property class. Values are: *Building* or *Site*.

Property Sub-Class Select to filter by a subclass. Property subclass is used to further categorize the property class. For instance, a *Building* can be a warehouse, an office building, a retail outlet, and so on. A *Site* can be a campus, a building site, empty land, and so on.

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Note. Property subclass is related to property class. There is a parent-child relationship between the two. You cannot select a subclass without first selecting a property class.

Viewing Space Utilization

This section provides an overview of space utilization and discusses how to:

- View space utilization.
- Personalize the Space Utilization pagelet.

Understanding Space Utilization

View the usage statistics of each property summarized by region and the type of ownership properties with the Space Utilization pagelet. The Space Utilization pagelet enables you to view the total occupied area and the unoccupied area in the properties you selected in the personalization settings. Click the Region link to navigate to the detailed page listing all the properties by ownership status. You can display this pagelet only if ALM is installed.

Pages Used to View Space Utilization

Page Name	Object Name	Navigation	Usage
Space Utilization pagelet	RE_SPACEUTL_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Space Utilization.	View usage statistics of each property summarized by region and ownership property types.
Personalize Space Utilization - Administration	RE_SPACEUTL_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Space Utilization, Personalize Space Utilization - Administration	Define default information for the Space Utilization pagelet.

View Space Utilization

Access the Space Utilization pagelet.

Occupied (x1000) (occupied per thousand) Displays the total occupied space (in thousands) for all properties within the specified region.

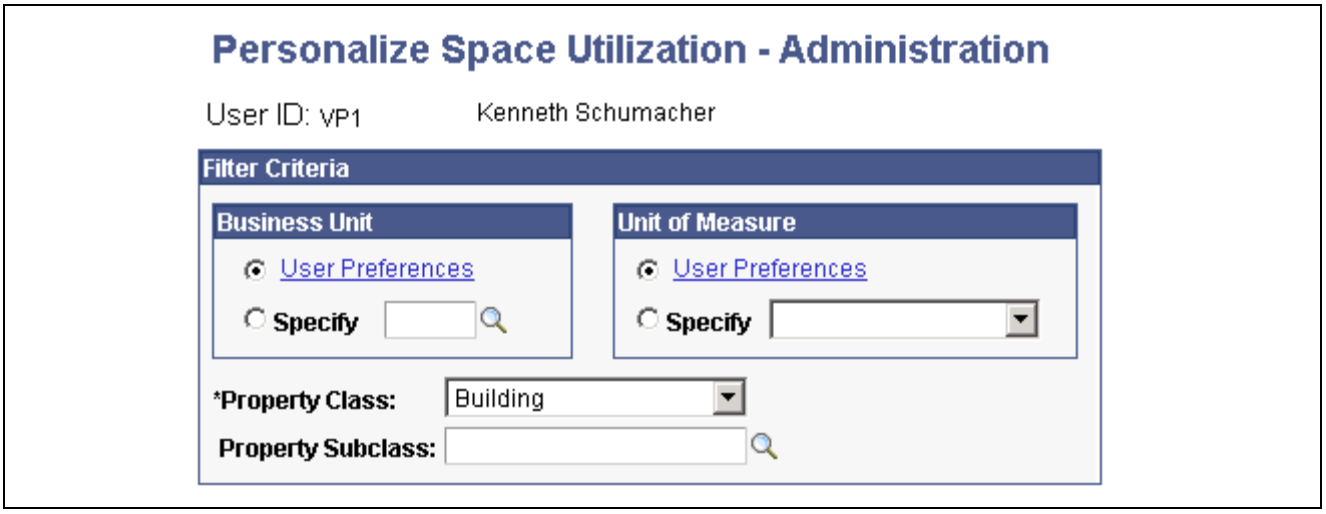
Vacant (vacant per thousand) Displays the total vacant space (in thousands) for all properties within the specified region.

Occupancy Rate Displays the percentage of occupied space for all properties within the specified region. Calculation method: (Occupied Space / (Occupied Space + Vacant Space)) × 100.

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Personalizing the Space Utilization Pagelet

Access the Personalize Space Utilization - Administration page.



Personalize Space Utilization - Administration page

Business Unit

User Preferences Select to have the system display usage statistics for only those properties with the business unit that is specified in your user preferences on the Asset Management - User Preferences page.

Specify Select to have the system display usage statistics for properties from a business unit other than the business unit that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must enter a business unit value.

Unit of Measure

User Preferences Select to have the system display usage statistics in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display property statistics in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Property Class Select to filter by a specific property class. Values are: *Building* or *Site*.

Property Sub-Class Select to filter by a subclass. Property subclass is used to further categorize the property class. For instance, a *Building* can be a warehouse, an office building, a retail outlet, and so on. A *Site* can be a campus, a building site, empty land, and so on.

Note. Property subclass is related to property class. There is a parent-child relationship between the two. You cannot select a subclass without first selecting a property class.

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Viewing My Lease Portfolio

This section provides an overview of My Lease Portfolio and discusses how to:

- View My Lease Portfolio.
- Personalize the My Lease Portfolio pagelet.

Understanding My Lease Portfolio

The My Lease Portfolio pagelet is summarized by the lease type—payables, receivable, and sublease. You can view the total number of leases for each lease type and region, the total area of all leases of that region by lease type, and the average life or the sum of all the leases term divided by total number of leases in a region. The total rented area is shown in 000s (rounded to thousands).

Note. This pagelet displays only leases that you add to your portfolio; otherwise this pagelet is blank.

Pages Used to View My Lease Portfolio

Page Name	Object Name	Navigation	Usage
My Lease Portfolio pagelet	RE_MYLEASES_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select My Lease Portfolio.	View a summary of leases you've added to your portfolio broken down by lease types and regions.
My Lease Portfolio	RE_MYPRTFL	Click the Region link to view all leases in that region.	Add or view leases in your portfolio.
Personalize My Lease Portfolio - Administration	RE_MYLEASES_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, My Lease Portfolio, Personalize My Lease Portfolio - Administration	Define default display information for the My Lease Portfolio pagelet.

Viewing My Lease Portfolio

Access the My Lease Portfolio pagelet.

Leases Displays the number of leases in your portfolio by lease type and region.

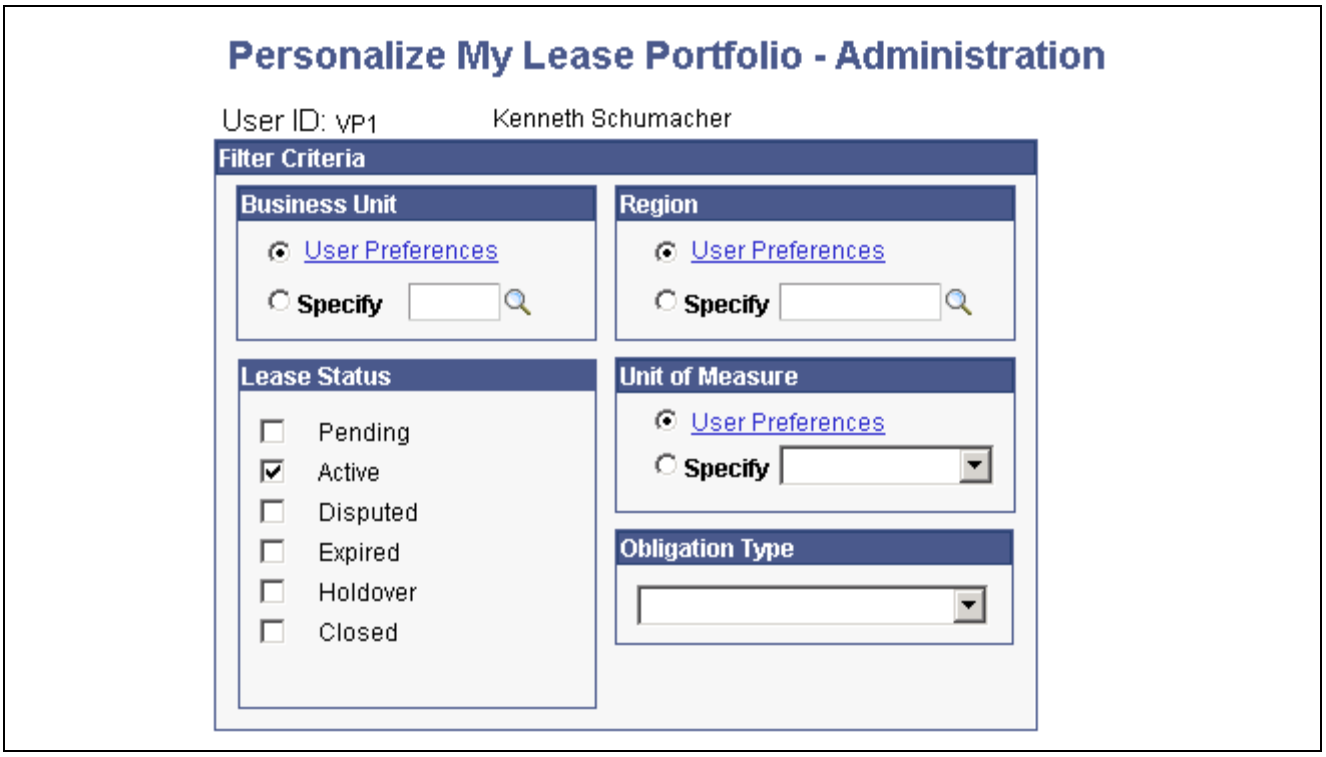
Area Rented (x1000) (area rented in thousands) Displays the total rented area of all leases for that region by lease type.

Avg. Life (Yrs) (average life in years) Displays the sum of all the lease terms divided by total number of leases in a region. This is displayed in thousands.

Personalizing the My Lease Portfolio Pagelet

Access the Personalize My Leases Portfolio - Administration page.

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Personalize My Lease Portfolio - Administration page

Business Unit

User Preferences Select to have the system display leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify Select to have the system display leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Region

User Preferences Select to have the system display leases for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display leases from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Lease Status

Select to filter by one or more lease statuses.

Unit of Measure

User Preferences Select to have the system display the area rented in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

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Specify Select to have the system display the area rented in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Obligation Type

Select to filter by a specific obligation type. Values are: *Receivable Lease, Payable Lease,* or *Sub-Lease.*

Viewing Lease Revenue

This section provides an overview of lease revenue and discusses how to:

- View lease revenue.
- Personalize the Lease Revenue pagelet.

Understanding Lease Revenue

The Lease Revenue pagelet summarizes the revenue from receivable leases that are in the status of *Processed* in the transaction queue. The revenue includes the recurring and non-recurring transactions for a lease. The information is summarized by region and the amounts are rounded to the thousands. The system uses the user personalization settings for unit of measure to calculate area and the currency to display the results.

Pages Used to View Lease Revenue

Page Name	Object Name	Navigation	Usage
Lease Revenue pagelet	RE_LEASESREV_P	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Revenue.	View revenues from receivables leases summarized by regions.
Personalize Lease Revenue - Administration	RE_LEASEREV_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Revenue, Personalize Lease Revenue - Administration	Define default information for the Lease Revenue pagelet.

Viewing Lease Revenue

Access the Lease Revenue pagelet.

Region Displays the region. Click to access the Payment Transaction page. The system passes the current filter values through to the page so that the transaction totals match the amounts that are in the pagelet.

Amount (x1000) (amount in thousands) Displays the revenue from receivables lease in a region. The amount that the system displays is based on the filters that you select on the Personalize Lease Revenue - Administration page.

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Revenue per Rent Sq. ft. (revenue per rentable square foot) Displays the average rent revenue per unit of measure of rentable area. This is calculated as (Total lease revenue of all receivable leases) ÷ (Rentable area on all receivable leases). The unit of measure is based on the value selected on the Personalize Lease Revenue - Administration page. The system uses the currency from the Personalize Lease Revenue - Administration page.

Revenue per Total Sq. ft. (revenue per total square feet) Displays the average revenue per unit of measure of total area. This is calculated as (Total lease revenue of all receivable leases) ÷ (Total area on all receivable leases). The unit of measure is based on the value selected on the Personalize Lease Revenue - Administration page.

Personalizing the Lease Revenue Pagelet

Access the Personalize Lease Revenue - Administration page.



Personalize Lease Revenue - Administration page

Business Unit

User Preferences Select to have the system display revenue for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify Select to have the system display revenue for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

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Calendar

The Administrator sets the maximum number of periods worth of data that will appear.

Calendar Enter the calendar that the system uses to calculate the timespan for which data is summarized in the pagelet. The system uses this value in combination with the value in the Prior Periods field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and *2* for prior periods, the system populates the pagelet data for the previous two months.

Prior Periods Specify the number of prior accounting periods from current period to be included in the calculation

Currency

User Preferences Select to have the system display the revenue from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display revenue from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a currency value.

Region

User Preferences Select to have the system display lease revenue for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify Select to have the system display lease revenue from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Transaction Group

Select to filter by one or more transaction groups.

Unit of Measure

User Preferences Select to have the system display lease revenue in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display the revenue in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

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Viewing Lease Costs

This section provides an overview of lease costs and discusses how to:

- View a summary of lease costs.
- Personalize the Lease Costs pagelet.

Understanding Lease Costs

The Lease Costs pagelet is a summary of the costs of maintaining payables leases. Lease costs include the recurring and nonrecurring transactions for a lease. The information is summarized by region and the amounts are rounded to the thousands. The system uses the user personalization settings for unit of measure to calculate area and the currency to display the results.

Pages Used to View Lease Costs

Page Name	Object Name	Navigation	Usage
Lease Costs	RE_LEASECOST_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Costs.	View a summary of the costs of maintaining PeopleSoft Payables leases.
Payment Transactions	RE_TXN_MANAGER	Click the Region link to view the transaction queue. The data on this page is summarized on the Lease Cost pagelet.	Displays the details that make up the summary of costs for maintaining payables leases. See *PeopleSoft Enterprise Real Estate Management 9.0 PeopleBook*, "Processing Payments for Payables Leases," Understanding Payment Processing.
Personalize Lease Costs - Administration	RE_LEASECOST_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Costs, Personalize Lease Costs - Administration	Define default display information for Lease Costs pagelet.

View a Summary of Lease Costs

Access the Lease Costs pagelet.

Region Displays the region. Click to access the Payment Transactions page. The system passes the current filter values through to the page so that the transaction totals match the amounts that are in the pagelet.

Amount (x1000) (amount in thousands) Displays the costs from payables leases in a region. The amount that the system displays is based on the filters that you select on the Personalize Lease Cost - Administration page.

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Cost per Rent Sq. ft. (cost per rentable square foot) Displays the average cost per unit of measure of rentable area. This is calculated as *(Lease cost of all payable leases) ÷ (Rentable area on all payable leases)* where the unit of measure is based on the value selected on the Personalize Lease Cost - Administration page.

Cost per Total Sq. ft. (cost per total square feet) Displays the average cost per unit of measure of total area. This is calculated as *(Total lease cost of all payable leases) ÷ (Total area on all payable leases)* where the unit of measure is based on the value selected on the Personalize Lease Cost - Administration page.

Personalizing the Lease Cost Pagelet

Access the Personalize Lease Cost - Administration page.



Personalize Lease Costs - Administration page

Business Unit

User Preferences Select to have the system display costs for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify Select to have the system display costs for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

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Calendar

Calendar Enter the calendar that the system uses to calculate the timespan for which data is summarized in the pagelet. The system uses this value in combination with the value in the Prior Periods field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and *2* for prior periods, the system populates the pagelet data for the previous two months.

Prior Periods Specify the number of prior accounting periods from current period to be included in the calculation.

Currency

User Preferences Select to have the system display the costs from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display costs from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a currency value.

Region

User Preferences Select to have the system display lease costs for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify Select to have the system display lease costs from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Transaction Group

Select to filter by one or more transaction groups.

Unit of Measure

User Preferences Select to have the system display lease costs in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display the revenue in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

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Viewing Lease Statistics

This section provides an overview of lease statistics and discusses how to:

- View lease statistics.
- Personalize the Lease Statistics pagelet.

Understanding Lease Statistics

The Lease Statistics pagelet lists the ratio of total area, usable area and rented area summarized by region. You can navigate to the Lease Maintenance search page to see the list of leases of the region clicked.

The information displayed is summarized by region. You can view the total area data, usable area, and rented area specified by your personalization filters. The total area is the sum of the total area of the filtered leases by region; usable area is the sum of total usable area of the filtered leases; and rented area displays the total rented area of the filtered leases. All the area calculations are in 000s (rounded to thousands). Clicking the Region link takes you to the Lease Maintenance search page, which lists all of the filtered leases for that region.

Pages Used to View Lease Statistics

Page Name	Object Name	Navigation	Usage
Lease Statistics pagelet	RE_LEASEOPT_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Statistics.	View the ratio of total area, usable area and area actually rented, summarized by region. You can navigate to Lease Maintenance search page to see the list of leases for the region selected.
Personalize Lease Statistics - Administration	RE_LEASEOPT_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Statistics, Personalize Lease Statistics - Administration	Define default information for the Lease Statistics pagelet.

Viewing Lease Statistics

Access the Lease Statistics pagelet.

Region Displays the region. Click to access the Lease Maintenance search page, which lists all of the filtered leases for that region.

Total Area Displays the sum of the total area of the leases by region.

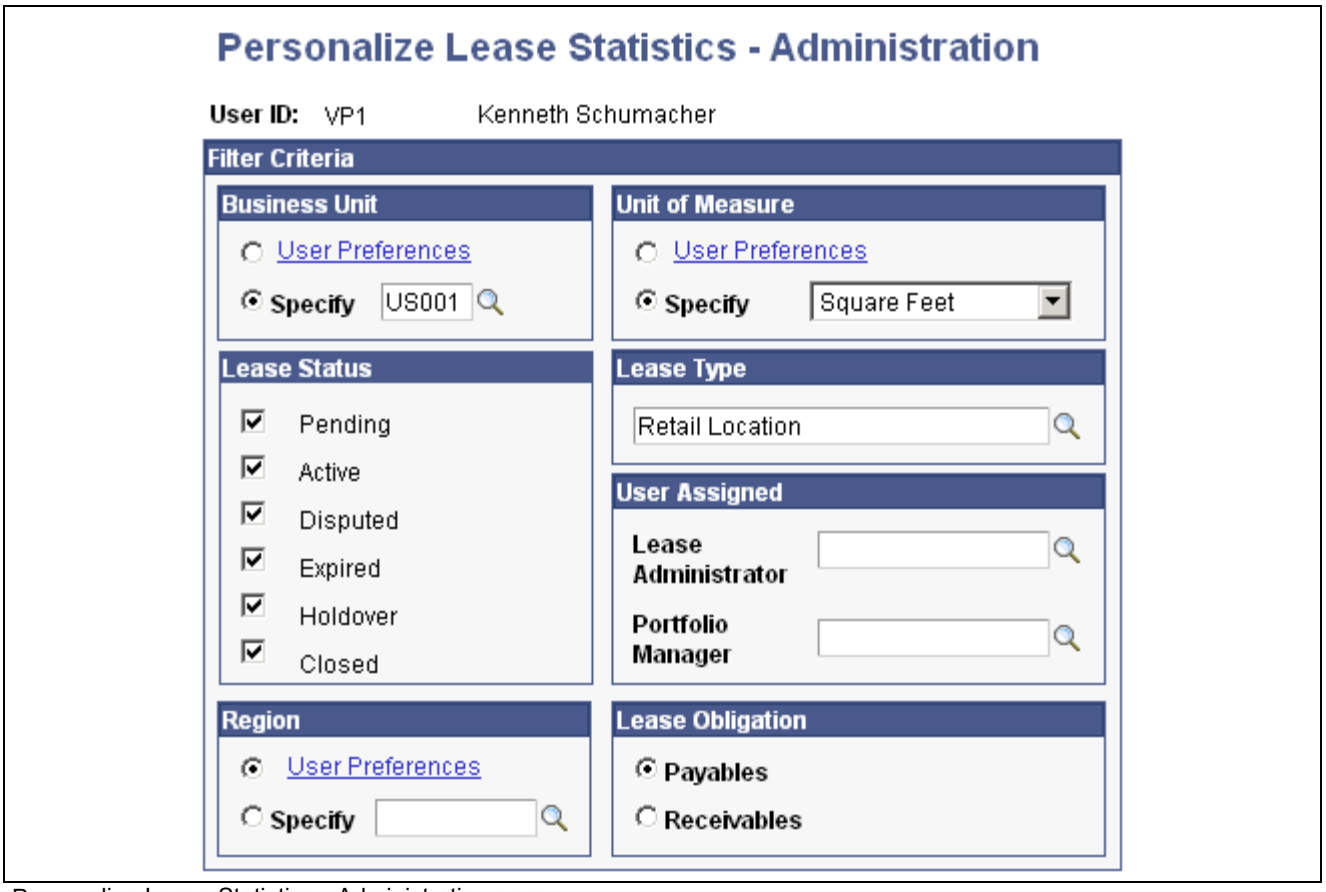
Rentable Displays the sum of the total rental area of the leases by region.

Usable Displays the sum of the total usable area of the leases by region.

Personalizing the Lease Statistics Pagelet

Access the Personalize Lease Statistics - Administration page.

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Personalize Lease Statistics - Administration page

Business Unit

User Preferences Select to have the system display the area for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify Select to have the system display the area for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Unit of Measure

User Preferences Select to have the system display the area in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify Select to have the system display the area in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

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Lease Status

Select to filter by one or more lease statuses. If you do not select any statuses, then no data appears in the pagelet.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

User Assigned

Lease Administrator and **Portfolio Manager** — Select to filter by specific lease administrator or portfolio manager.

Region

User Preferences — Select to have the system display the area for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify — Select to have the system display the area from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Lease Obligation

Select Payables or Receivables to display the total, rentable, and usable area in the pagelet for the payables leases or the receivables leases.

Viewing Lease Optimization

This section provides an overview of lease optimization and discusses how to:

- View lease optimization.
- Personalize the Lease Optimization pagelet.

Understanding Lease Optimization

The Lease Optimization pagelet summarizes the costs of maintaining payables leases and the revenues from subleasing activity. It also provides information on the subleasing ratio and cost recovery ratio. The subleasing ratio is the ratio of subleased area to the total area of subleased payables leases. The cost recovery ratio is the ratio of sublease revenue to the costs of subleased payables leases. Lease costs include the recurring and non-recurring transactions for all payables leases which are subleased and sublease revenue includes recurring and non-recurring transactions from subleasing.

You can view the lease cost, sublease revenue, sublease ratio, and cost recovery ratio based on your personalization filters. The system displays the information summarized by region. The lease cost and sublease revenue are in the thousands. You can click a lease cost to transfer to the Lease Cost page on which you can view all of the filtered leases for the region row that you select. You can click a sublease revenue to access the Sublease Revenue page on which you can view all of the filtered leases from the region row that you select.

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Pages Used to View Lease Optimization

Page Name	Object Name	Navigation	Usage
Lease Optimization pagelet	RE_LSOPTIMIZE_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Optimization.	View the ratio of subleasing with respect to total leased area and the ratio of recovery of lease cost by subleasing activity.
Lease Cost - <Region>	RE_LSCOSTS_DTL	Click a lease cost link in the Lease Optimization pagelet.	View the details for the summary of costs for payables leases.
Sublease Revenue - <Region>	RE_SUBLSREV_DTL	Click a sublease revenue link in the Lease Optimization pagelet.	View the details for the summary of sublease revenues.
Personalize Lease Optimization - Administration	RE_LSOPTIMIZE_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Optimization, Personalize Lease Optimization - Administration	Define default information for the Lease Optimization pagelet.

Viewing Lease Optimization

Access the Lease Optimization pagelet.

Lease Cost (x1000) Displays the sum of recurring and non-recurring financial terms for all payables leases that have sublease activity. The system displays the amount based on all of the filters defined on the Personalize Lease Optimization - Administration page. The system includes processed transactions for this pagelet.

Sublease Revenue (x1000) Sum of recurring and non-recurring financial terms for subleases.

The amount will be subject to all the filters defined. The system displays the amount based on all of the filters defined on the Personalize Lease Optimization - Administration page. The system includes processed transactions for this pagelet.

Sublease Ratio Displays the sublease ratio that is calculated as (Total area of all subleases) ÷ (Total area of all payable leases that are subleased).

Cost Recovery Ratio Displays the cost recovery ratio that is calculated as (Sublease revenue) ÷ (Lease cost).

Personalizing the Lease Optimization Pagelet

Access the Personalize Lease Optimization - Administration pagelet.

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Personalize Lease Optimization - Administration page

Business Unit

User Preferences Select to have the system display values for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify Select to have the system display the values for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Calendar ID

Calendar Enter the calendar that the system uses to calculate the timespan for which data is summarized in the pagelet. The system uses this value in combination with the value in the Prior Periods field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and *2* for prior periods, the system populates the pagelet data for the previous two months.

Prior Periods Specify the number of prior accounting periods from current period to be included in the calculation.

Transaction Group

Select to filter by one or more transaction groups. .

Currency

User Preferences Select to have the system display the values from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

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Specify Select to have the system display the values from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a currency value.

Region

User Preferences Select to have the system display values for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify Select to have the system display values from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Viewing My Tasklist

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

- View your tasklist.
- View your critical dates.

Understanding the Tasklist

You can view a summary of all critical dates assigned to you. This pagelet displays the details and the critical date assignments summarized into incremental timelines. The option column shows the different types of lease options with critical dates assigned. This column provides a link enabling you to drill down into the Lease Maintenance search page showing all the leases and the selected lease options by lease and timeline.

Pages Used to View My Tasklist

Page Name	Object Name	Navigation	Usage
My Tasklist pagelet	RE_MYTASKS_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select My Tasklist.	View a summary of all critical dates for a specific user.
My Critical Dates	RE_OPT_RECIP	Click the link in the Options column on the My Tasklist page.	View all leases with the specified lease option within the supplied date range.

View My Tasklist

Access the My Tasklist pagelet.

Option Displays the different types of lease options with critical dates assigned.

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Urgent Displays the count of lease options with critical dates that fall within this timeline (0 - 7 days from report date). You can click the number link to view the lease options that require action.

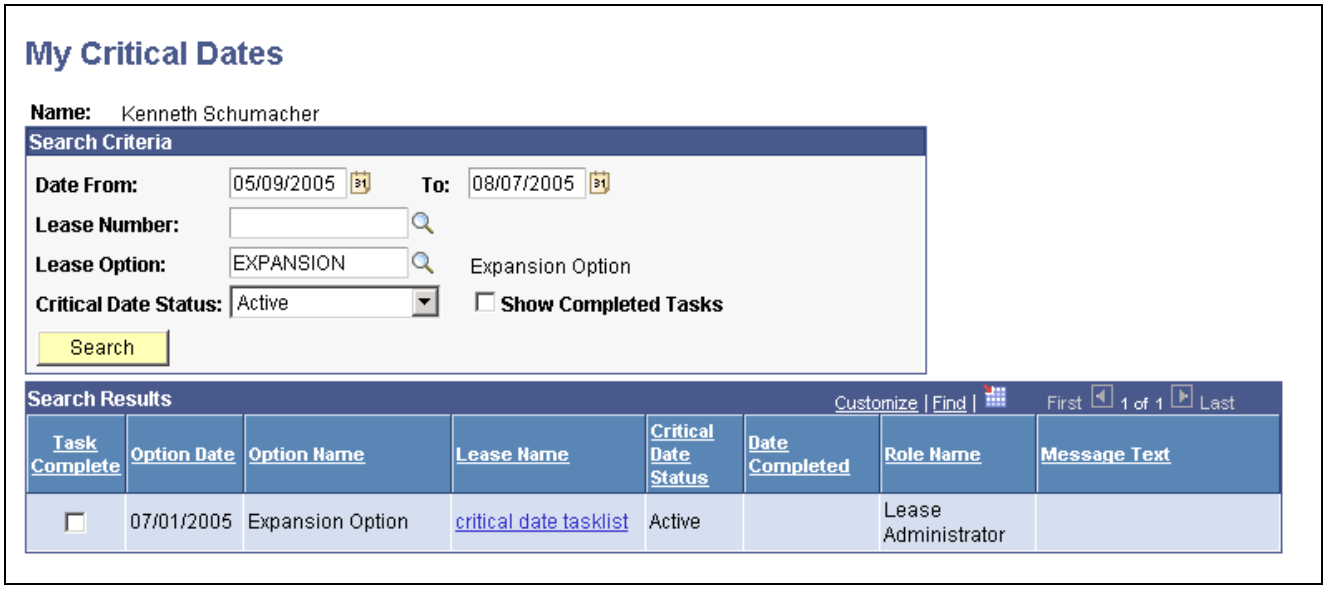
30 Days Displays the count of lease options with critical dates that fall within this timeline (8 - 59 Days from report date). You can click the number link to view the lease options that require action.

60 Days Displays the count of lease options with critical dates that fall within this timeline (60 - 89 Days from report date). You can click the number link to view the lease options that require action.

90 Days Displays the count of lease options with critical dates that fall within this timeline (90 Days + from report date). You can click the number link to view the lease options that require action.

Viewing My Critical Dates

Access the My Critical Dates page.



My Critical Dates page

Date From and **To** Select to filter lease options by the date range. You can view all lease options that fall within that date range.

Lease Option Select to filter by lease options. You can view all critical dates associated with that option.

Critical Date Status Select to view active or inactive statuses for that critical date.

Show Completed Tasks Select to display all tasks you've marked completed.

Task Complete Select to mark the task as complete for the option. By selecting the task as complete, you can filter your search to view only tasks that require action.

Note. This is not part of PeopleSoft Workflow. This enables you to keep track of actions you have taken with the lease options.

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Option Date	Display the lease option expiration date. Any action required for this option needs to occur prior to this date.
Lease Name	Click the link to view all lease options associated with the lease. This link takes you to the Options page in the Maintain Lease component.
Date Completed	Displays the date the you completed the task. When you mark a task complete, the system populated this field with the date you completed the task.

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Glossary of PeopleSoft Enterprise 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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

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Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Enterprise 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 Enterprise 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.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft Enterprise 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 Enterprise 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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

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	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise 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."

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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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise 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 process A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business unit constraints In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

business task The name of the specific function depicted in one of the business processes.

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 Enterprise 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.

buy event In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

cash drawer A repository for monies and payments taken locally.

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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

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catalog partner In PeopleSoft Enterprise 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.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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 Enterprise 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 Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

claimback In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

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.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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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, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise 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.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise 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 Enterprise. 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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

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 Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

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	3C access groups so that you can assign data-entry or view-only privileges across functions. 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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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.

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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 Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). 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.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

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 Enterprise 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 Enterprise 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.

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elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise 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 Enterprise 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.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

event constraints In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

event propagation process In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise 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 Enterprise 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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

financial sanctions For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

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.

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fund In PeopleSoft Enterprise 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.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

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, and user interaction objects.

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incentive rule In PeopleSoft Enterprise 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 Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise 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 Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

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keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

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.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise 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.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

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.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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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.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise 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 Enterprise 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.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise 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 Enterprise 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.

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meta-SQL Meta-SQL constructs expand into platform-specific 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 Enterprise 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 Enterprise 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.

NDP Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

Optimization Engine A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

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 Enterprise and non-PeopleSoft Enterprise 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 Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Enterprise 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.

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PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure 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.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

plan In PeopleSoft Enterprise 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 Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

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	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort.*
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise 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.

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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 A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

proxy bidding In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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 Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise 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.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

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 Enterprise 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.

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REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reservations In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

RFI event In PeopleSoft Strategic Sourcing, a request for information.

RFx event In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.

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.

saved bid In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.

score In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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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.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

serial genealogy In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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 Enterprise 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.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise 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.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

speed key See *communication key.*

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.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise 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 Enterprise 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.

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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 Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

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.

task A deliverable item on the detailed sourcing plan.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

tenant In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

territory In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

tiered pricing Enables different portions of a schedule to be priced differently from one another.

time span A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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travel group In PeopleSoft Expenses, the organization's travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

trace usage In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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 Enterprise 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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

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	See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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 Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise 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 link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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yield by operation In PeopleSoft Enterprise 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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