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PeopleSoft Enterprise Services Procurement 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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PeopleSoft Services Procurement Preface

This preface discusses:

- Oracle's PeopleSoft Enterprise products.
- PeopleSoft application fundamentals.
- Pages with deferred processing.
- Common elements used in this PeopleBook.

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

Oracle's PeopleSoft Enterprise Products

This PeopleBook refers to these products:

- PeopleSoft eProcurement
- PeopleSoft Purchasing
- PeopleSoft Project Costing
- PeopleSoft Resource Management
- PeopleSoft eRecruit
- PeopleSoft HCM
- PeopleSoft Strategic Sourcing

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Services Procurement 9.0 PeopleBook* provides you with implementation and processing information for your PeopleSoft Services Procurement system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

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

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

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- *PeopleSoft Enterprise Managing Items PeopleBook*

Pages With Deferred Processing

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

Common Elements Used In This PeopleBook

Approver	Individual viewing and approving requisitions, work orders, timesheets, progress logs, expenses, or invoices. This individual is usually the requestor's manager.
Business Unit	Identification code that represents a high-level organization of business information. Use a business unit to define regional or departmental units within a larger organization.
Deliverables Based Requisition	Deliverables based requisitions reflect requirements generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider.
Department	Department that generates the service requisition and work order.
Description	Can be brief text up to 10, 15, or 30 characters, or long text up to 254 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. This date also determines when you can view and change information. Pages and batch processes that use the information use the current row.
Invoice Date	Date the invoice was created.
Invoice Manager	Individual who has the authority to generate and manage invoices.
Invoice Number	Number assigned to invoice upon creation.
Line Number	Eligible lines associated with the requisition ID.
Project	Project ID associated with the requisition line or work order.
Service	Identifies the job to be performed by the service provider who fills the position.
Rate Sheet	Rate template that is defined and associated with a requisition line service and location code.
Requester	Individual within the enterprise that can create and manage service projects, activities, requisitions and work orders, view sourcing and bid/response

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	information. This individual can also approve timesheets, progress logs, and expenses.
Requisition	Document used to request services for qualified service providers.
Resource Based Requisition	Resource requisitions enable you to request the services of an individual service provider.
Run Control ID	An identifier that, when paired with the user ID, uniquely identifies the process you are running. In addition, it enables important parameters to be available for a process when it runs. This ensures that when a process runs in the background, it does not have to prompt you for any additional values. All parameters are stored within the system and associated with run control IDs and user IDs.
Scope of Work	Description of the work to be performed by the service provider.
Service Coordinator	Individual working with both the requestor and the supplier to fill the requisition request.
Service Provider	Candidate submitted to fill the work order.
Service Provider Contact	Individual submitting the qualified bid.
Service Provider Roster	List of active and inactive service providers associated with a service provider contact.
SetID	Identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define the company's structure and processing options.
Sourcing	Process used to send requisitions to suppliers in an effort to fill a requirement.
Status	Indicates whether a row in a table is *Active* or *Inactive*. You cannot display inactive rows on transaction pages or use them for running batch processes. The *Inactivate* value also enables you to maintain an audit trail of data you no longer use.
Supplier Network	Collection of one or more suppliers associated with a business unit that is involved in the services procurement process.
Services Template	Defines the time and progress reporting defaults for the structure and attributes to be used when entering time, expenses, and progress for the business unit.
User ID	System identifier for the individual who generates a transaction.
Visibility	Determines whether an activity is considered public or private. Private activities are not visible when non-involved parties view timesheet information.
Work Order	Specifies the basic terms and conditions of a project. This is also known as the Statement of Work.
	Navigates to the selected record in edit mode.

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CHAPTER 1

Getting Started with PeopleSoft Services Procurement

This chapter discusses:

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

PeopleSoft Services Procurement Business Processes

PeopleSoft Services Procurement provides these business processes:

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

  The reports analyze supplier information to help manage your services spend.

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

Delivered User Roles

The PeopleSoft system delivers the following access for user roles:

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 87.

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

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User Role	Access
Service Provider Contact	• Review requisitions and submit bids. • Maintain communications. • Manage service providers. • Maintain service provider contacts (supplier administrators only). • Maintain time and expenses (read-only). • Maintain time and expense as proxy. • Maintain progress logs. • Approve invoices.
Service Provider	Maintain time and expenses.
Executive	• View provider roster (read-only). • View provider performance (read-only). • View provider length of stay (read-only). • View expense life cycle (read-only). • View expense variance (read-only). • View supplier performance (read-only). • View supplier rate comparison (read-only). • View minority-owned suppliers (read-only).
Invoice Manager	• Manage invoices. • Create batch invoices. • Print invoices. • Export invoices to PeopleSoft Payables.

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

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

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User Role	Access
Administrator continued	• Define services by service type. • Define service type by service. • Define service activities. • Define Project Activities (Project Costing installed). • Define Activities by Service Type (Project Costing not installed). • Define activities by service. • Define response types. • Set up surveys. • Define surveys by service type. • Define VMS by business unit and service type. • Define payment terms timing. • Define single payment terms. • Define multiple payment terms. • Establish an accounts payable interface. • Define time and expense templates. • Define expense business purpose. • Define expense distance rate. • Define expense type.
Administrator continued	• Define expense payment type. • Define expense location. • Maintain preferred merchant. • Define time reporting codes. • Define pay types. • Define markups by service type. • Define markups by procurement region. • Create bid factors. • Create bid factor mapping. • Define performance level code. • Define supplier scoring rule. • Define Service Request Type. • Define Role Distribution List. • Define Service Teams. • Define Teams by Region/Service Type. • Define Rating Models. • Define Experience.

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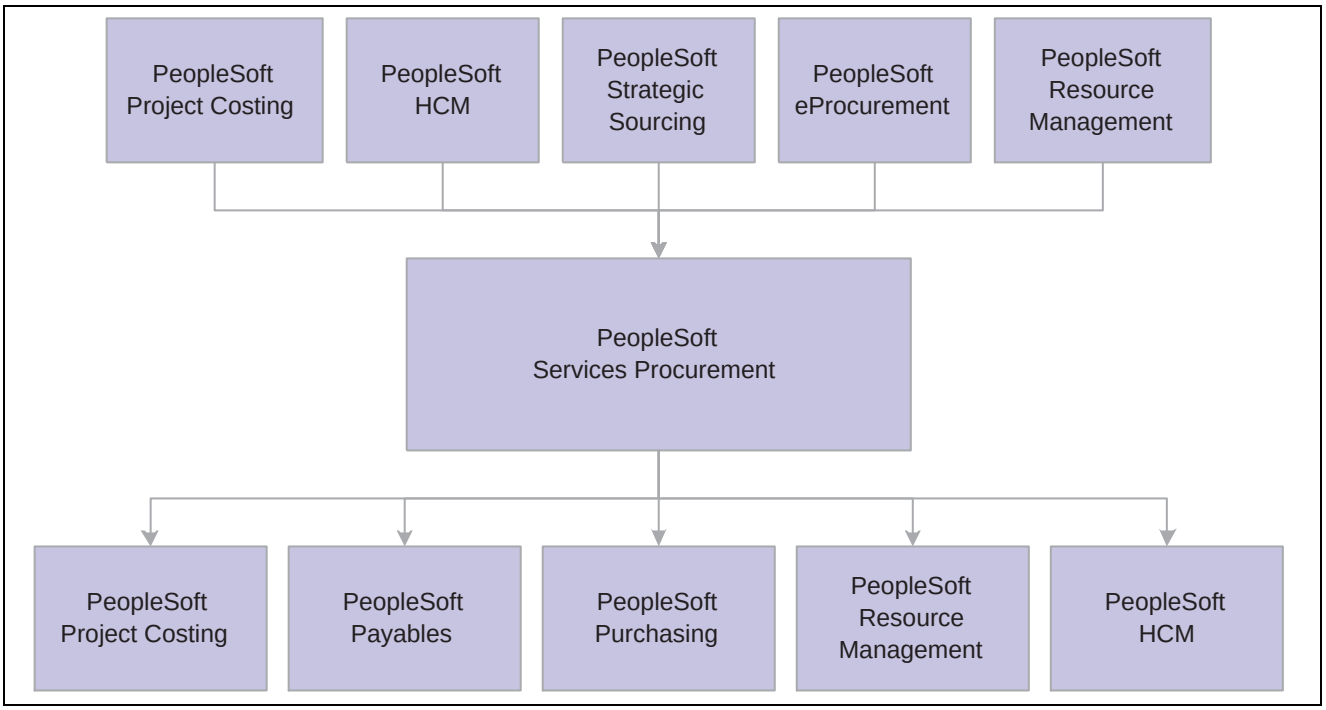
PeopleSoft Services Procurement Integrations

PeopleSoft Services Procurement integrates with these PeopleSoft applications:



PeopleSoft Services Procurement Integration with other PeopleSoft Applications

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

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

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

PeopleSoft Payables

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

See Chapter 7, “Integrating with Other PeopleSoft and Third-Party Applications,” Integrating with Accounts Payables Applications, page 155.

PeopleSoft Project Costing

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

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

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PeopleSoft Purchasing

You can generate PeopleSoft Purchasing purchase orders from work orders. The approved purchase order amount is stored on the work order and is consumed during the invoicing process.

See Chapter 7, "Integrating with Other PeopleSoft and Third-Party Applications," Integrating With PeopleSoft Purchasing, page 157.

PeopleSoft Resource Management

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

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

See Chapter 7, "Integrating with Other PeopleSoft and Third-Party Applications," Integrating With PeopleSoft Resource Management, page 159.

PeopleSoft Strategic Sourcing

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

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

PeopleSoft Services Procurement Implementation

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

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

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

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Component	Component Interface	Reference
Competencies	RS_COM_COMPTNCY_TBL	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Service Setup, page 57.
Project Costing Options	PROJECT_BU_OPTIONS	See Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 26.
Preferred Merchant	EX_MERCHANT_SETUP	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 118.
Expense Location	EX_LOCATION_SETUP	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 118.
Distance Rate	EX_AUTO_RATE_SETUP	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 118.
Add Vendors	EM_VENDOR_CI	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Service Supplier Setup, page 73.
Requester Setup	REQUESTOR_TBL_CI	See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 87.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "PeopleSoft Enterprise Application Fundamentals PeopleBook Preface"

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Setup Manager

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces

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CHAPTER 2

Navigating in PeopleSoft Services Procurement

This chapter discusses how to navigate in PeopleSoft Services Procurement.

Navigating In PeopleSoft Services Procurement

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

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

Pages Used to Navigate in PeopleSoft Services Procurement

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

Define Services Procurement

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

Page Name	Navigation	Usage
Define Services Procurement	Services Procurement, Define Services Procurement	Access primary PeopleSoft Services Procurement menu options and activities.
General Setup	Click General Setup on the Define Services Procurement page.	Maintain installation options, business units, system wide and project/activity definitions.
Business Unit Definitions	Click Business Unit Definitions on the General Setup page.	Maintain Business Unit definitions for Services Procurement-related applications.
Project/Activity Definitions	Click Project/Activity Definitions on the General Setup page.	Maintain project types, projects and activities.
System-Wide Definitions	Click System-Wide Definitions on the General Setup page.	Maintain locations and other definitions that affect multiple applications.
Service Setup	Click Service Setup on the Define Services Procurement page.	Maintain service setup for requisitions and work orders

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Page Name	Navigation	Usage
Competency Setup	Click Competency Setup on the Service Setup page.	Maintain competencies and associate them to a competency types and set IDs. Maintain rating models.
Rate Sheet Setup	Click Rate Sheet Setup on the Service Setup page.	Maintain rate sheets and rate sheet lists.
Service (Project Role) Setup	Click Service (Project Role) Setup on the Service Setup page.	Maintain services (project roles) and associated service types. Maintain experience values
Service Type Setup	Click Service Type Setup on the Service Setup page.	Maintain service types for both resource and deliverable services. Maintain Surveys by Service Type.
Survey Setup	Click Survey Setup on the Service Setup page.	Maintain response types, work order surveys and service types for a survey.
Tasks and Task Group Setup	Click Tasks and Task Group Setup on the Service Setup page.	Maintain logistical tasks and task groups for work orders and associate them to service types.
Service Supplier Setup	Click Service Supplier Setup on the Define Services Procurement page.	Define vendor as a services supplier.
Deliverable Service Setup	Click Deliverable Service Setup on the Service Supplier Setup page.	Maintain services, suppliers and regions for deliverable services.
Resource Service Setup	Click Resource Service Setup on the Service Supplier Setup page.	Maintain service types, suppliers and regions for resource services.
Settlement Setup	Click Settlement Setup on the Define Services Procurement page.	Maintain time and expense reporting, invoicing and other settlement options.
Invoicing Setup	Click Invoicing Setup on the Settlement Setup page.	Maintain payment terms and accounts payable interface.
Time and Expense Setup	Click Time and Expense Setup on the Settlement Setup page.	Maintain time and expense reporting options.
Sourcing Setup	Click Sourcing Setup on the Define Services Procurement page.	Define automatic sourcing rules and bid factors, markups, and scoring for evaluating suppliers.
Bid Factor Setup	Click Bid Factor Setup on the Sourcing Setup page.	Maintain bid factors, bid factor groups, and associate them to attributes and categories.
Pay Types and Markups Setup	Click Pay Types and Markups Setup on the Sourcing Setup page.	Maintain pay types and markups for a service type and associate them to a region.
Supplier Scoring Setup	Click Supplier Scoring Setup on the Sourcing Setup page.	Maintain performance levels and scoring rules for evaluating suppliers.

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Page Name	Navigation	Usage
User and Team Setup	Click User and Team Setup on the Define Services Procurement page.	Maintain users and define service teams.
Workflow Setup	Click Workflow Setup on the Define Services Procurement page.	Maintain approval processes, notifications and templates related to workflow.
Reconciliations	Click Reconciliations on the Define Services Procurement page.	Close requisitions and purchase orders related to Services Procurement.

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CHAPTER 3

PeopleSoft Services Procurement Portal Pagelets

This chapter provides an overview and discusses how to:

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

Understanding PeopleSoft Services Procurement Pagelets

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

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

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

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

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

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

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

Pagelet Security

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

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

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Using Pagelets by Functional Role

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

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

- Requester
- Service Coordinator
- Approver

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 87

Requester

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

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Requester Defaults, page 99

Service Coordinator

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

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Coordinator Defaults, page 100

Approver

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

Viewing and Using PeopleSoft Services Procurement Pagelets

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

Pages Used to View and Use PeopleSoft Services Procurement Pagelets

Available Services Procurement pagelets include:

- Interview Schedule pagelet.

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

This table provides details on PeopleSoft Services Procurement pagelets.

Pagelet Name	Roles	Usage
Interview Schedule	Requester	Provides a synopsis of the scheduled interviews. See Chapter 17, "Reviewing and Awarding Bids," Creating and Maintaining Interview Schedules, page 277.
Recently Created Requisitions (SPF_E_RCNTRQ)	Requester	Displays the five most recent requisitions that you created. See Chapter 14, "Creating and Managing Requisitions," page 211.
Recent Work Orders (SPF_E_RCNTWO)	Requester, Service Coordinator	Displays the five most recent work orders requiring action with statuses of *Created, Submitted,* and *Approved.* See Chapter 18, "Managing Work Orders," page 281.
Timesheets Approval (SPA_E_TIMAPR)	Requester, Approver	Displays the timesheets and amounts including expenses that are awaiting approval. See Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 323.
Progress Logs Approval (SPA_E_PLGAPR)	Requester, Approver	Displays progress logs that need approval if you are using a deliverables-based payment system. See Chapter 21, "Managing Progress Logs," page 351.

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Pagelet Name	Roles	Usage
Logistical Tasks (SPF_E_LGTASK)	Requester	Displays the five most recent activities that need to be completed before a work order can be released. See Chapter 18, "Managing Work Orders," Viewing Logistical Tasks, page 312.
Expense Variance Chart (SPR_E_EXPLIM)	Requester, Service Coordinator	Provides a summary graph of total amount spent compared to total work order amount. This is listed in a bar chart by work order. See Chapter 22, "Managing Settlements," page 359.
Supplier Headcount (SPR_E_SUPCNT)	Requester, Service Coordinator	Displays the top five suppliers by headcount in a graphical format. See Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Rosters, page 412.
Supplier Analysis (SPR_E_SUPANALYZ)	Service Coordinator	Provides a method to compare suppliers based upon supplier performance, service provider performance, and rate. See Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Performance, page 416.
Requisition Approval	Requester, Approver	Displays the requisitions that are awaiting approval. See Chapter 8, "Implementing PeopleSoft Services Procurement Workflow," Using Requisition Approval Workflow, page 172.
Work Order Approval	Requester, Service Coordinator, Approver	Displays the work orders that are awaiting approval. See Chapter 8, "Implementing PeopleSoft Services Procurement Workflow," Using the Work Order Approval Workflow, page 174.
Invoice Approval		Displays the invoices that are awaiting approval. See Chapter 22, "Managing Settlements," Approving Invoices, page 384.

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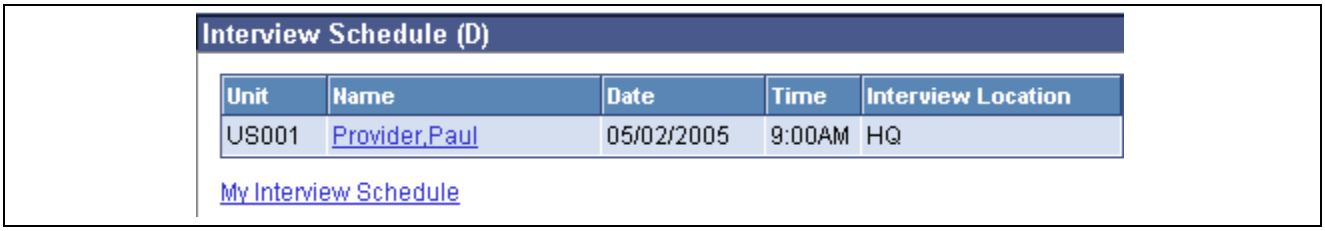
Pagelet Name	Roles	Usage
Create New Time Sheet	Service Provider, Proxy	Allows creation of new timesheets.
Active Time Sheets	Service Provider, Proxy, Time Approver	Provides view of timesheets that are currently awaiting action. For example, status of open or denied for Service Provider or status of submitted for Time Approver).
Time Sheet History	Service Provider, Proxy, Time Approver	Provides view of all timesheets regardless of status.
Create New Expense Sheet	Service Provider, Proxy, Service Provider Contact	Allows creation of new expense sheets.
Active Expense Sheets	Service Provider, Proxy, Service Provider Contact, Expense Approver	Provides view of expense sheets that are currently awaiting action. For example, status of open or denied for Service Provider or status of submitted for Expense Approver).
Expense Sheet History	Service Provider, Proxy, Service Provider Contact, Expense Approver	Provides view of all expense sheets regardless of status.

Viewing the Interview Schedule Pagelet

Access the Interview Schedule pagelet.



Interview Schedule pagelet

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

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

Viewing the Recently Created Requisitions Pagelet

Access the Recently Created Requisitions pagelet.

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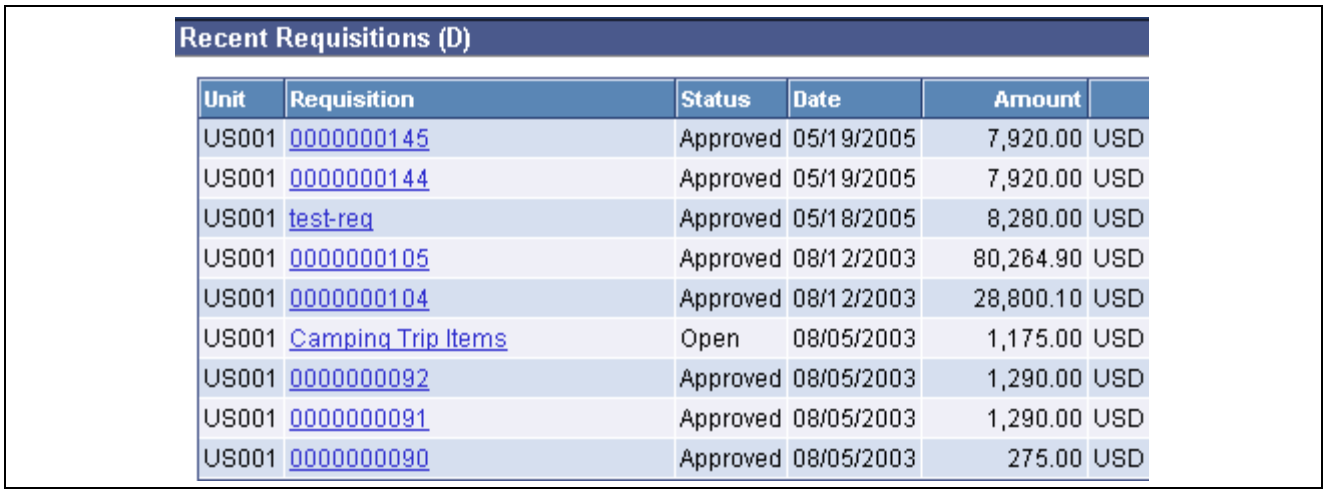


Recent Requisitions (D)

Unit	Requisition	Status	Date	Amount	
US001	0000000145	Approved	05/19/2005	7,920.00	USD
US001	0000000144	Approved	05/19/2005	7,920.00	USD
US001	test-req	Approved	05/18/2005	8,280.00	USD
US001	0000000105	Approved	08/12/2003	80,264.90	USD
US001	0000000104	Approved	08/12/2003	28,800.10	USD
US001	Camping Trip Items	Open	08/05/2003	1,175.00	USD
US001	0000000092	Approved	08/05/2003	1,290.00	USD
US001	0000000091	Approved	08/05/2003	1,290.00	USD
US001	0000000090	Approved	08/05/2003	275.00	USD

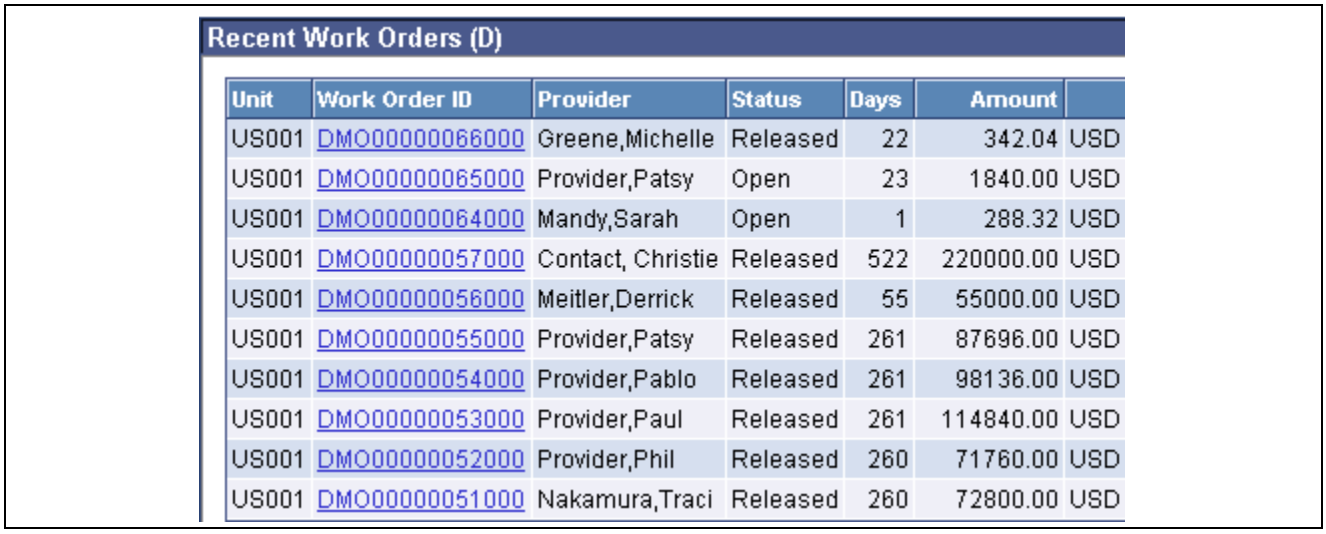
Recent Requisitions pagelet

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

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

Viewing the Recent Work Orders Pagelet

Access the Recent Work Orders pagelet.



Recent Work Orders (D)

Unit	Work Order ID	Provider	Status	Days	Amount	
US001	DMO000000066000	Greene,Michelle	Released	22	342.04	USD
US001	DMO000000065000	Provider,Patsy	Open	23	1840.00	USD
US001	DMO000000064000	Mandy,Sarah	Open	1	288.32	USD
US001	DMO000000057000	Contact, Christie	Released	522	220000.00	USD
US001	DMO000000056000	Meitler,Derrick	Released	55	55000.00	USD
US001	DMO000000055000	Provider,Patsy	Released	261	87696.00	USD
US001	DMO000000054000	Provider,Pablo	Released	261	98136.00	USD
US001	DMO000000053000	Provider,Paul	Released	261	114840.00	USD
US001	DMO000000052000	Provider,Phil	Released	260	71760.00	USD
US001	DMO000000051000	Nakamura,Traci	Released	260	72800.00	USD

Recent Work Orders pagelet

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

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

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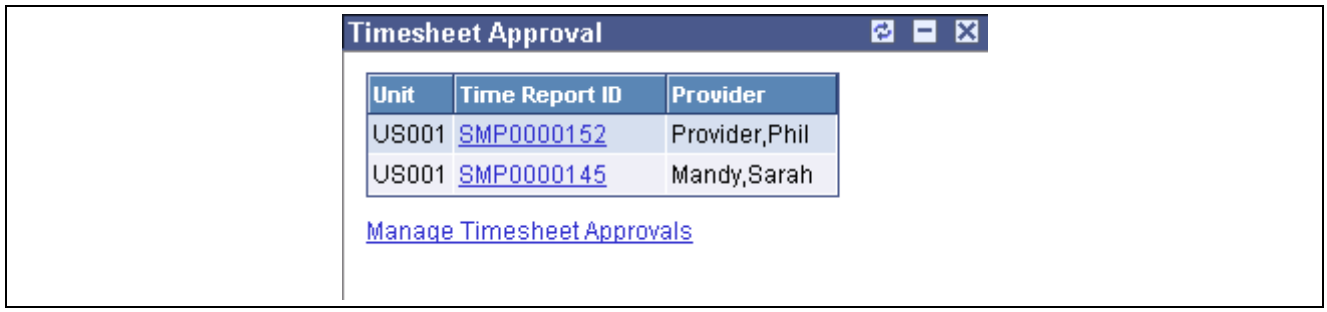
Viewing the Timesheet Approvals Pagelet

Access the Timesheet Approvals pagelet.



Timesheet Approvals pagelet

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

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

Viewing the Progress Log Approvals Pagelet

Access the Progress Log Approvals pagelet.

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

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

See Also

Chapter 21, “Managing Progress Logs,” page 351

Viewing the Logistical Tasks Pagelet

Access the Logistical Tasks pagelet.

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

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

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See Also

Chapter 18, “Managing Work Orders,” Viewing Logistical Tasks, page 312

Viewing the Expense Variance Chart Pagelet

Access the Expense Variance Chart pagelet.

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

See Also

Chapter 24, “Interactive Reports in PeopleSoft Services Procurement,” Analyzing Expense Variance, page 425

Viewing the Supplier Headcount Chart Pagelet

Access the Supplier Headcount Chart pagelet.

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

Viewing the Supplier Analysis Pagelet

Access the Supplier Analysis pagelet.

Supplier Analysis pagelet

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

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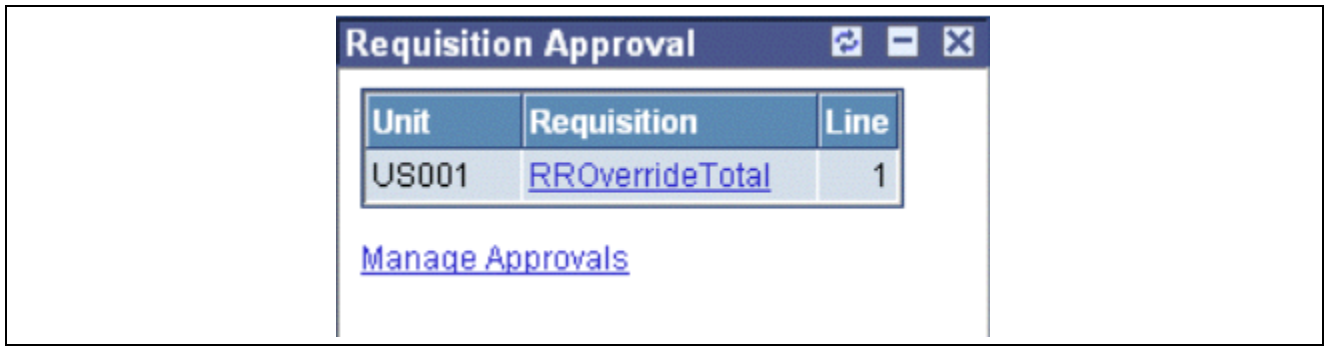
Viewing the Requisition Approval Pagelet

Access the Requisition Approval pagelet.



Requisition Approval pagelet

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

See Also

Chapter 14, “Creating and Managing Requisitions,” page 211

Viewing the Work Order Approval Pagelet

Access the Work Order Approval pagelet.

Work Order Approval pagelet

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

See Also

Chapter 18, “Managing Work Orders,” page 281

Viewing the Invoice Approval Pagelet

Access the Invoice Approval pagelet.

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Invoice Approval pagelet

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

See Also

Chapter 22, “Managing Settlements,” page 359

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CHAPTER 4

Setting Up PeopleSoft Services Procurement

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

- Set up business units definitions.
- Define system-wide definitions.
- Define project and activities definitions.

Understanding the PeopleSoft Services Procurement Implementation Process

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

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

Implementation Order

To set up services procurement installation options, use the Services Procurement Installation Options component.

To set up PeopleSoft Services Procurement:

1. Set up installation options.
2. Define general options.
3. Create business units.
4. Define bid factors.
5. Define competencies.
6. Define services, project roles, service types, and service activities.
7. Define rate sheets.
8. Define settlements.
9. Define projects.
10. Configure time and expense.

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11. Set up users.
12. Configure the supplier network.
13. Define suppliers by service type and region.
14. Set up logistical tasks.
15. Set up file attachment servers.

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

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," page 57.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options

Setting Up Business Unit Definitions

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

To create PeopleSoft Services Procurement business units, use the Services Procurement Bus Unit (BUS_UNIT_TBL_SP) component. To creating Project Costing definitions, use the Project Costing Definition (PC_BU_DEFN) component.

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

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

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

- Define PeopleSoft Strategic Sourcing business units.
- Define PeopleSoft Purchasing business units.
- Define PeopleSoft Services Procurement business units.
- Define PeopleSoft eProcurement business units.
- Setting up Projects costing definitions.
- Setting up Projects costing options.

Understanding PeopleSoft Purchasing Related Business Units

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

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

Pages Used to Set Up Business Unit Definitions

Page Name	Object Name	Navigation	Usage
Strategic Sourcing Business Unit Definition	BUS_UNIT_TBL_A1	• Set Up Financials/Supply Chain, Business Unit Related, Sourcing, Business Unit Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Strategic Sourcing Definition	Define PeopleSoft Strategic Sourcing business units.
Purchasing - Business Unit Definition	BUS_UNIT_TBL_PM	• Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Purchasing Definition	Define PeopleSoft Purchasing business units. Link PeopleSoft Purchasing business units to PeopleSoft Services Procurement business units.
Services Procurement Business Unit Definition	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn	Define PeopleSoft Services Procurement business units. Define your own consolidation structures for accounting and reporting purposes.
Work Order Settings	BUS_UNIT_TBL_SP_WO	Click the Work Order Settings tab on the Services Procurement Business Unit page.	Enable surveys and work order approvals, track deliverable resources, and determine whether new assignments require sourcing and set up work order alert notifications.
Reason Code Setup	SPB_REASONCD_BU	Click the Work Order Setting tab on the Services Procurement Business Unit page.	Establish reason code types for each negative transaction and determine if the reason code type is required.

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Page Name	Object Name	Navigation	Usage
eProcurement BU Definition (eProcurement business unit definition)	PV_BUS_UNIT_PM	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, eProcurement Options	Define eProcurement business units.
Services Project Business Unit Definition	BUS_UNIT_TBL_PC	• Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Project Costing Definition	Define PeopleSoft Projects business units.
Services Project Business Unit Options	BUS_UNIT_OPT_PC	• Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Project Costing Options	Define PeopleSoft Projects business unit options.

Defining PeopleSoft Strategic Sourcing Business Units

Access the Strategic Sourcing Business Unit Definition page.

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

See *PeopleSoft Enterprise Strategic Sourcing 9.0 PeopleBook*, “Setting Up Business Units in PeopleSoft Strategic Sourcing”.

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

Defining PeopleSoft Purchasing Business Units

Access the Purchasing - Business Unit Definition page.

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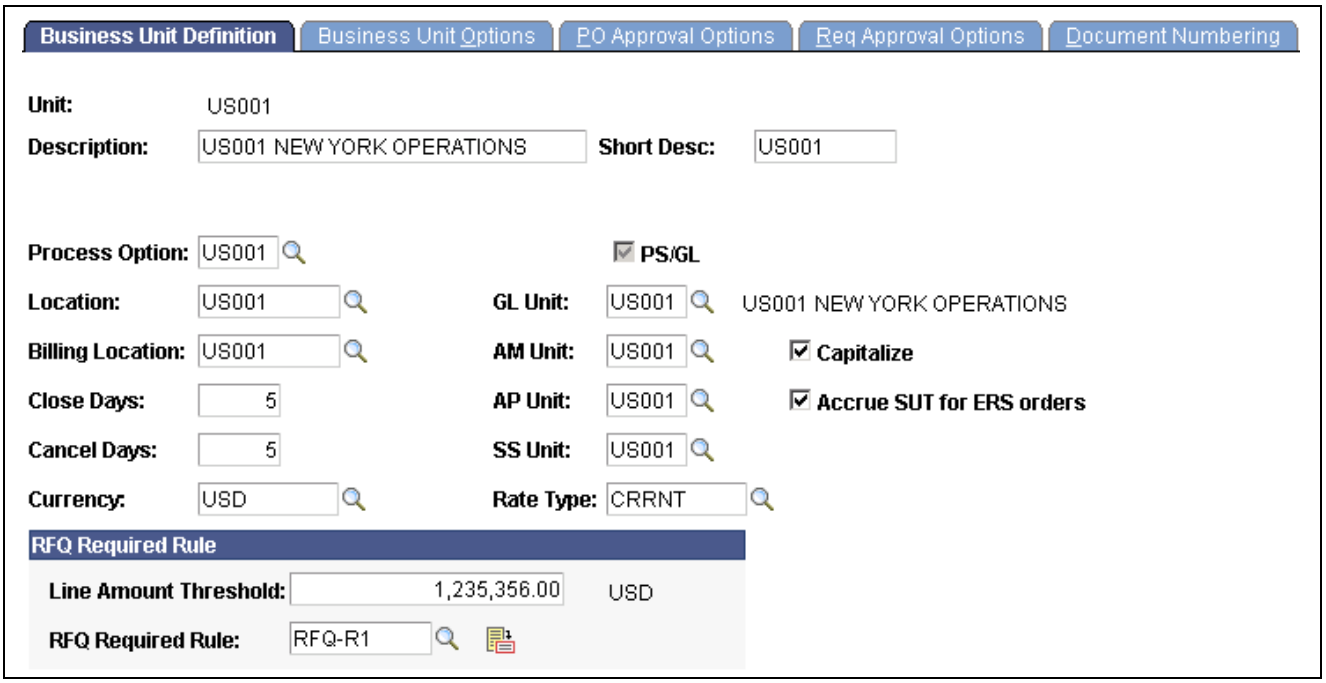

Purchasing Business Unit page

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

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

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

Currency Enter the default currency of the business unit.

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

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

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Establishing PeopleSoft Purchasing Business Units.

Purchasing Business Unit - Business Unit Options page

Use the Purchasing Business Unit - Business Unit Options page to define the multicurrency settings for the requisitions and purchase orders. If the Services Procurement application is installed, use this page to define settings that have a direct impact on the service requisitions and work orders.

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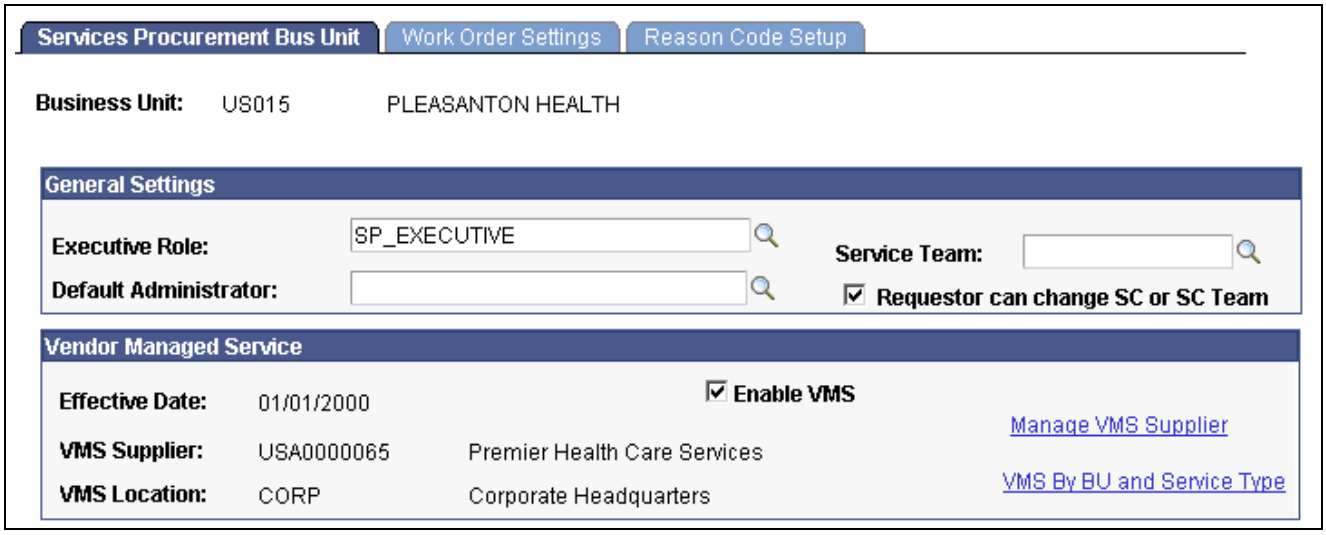
See Also

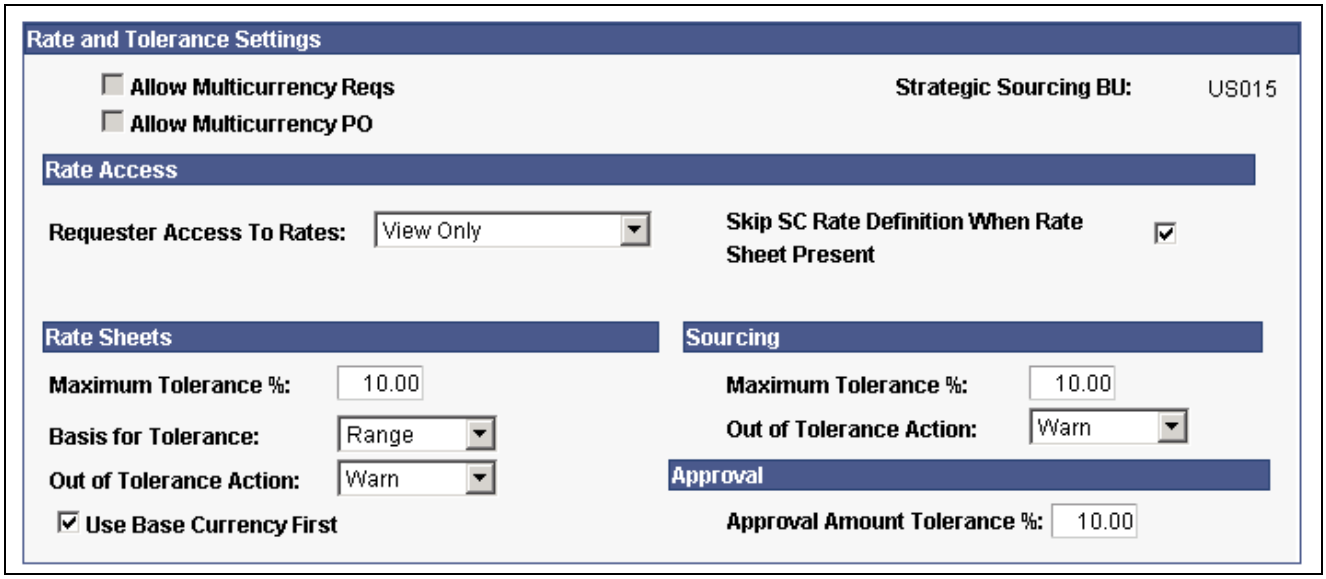
PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options," Creating Business Unit Options

Defining PeopleSoft Services Procurement Business Units

Access the Services Procurement Bus Unit page.



Services Procurement Bus Unit page (1 of 3)



Services Procurement Bus Unit page (2 of 3)

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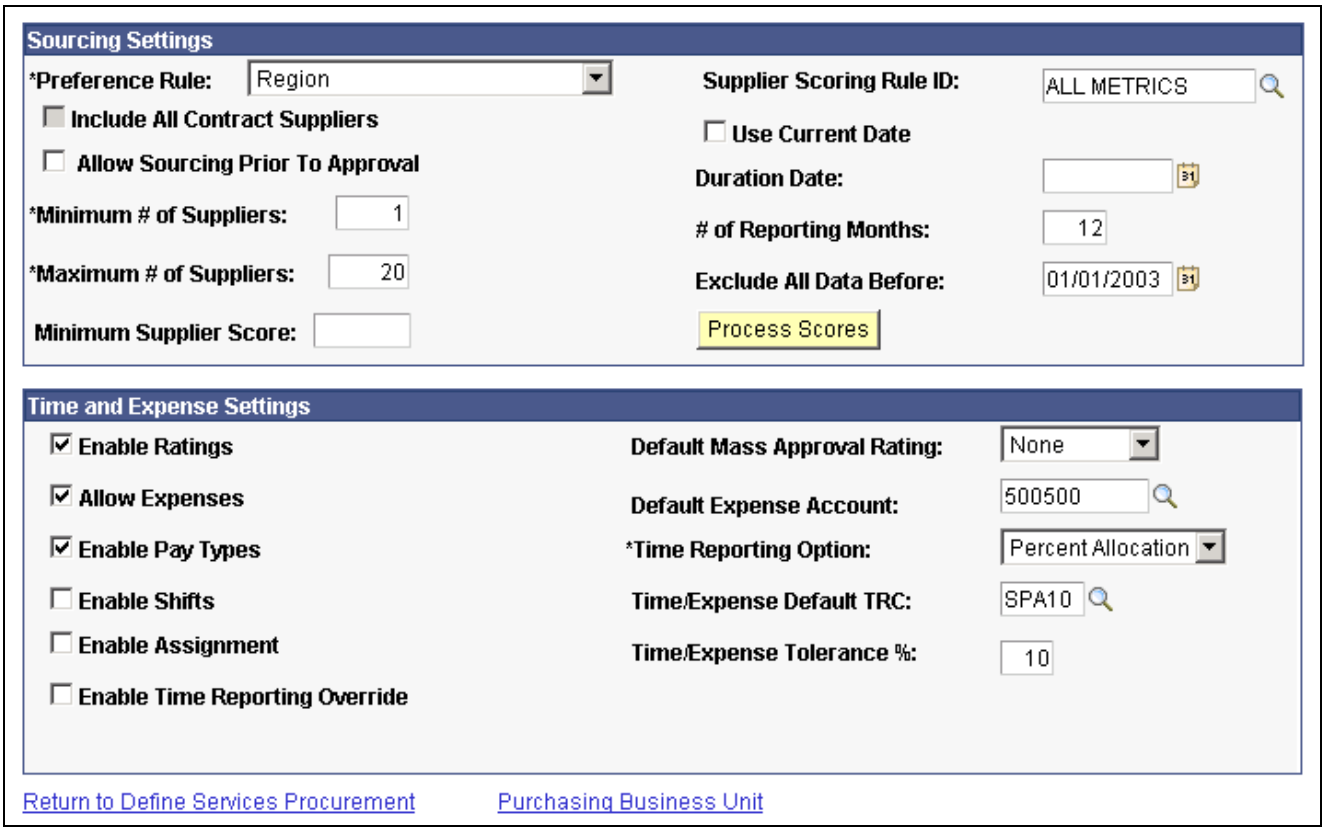

Services Procurement Bus Unit page (3 of 3)

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

General Settings

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

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

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

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

Requester can change SC or SC Team Use this option to specify whether a requester can override the service coordinator or service coordinator team that defaults onto the requisition.

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

Vendor Managed Service

The VMS section is replaced by an MSP section on this page if the MSP (managed service provider) installation option is enabled.

Enable VMS Select this option to determine whether requisitions or work orders for this business unit are under VMS management by default. Once you select this option, you must define at least one VMS supplier and VMS fee.

Note. VMS vendor and markup costs that are defined here apply for the VMS services provided within the business unit that do not have a service type level VMS override defined.

If you select this option, the current VMS Supplier and VMS Location fields associated with the VMS provider appear on the page.

Manage VMS Supplier Click this link to access the VMS Supplier by Business Unit page, where you can define the effective dated VMS vendor and vendor location information.

VMS by BU and Service Type Click this link to access the VMS by BU and Service Type page, where you can define any override of the business unit's VMS settings for this service type, and view the current VMS suppliers and locations defined for business unit and service type combinations.

Rate and Tolerance Settings

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

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

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

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

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

Rate Access

Requester Access to Rates Select a value to define what occurs when requesters view pages that contain rate information:

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

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

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

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

If you select this option, requisitions and work orders are not routed to service coordinators (if a rate sheet is present).

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

Note. This field is only available if the Requester Access to Rates field is set to *View Only* or*No Access*.

Rate Sheets

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

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

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

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

Sourcing

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

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

Approval

Approval Amount Tolerance % Enter the total percentage by which the filled requisition can exceed the rate defined on the requisition. The default value is *0,* indicating that no tolerances are used for the business unit. The system uses the approval tolerance

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amount percentage while comparing the filled requisition amount against the approved requisition amount. If the filled amount exceeds the approval amount tolerance, the requisition is rerouted for approval.

Note. The requisition is not rerouted for approval if the user who fills the requisition has one of the roles defined for the SP_IGNORE_REAPPROVE role action.

Sourcing Settings

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

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

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

Allow Souring Prior to Approval Select to indicate that sourcing is allowed before requisition approval is granted.

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

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

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

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

Use Current Date Check this box to use the current date rather than a specific date as the starting point for reporting

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

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Note. If the values that you enter in the Duration Date and # of Reporting Months (number of reporting months) fields define a date before the entered start date, the system does not retrieve data prior to the entered start date. For example, if the start date is 01/01/2005, the duration date is 06/30/2005, and the number of reporting months is 12 (indicating 12 months of data prior to 06/30/2005), the system retrieves data only for the period between 01/01/2005 and 06/30/2005. The system does not retrieve data prior to 01/01/2005 or, in this example, between 07/01/2004 and 12/31/2004.

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

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

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

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

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

Time and Expense Settings

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

Default Mass Approval Rating Select the rating to be used when mass approving timesheets and progress logs. Values are *Excellent, Fair, Good, Poor,* or *None.*

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

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

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

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

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

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

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

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

Enable Shifts Select this option to enable the business unit to use shifts on timesheets.

Enable Assignment Select this option to enable the business unit to use assignments on timesheets

Enable Time Reporting Override Select this option if time reported can be overridden.

Time Reporting Option Use this option to determine whether the service provider reports time against specific ChartFields, or whether the total time is entered and distribution percentages automatically split time or progress according to the ChartField distribution defined for the work order.

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

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

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

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

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

Time/Expense Default TRC (time and expense default time reporting code) Select a TRC. The system uses this TRC as the default for time calculations when there is no time reporting rule associated to the time template.

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

See Also

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Using Shifts on Timesheets, page 126

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Defining Assignments for Use on Timesheets, page 132

Chapter 19, “Managing Time in PeopleSoft Services Procurement,” Editing Time Categories on Timesheets, page 341

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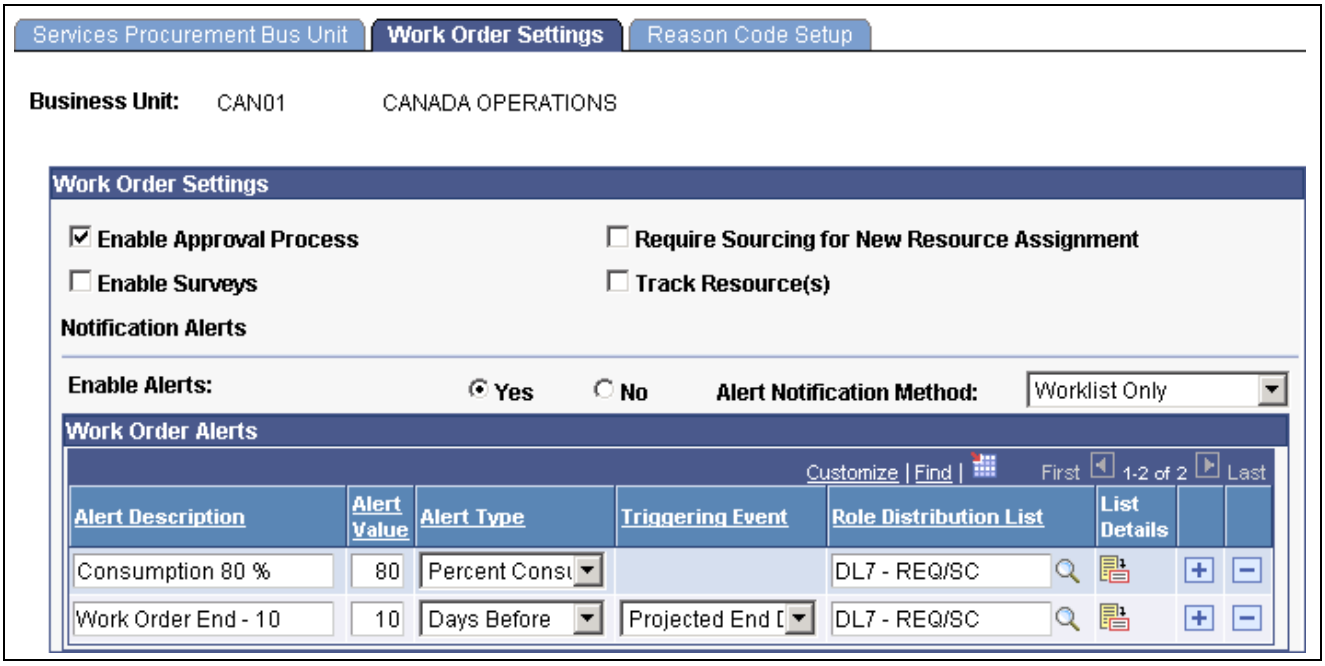
Defining Work Order Settings

Access the Work Order Settings page.



Work Order Setting page

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

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Role Distribution Lists, page 63.

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

Work Order

Enable Approval Process Select to indicate that the work order requires submission to and approved by the work order approver. The work order approval process is used for work orders that are related to the specified business unit.

Note. If you leave this option unchecked, the system bypasses the approval process and automatically approves the work order upon submittal.

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

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

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

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

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

Alert Notification Method When the Enable Alerts option is set to *Yes*, you can select whether the alert notification must be sent using a worklist only or email and worklist.

Work Order Alerts

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

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

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

Note. This value is represented in days and percent.

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

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

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

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

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

- *Actual End Date*
- *Actual Start Date*
- *Approval Date*
- *Cancel Date*
- *Closed Date*
- *Entered Date*

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- *Projected End Date*
- *Projected Start Date*
- *Released Date*
- *Terminated Date*
- *Work Order End Date*

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

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

Role Distribution List Select the list of users that will receive the work order notification.

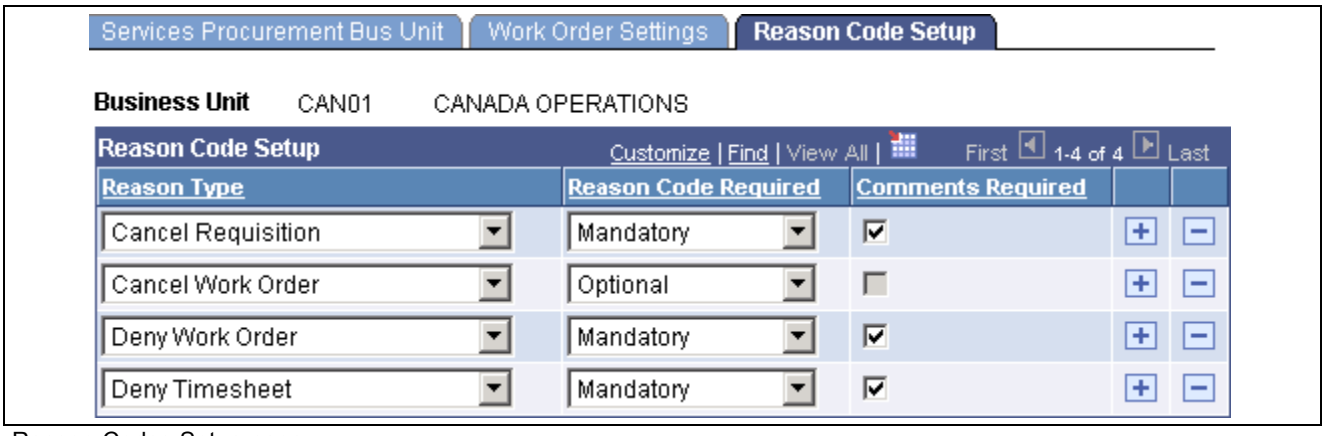
List Details Click to view the list of roles that are included on the selected distribution list.

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

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

Setting Up Reason Codes

Access the Reason Code Setup page.



Reason Codes Setup page

Reason Type Select a Services Procurement reason type that is supported for reason codes.

Reason Code Required Select to indicate if reason codes are *Mandatory*, *Not Used*, or *Optional* for the related reason type.

Comments Required Select if reason comments are required for this reason type.

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

Defining eProcurement Business Units

Access the eProcurement Business Unit page.

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

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

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

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

Setting Up Project Costing Definitions

Access the Project Costing Definition page.

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

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

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options

Setting Up Project Costing Options

Access the Project Costing Options page.

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

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

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

Defining System-Wide Definitions

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

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

This section discusses how to:

- Define automatic numbering.
- Set up file attachment servers.
- Define service region codes.
- Define services region codes.

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

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining and Using ChartFields," Defining Account Types

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining and Using ChartFields," Adding Department Values

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Setting Up Locations

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Establishing Regions and Region Codes

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Defining Additional Common Information

Understanding Region Codes

PeopleSoft Services Procurement supports reason codes for negative transactions. Negative transactions include, but are not limited to, transactions that are denied, withdrawn, declined, rejected, ended, terminated, or canceled. Reason codes are used to track the reason why requesters, service coordinators, approvers, and service provider contacts perform certain negative actions. Reason codes are defined by reason type, there is a specific reason type for each negative transaction supported.

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

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

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

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

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Pages Used to Setup System-Wide Definitions

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

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Page Name	Object Name	Navigation	Usage
Currency Code	CURRENCY_CD_TABLE	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Currency Code • Set Up Financials/Supply Chain, Common Definitions, Currency, Currency Code	Define currency. **Note.** To meet the needs of your multicurrency business, PeopleSoft supports the Euro and delivers the Currency Code table with many common currencies identified according to ISO standards.
Department	DEPARTMENT	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Department	Manage department numbers and department names.
Detail Calendar	DETAIL_CALENDAR1	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Detail Calendar • Set Up Financials/Supply Chain, Common Definitions, Calendars/Schedules, Detail Calendar	Define begin and end dates and number of accounting periods in fiscal year calendar.
Detail Calendar - Depreciation	DETAIL_CALENDAR2	Click the Depreciation link on the Detail Calendar page.	Define depreciation parameters.
Administer File Attachments	SAC_ATT_ADMIN	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, File Attachment Server • Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments	Add new file attachment servers, and change the currently active server.
Location Definition	LOCATION_TBL	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Location • Set Up Financials/Supply Chain, Common Definitions, Location, Location	Define a location code, such as a branch office or shipping office.

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Page Name	Object Name	Navigation	Usage
Location Detail	LOCATION_TBL2	Select the Locations Details tab on the Location Definition page.	Add details to a location definition.
Ship to Location Definition	SHIPTO_HDR	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Ship To Location • Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Ship to Locations	Define a ship to location code. This location will be used on the service requisition as the place where the services are to be performed.
Region Codes	REGION_CD	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Region Code • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Ratesheets, Service Region Code	Define Services Procurement region codes.
Region Codes Address	REGION_CD_ADDR	Select the Region Codes Address tab on the Region Codes page.	Enter service region code address information.

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Page Name	Object Name	Navigation	Usage
Service Region Structure	PSTREEMGR or SPB_REGIONLOCATION	Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Region Structure	Maintain region structures using region tree or location by region. **Note.** The Region Tree Structure check box on Services Procurement Installation Options determines which method is used. **Note.** The navigation for this page changes depending on your setting for the Use Region Tree Structure check box defined on the Services Procurement Installation Options page. When you select the Use Region Tree Structure option on the Services Procurement Installation Options page, the system navigates you to the Tree Manager page, where you can maintain the region structure. If you do not select the Use Region Tree Structure option, the system navigates you to the Location by Region page, where you can specify locations that are included in each region.
Reason Code	SPB_REASON_CD	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Reason Code • Set Up Financials/Supply Chain, Product Related, Services Procurement, Reason Codes	Define reason codes related to each reason type.
Tree Manager	PSTREEMGR	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Tree Manager • Tree Manager, Tree Manager	View and modify trees needed for service regions and purchase items.

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Page Name	Object Name	Navigation	Usage
Units of Measure	UNITS_OF_MEASURE	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Units of Measure • Set Up Financials/Supply Chain, Common Definitions, Units of Measure, Units of Measure	Establish units of measure for your resources.

Defining Automatic Numbering

These Services Procurement fields use automatic numbering:

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

Defining Region Codes

Access the Region Codes page.

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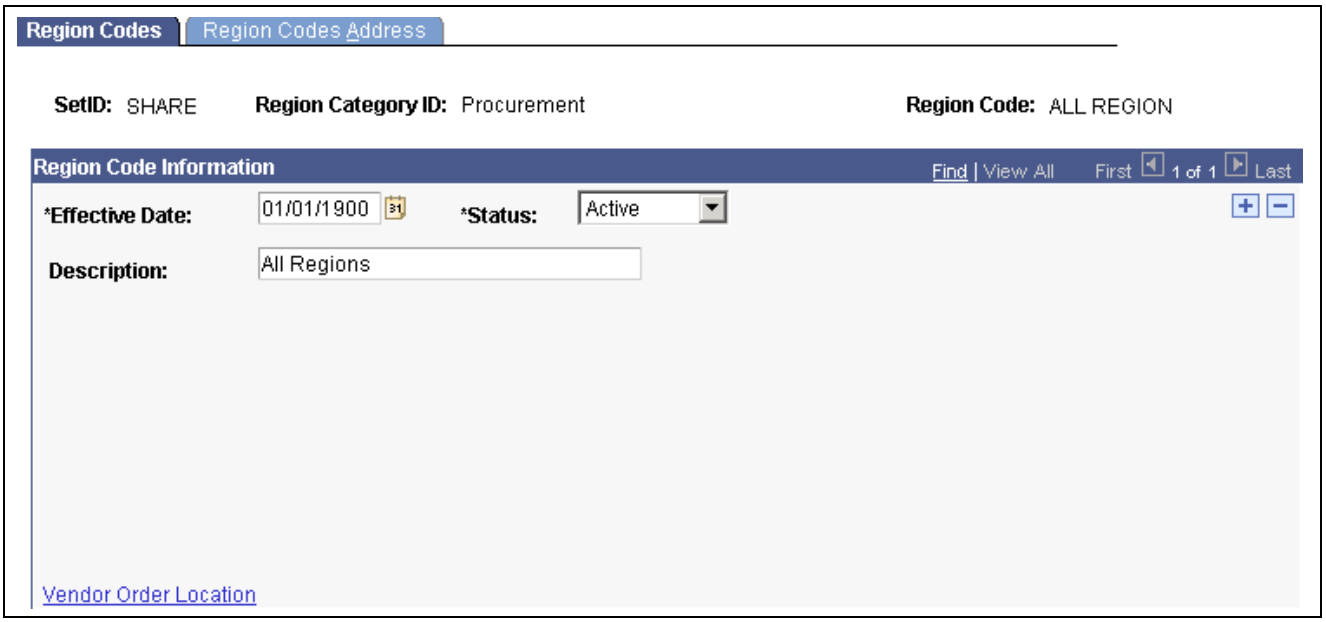

Region Codes page

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

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

Setting Up File Attachment Servers

Access the Administer File Attachments page.

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

Define Services Reason Codes

Access the Reason Codes page.

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Reason Codes page

Reason Codes - Requisitions

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

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

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

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

Reason Codes - Sourcing

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

Reason Codes - Bidding

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

- Bid Response: Service Coordinator or Requester declines a bid or ends communications.

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

- Incoming Bid: Service coordinator or requester ends communications.

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

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

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

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Reason Codes - Work Orders

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

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

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

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

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

Reason Codes - Timesheets

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

- Time/Expense Summary: Timesheet approvers deny a timesheet.

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

- Project Time Details: Timesheet approvers deny a timesheet line.

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

Reason Codes - Progress Logs

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

Reason Codes - Invoices

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

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

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

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

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

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

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

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

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

Defining Project and Activities Definitions

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

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

This section discusses how to:

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

Pages Used to Define Project and Activities Definitions

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

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

Defining Project Types

Access the Services Project Types page.

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

Maintaining Service Projects

Access the Maintain Services Projects page.

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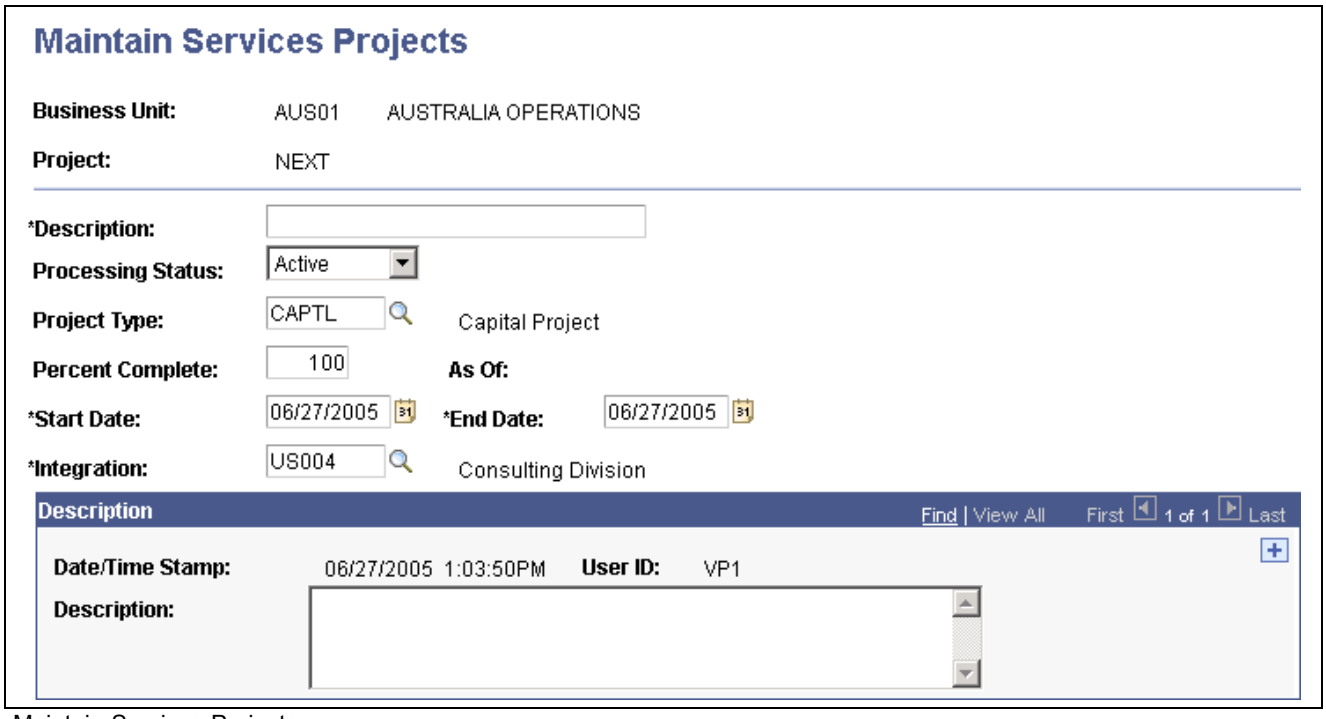

Maintain Services Projects page

Processing Status	Select the activity status. Values are *Active* or *Inactive*.
Project Type	Enter the project type.
Percent Complete	Enter the percentage completed for the activity and the as of date for the specified percentage.
Start Date	Enter the project start date.
End Date	Select the project end date
Time Template	Enter the time template associated to the project

Defining Project Activities

Access the Project Activities page.

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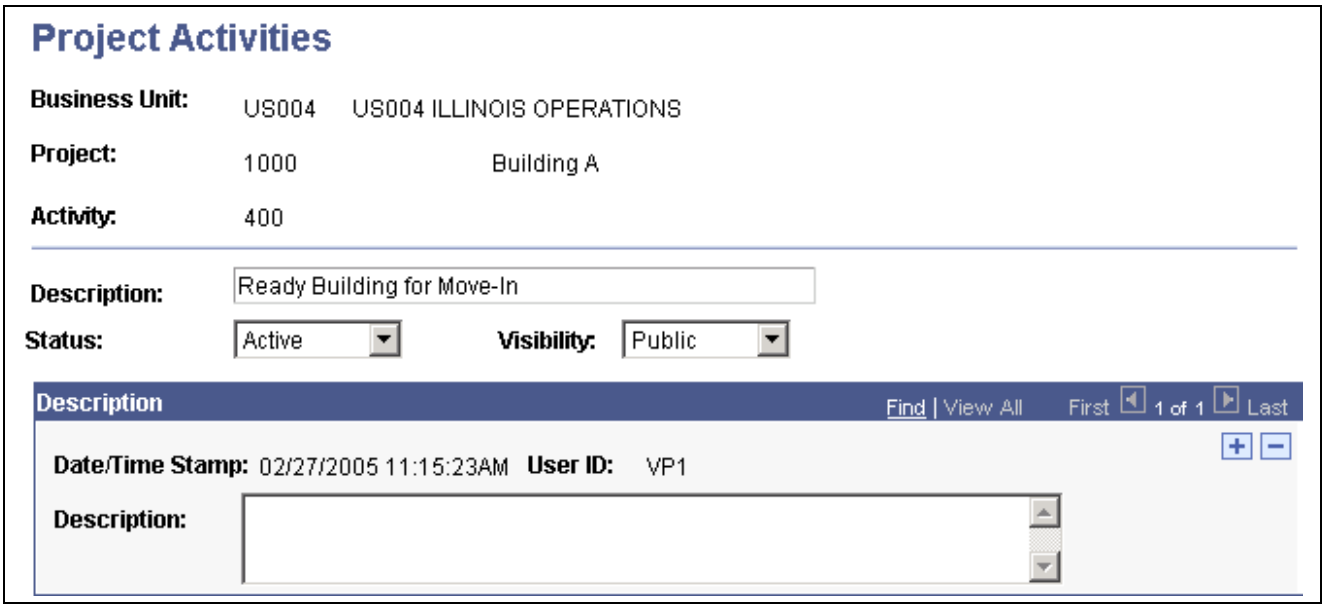


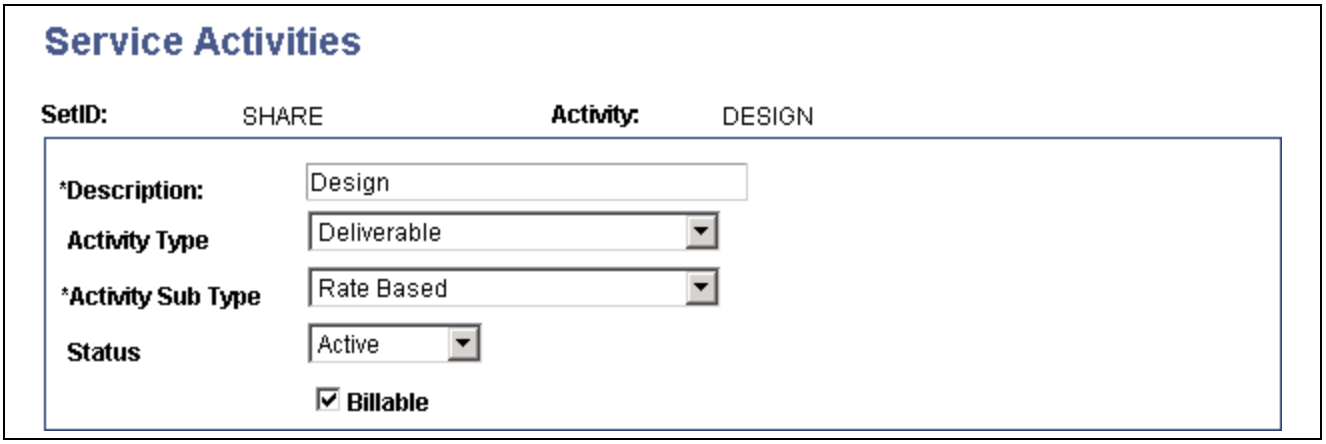
Project Activities page

Description Enter the activity description.

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

Setting Up Service Activities

Access the Service Activities page.



Service Activities page

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

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

Activity Type Select an activity type. Values are:

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

Activity Sub Type Activity sub type is used to indicate the type work that this activity may be used for. The available values are dependent on the Activity Type that was selected.

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

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

Status Options are *Active*and *Inactive.*

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

Billable This option indicates whether time associated to this activity is billable. This value acts as a default for the Activities by Service Type page.

Grouping Bid Factors by Activity

Access the Bid Factors by Activity page.

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

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

Setting Up Activities by Service

Access the Activities by Service page.

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

Activity Enter an activity to associate with a service.

Rate Amount Enter a deliverable rate amount.

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

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

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

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

Setting Up Activities by Service Type

Access the Activities by Service Type page.

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

Activity Enter an activity to associate with a service type.

Billable Indicate whether this is a billable activity for the service type.

Status Indicate whether the status of the activity is active or inactive for the service type. Inactive activities may not be selected during time or progress entry.

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CHAPTER 5

Setting Up Application Specific Options for PeopleSoft Services Procurement

This chapter discusses how to:

- Maintain service setup.
- Define service supplier setup.
- Define sourcing setup.
- Maintain users and team setup.
- Maintain workflow setup.
- Maintain settlement setup.

Prerequisites

You must perform the following:

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

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

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing Service Coordinators, page 107

Maintaining Service Setup

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

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

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

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

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

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

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

This section discusses how to:

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

Pages Used to Maintain Service Setup

Page Name	Object Name	Navigation	Usage
Service Request Types	SP_REQUEST_TYPE	• Services Procurement, Define Services Procurement, Service Setup, Service Request Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Request Type	Maintain service request types.

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Page Name	Object Name	Navigation	Usage
Role Distribution List	SP_DSTRLST	• Services Procurement, Define Services Procurement, Service Setup, Role Distribution Lists • Set Up Financials/Supply Chain, Product Related, Services Procurement, Role Distribution Lists	Specify the role distribution lists that receive work order surveys and alerts.
Competency Types	RS_CM_TYPE_TBL	• Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competency Types • Set Up Financials/Supply Chain, Common Definitions, Resource Data, Competency Types	Enter a long or short description for new competency types.
Competency	RS_CM_COMPTNCY_TBL	• Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competencies • Set Up Financials/Supply Chain, Common Definitions, Resource Data, Competencies	Define competencies.
Competencies by SetID	SP_COMPBYSETID_PG	Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Competencies by SetID	Define competencies by setID.
Rating Model	RS_CM_REVW_RAT_TBL	• Services Procurement, Define Services Procurement, Service Setup, Competency Setup, Rating Models • Set Up Financials/Supply Chain, Common Definitions, Resource Data, Rating Models	Select the model used to rate a candidate's competency.

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Page Name	Object Name	Navigation	Usage
Service Types	SPB_ROLE_TYPE	• Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service Type	Set up service types.
Service/Roles by Service Type	SPB_ROLESBYTYPE	• Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Services/Roles by Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Services/Roles by Service Type	Define Service (project roles) by role type.
Surveys by Service Type	SP_SURVEY_BY_SVTYP	• Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Surveys by Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Surveys by Service Type	Associate service type with one or more surveys.
VMS by BU Service Type	SPB_VMS_BU_SRVC	Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, VMS by BU Service Type	Associate the VMS supplier by business unit and service type. **Note.** This page is only available if you do not have the Managed Service Provider Installation option enabled on the Services Procurement Installation Options page. See Chapter 10, "Establishing and Managing VMS," page 187.

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

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

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Page Name	Object Name	Navigation	Usage
Tasks by Task Groups	SPB_TASKTOGROUP_PG	• Services Procurement, Define Services Procurement, Service Setup, Tasks and Task Groups, Tasks by Task Groups • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Work Order Tasks, Tasks by Task Groups	Associate one or more tasks to a task group.
Task Group by Service Type	SPB_ROLE_TASKGP_PG	• Services Procurement, Define Services Procurement, Service Setup, Tasks and Task Groups, Task Group by Service Type • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Work Order Tasks, Task Group by Service Type	Define task groups by service type.
Response Types	SP_SUR_RESTYP	• Services Procurement, Define Services Procurement, Service Setup, Survey Setup, Response Types • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Surveys, Response Types	Define formats and answer choices for work order survey questions. See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," page 393.
Survey Setup	SP_SUR_DEFN	• Services Procurement, Define Services Procurement, Service Setup, Survey Setup, Survey Setup • Set Up Financials/Supply Chain Management, Product Related, Services Procurement, Surveys, Survey Setup	Define questions, role distribution lists and response types for work order surveys. See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," page 393.
Survey Setup - Service Type	SP_SUR_DEFN_SVTYP	Select the Service Type tab on the Survey Setup page.	View the service types related to the survey.

Maintaining Role Distribution Lists

Access the Role Distribution List page.

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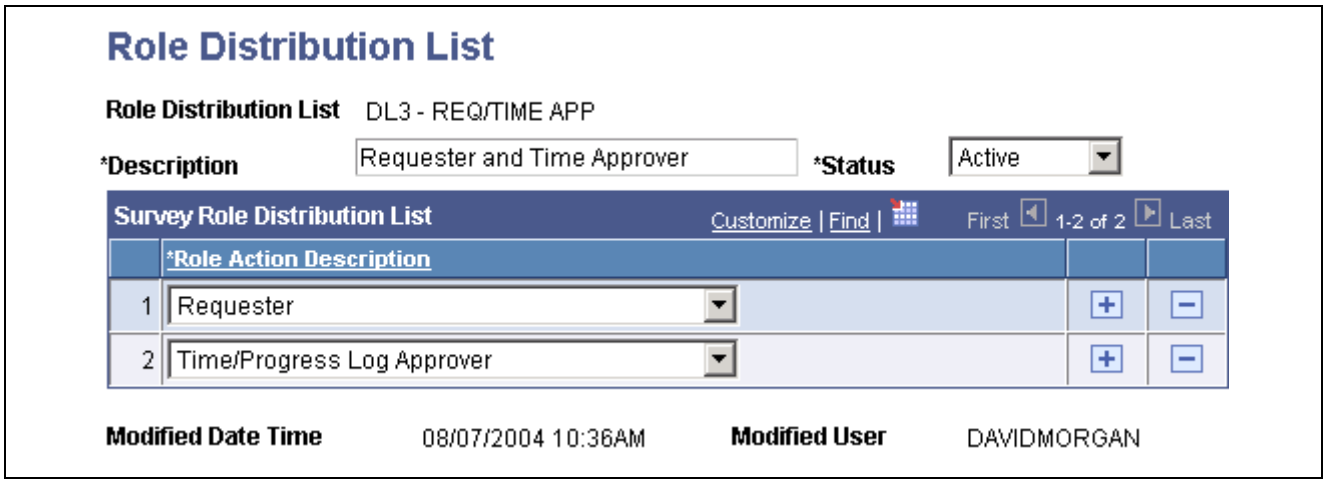


Role Distribution List page

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

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

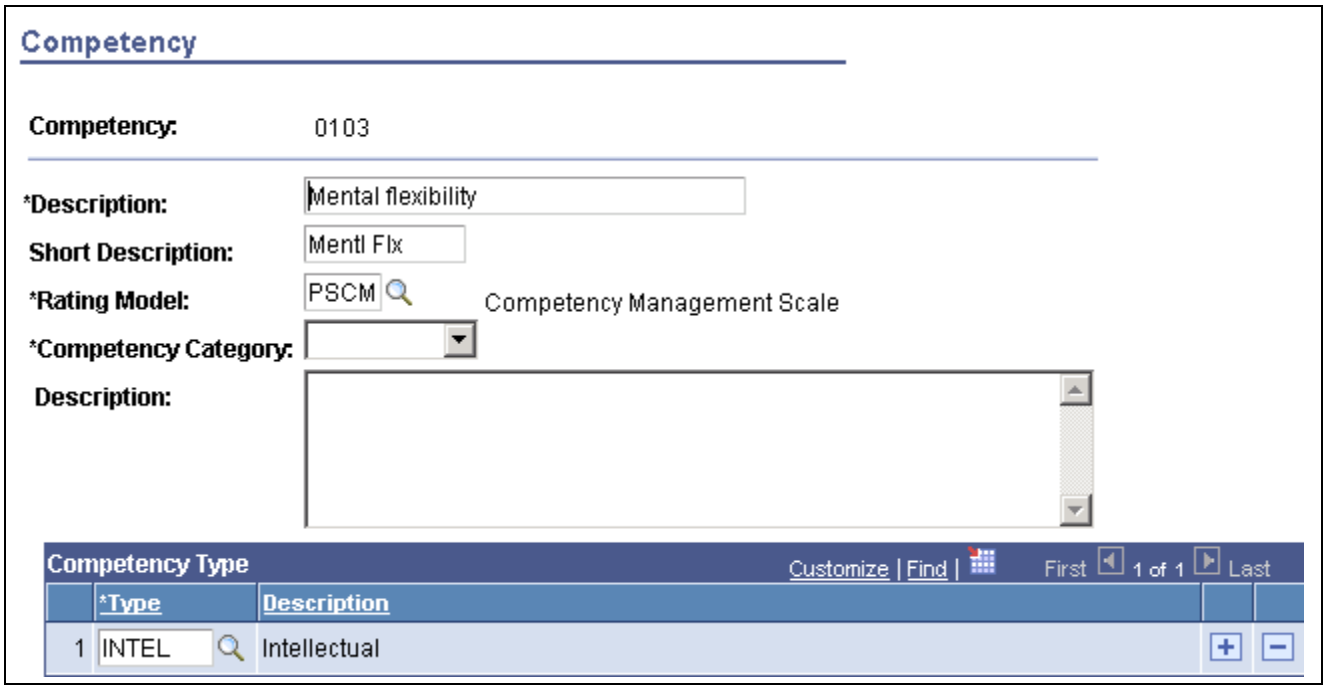
Role Action Description Select from the available work order role actions for the distribution list.

See Also

Chapter 23, "Using Surveys in PeopleSoft Services Procurement," Setting Up Surveys, page 393

Maintaining Competencies

Access Competency page.



Competency page

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

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

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

Competency Type

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

Maintaining Competencies by SetID

Access the Maintain Competencies by SetID page.

Competencies by SetID page

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

Maintaining Rate Models

Access the Rate Model page.

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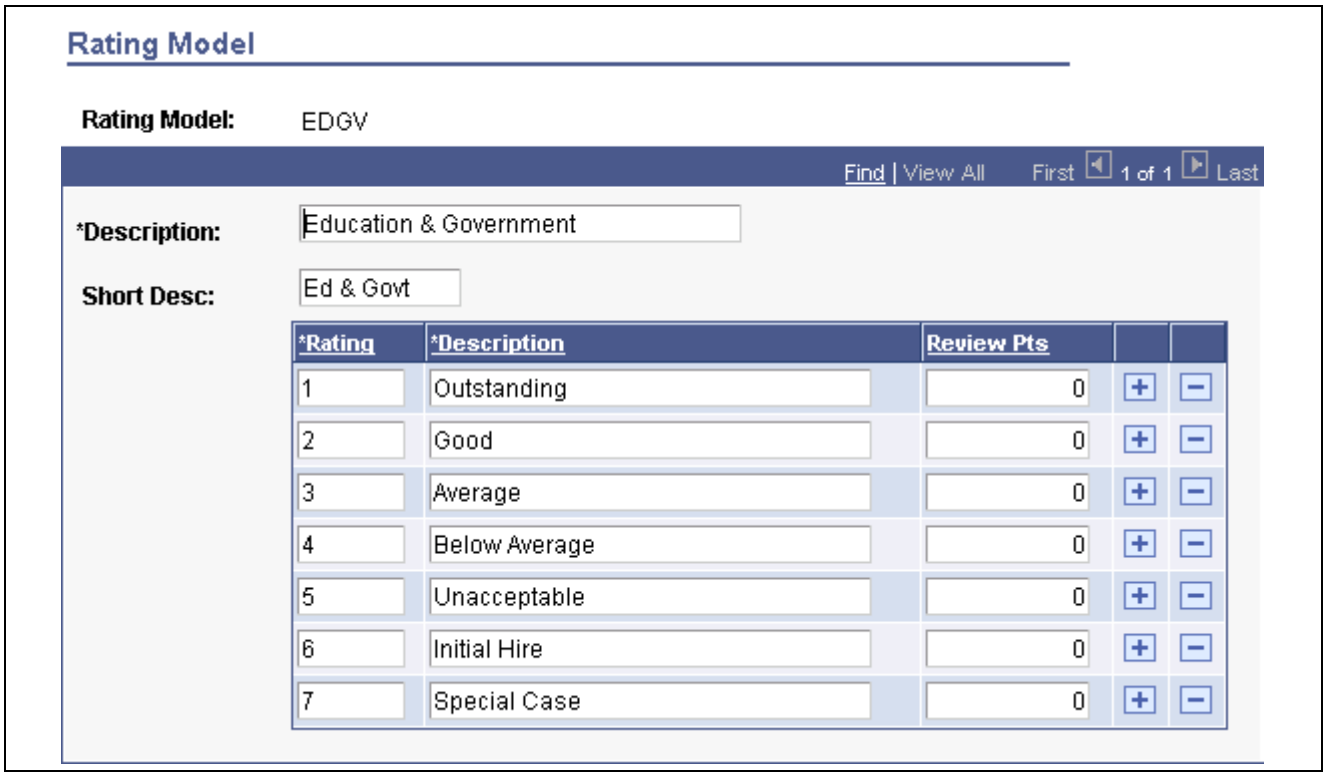

Rate Model page

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

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

Note. This value is not used within services procurement.

Maintaining Service Types

Access the Service Types page.

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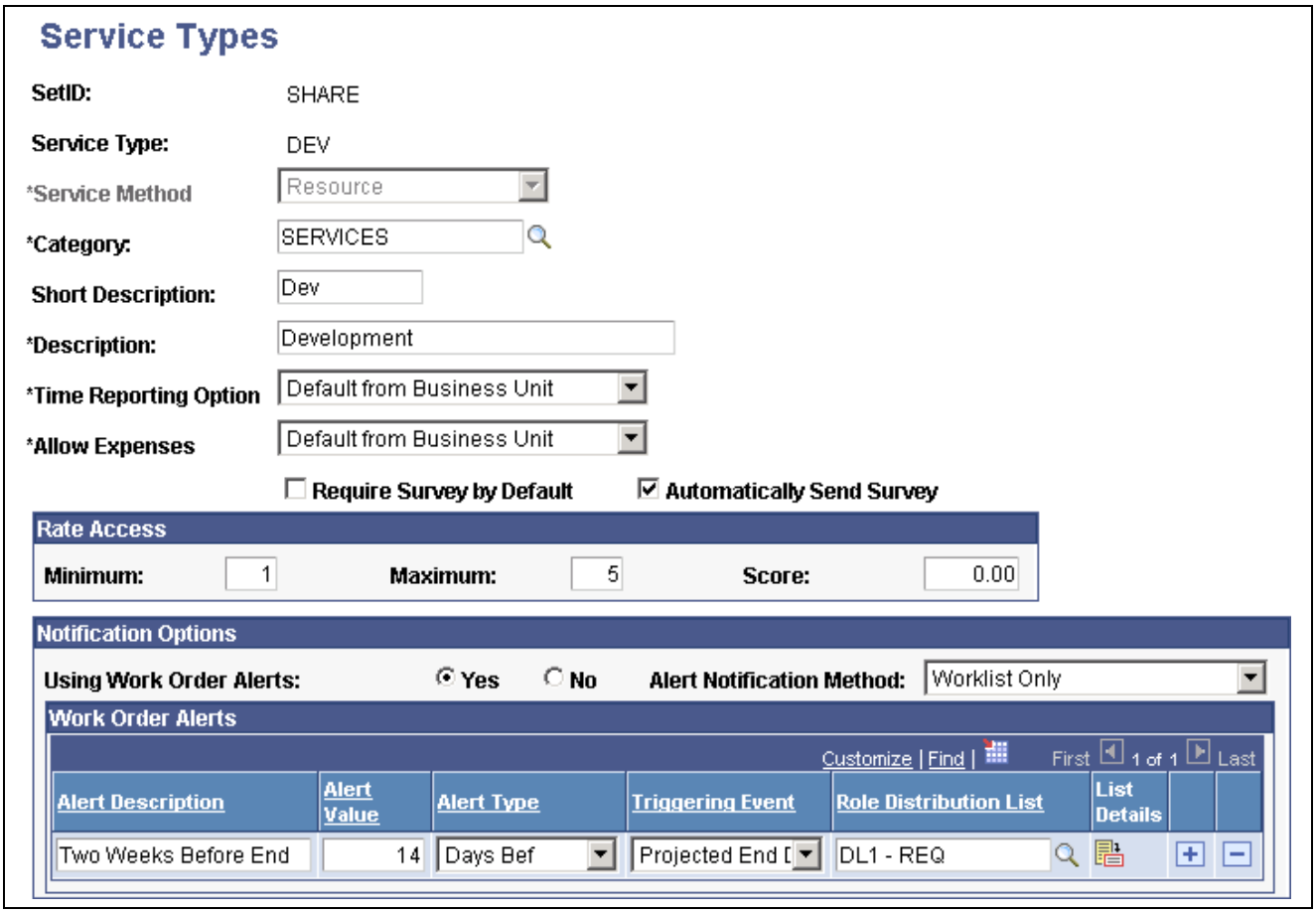

Service Types page

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

Service Method Select the service method for the service type. Available options are *Resource* and *Deliverable.*

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

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

Category Select the item category for the service type.

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

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

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

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

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

Allow Expenses Select to track and report expenses for deliverable-based assignments.

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

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

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

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

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

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

Rate Access

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

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

Notification Options

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

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 37.

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

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See Also

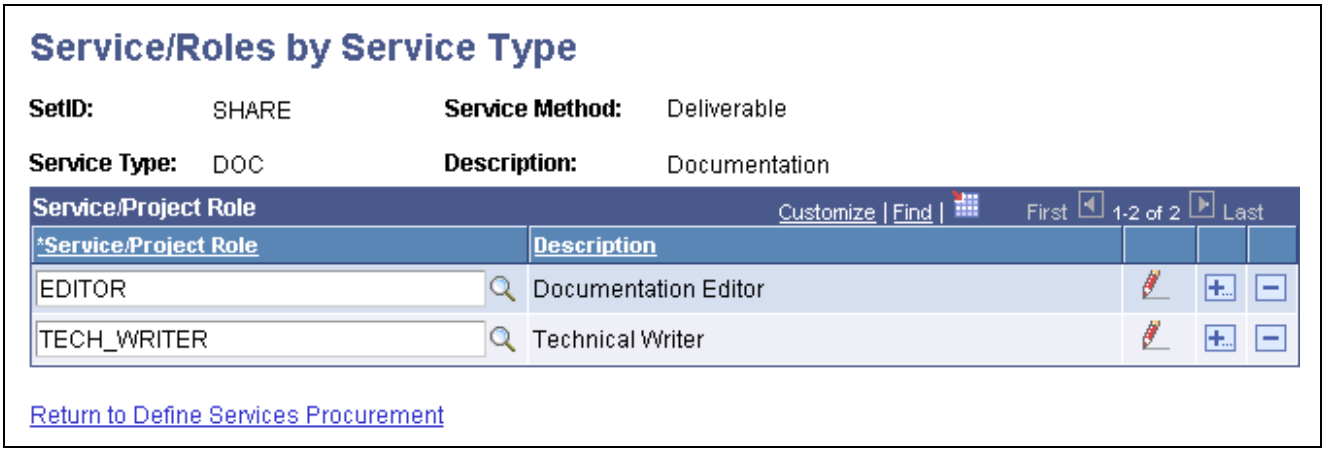
Chapter 19, “Managing Time in PeopleSoft Services Procurement,” page 323

Chapter 4, “Setting Up PeopleSoft Services Procurement,” Defining Work Order Settings, page 37

Chapter 18, “Managing Work Orders,” page 281

Maintaining Service/Roles by Service Type

Access the Service/Role by Service Type page.



Service/Role by Service Types page

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

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

Description Displays the description for the services and project role.

Maintaining Service/Project Role Attributes

Access the Service/Project Role Attributes page.

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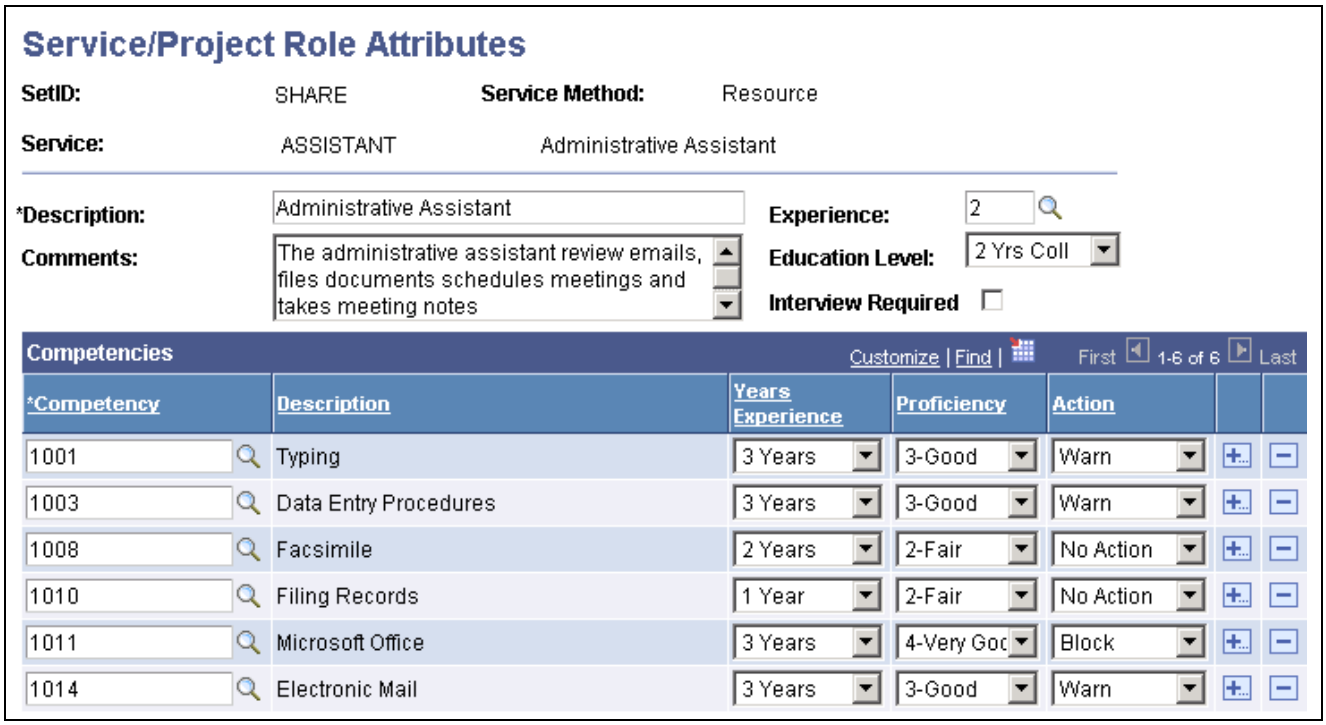

Service/Project Role Attributes page

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

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

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

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

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

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

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

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

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

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

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

Competencies Add or delete competencies to a service.

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

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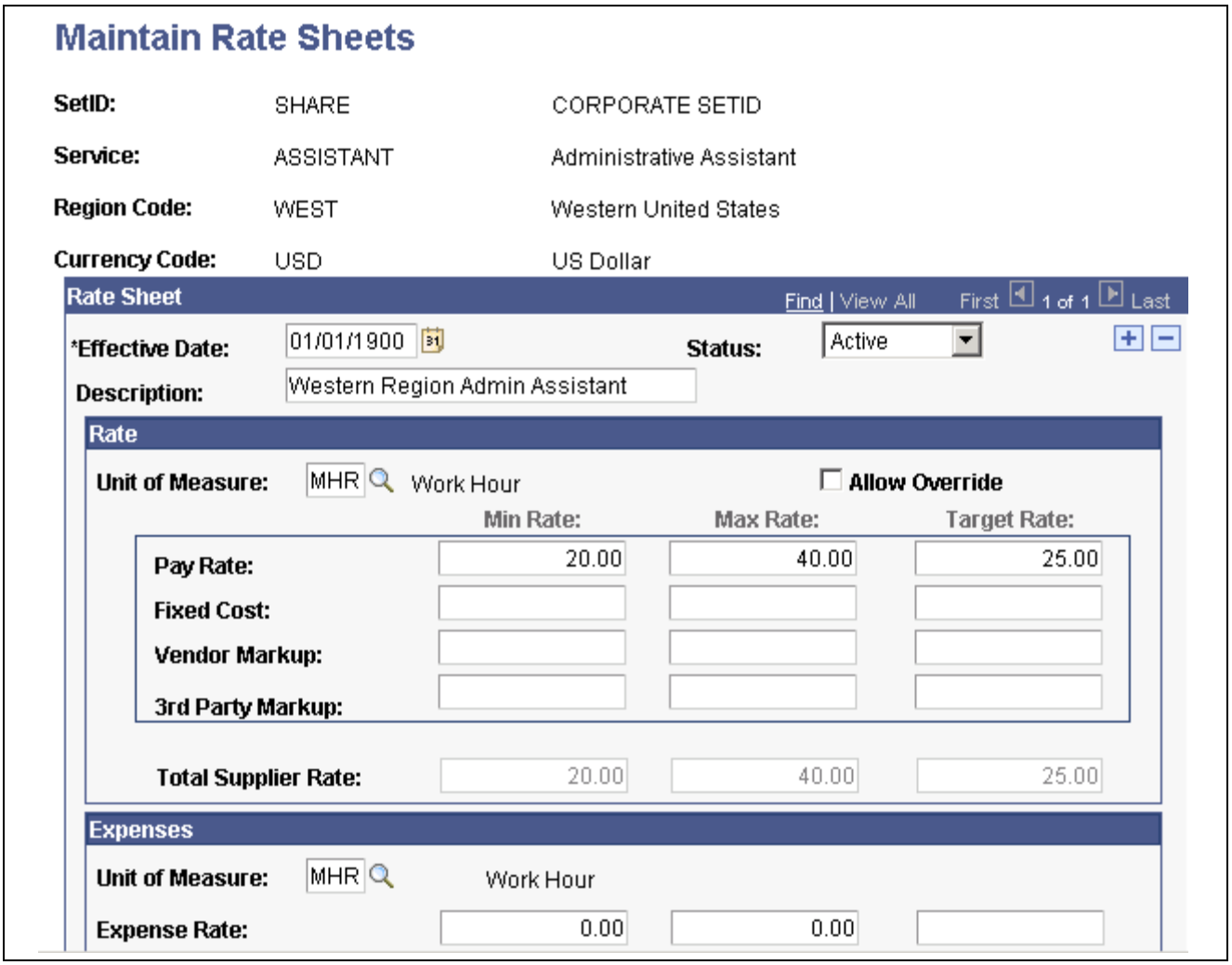
Note. The experience, education level and interview required fields are available only for resource-based requisitions. Experience and education level are informational only and are not used to filter resource skills on a requisition or work order.

Maintaining Rate Sheets

Access the Rate Sheet page.



Maintain Rate Sheets page

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

Rate

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

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

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

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

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

Expenses

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

Viewing Rate Sheet Lists

Access the Rate Sheet List page.

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

Maintain Logistical Tasks

Access the Logistical Tasks page.

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

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

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

Approval Type Select work order approval type. Values are:

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

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

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

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

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

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

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

Execution Type Select work order execution type. Values are:

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

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

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

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

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

Defining Service Supplier Setup

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

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

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

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

This section discusses how to:

- Build the region hierarchy using PeopleSoft Tree Manager.
- Enter supplier information.

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- Maintain services supplier information.
- Maintain the supplier network.
- Maintain sourcing supplier setup.
- Set up suppliers by region.

Pages Used to Define Service Supplier Setup

Page Name	Object Name	Navigation	Usage
Tree Definitions and Properties	PSTREEDEFN	• Tree Manager, Tree Manager • Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Tree Manager	Build the region tree hierarchy.
Region Codes	REGION_CD	• Services Procurement, Define Services Procurement, General Setup, System-Wide Definitions, Service Region Code • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Regions/Ratesheets, Service Region Code	Define procurement region codes.
Identifying Information	VNDR_ID1_SUM	• Services Procurement, Define Services Procurement, Services Supplier Setup, Vendor Information • eProcurement, Buyer Center, Vendors, Maintain Vendors, Vendor Information	Maintain vendor information. See *PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook*, "Maintaining Vendor Information".
Services Supplier Information	VENDOR_SPRO_PG	• Services Procurement, Define Services Procurement, Services Supplier Setup, Service Supplier Information • Services Procurement, Define Services Suppliers, Service Details	Maintain vendors as service suppliers.

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

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

Building the Region Hierarchy

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

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

With the region hierarchy, you can also:

- Determine the best supplier to fill a requisition requirement.
- Create requisitions for specific regions (ship to locations) and source them to qualified suppliers in those regions.
- Source requisitions to suppliers that match region and rate sheet requirements.

To build the region hierarchy:

1. Access the Region Codes page and set up PeopleSoft Services Procurement region codes.

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2. Access the Tree Manager page and set up the tree definition and properties.

   Select *REGION_TREE* as the structure ID, enter a description and SetID, and select *Level Not Used* for the Use of Levels field.

3. Add a root node by selecting one of the available values.

See Also

Chapter 6, "Using Default Hierarchies," Defining the Region Hierarchy, page 154

Entering Supplier Information

Access the Identifying Information page.

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

See Also

PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook, "Maintaining Vendor Information"

Maintaining Services Supplier Information

Access the Services Supplier Information page.

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

Internal Supplier Select if the supplier is internal to your organization.

Include in Invoice Approval Select if invoices should be routed to the supplier for approval before being routed internally for approval.

If this option is selected after work orders have already been opened for the supplier, then the Supplier Invoice Approver name on these work orders will be missing. Therefore, the system issues a warning whenever this option is selected to remind the user to review all open work orders for this supplier and to assign a supplier invoice approver.

If the Supplier Invoice Approver is missing on any work orders, invoicing will bypass submitting the invoice to suppliers for approval even though this option is selected to Include in Invoice Approval.

Ethnicity If the vendor is minority owned, select the ethnicity of the owner.

Score Displays the supplier score as determined from data analysis.

Maintaining the Supplier Network Setup

Access the Supplier Network Setup page.

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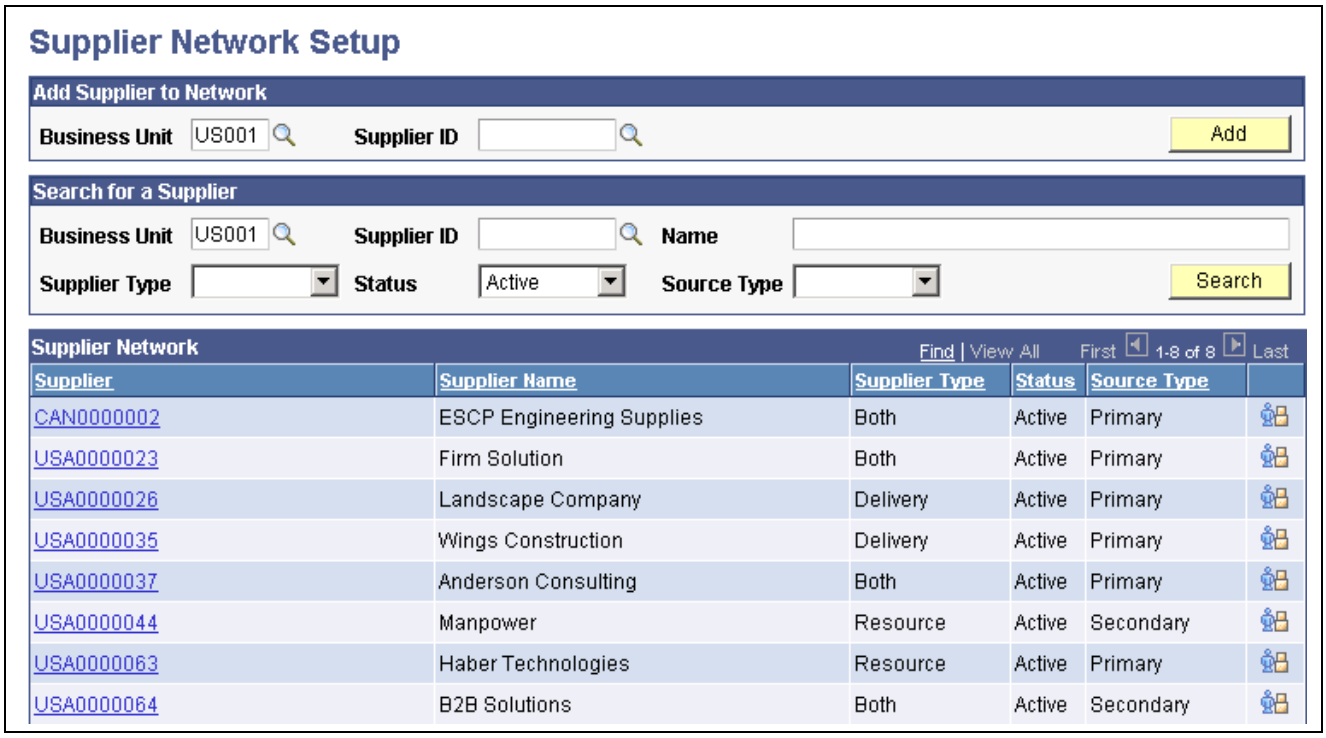
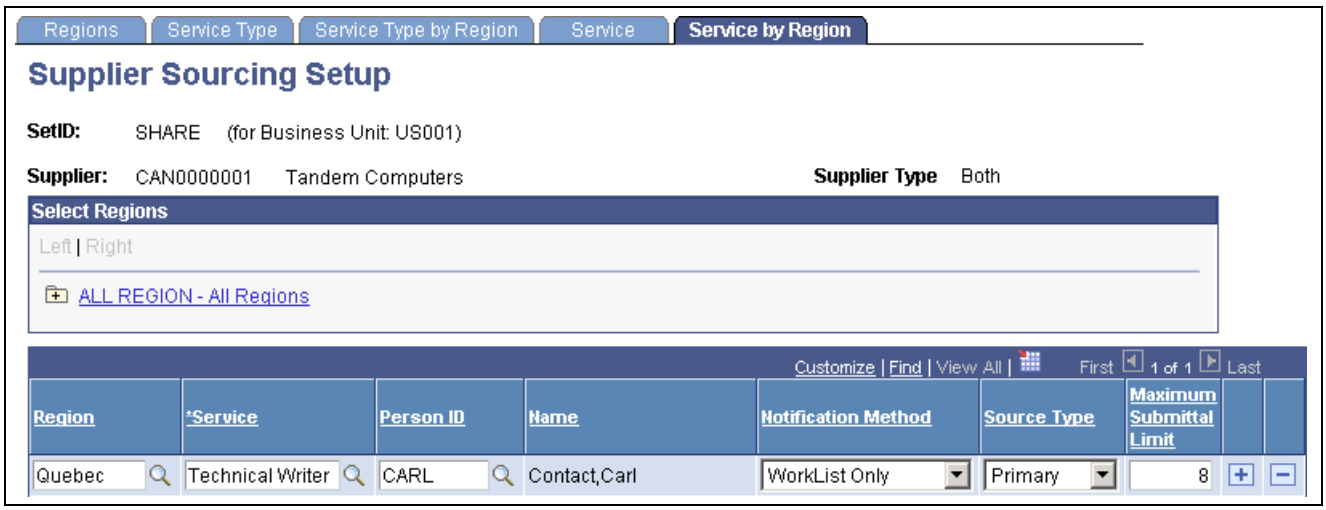


Supplier Network Setup page

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

Maintaining Supplier Sourcing Setup

Access the Supplier Sourcing Setup page.



Supplier Sourcing Setup page

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

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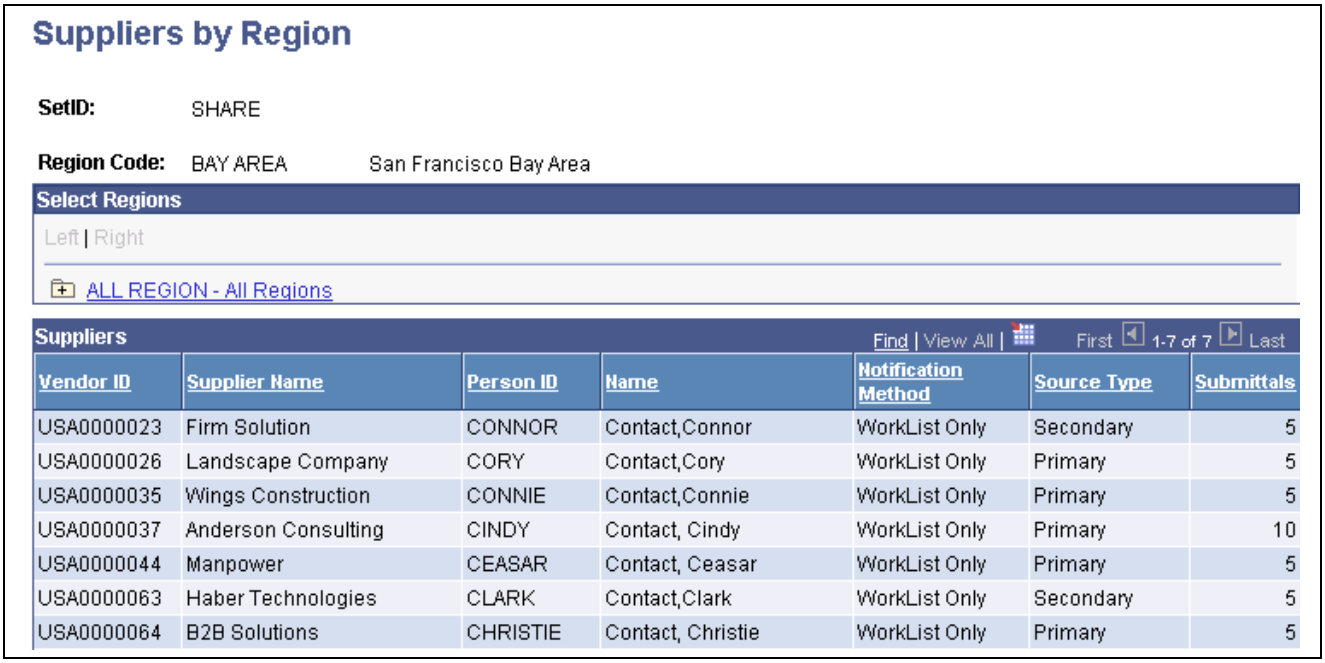
Setting Up Suppliers by Region

Access the Suppliers by Region page.



Suppliers by Region

SetID: SHARE

Region Code: BAY AREA San Francisco Bay Area

Select Regions

Left | Right

ALL REGION - All Regions

Suppliers

Find | View All | First 1-7 of 7 Last

Vendor ID	Supplier Name	Person ID	Name	Notification Method	Source Type	Submittals
USA0000023	Firm Solution	CONNOR	Contact,Connor	WorkList Only	Secondary	5
USA0000026	Landscape Company	CORY	Contact,Cory	WorkList Only	Primary	5
USA0000035	Wings Construction	CONNIE	Contact,Connie	WorkList Only	Primary	5
USA0000037	Anderson Consulting	CINDY	Contact, Cindy	WorkList Only	Primary	10
USA0000044	Manpower	CEASAR	Contact, Ceasar	WorkList Only	Primary	5
USA0000063	Haber Technologies	CLARK	Contact,Clark	WorkList Only	Secondary	5
USA0000064	B2B Solutions	CHRISTIE	Contact, Christie	WorkList Only	Primary	5

Suppliers by Region page

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

Defining Sourcing Setup

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

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

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

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

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

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Understanding Bid Factors

With PeopleSoft Services Procurement bid factors, you can:

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

Bid Factors and Requisitions

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

Bid factors appear by default from several setup pages:

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

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

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

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

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

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

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

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

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

See Also

Chapter 14, “Creating and Managing Requisitions,” page 211

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Pages Used to Define Sourcing Setup

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

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Page Name	Object Name	Navigation	Usage
Bid Factor Mapping	SPF_BIDFCTR_MAP_PG	• Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factor Mapping • Set Up Financials/Supply Chain, Product Related, Services Procurement, Bid Factors, Bid Factor Mapping	Map predefined attributes to bid factors in the strategic sourcing module.
Bid Factors by Category	SP_BDFTR_BY_CAT_PG	• Services Procurement, Define Services Procurement, Sourcing Setup, Bid Factor Setup, Bid Factors by Category • Set Up Financials/Supply Chain, Product Related, Services Procurement, Bid Factors, Bid Factors by Category	Associate bid factors by category.
Services Procurement Pay Types	SPB_PAY_TYPES	• Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Services Pay Types • Set Up Financials/Supply Chain, Product Related, Services Procurement, Pay Types, Services Pay Types	Maintain descriptive labels for each pay type.
Markup Details	SPB_SRVC_MRKUP	• Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Markups by Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Pay Types, Markups by Service Type	Maintain vendor markup information by service type.

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Page Name	Object Name	Navigation	Usage
Maintain Markups by Region	SPB_RGN_MRKUP	• Services Procurement, Define Services Procurement, Sourcing Setup, Pay Types and Markups Setup, Markups by Region • Set Up Financials/Supply Chain, Product Related, Services Procurement, Pay Types, Markups by Region	Maintain vendor markup information by region.
Performance Level Codes	SPB_LVL_CD	• Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Performance Level Codes • Services Procurement, Define Service Suppliers, Performance Level Codes	Maintain performance level codes for a supplier. See Chapter 25, "Supplier Scoring for PeopleSoft Services Procurement," Setting Up Performance Level Codes, page 436.
Supplier Scoring Rules	SPB_SUP_SCORE_RULE	• Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Scoring Rules • Services Procurement, Define Service Suppliers, Scoring Rules	Maintain supplier scoring rules. See Chapter 25, "Supplier Scoring for PeopleSoft Services Procurement," Setting Up Supplier Scoring Rules, page 437.

Creating Bid Factors

Access the Bid Factor Setup page.

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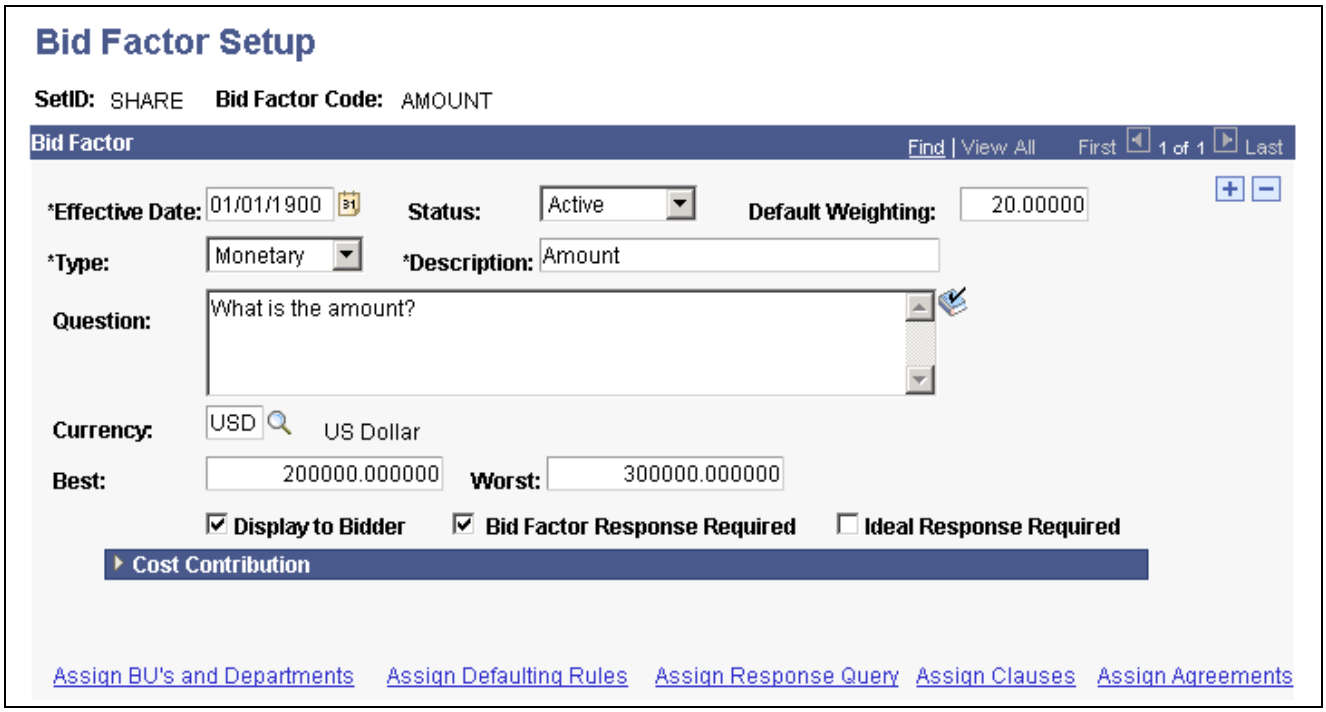

Bid Factor Setup page

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

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

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

Additional fields appear, depending on the bid type selection.

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

Question Enter the text of the bid factor question.

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

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

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

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

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

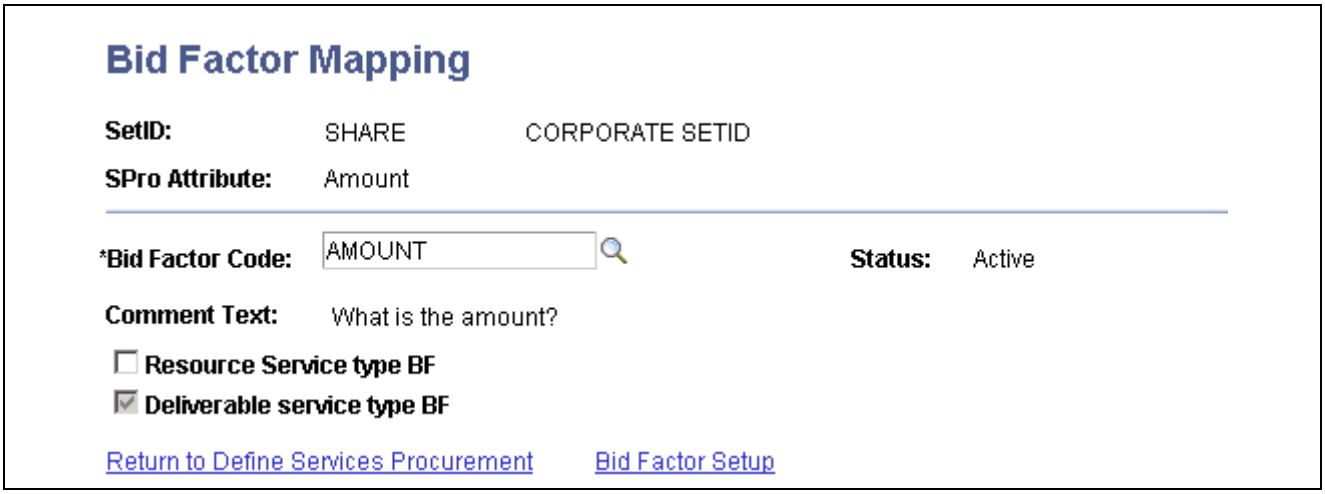
Assign Agreements Click to access the Assign Contract Agreements page, where you can assign contract agreement to bid factors.

Cost Contributions

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

Mapping Bid Factors

Access the Bid Factor Mapping page.



Bid Factor Mapping page

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

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

Bid Factor Code Enter the bid factor code that maps to the specified services procurement attribute.

Status Displays the status of the bid factor mapping.

Comment Text Displays the question related to the bid factor code.

Resource Service type BF(resource service type bid factor) Select this check box if the bid factor is related to resource-based requisitions.

Note. The RATE and CANDIDATE bid factor mappings only occur on resource-based requisitions, and therefore, only have the Resource Service type BF check box selected.

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Deliverable service type BF(deliverable service type bid factor)

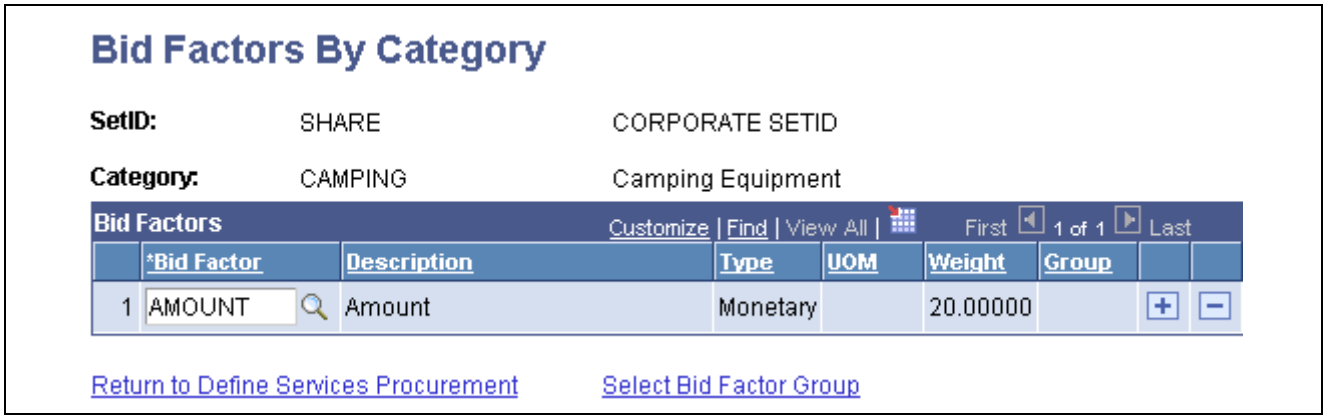
Select if the bid factor is related to deliverables-based requisitions.

The *AMOUNT* bid factor mappings only occurs on deliverables-based requisitions, and therefore, only have the Deliverable service type BF check box selected.

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

Defining Bid Factors by Item Category

Access the Bid Factors by Category page.



Bid Factor by Category page

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

Setting Up Services Procurement Pay Types

Access the Services Procurement Pay Types page.

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

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

Entering Markups by Service Type

Access the Markup Details page.

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

Max Vendor Markup (maximum vendor markup)

Enter the maximum vendor markup rate as percentage or as total amount.

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

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

Entering Markups by Region

Access the Maintain Markups by Region page.

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

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

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

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

Maintaining Users and Team Setup

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

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

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

- Set up roles for role actions.
- Set up users.
- Set up user preferences.
- Set up service requester defaults.
- Set up service coordinator defaults.
- Create and edit requesters.
- Create and edit service coordinators.
- Create and edit service provider contacts.
- Create and edit service providers.
- Create and edit service providers/coordinators.
- Revoke the service provider/coordinator role.
- Replace the services coordinator.
- Replace the VMS service coordinator.

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- View the Coordinator Replacement log.
- Create and edit service administrators.
- Create and edit approvers.
- Create service coordinator teams.

Understanding Users and Team Setup

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

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

Understanding User Roles

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

Here are some examples of enterprise users:

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

Here are some examples of supplier users:

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

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

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

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

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

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

Requesters

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

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

Service Coordinators

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

Provider Contacts

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

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

Service Providers

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

Service Providers/Coordinators

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

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

Independent Providers

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

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

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

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

Common Elements Used in this Section

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

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

Pages Used to Maintain Users and Team Setup

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

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Page Name	Object Name	Navigation	Usage
User Profile Information	SPB_USR_PROFILE_PG	• Services Procurement, Define Services Procurement, Services User Setup On the Services User Setup (page 1), select Create a new Services User option in #1, select any type in step #2, and then click the Next button. Click No in step #3, and then click the User Profile link that appears in step #4. • Services Procurement, Maintain Users, Services User Setup On the Services User Setup (page 1), select Create a new Services User option in #1, select any type in step #2, and then click the Next button. Click No in step #3, and then click the User Profile link that appears in step #4.	Update user profile information.
eProcurement Role Actions	PV_ACTIONS	• Services Procurement, Define Services Procurement, User and Team Setup, Role Actions • Services Procurement, Maintain Users, Role Actions	Assign user roles to delivered role actions.
Role Action for User Setup	SPB_USRSTP_ROLE_PG	• Services Procurement, Define Services Procurement, User and Team Setup, Role Action for User Setup • Services Procurement, Maintain Users, Role Actions for User Setup	Assign roles to predefined role actions to be used when creating a new user.
User Preferences	PV_OPR_LINKS	• Services Procurement, Maintain Users, Maintain User Preferences • On the Service User Setup (page 1), choose any existing user in step #1, select any type in step #2, and enter person ID in step #3, and then click the User Preferences link in step #5.	Enter overall and procurement preferences.

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Page Name	Object Name	Navigation	Usage
Overall Preferences	OPR_DEF_TABLE_FS1	Click the Overall Preferences link on the Users Preferences page.	Capture the default business unit and default SetID for the requester, and add all other users.
Requester Defaults	SPB_REQ_USR_DEF_PG	• Services Procurement, Maintain Users, Service Requester Defaults • On Service User Setup (page 1) select the 'existing' option in step #1 and in step #2, select Requester, and click the Requester Default link.	Set up preferences for requesters.
Service Coordinator Defaults	SPB_SRVC_USRDEF_PG	• Services Procurement, Maintain Users, Service Coordinator Defaults • On Service User Setup (page 1) select the 'existing' option in step #1, and select Service Coordinator in step #2, and then click the Service Coordinator Defaults link.	Set up preferences for service coordinators.
Services User Setup (page 1)	SPB_USER_SETUP_PG1	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup • Services Procurement, Maintain Users, Services User Setup	Register requesters, service coordinators, service providers, service provider contacts, service administrators, and approvers.
Services User Setup (page 2)	SPB_USER_SETUP_PG2	Click the Create a New Services User button, and then click the requester, service coordinators, service providers, service provider contacts, service administrator, or approver option to add a new user.	Determine whether the new user has an existing user profile or needs a new profile, add new users as requesters, and establish security and user preferences for the new user.
User Profile Information	PB_USR_PROFILE_PG	Click the User Profile link on the Services User Setup (page 2).	Enter user ID and password information for the new requester.

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Page Name	Object Name	Navigation	Usage
Requester Setup	REQUESTOR_TBL	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button on the Services User Setup page to add the new user as a requester or click the Edit Requester link to edit an existing requester. • Services Procurement, Maintain Users, Requester Setup	Define requisition and catalog defaults for the requester.
Business Unit Security by User ID	SEC_BU_OPR	Click the Unit by User ID link on the Services User Setup page.	Set up business unit access by user ID.
TableSet Security by User ID	SEC_SETID_OPR	Click the TableSet by User ID link on the Services User Setup page.	Set up TableSet access by user ID.
Maintain Service Coordinator	SPB_PERSON_PAGE	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button to add a new Person ID or click the Edit Service Coordinator link to edit an existing service coordinator Person ID. • Services Procurement, Maintain Users, Service Coordinator	Define personal information for the service coordinator
Maintain Service Coordinator - Service Coordinator Information	SPB_COORDINATOR_PG	Click the Service Coordinator Information link on the Maintain Service Coordinator page.	Define employee and user ID information.
Maintain Service Coordinator - Phone and Email Details	SPB_USR_PH_EM_PAGE	Click the Phone and Email Details link on the Maintain Service Coordinator page.	Enter telephone and email details for the service coordinator.
User Login Information - User Profile Information	SPB_PERSLGN_SEC_PG	Click the Create User Profile button on the Service Coordinator Information page.	Define login information for the service coordinator.

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Page Name	Object Name	Navigation	Usage
Maintain Provider Contact	SPB_SP_PERS_PAGE	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button to add a new Person ID or click the Edit Service Provider Contact link to edit an existing service provider contact for the selected Person ID. • Services Procurement, Maintain Users, Provider Contact	Define personal information for the provider contact.
Maintain Provider Contact - Provider Contact Information	SPB_PROV_CNTCT_PG	Click the Provider Contact Information link on the Maintain Provider Contact page.	Define supplier, location code, and create user profile.
Maintain Provider Contact - Phone and Email Details	SPB_USR_PH_EM_PG2	Click the Phone and Email Details link on the Maintain Provider Contact page.	Enter telephone and email details for the provider contact.
Replace Service Coordinator	SPB_REPLACE_SC	• Services Procurement, Maintain User, Replace Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Replace Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Select a person ID in step #3, and then click the Edit Service Provider link in step #4. Change the Person Type to *Service Provider/Coordinator* and then click the Save button. Click the Replace Service Coordinator link.	Use this page to replace the service coordinator. This page is used for non-VMS service coordinators.

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Page Name	Object Name	Navigation	Usage
Replace VMS Service Coordinator	SPB_REPL_VMS_SC	• Services Procurement, Maintain Users, Replace VMS Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Replace VMS Coordinator	Use this page to replace VMS service coordinators. This page is used to replace VMS service coordinators.
Service Coordinator Replacement Log	SPB_REPLASC_LOG	• Services Procurement, Maintain Users, Coordinator Replacement Log • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup, Coordinator Replacement Log	View requisitions and work orders on which the service coordinator replaced.
Maintain Service Provider	SPB_PERS_PROV_PAGE	• Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Click the Add button to add a new Person ID or click the Edit Service Provider link to edit an existing service provider for the selected Person ID. • Services Procurement, Maintain Users, Service Provider	Define personal information for the service provider.
Maintain Service Provider - Service Provider Information	PB_INDP_PROV_PG	Click the Service Provider Information link on the Maintain Service Provider page.	Define work status, project role, supplier, years of experience, and other parameters to define the service provider.
Maintain Service Provider - Phone and Email Details	SPB_USR_PH_EM_PG3	Click the Phone and Email Details link on the Service Provider Information page.	Enter telephone and email details for the service provider.
Service Provider Skills	SPB_PROV_SKILL_PG	Click the Provider Skills link on the Service Provider Information page.	Select appropriate competencies for the service provider.

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Page Name	Object Name	Navigation	Usage
Service Teams	SPB_TEAM	• Services Procurement, Define Services Procurement, User and Team Setup, Service Team • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Teams, Service Team	Create service coordinator teams that can source and bid on each other's requisitions and edit each other's work orders.
Teams by Region/Service Type	SPB_TEAM_STREG	• Services Procurement, Define Services Procurement, User and Team Setup, Teams by Region/Service Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Teams, Teams by Region/Service Type	Determines which team will be defaulted to a requisition or work order. If there is no default team associated to the service requester, the system then looks for a team by region and service type.

Setting Up Roles for Role Actions

Access the eProcurement Role Actions page.

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

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

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

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

SP_APPROVER Enables you to approve invoices.

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

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

SP_ENTERPRISE_ADMIN Identifies enterprise administrators.

SP_EXP_APPROVER Determines which user roles can approve expenses.

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

SP_INVOICE_APPROVER Enables you to approve invoices.

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

Setting Up User Profiles

Access the User Profile page.

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

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

To set up user profiles:

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

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

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

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

   This table lists user roles and ID types:

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

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

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

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

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

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

   Enter the approver name in the Supervising User ID field.

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

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

Setting Up User Preferences

Access the User Preferences page.

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

To set up user preferences:

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

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

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

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

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

Setting Up Service Requester Defaults

Service requester defaults make service requisition entry easier. The defaults that you define on this page are used on the requisition, simplifying the requisition entry process.

Requisition/Work Order

Projects Business Unit Enter the default PeopleSoft Project Costing business unit. If the default project business unit is already defined for the project user preferences, the value is display only.

Project Enter the default project for which the requester is to enter service requisitions.

Service Type Select the default service type.

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

Time Approver Select the default time approver. The values include users who have at least one of the roles specified for the role action: *SP_TIME_APPROVER*.

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

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

Expense Approver Select the default expense approver. Values include users who have at least one of the roles specified for the role action: *SP_EXP_APPROVER*.

Service Coordinator

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

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

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

Notification Options

Requisition Notification Method Select the notification method for requisitions.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 37.

Permissions

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

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

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

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

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

Setting Up Service Coordinator Defaults

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

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

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Requisition/Work Order

Projects Business Unit Enter the default PeopleSoft Project Costing business unit. If the default project business unit is already defined for the project user preferences, the value is display only.

Project Enter the default project for which the requester is to enter service requisitions.

Service Type Select the default service type.

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

Time Approver Select the default time approver. Values include users who have at least one of the roles defined in the role query: *SP_TIME_APPROVER*.

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

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

Expense Approver Select the default expense approver. Values include users who have at least one of the roles defined in the role query: *SP_EXP_APPROVER*.

Notification Options

Requisition Notification Method Select the notification method for requisitions.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 37.

Permissions

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

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

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

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

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

Creating and Editing Requesters

To create and edit requesters:

1. Access the Services User Setup page.

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

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

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

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

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

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

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

   See Appendix C, "HCM Integrations," page 459.

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

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

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

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

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

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

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

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

Creating and Editing Service Coordinators

To create and edit service coordinators:

1. Access the Services User Setup page.

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

   Person ID Use this field to search for a Person ID to associate with the new service coordinator.

   Note. If you do not have a pre-existing person ID to associate with the new service coordinator, click the Add button to add a new person ID.

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Add Click to access the Maintain Service Coordinator page, where you can add a new person ID and define personal information for the service coordinator.

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

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

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

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

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

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

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

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

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

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

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

3. Access the Service Coordinator Information page.

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

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

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

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

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing Service Coordinators, page 107.

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

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing VMS Service Coordinators, page 111.

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

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

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

Viewing Service Coordinator Information

Access the Service Coordinator Information page.

Service Coordinator Information page

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

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

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

Creating and Editing Service Provider Contacts

To create and edit service provider contacts:

1. Access the Services User Setup page.

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

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

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

   Person Type Select *Service Provider* or *Service Provider/Coordinator*.

   Note. On the Maintain Provider Contact page, the person type field is always display-only.

   Personnel Status This field always defaults to Non-Employ (non-employee) and cannot be changed.

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

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

Creating and Editing Service Providers

To create and edit service providers:

1. Access the Services User Setup page.

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

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

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

   Independent Provider Service provider or service provider/coordinator that does not have any provider contacts that represent them.

3. Select the Service Provider Information link on the Maintain Service Provider Information page to access the Service Provider Information page.
4. Select the Phone and Email Details link, the Provider Skills link, and the Resume Attachment link, and enter the related information.

   Function Type Indicates whether the service provider is independent.

5. After you save the page, click the Return to Services User Setup page link on the Maintain Service Provider page to access the modified Services User Setup page.

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

Creating and Editing the Combined Service Providers/Coordinator Roles

To create and edit service provider/coordinators:

1. Access the Services User Setup page.

   Select the Edit an existing Services User option from step #1.

2. Select the Service Provider option from step #2.
3. Select the Person ID that you want to change to a service provider/coordinator user.

   Note. Only *existing* service providers can be assigned to this role.

4. Click the Edit Service Provider link from step #4 to access the Maintain Service Provider page.
5. Select *Service Provider/Coordinator* in the Person Type field.

   You will receive a confirmation message indicating your approval to change this person to the new service provider/coordinator role. Click the OK button to accept the changes, and to return to the Maintain Service Provider page.

6. Click Save button to assign this role.
7. Click the Return to Services Setup link.
8. (optional) Click the User Preferences link from step #5, and then click the Service Coordinator Defaults link to add any specific defaults such as the time approver and any permissions that you may want this person to have.

   Save your changes, and then click the Return to Services Setup link.

9. (optional) Click the Update User Profile link to make changes to the existing user profile, and then click the OK button to return to the Services Setup page.
10. Click the Finish button or the Return to Define Services Procurement link.

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Note. A service provider can be associated to multiple suppliers with the service provider becoming effective for the new supplier on a designated effective date. For a user with the combined role of service provider/coordinator, the supplier information for the service coordinator should be in sync. An email notification is sent to the service administrator making the change when the service provider gets associated to a different supplier. The service administrator will have to manually change the supplier information for the coordinator when the associated service provider becomes effective for the new supplier.

For the combined service provider/coordinator role, the vendor information from the Maintain Service Coordinator page cannot be changed. An error message will be displayed if the vendor information is changed on the Maintain Service Coordinator page for a Service Provider/Coordinator role user. For this user, the vendor information can be changed only on the Service Provider Information page.

The service administrator will receive a warning message if there are no active approved work orders assigned to the service provider, and can click the OK button to proceed with changing the role to a service provider/coordinator.

Revoking the Service Provider/Coordinator Role

The following describes the steps involved when the service provider/coordinator role is revoked:

1. Service administrator accesses the Maintain Service Provider page.
2. Service administrator changes the person type from *Service Provider/Coordinator* to *Service Provider*.

   The system validates that the service provider/coordinator is not associated to any active work orders. If the service provider/coordinator is associated to any active work orders, an error message displays, and the service administrator will not be able to change the person type to being just a Service Provider

   If the service provider/coordinator is associated to any active work orders, an error message displays and the system will direct the service administrator to identify a replacement service coordinator for all active work orders for this Service Coordinator before re-attempting to revoke the coordinator role.
3. If the service provider/coordinator is the only active team member, an error message displays and the system and will direct the service administrator to assign another active member to the team before attempting to revoke the coordinator role.
4. Upon confirmation, the system revokes all the service coordinator roles that were granted to the service provider.

   The system sets the Person Status field to Inactive on the Maintain Service Provider page.
5. The person continues in the system as a service provider, and can continue entering time or can be submitted as a candidate for other sourced requisitions.

   The system sets the service coordinator status to Inactive.

If there are any open requisitions or work orders for the service coordinator, an error message displays and the person type will not be changed. In addition, if the service coordinator is the only active member of a team, an error message displays stating that another active member must be assigned to the team before revoking the service provider/coordinator role.

In addition, the system also display an error message if the service provider/coordinator (user) is defined as a service coordinator for a VMS business unit or for a VMS by business unit and Service Type.

Replacing Service Coordinators

Access the Replace Service Coordinator page.

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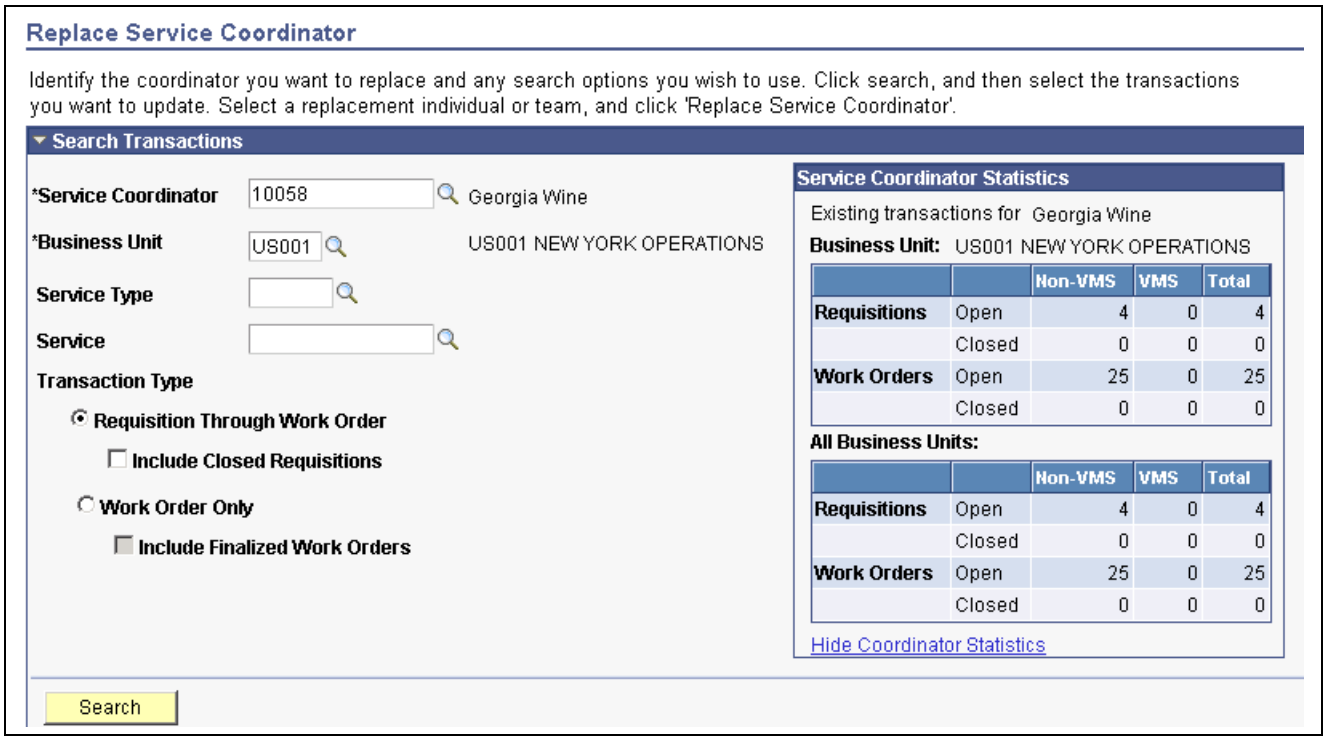
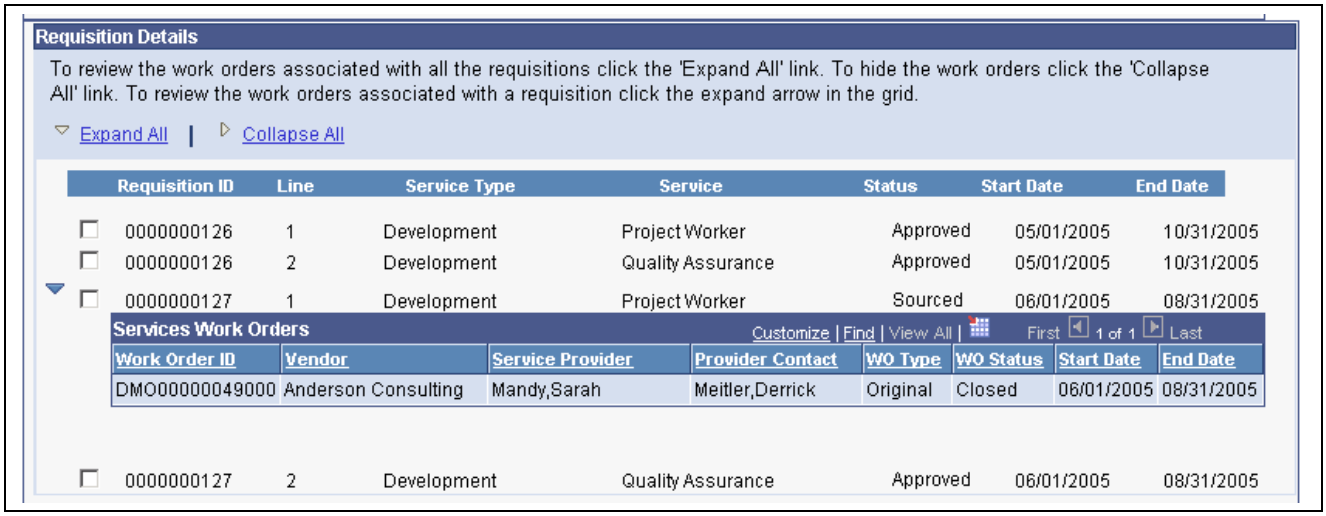


Replace Service Coordinator page: requisitions and work orders (1 of 3)



Replace Service Coordinator page: requisitions and work orders (2 of 3)

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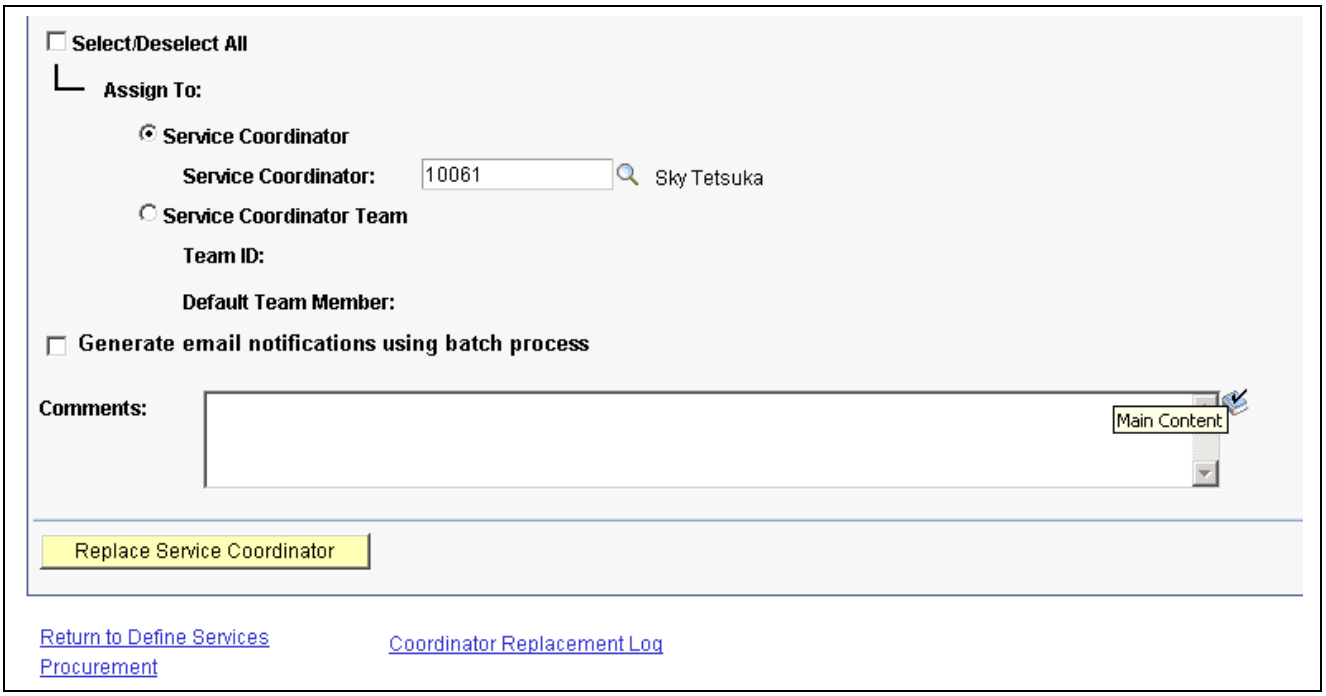

Replace Service Coordinator page: requisitions and work orders (3 of 3)

The fields on this page differ from this page shot if the search criteria is for work orders only. Differences are noted.

You may want to use this functionality to distribute workload more evenly between service coordinators.

Search Transactions

Service Coordinator Select the service coordinator that you want to replace. This is a required field.

Business Unit Select the business unit for the service coordinator. This is a required field.

Service Type Select a value for the service coordinator. If you want to retrieve all service types, leave this field blank.

Note. If the Use HCM Terminology? option is selected on the Services Procurement Installation Options page, the label for this field is Job Family.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options.

Service Select a project role for the service coordinator. If you want to retrieve all project roles, leave this field blank.

Note. If the Use HCM Terminology? option is selected on the Services Procurement Installation Options page, the label for this field is Job Code.

Transaction Type Select a value to determine the types of transactions to be retrieved. Values are:

- Requisition Through Work Order: Select this option to retrieve all associated services requisitions and work orders.

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Include Closed Requisitions: Select this option if you want to include all closed services requisitions.

- Work Order Only: Select this option if you want to retrieve work orders only.

  Include Finalized Work Orders: Select this option if you want to include any work orders that have been finalized.

View Coordinator Statistics Click this link to display the number of transactions associated to the selected service coordinator.

Hide Coordinator Statistics Click this link if you do not want the system to display the coordinator statistics.

Note. This link is available only after you have clicked the View Coordinator Statistics link.

Search Click this button to retrieve transactions based on the search criteria.

Service Coordinator Statistics

This grid displays the total number of transactions for the service coordinator. The information is summarized for the specific business unit entered in the Search Criteria section, and the information is also summarized for all business units to which the service coordinator is associated.

You can view information such as the:

- Number of open and closed requisitions.
- Number of VMS and non-VMS requisitions.
- Number of open and closed work orders.
- Number of VMS and non-VMS work orders.

Requisition Details

This section displays requisition and work order details such as requisition ID, service type, service, vendor, provider contacts, work order type and status, and start and end dates.

If the search criteria was for Work Order Only, the name of this step box would be Services Work Orders. Any differences in information displayed are noted.

Expand All and **Collapse All** These options appear when the transaction type of Requisition Through Work Orders is selected. Click to expand or collapse the grid to view any work orders associated with requisitions.

Click the arrow toggle switch button to display associated work orders for a single requisition line. If there are no associated work orders for the requisition line, this button is hidden.

Click the Selection check box next to the requisitions or work orders where you want to replace the services coordinator.

Select/Deselect All Click this check box to automatically select or clear all the check boxes in the search results grid.

Assign To Select to whom the requisitions or work orders should be reassigned. Values are:

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- Service Coordinator: Select the specific service coordinator to whom you are reassigning requisitions and work orders.
- Service Coordinator Team: Select this option to reassign to a service coordinator team. If you select this option, the Team ID and Default Team Member fields become available:
  - Team ID: Select this option and all team members receive notification of the reassignment.
  - Default Team Member: Select this option and the specific team member that you select is notified of the reassignment.

Generate email notifications using batch process

Select this option to run the email notifications as a batch process rather than including them as part of the online processing. The service coordinator or team receives an email that includes a link to the Coordinator Replacement Log for the transactions that have been reassigned.

Note. A URL must be defined for the replacement email notification. Define this URL using the URL Maintenance page (PeopleTools, Utilities, Administration, URLs) for the *SP_REPLACESC_EM* and *SP_REPLACETEAM_EM* URL identifiers.

Comments

Enter any applicable freeform text related to the reassignment.

Replace Service Coordinator

Click this button to replace the service coordinator on all selected transactions. A confirmation page displays, and you must click the OK button to confirm the replacement process. In addition, upon clicking the OK button, email notifications will be generated either online or in batch if the Generate email notifications using batch process option has been selected.

Coordinator Service Log

Click this link to access the Coordinator Service Log to view transactions associated with the reassignment.

Replacing VMS Service Coordinators

Access the Replace VMS Coordinator page.

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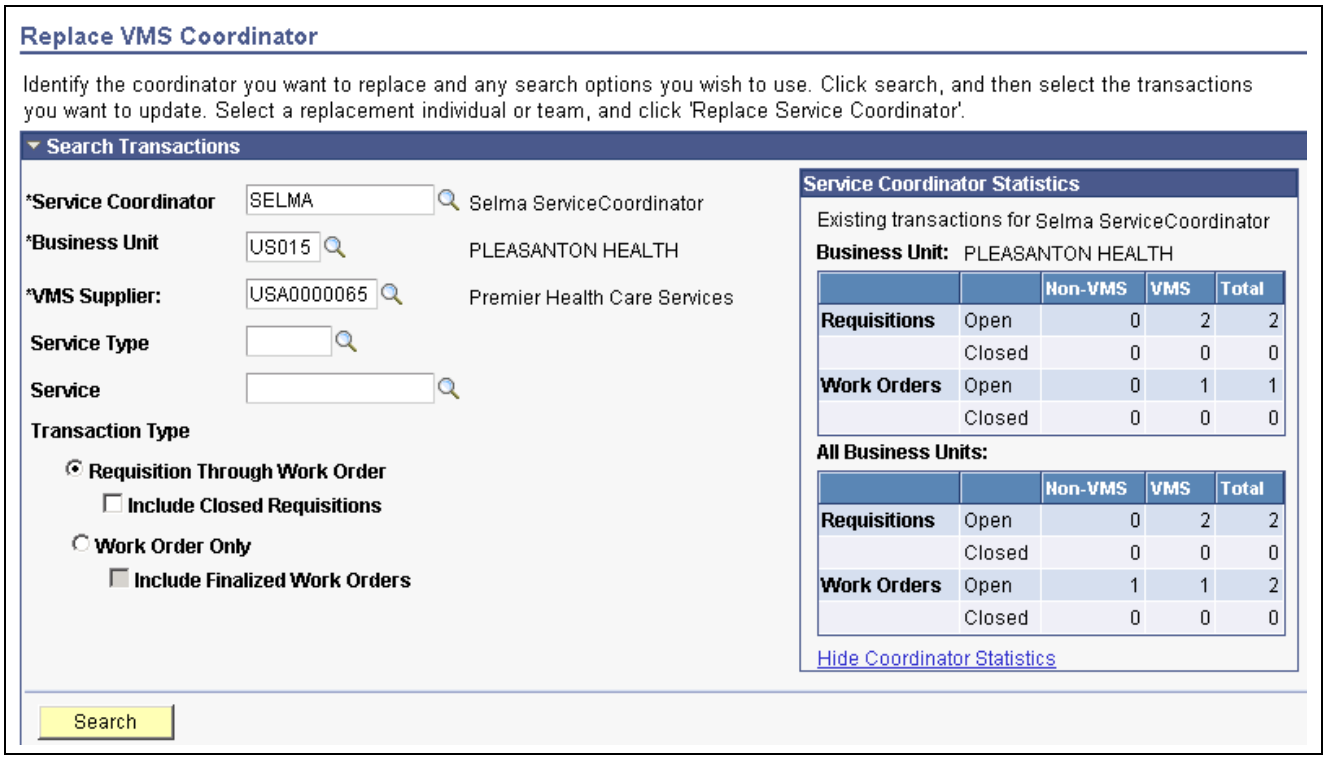
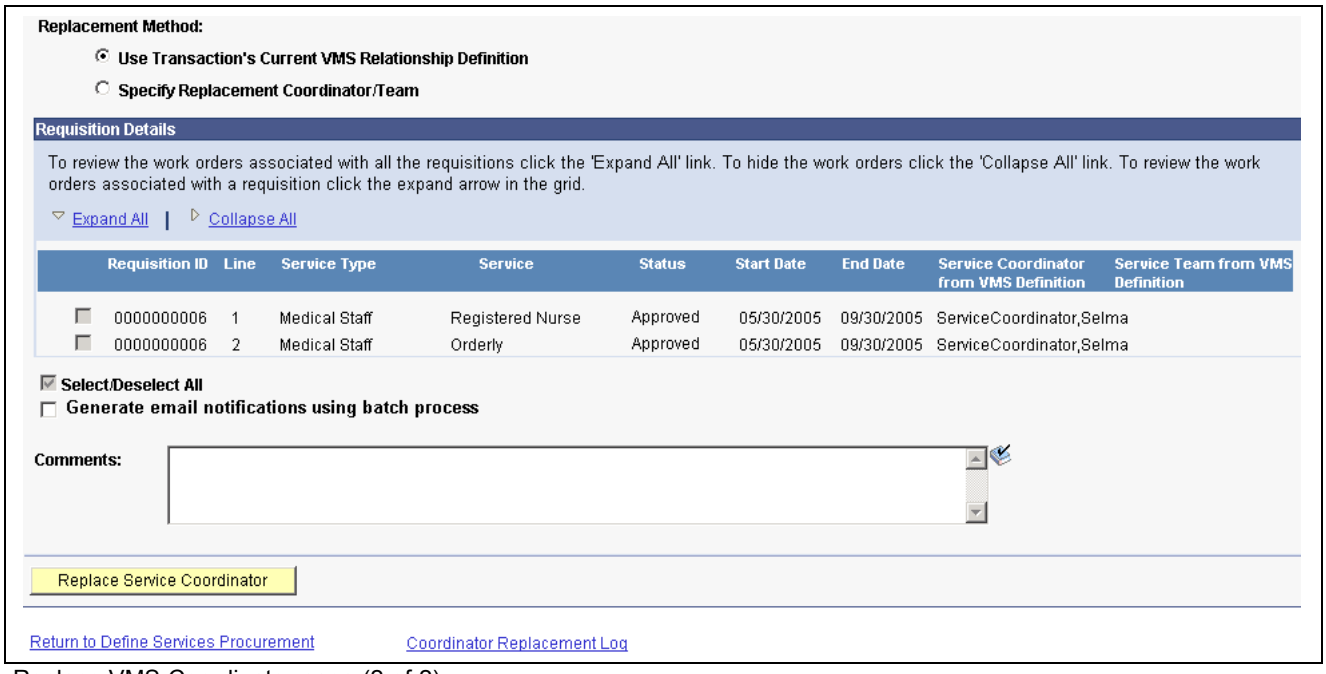


Replace VMS Coordinator page (1 of 2)



Replace VMS Coordinator page (2 of 2)

This page behaves in a similar manner as the Replace Coordinator page which is used for non-VMS transactions. The VMS-related differences are described here.

Note. When replacing the VMS Service Coordinator on Work Orders, if the replacement process detects that the work order's supplier invoice approver is the same person as the VMS service coordinator that is being replaced, the system will also updates the supplier invoice approver with the *replacement* service coordinator.

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VMS Supplier Select the VMS supplier for which transactions are to be reassigned. If there is only one VMS supplier, then it appears as a default value in this field. This is a required field.

Replacement Method Select a value to indicate the method to use for replacement. Values are:

- Use Transaction's Current VMS Relationship Definition: Select this option to indicate that the selected transactions will be assigned to the VMS coordinator or team that is currently effective for the related service type or business unit and VMS supplier.

  This is the default value for the field.

  If the check boxes next to the transactions in the Requisition Details group box are display only, one of the following scenarios may be occurring:

  - The service coordinator associated with the current VMS definition is the same as the service coordinator that you are trying to replace.

  - If the VMS definition uses a service coordinator team, then the current VMS definition shows a team that is different from the transaction selected.

Note. You will not be able to select this replacement method if the service coordinator, team, or if the service coordinator is the only member of the VMS supplier team. For example, if the VMS transactions are being handled by only one VMS service coordinator team, then you cannot use this replacement method. In addition, if the service coordinator is the only member of the VMS team, then you cannot use this replacement method.

Note. Once a VMS service coordinator has been replaced on a requisition, the replacement service coordinator takes precedence over any *other* service coordinator changes made to the VMS setup definition. For example, when a requester creates a VMS-managed service requisition, the VMS supplier, location and service coordinator are assigned to the VMS requisition from the VMS setup definition. Then, when the requester edits the requisition, the system checks for more recent changes to the VMS supplier, location, and service coordinator defined in the VMS setup definition. If the system finds more recent changes to these fields, it refreshes the requisition with the most recent VMS setup information.

  However, if the requisition's VMS Service Coordinator has been replaced by the Replace VMS Coordinator function, then the system applies the change made by the replacement feature as taking precedence, and the system *will not* refresh the VMS Service Coordinator on the requisition, even if there has been a more recent change in the VMS setup definition.

- Specify Replacement Coordinator/Team: Select this option to indicate that all selected transactions will be assigned to a single VMS team or service coordinator.

  If you select this option, the Service Coordinator and Service Coordinator Team fields become available where you can assign the transactions.

  See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Replacing VMS Service Coordinators, page 111.

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Requisition Details

This section displays requisition and work order details such as requisition ID, service type, service, vendor, provider contacts, work order type and status, start and end dates, and the service coordinator or service team defined for the VMS supplier.

If the search criteria was for Work Order Only, the name of this step box would be Services Work Orders.

Service Coordinator from VMS Definition	This column displays the VMS service coordinator that is defined for this VMS supplier.
Service Team from VMS Definition	This column displays the VMS service team that is defined for this VMS supplier.

Confirmation Message for VMS Coordinator Replacement

The following discusses the confirmation messages received when you click the Replace Service Coordinator button on the Replace VMS Coordinator page:

- If the replacement method is Use Transaction's Current VMS Relationship Definition:

  The system will reassign the service coordinator for the selected transactions, using the current effective-dated VMS service team/service coordinator established on the selected transactions' VMS relationship definition, as shown in the Service Team/Service Coordinator from VMS Definition columns of the Requisition (Work Order) transaction grid.

  Please either confirm or cancel the reassignment. This operation may take several minutes to complete. Please be patient.

- If the replacement method is Specify Replacement Coordinator/Team:

  The confirmation message displays the quantity of requisitions or work orders selected, as well as the Service Coordinator or Team that will receive the reassignment of the selected transactions.

Viewing Service Coordinator Replacement Logs

Access the Coordinator Replacement Log page.

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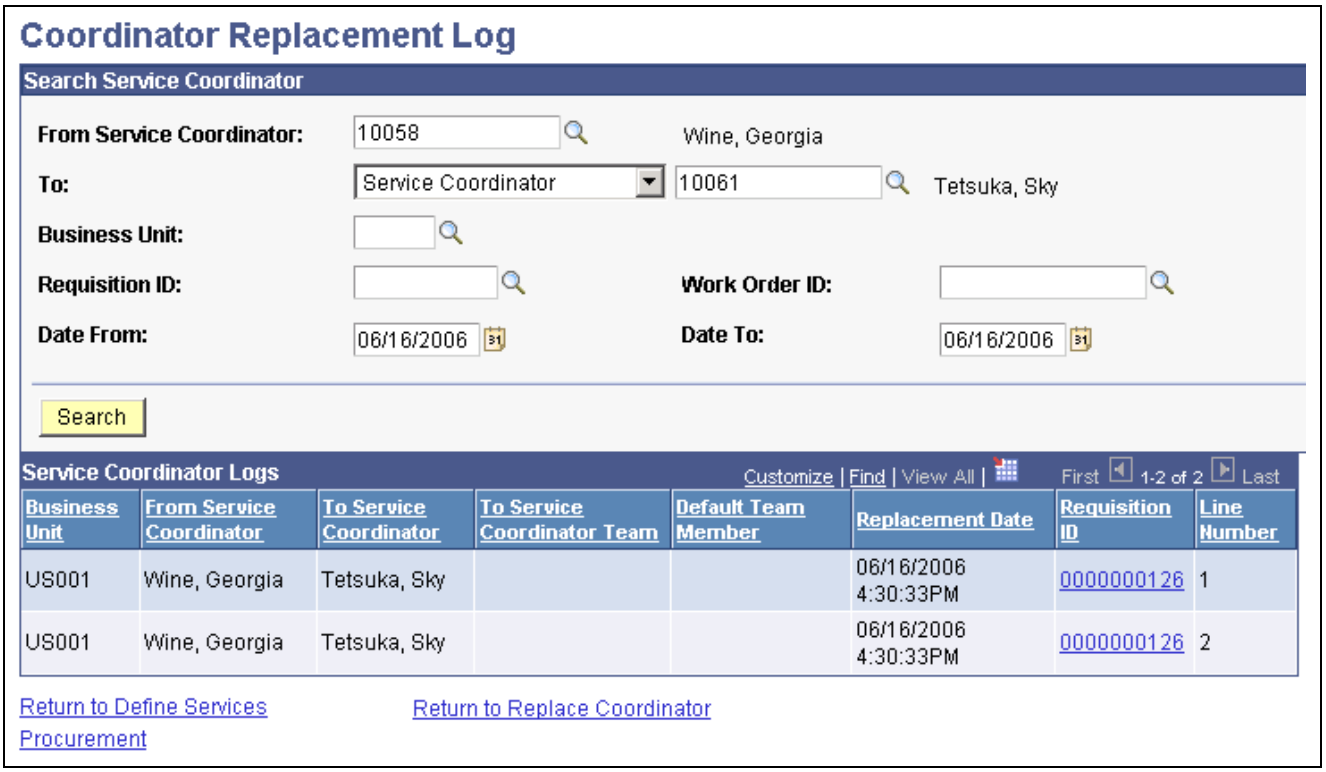

Coordinator Replacement Log page

The service coordinator will receive an email which contains a link to the Coordinator Replacement Log page. The email includes a list of all requisitions and work orders that have been reassigned to the service coordinator.

Search Service Coordinator

From Service Coordinator Select the service coordinator that was replaced.

To Select a value to indicate the role that was replaced: Values are *Service Coordinator* and *Service Coordinator Team.*Select the service coordinator or service coordinator team in the adjacent field that is available.

Business Unit Select the specific business unit associated with the service coordinator. If you want to see all business units to which the service coordinator is associated, leave this field blank.

Requisition ID (Optional) Select a specific requisition or leave this field blank if you'd like to retrieve all requisitions associated with the service coordinator.

Work Order ID (Optional) Select a specific work order or leave this field blank if you'd like to retrieve all work orders associated with the service coordinator.

Date From and **Date To** (Optional) Enter the beginning and ending dates to narrow the results that are retrieved.

Service Coordinator Logs

Requisition ID and **Work Order ID** Click a link to access information related to the requisition or work order.

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Return to Replace Coordinator Click this link to access the Replace Coordinator page.

Note. If you are reviewing VMS service coordinators, the link will read Return to Replace VMS Coordinator.

Creating and Editing Service Administrators

To create and edit service administrators:

1. Access the Services User Setup page.

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

2. Once you select the Create a new Services User and Service Administrator options, the system adds step #3 for you to enter a user ID for the new service administrator user.

   Note. If you choose to edit an existing service user, the system adds step #3, where you must chose the user ID that you want to edit.

3. Click the Add button on the Services User Setup page to access the User Profile Information page, where you can enter passwords, general attributes, permission lists, and workflow attributes.
4. Once you finish entering information on the User Profile Information page, click the OK button to return to the Services User Setup page.

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

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

Creating and Editing Approvers

To create and edit approvers:

1. Access the Services User Setup page.

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

2. Once you select the Create a new Services User and Approver options, the system adds step #3 for you to enter a user ID for the new approver user.

   Note. If you choose to edit an existing approver user, the system adds step #3, where you must choose the user ID that you want to edit.

3. Click the Add button on the Services User Setup page to access the User Profile Information page, where you can enter passwords, general attributes, permission lists, workflow attributes, and approver authorizations.
4. Once you finish entering information on the User Profile Information page, click the OK button to return to the Services User Setup page.

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

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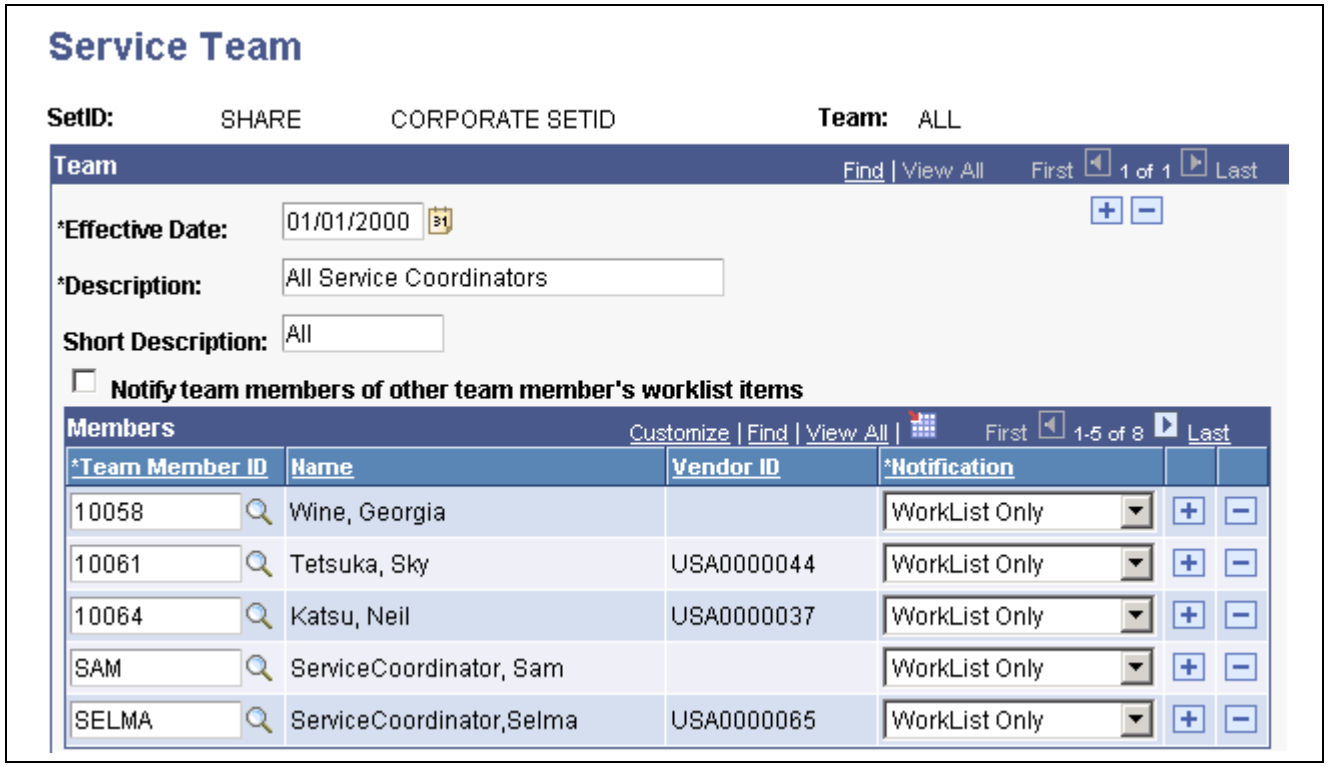
5. Click the Finish button on the Services User Setup page once you complete the service administrator setup.

Creating Service Coordinator Teams

Access the Service Team page.



Service Team page

Use this page to select the services coordinators that belong to each team and specify their notification preferences.

The system stores the service team or service coordinator from the requisition on the work order. If the work order is not created from a requisition, and the user creating the work order is a requester, the system uses the default service coordinator team or default service coordinator from the requester defaults. If the work order is not created from a requisition, and the user creating the work order is a service coordinator that belongs to a team, you can select from all the service coordinator's teams or you can assign it to an individual service coordinator. If the user doesn't belong to any teams, the system makes the user the service coordinator on the work order.

Notify team members of other team member's worklist items Select to notify all team members with a notification type of *Email and Worklist* or *Worklist Only* when any service coordinator on the team receives a worklist notification. The initial sourcing notification will be sent to all team members regardless of this setting

Maintaining Workflow Setup

This section discusses how to set up workflow.

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See Chapter 8, "Implementing PeopleSoft Services Procurement Workflow," page 163.

Maintaining Settlement Setup

To define Services Procurement business unit options, use the Services Procurement Options (BUS_UNIT_SPRO) component.

To define shifts, use the Shifts (SPB_SHIFT) component. To define shift and service combinations, use the Shift by Service (SPB_SHFT_BY_SRV) component. To define assignments, use the Assignments (SPB_ASSIGNMENT) component. To define assignment and service combinations, use the Assignment by Service (SPB_ASGN_BY_SRV) component. To define time category overrides, use the Review/Override Time Categories (SPA_TM_EDIT_TRC) component.

To define rules for reporting time, use the Time Reporting Rule (SPA_TRULE_DEFN) component. To set up the AP interface, use the AP interface (SPA_AP_INTRFACE) component. To set up payment types, use the Payment Types (SPA_EXPEND_MTHD) component. To set up expense types, use the Expense Types (SPA_EXPENSE_TYPE) component. To define your service time/progress template, use the Service Time/Progress Template (SPA_TIME_TMPL) component. To set up time reporting codes, use the Time Reporting Code (SPA_TRC_CODE) component.

To define business purposes, use the Business Purpose (EX_PURPOSE) component.

To set up preferred merchants, use the Preferred Merchant (EX_MERCHANT) component. Use the EX_MERCHANT_SETUP component interface to load data into the tables for this component.

To define expense locations, use the Expense Location (EX_LOCATION) component. Use the EX_LOCATION_SETUP component interface to load data into the tables for this component. To define expense payment type, use the Expense Payment Type (SPA_EXPEND_MTHD) component. To define expense types, use the Expense Type (SPA_EXPENSE_TYPE) component.

To define expense distance rates, use the Distance Rates (EX_AUTO_RT_TBL) component. Use the EX_AUTO_RATE_SETUP component interface to load data into the tables for this component.

This section discusses how to:

- Maintain time reporting codes.
- Create time reporting rules.
- Maintain the service time/progress template.
- Define expense distance rates.
- Define expense types.
- Defining additional expense types.
- Define payment terms timing codes.
- Define single payment terms.
- View where payment terms are used.
- Calculate example data for single payment terms.
- Define multiple payment terms.
- Calculate example data for multiple payment terms.

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- Define the accounts payable interface.

Common Elements Used in this Section

Return to Time and Expense Setup Click this link to return to the Time and Expense home page.

Pages Used to Maintain Settlement Setup

Page Name	Object Name	Navigation	Usage
Shift	SPB_SHIFT	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Shifts	Define shifts to be used on timesheets. **Note.** This page appears only if the Enable Shifts check box is selected on the Services Procurement Business Unit Definition page.
Assignment	SPB_ASSIGNMENT	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Assignments	Define assignments to be used on timesheets. **Note.** This page appears only if the Enable Assignments check box is selected on the Services Procurement Business Unit Definition page.
Services Procurement Business Unit Definition	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn	Select the check boxes to enable the business units to use shifts, assignments, and time category overrides.
Shifts by Service	SPB_SHFT_BY_SRV	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Shifts by Service	View and modify valid shifts that are associated with a specific service.
Assignments by Service	SPB_ASGN_BY_SRV	Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Assignments by Service	View or modify assignments that are associated with a specific service.

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Page Name	Object Name	Navigation	Usage
Shift by Service, Service by Shift, Assignment by Service, Service by Assignment	QRY_QUERY	Reporting Tools, Query, Query Manager	Use this page to select the query name for which you want to run these PSQUERY reports: • Shift by Service • Service by Shift • Assignment by Service • Service by Assignment
Service Time/Progress Template	SPA_TIME_TMPL_PG	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Service Time/Progress Template • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Service Time/Progress Template	Create services templates. Enter or modify options used in a timesheet to enter time and expense information and progress information.
Select ChartFields	SPA_TIME_TMPL_DIST	Click the Select ChartField link on the Service Time/Progress Template page.	Select the ChartFields to display on the Timesheet. The values from the selected ChartFields will be used to allocate time on Distribution lines. **Note.** This option is only available when you select Actual Allocation as your time reporting option.
Services Time Reporting Codes	SPA_TRC_CODE	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Services Time Reporting Codes • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Services Time Reporting Codes	Define time reporting codes.

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Page Name	Object Name	Navigation	Usage
Pay Types by Time Reporting Codes	SPA_TRC_PAYTYPE	Click the Pay Types link on the Services Time Reporting Codes page.	Enter and view pay types that are associated with time reporting codes. Use this page to indicate the pay rate and mark up rates that are used on the work order. **Note.** This option is only available when pay types are used.
Time Reporting Rule	SPA_TIMERPT_RUL	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Time Reporting Rule • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Time Reporting Rule	Define rules for reporting time.
Business Purpose	EX_PURPOSE	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Business Purpose • Set Up Financials/Supply Chain, Product Related, Expenses, Purchase, Business Purpose	Use business purposes to justify a business expense as a corporate tax deduction.
Expense Distance Rate	EX_AUTO_RT_TBL	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Distance Rate • Set Up Financials/Supply Chain, Product Related, Expenses, Management, Distance Rate	Define expense distance rates.
Expense Types - Expense Types1	SPA_EXPENSE_TYPES1	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Expense Type	Define expense types.

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Page Name	Object Name	Navigation	Usage
Expense Types - Expense Types2	SPA_EXPENSE_TYPES3	Click the Expense Types2 tab from the Expense Types1 page.	Define expense types.
Expense Payment Type	SPA_EXPEND_MTHD	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Payment Type • Set Up Financials/Supply Chain, Product Related, Services Procurement, Time and Expense, Expense Payment Type	Create payment types that show (on an expense sheet) how an expense item was paid.
Expense Location	EX_LOCATION	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Expense Location • Set Up Financials/Supply Chain, Product Related, Expenses, Location, Expense Location	Create an expense location that can be required on an expense sheet. When you define an expense type, you can require a service provider to enter the location for the transaction to ensure that the cost accurately reflects prevailing prices for that region.
Preferred Merchant	EX_MERCHANT	• Services Procurement, Define Services Procurement, Settlement Setup, Time and Expense Setup, Preferred Merchant • Set Up Financials/Supply Chain, Product Related, Expenses, Purchase, Preferred Merchant	Define a preferred merchant that you can include in an expense type. When you define an expense type, you can require a service provider to enter the preferred merchant for that transaction to ensure that the cost accurately reflects prevailing prices for that region.
Payment Terms Timing Codes	PYMT_TERMS_TIMING	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms Timing Codes • Set Up Financials/Supply Chain, Product Related, Procurement Options, Payments, Payment Terms Timing Codes	Define payment terms timing for each period that you reference in your payments.

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Page Name	Object Name	Navigation	Usage
Payment Terms - Single Payments	PYMT_TERMS_SINGLE	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms - Single Payment • Set Up Financials/Supply Chain, Product Related, Procurement Options, Payments, Payment Terms - Single Payment	Define valid payment terms for single payments.
Search Where Used	SNGL_TRMS_WHR_USED	Click the Search Where Used link on the Payment Terms - Single Payments page.	View where payment terms are used.
Calculate Example Payment Data (single payment terms)	SNG_TR_CLC_PAY_DTA	Click the Calculate Example Payment Data link on the Payment Terms - Single Payments page.	Calculate example data for single payment terms.
Payment Terms - Multi Payment	PYMT_TERMS_MULTI	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Payment Terms - Multi Payment • Set Up Financials/Supply Chain, Product Related, Procurement Options, Payments, Payment Terms - Multi Payment	Define valid payment terms for multiple payments.
Calculate Example Payment Data (multiple payment terms)	MLT_TR_CLC_PAY_DTA	Click the Calculate Example Payment Data link on the Payment Terms - Multi Payment page.	Calculate example data for multiple payment terms.
Accounts Payables Interface	SPA_AP_INTRFACE	• Services Procurement, Define Services Procurement, Settlement Setup, Invoicing Setup, Accounts Payables Interface • Set Up Financials/Supply Chain, Product Related, Services Procurement, AP Interface	Define accounts payable application interface information.

Maintaining Time Reporting Codes

Access the Services Time Reporting Codes page.

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Services Time Reporting Codes page

Multiplication Factor Define the multiplication factor for the TRC. The system uses the value that you enter when calculating time and expense amounts.

Note. This factor is applied in addition to any applicable shift or assignment pay rate. In addition, for assignment pay, the assignment pay rate must be Based on Time.

Pay Types Associate pay types with time reporting codes. Available only if pay types are enabled on the Services Procurement Installation Options page.

Pay Types by TRC

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

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

You can select up to 4 pay types on this page, but each pay type can only be defined once.

Pay Type Select the pay type you are to pay to the supplier

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

Creating Time Reporting Rules

Access the Time Reporting Rule page.

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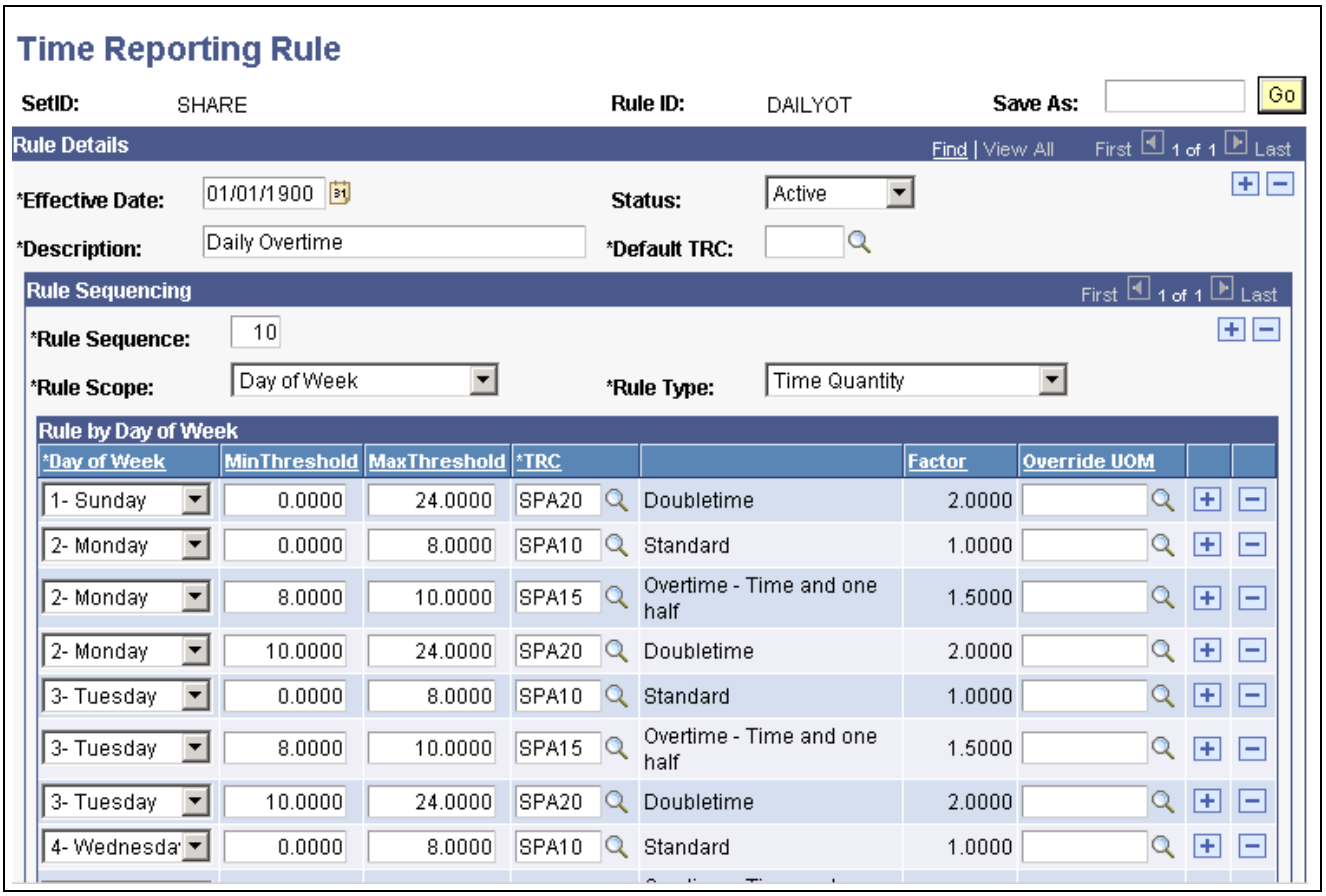

Time Reporting Rule page

Rule Details

Description Enter a long description to identify the time reporting rule.

Default TRC (default time reporting code) Select a default TRC to use when the time reporting rule does not meet the rule criteria.

Rule Sequence

Rule Sequence Enter a rule sequence number. This value is used to determine the order the system validates and applies the rule criteria to a timesheet. Since the rule sequence numbers are incremental, be sure to prioritize the rule in the order in which you want the system to evaluate and validate the TRC codes to use for time reporting.

Note. Always identify the most important rules at the lowest rule sequence to ensure that the system picks up those rules first. If you define a priority rule at higher sequence number and the system validates another rule that qualifies at a lower sequence number, the system uses the lowest rule sequence to populate the timesheet.

For example, if you create a rule with specific capture dates (as in the case of holidays), always be sure to define those dates first. The system starts at the most current rule sequence and works its way down the list. Also, if you want

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to be sure that there is always a valid rule in place, identify the "catch-all" rule as the last rule in the sequence. That way, you are always sure that there is a valid rule in the sequence.

Rule Scope Select the time scope that this rule sequence covers.

Values include *Date*, *Day of the Week*, and *Time Period.*

Rule Type Select the type for this rule sequence.

Values include *Time Quantity* and *TRC List.*

Rules by Date

Date Enter the date for which this rule applies.

Min Threshold (minimum threshold) Enter minimum quantity of hours for this rule.

Max Threshold (maximum threshold) Enter the maximum quantity of hours fro this rule.

TRC (time reporting code) Select a value to use with this time reporting rule.

Override UOM (override unit of measure) Select an alternative UOM to use as an override on the work order. Use this UOM to calculate a different rate on the work order.

Blackout Select to prevent time from being entered for the specified day.

Note. This option is only available for the rule type of TRC List.

Rules by Day of the Week

Day of Week Enter a day of the week to create a time reporting rule.

Values include:

- *Sunday*
- *Monday*
- *Tuesday*
- *Wednesday*
- *Thursday*
- *Friday*
- *Saturday*

Rules by Time Period

Time Period Enter a time period to create a time reporting rule.

Values include *Bi-Monthly, Daily, Monthly, Semi-Monthly,* and *Weekly.*

Using Shifts on Timesheets

The following diagram illustrates the steps involved in defining shifts that can be used on timesheets:

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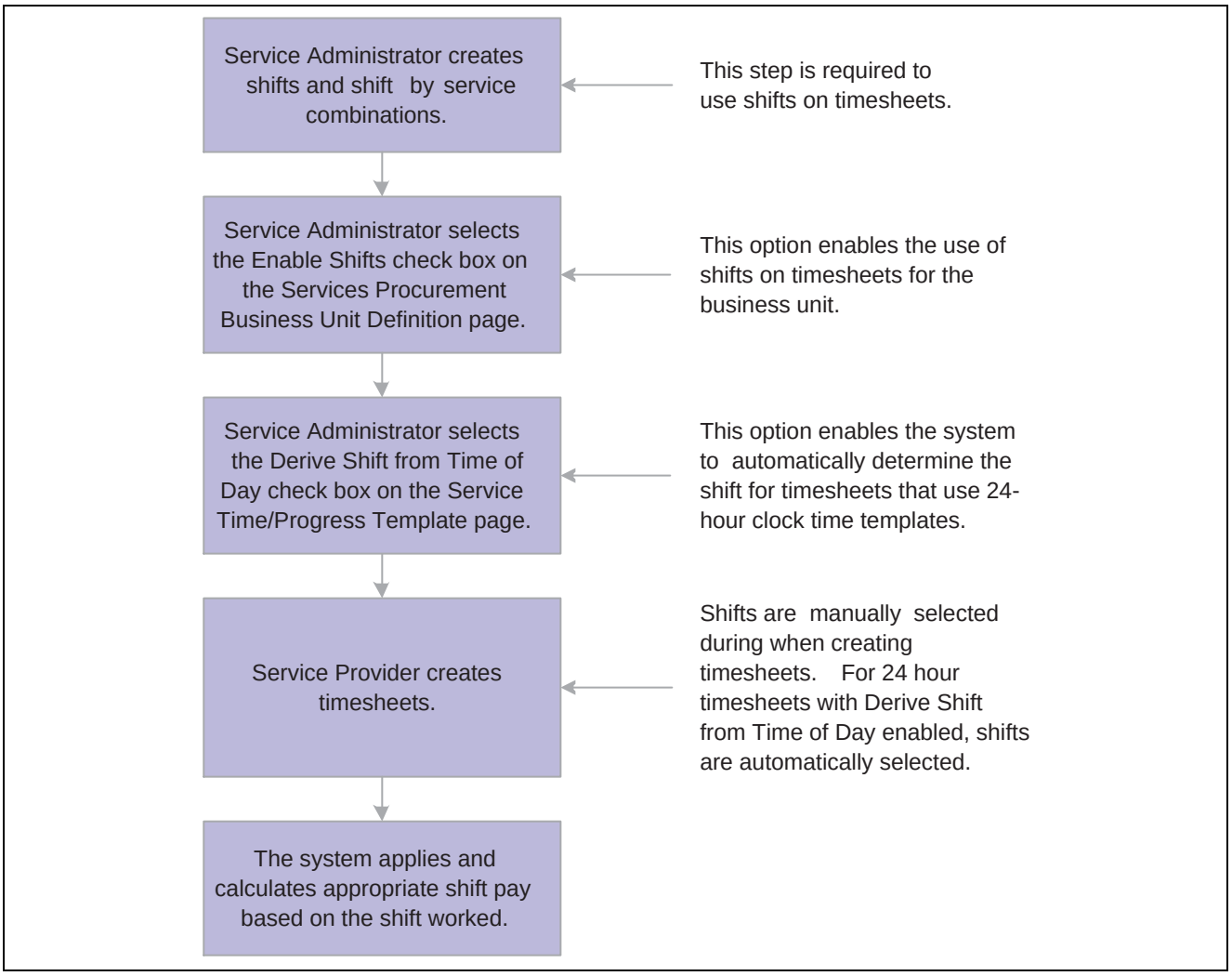

Shifts Definition

Defining Shifts for Use on Timesheets

Access the Shift page.

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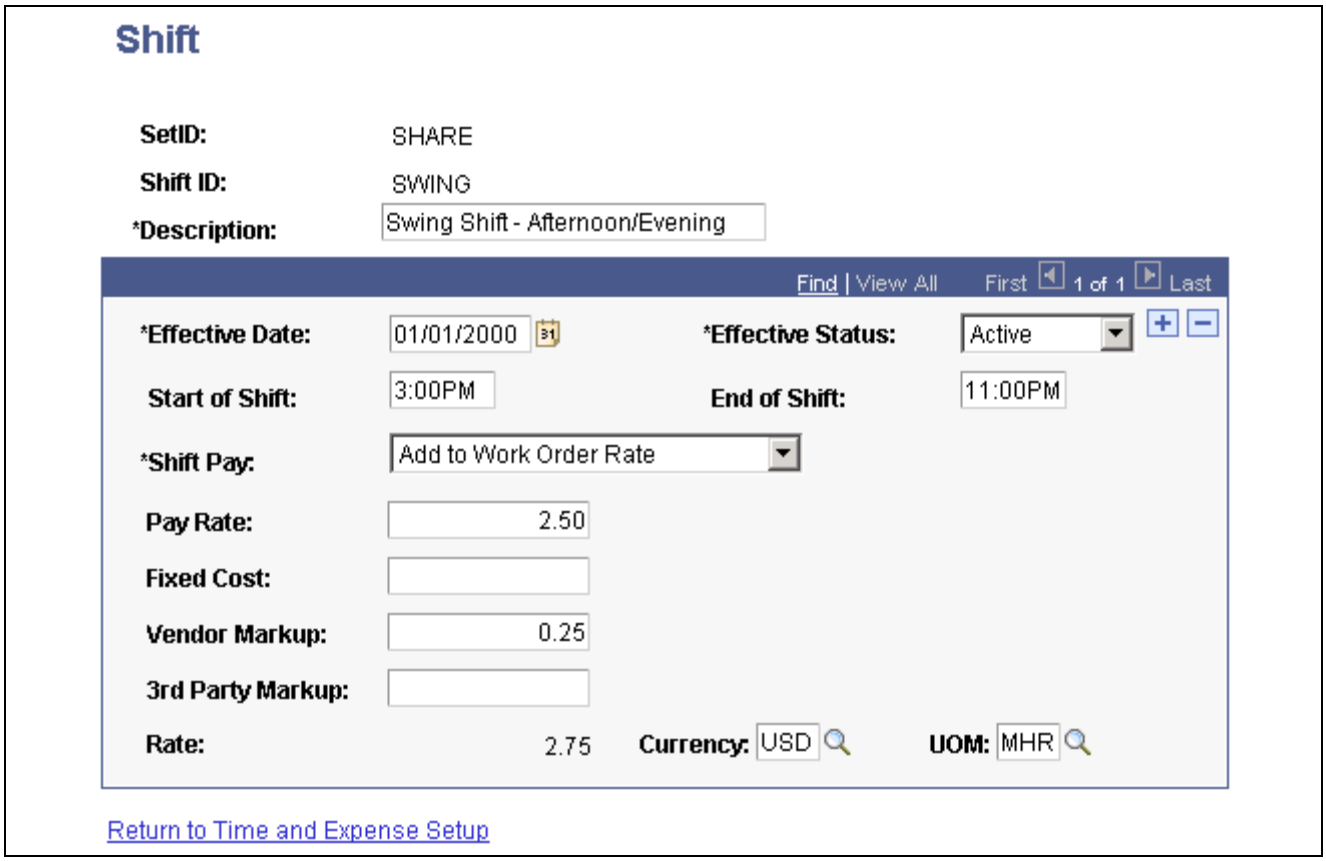

Shift page

Note. These settings are defined at the setID level.

Note. The fields that appear on this page depend upon the value selected for the Shift Pay field.

Note. The Document Service and Service Type labels will differ if Enterprise Human Capital Management is installed.

SetID Select the SetID that will be able to use this shift.

Shift ID Enter a name for the shift.

Description Enter a description for the shift. This is a required field.

Effective Date Enter the date that the shift will become effective. The current date is the default value. This is a required field.

Add effective-dated rows for each Shift Pay type as required.

Effective Status Select *Active* (default) or *Inactive*. This determines if this shift will be available for use on timesheets. Only shifts with a status of Active will be available for use. This is a required field.

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Note. If you change an Active shift to Inactive, the system will issue a warning message if there are any existing shift and service combinations for the effective dated shift.

Shift Start Time and **Shift End Time**

(Optional) Enter the start and end times for the shift. Shift pay is paid for work performed during this time period. You can leave this blank and the system will automatically select the shift based on the start and end times entered on the timesheet.

Note. Start and stop times are for informational purposes only. If the 24-hour clock time template is used and the Derive Shift Based From Time of Day option is selected, then the system automatically populates the default time values in this fields. However, these start and stop times can still be modified at the template definition level.

Shift Pay

Select a value to indicate the basis for the shift pay calculation:

- *Add to Work Order Rate:* Shift pay is added to the work order rate for this shift.
- *Percent of Work Order Rate:* Shift pay is defined as a percentage of the work order rate.

  You must enter percentage rate in the Shift Percent field.
- *Substitute Work Order Rate:* Shift pay rate will replace the work order rate for this shift.

This is a required field.

Shift Pay Rate Percentage

Enter a negative or positive percent value for the shift pay rate. This is a required field and is used with the *Percent of Work Order Rate* value.

Shift Pay Rate Amount

Enter a negative or positive amount. If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields that appear. This is a required field and is used with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

Shift Pay Rate Currency

Enter the currency code for this shift pay rate. This field works with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

Shift Pay Rate UOM (unit of measure)

Enter the unit of measure for this shift pay rate. This field works with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

Defining Shifts by Service

Access the Shifts by Service page.

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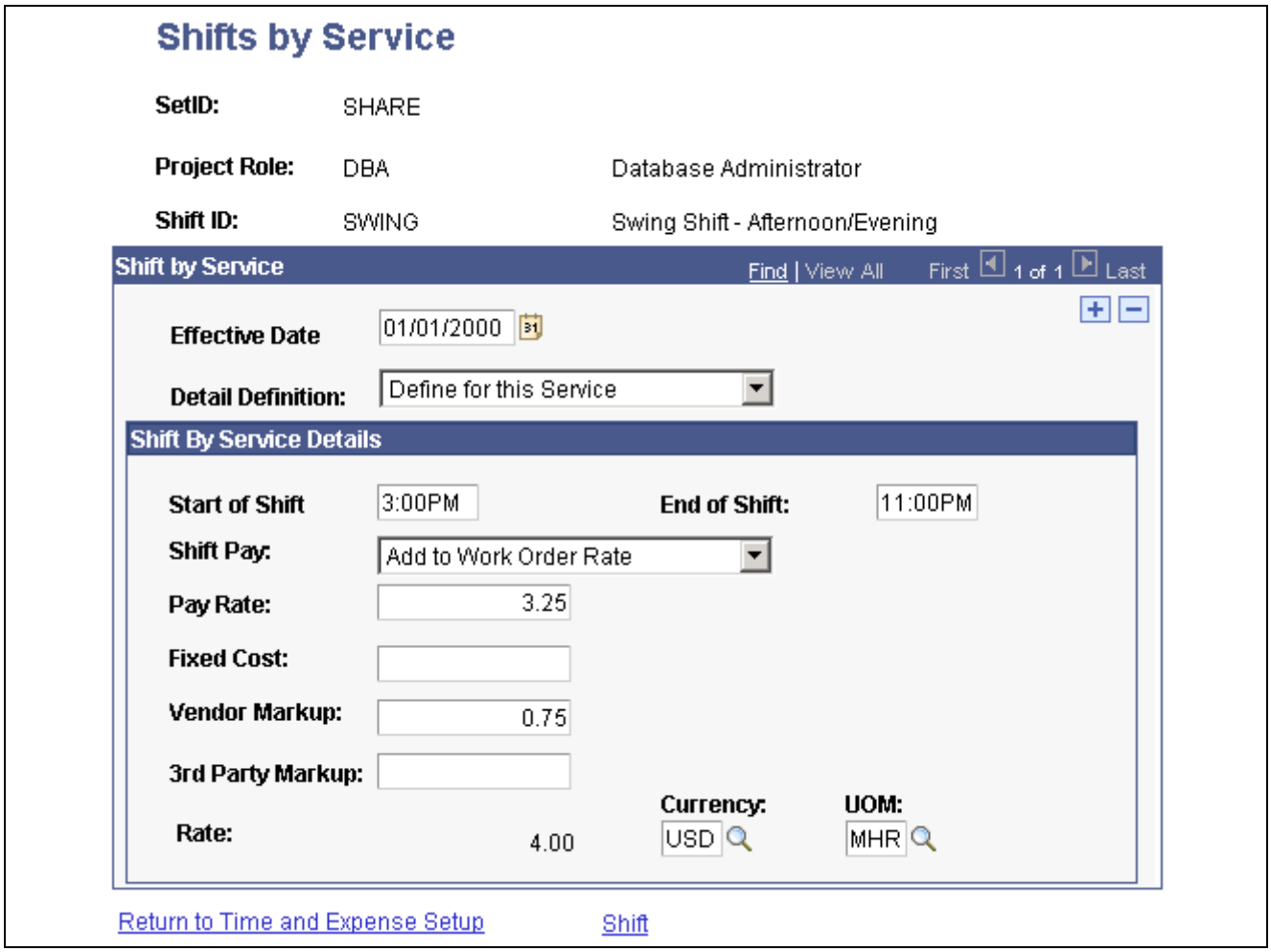

Shifts by Service page

Note. These settings are defined at the setID level.

This page identifies the shifts that are valid for a particular service. Only shifts associated to the service can be associated to time reported against a work order for that service. In addition, for 24-hour clock time entry, only shifts that are associated to the time template can be associated to the time reported.

Shift by Service Details

Project Role Select a value for this service (job) code.

Shift ID Select the shift to be associated with this service.

Effective Date Enter the effective date for this service. This is a required field.

Detail Definition Select a method to use for defining details of the shift. Values are:

- *Define for Service:* Indicates that the shift is available for use with this service as of the effective date.

  The service and shift combination will have specific times and rates defined.

  Note. The Description group box appears when you select this option.

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- *No Longer Valid for Service:* Indicates that the shift is no longer available for use as of the effective date.
- *Use Shift Definition:* Indicates that the shift is available for use with the service as of the effective date.

  The shift times and rates from the Shift Definition will be used for this service.

Description

Start of Shift and **End of Shift** — (Optional) Enter the beginning and ending times for the shift.

Note. Start and stop times are for informational purposes only. If the 24-hour clock time plate is used and the Derive Shift Based From Time of Day option is selected, then the system automatically places default time values on this fields. However, these start and stop times can still be modified at the template definition level.

Shift Pay — The default values come from the Shift definition page but you can modify it here. Values are:

- *Add to Work Order Rate:* Shift pay rate will be added to the work order rate for this shift by service.
- *Percent of Work Order Rate:* Shift pay is defined as a percentage of the work order rate.
- *Substitute Work Order Rate:* Shift pay rate is substituted for the work order rate.

  If you select this option, can only enter a positive amount in the Pay Rate field.

Pay Rate — This required field is available if you select *Add to Work Order Rate* or *Substitute Work Order Rate.*If you selected the Add to Work Order Rate, you must enter a positive or a negative amount in this field, If you selected the Substitute Work Order Rate value, you must enter a positive amount.

If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields that appear.

Shift Percent — You must enter a positive or a negative percent in this field if you selected the *Percent of Work Order Rate* value. This is a required field.

Currency — You must enter a value in this field if you selected the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

UOM (unit of measure) — This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* value. This is a required field.

Shift — Click this link to access the Shift definition page for this specific shift.

See Also

Appendix E, "PeopleSoft Services Procurement Reports," PeopleSoft Services Procurement Reports: General Description, page 505

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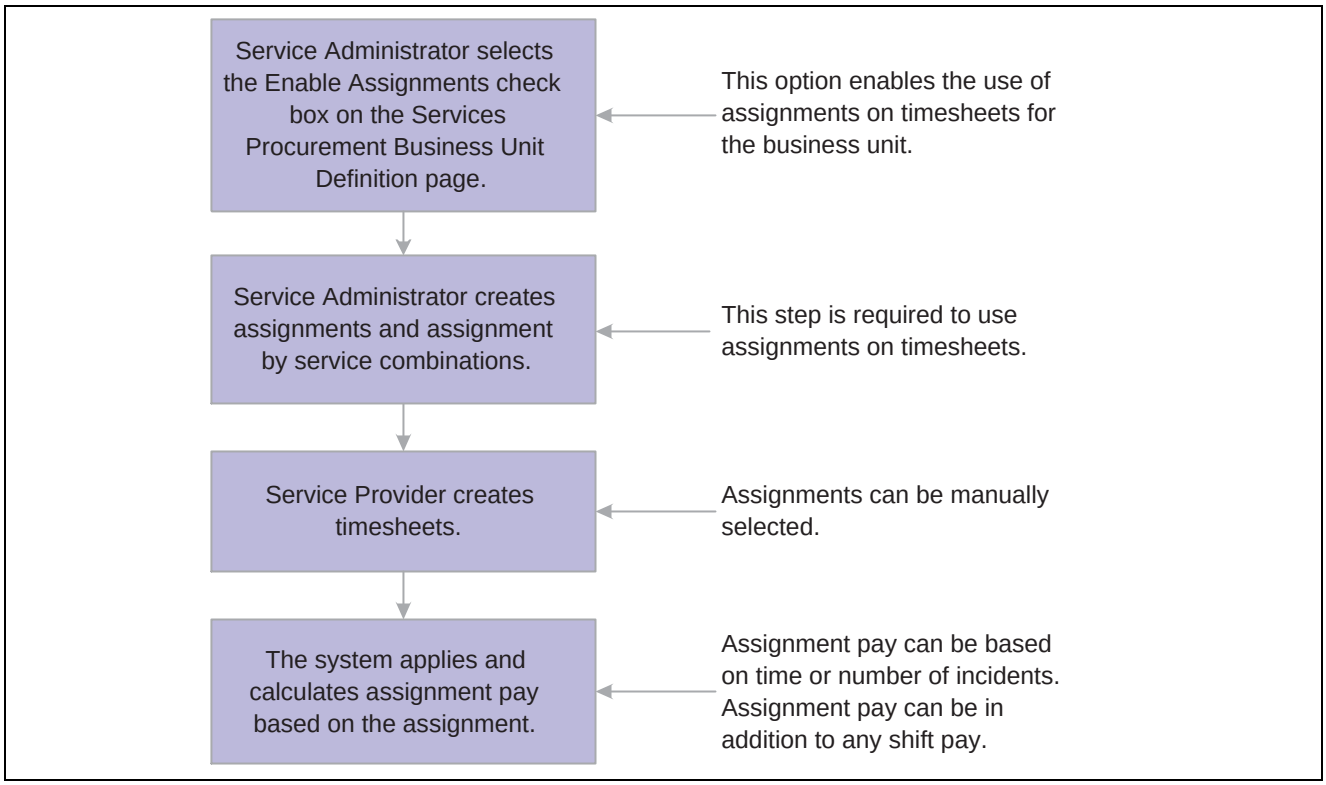
Using Assignments on Timesheets

The following diagram illustrates the steps involved to define assignments that can be used on timesheets:



Assignments Definition

Defining Assignments for Use on Timesheets

Access the Assignment page.

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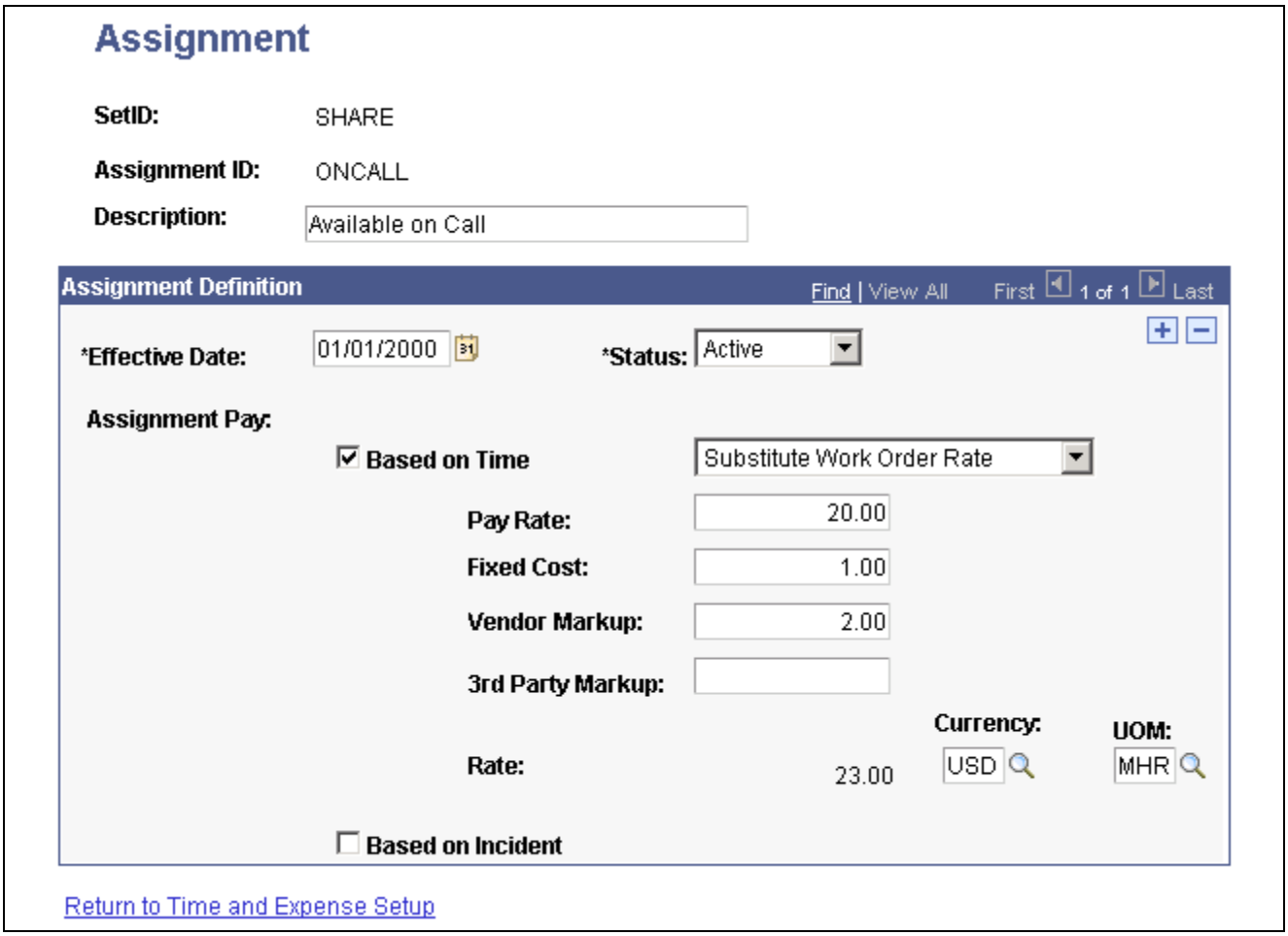

Assignment page

Note. These settings are defined at the setID level.

Note. The fields that appear on this page depend upon the value selected for the Assignment Pay field.

SetID Select the SetID that will be able to use this assignment.

Assignment ID Enter a name for the assignment.

Description Enter a description for the assignment.

Assignment Definition

Effective Date Enter the date that the assignment will become effective. The current date is the default value. This is a required field.

Add effective-dated rows for each Assignment Pay type as required.

Status Select *Active* (default) or *Inactive.* This determines if this assignment will be available for use on timesheets. Only assignments with a status of Active will be available to associate with services or on timesheets. This is a required field.

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Note. If you change an Active assignment to Inactive, the system will issue a warning message if there are any existing assignment and service combinations for the effective-dated assignment.

Assignment Pay Select the value on which the assignment pay calculation should be based. Values are Based on Time or Based on Incident.

- Based on Time: This option indicates that some or all of the assignment rate is based on the time spent on the assignment.
- Based on Incident: This option indicates that some or all of the assignment rate is based on the number of incidents for the assignment.

If you select Based on Time, select a value as the basis for time associated with the assignment:

- *Add to Work Order Rate:* The assignment rate will be added to the work order rate.

  If you select this option, you must enter a negative or a positive value in the Pay Rate field that appears.

  Note. If pay types are not enabled, this is a single rate. If pay types are enabled, the Pay Rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields that appear on the page.

- *Percent of Work Order Rate:* The assignment rate is a percent of the work order rate.

  If you select this option, you must enter a negative or positive value in the Percent field.

- *Substitute Work Order Rate:* The assignment rate will replace the work order rate.

  If you select this option, you must enter a positive value in the Pay Rate field.

  Note. If pay types are not enabled, this is a single rate. If pay types are enabled, the Pay Rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields that appear on the page.

Rate This display-only field shows the total of the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields.

Currency Enter the currency associated with the assignment pay rate. This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

UOM (unit of measure) Enter the unit of measure associated with the assignment pay rate. This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

If you select Based on Incident, you must break down the assignment pay amount into these fields.

Note. The total of these fields should add up to the total assignment pay amount.

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- Pay Rate
- Fixed Cost
- Vendor Markup
- 3rd Party Markup

Rate This display-only field shows the total of the Pay Rate, Fixed Cost, Vendor Markup, and 3rd Party Markup fields.

Currency The value in this display-only field comes from the assignment currency.

Defining Assignments by Service

Access the Assignments by Service page.

Assignments by Service page

Note. These settings are defined at the setID level.

Assignment ID Enter a description for this assignment by service.

Service Enter the service code.

Assignment by Service

Effective Date Enter the effective date for this service. This is a required field.

Detail Definition Select a method to use for defining details of the assignment by service combination. Values are:

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- *Define for Service:* Indicates that the assignment is available for use with this service as of the effective date.

  The service and assignment combination will have specific times and rates defined.

  Note. The Description group box appears when you select this option.

- *No Longer Valid for Service:* Indicates that the assignment is no longer available for use as of the effective date.
- *Use Assignment Definition:* Indicates that the assignment is available for use with the service as of the effective date.

  The shift times and rates from the Assignment definition page will be used for this service.

Description

Assignment Pay Select the method on which to base the assignment pay. Values are:

- Based on Time: Assignment pay will be based on the beginning and end times of the assignment.

  You can select one of these values to calculate the assignment pay:

  - *Add to Work Order Rate:* Assignment pay rate will be added to the work order rate for this assignment by service combination.
  - *Percent of Work Order Rate:* Assignment pay is defined as a percentage of the work order rate.
  - *Substitute Work Order Rate:* Assignment pay rate is substituted for the work order rate.

    If you select this option, can only enter a positive amount in the Pay Rate field.

- Based on Incident: The assignment pay will be based on the number of incidents.

  If you select this option, you must enter values for the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields.

Pay Rate This required field is available if you select *Add to Work Order Rate* or *Substitute Work Order Rate.* If you selected the Add to Work Order Rate, you must enter a positive or a negative amount in this field, If you selected *Substitute Work Order Rate*, you must enter a positive amount.

If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Vendor Markup, and Third-Party Markup fields that appear.

Percent You must enter a positive or a negative percent in this field if you selected the *Percent of Work Order Rate* value. This is a required field.

Currency You must enter a value in this field if you selected the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

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UOM (unit of measure)	This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* value. This is a required field.
Assignment	Click this link to access the Assignment definition page for this specific assignment.

Enabling the Use of Shifts and Assignments

Access the Services Procurement Bus Def (business unit definition) page.

Time and Expense Settings

Enable Shifts	Select this check box if you want to use shifts on timesheets.
Enable Assignments	Select this check box if you want to use assignments on timesheets.
Enable Time Category Override	Select this check box if you want to enable time category overrides.

See Also

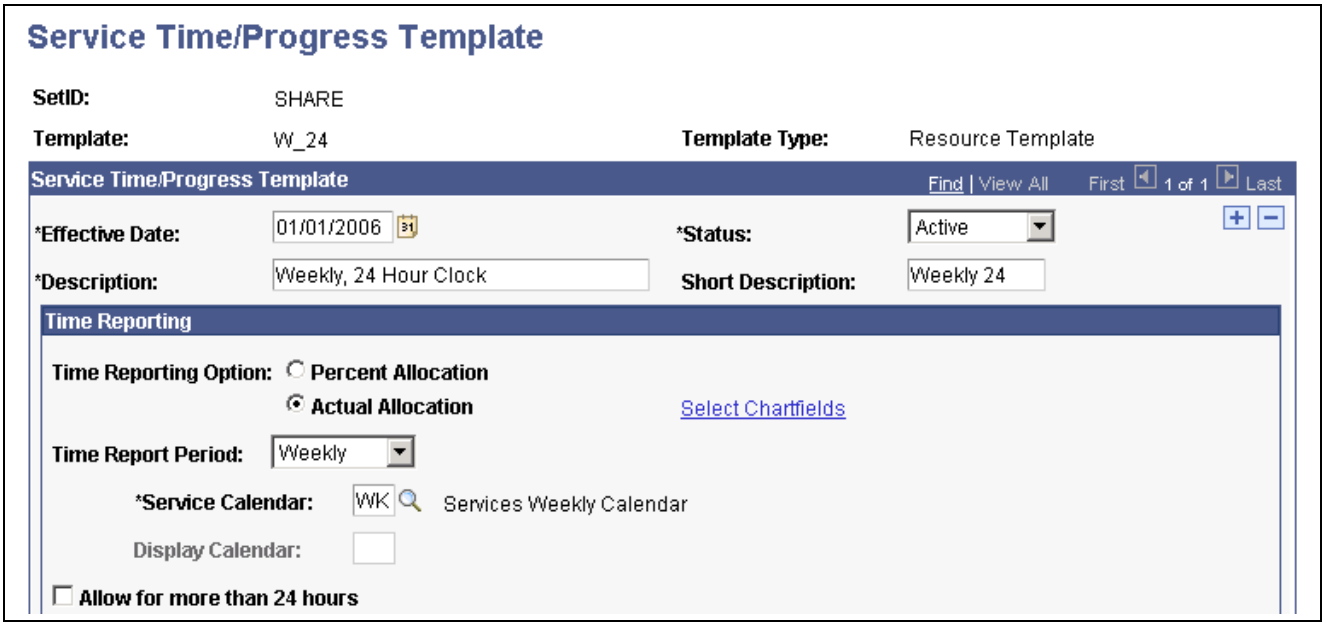
Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Shifts for Use on Timesheets, page 127

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Assignments for Use on Timesheets, page 132

Chapter 19, "Managing Time in PeopleSoft Services Procurement," Editing Time Categories on Timesheets, page 341

Maintaining the Service Time/Progress Template

Access the Service Time/Progress Template page.



Service Time/Progress Template page (1 of 2)

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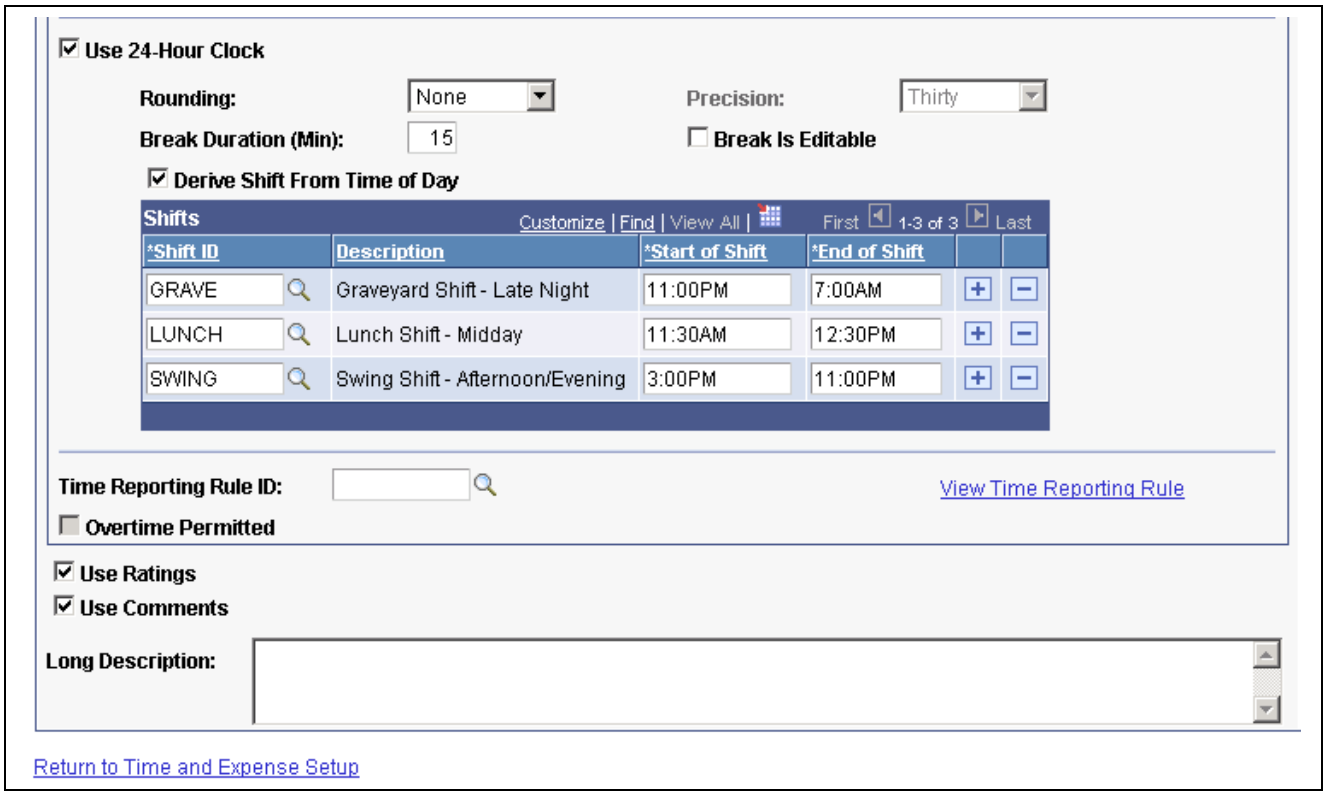

Service Time/Progress Template page (2 of 2)

Time Reporting

Time Reporting Option

Use this option to determine whether a resource based work order requires the service provider to report time against specific ChartFields, or whether the total time is entered and distribution percentages automatically split time or progress according to the ChartField distribution defined for the work order. Values are:

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

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

Time Reporting Period

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

Note. When you select a the monthly time reporting option, the Display Calendar field is editable. You must select a display calendar to chunk monthly reporting properly.

Select ChartFields

Select the ChartFields to display on the timesheet.

The values from the selected ChartFields will be used to allocate time on distribution lines.

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Note. This option is only available when you select Actual Allocation as the time reporting option.

Service Calendar Select a service calendar for the time reporting period. Use this calendar as a detail for how the organization reports time during the calendar year. Values are:

- *Bi-Weekly*
- *Daily*
- *Monthly*
- *Semi-Monthly*
- *Weekly*

Display Calendar Select an appropriate calendar display option.

Use this option to determine how the calendar is displayed for the time reporting period. For example, if you select Monthly as the time reporting option, you may want to display the calendar on a weekly basis.

Allow for more than 24 hours Select if a service provider is enabled to enter more than 24 hours for a single project, work order, activity, and day. You can use this option for team reporting instead of individual reporting.

Note. When you select this option, the *Rounding*, *Default Start Time*, *Default Stop Time*, *Break Duration*, *Precision*, and *Break is Editable* fields are available.

Use 24-Hour Clock Select this option if you want time logged using the 24-hour clock. You will select this check box if you want to pay providers shift differential using shifts.

Rounding Select whether you want to round up or down to the hour. Select *None* if you do not want to round the minutes.

Precision Select the number of precise minutes for rounding. Values are *Six, Twelve, Fifteen, Twenty,* and *Thirty.*

Default Start Time and **Default Stop Time** Enter the default start and stop times to appear by default on the timesheet. The user can override these values.

Break Duration (Mins) (break duration - minutes) Enter the break duration in number of minutes. The break duration is subtracted from the total time difference between the start and end dates. For example, if you have a start time of 8:00 a.m. and end time of 5:00 p.m. with a 30-minute break duration, 8.5 hours are recorded for the day.

Break is Editable Select to indicate that the break is not mandatory.

Derive Shift From Time of Day Select this option if you want the system to automatically derive the shift depending upon the time of day. This option is used with 24-hour clocks only.

Shifts This group box appears when you select Derive Shift From Time of Day. Use this group box to associate specific shifts with this time service template.

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Note. Start and stop times are for informational purposes only. If the 24-hour clock time plate is used and the Derive Shift Based From Time of Day option is selected, then the system automatically places default time values on this fields. However, these start and stop times can still be modified at the template definition level.

Start of Shift and **End of Shift** — These default values come from the Shift definition page, but you can override the values here. These are required fields.

Note. Start and end times cannot fall within the ranges for another shift for the sample template.

Time Reporting Rule ID — Select a time reporting rule to use for calculating different payouts.

Note. To use this feature, you must first define the time reporting rules on the Time Reporting Rules page.

View Time Reporting Rules — Click to view the time reporting rule associated with this service template.

Overtime Permitted — Select to indicate if a requisition allows overtime.

This option controls which service time templates appears in the Time Template lookup prompt on work order. If Overtime Permitted option equals *N*, the work order prompt list only displays Service Time Templates that are defined with the overtime permitted option equal to *N*.

If the Overtime Permitted option is equal to *Y*, the prompt list displays all service templates.

Note. Setting this option is the responsibility of the administrator who defines time templates. It is also the responsibility of the Administrator to configure and define Time Reporting Rules that prevent overtime and associate the right Time Reporting Rule ID to the Time Template that does not permit overtime.

Use Ratings — Select if the performance of a service provider during the time period is to be rated.

Note. This check box is only accessible if the Use Ratings check box on the Services Procurement Business Unit Definition page is selected.

Use Comments — Select to enable service providers and provider contacts to enter comments or concerns on the timesheet and progress log.

Defining Expense Distance Rates

Access the Distance Rate page.

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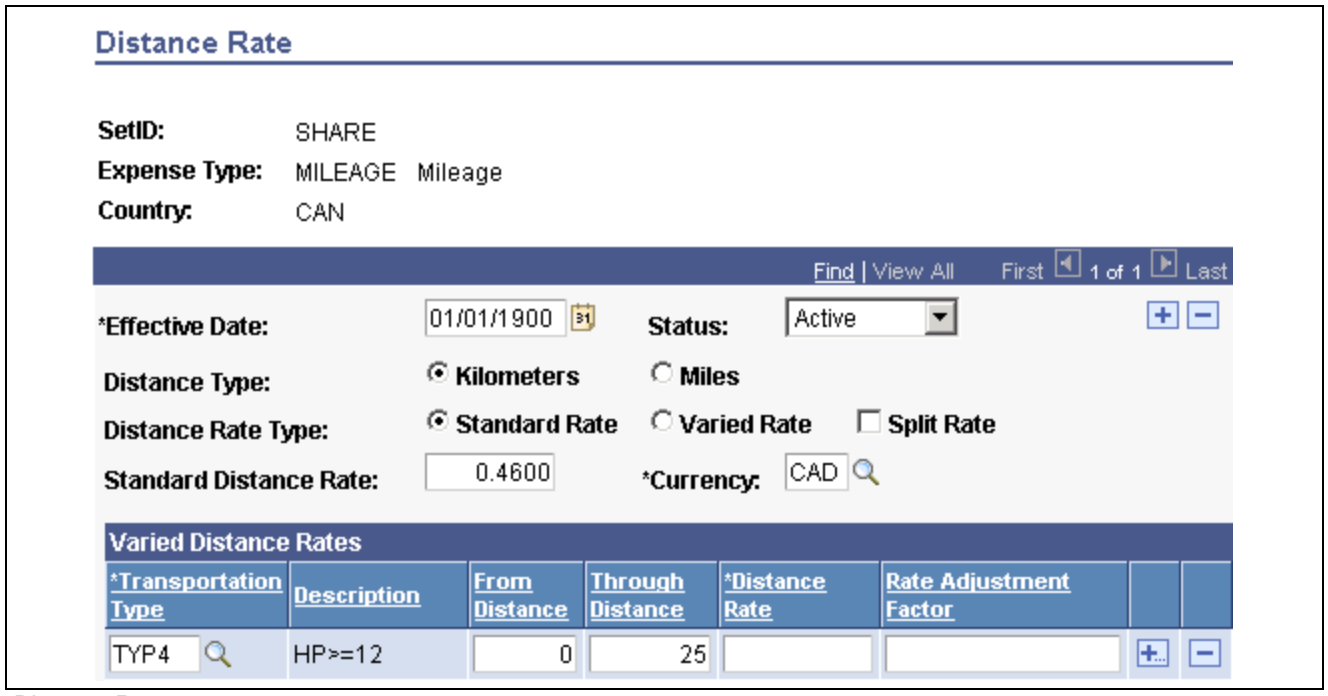

Distance Rate page

You can set up standard and varied distance rates in different base currencies with each combination tied to an expense type. When service providers use their automobiles for business purposes, you can reimburse them based on how far they must drive.

Distance Rate Type Select Standard Rate to indicate a uniform reimbursement rate regardless of transportation type.

Select Varied Rate to indicate reimbursement rates that depend on the transportation type.

Standard Distance Rate Enter the monetary amount that is to be reimbursed per unit driven, if you selected Standard Rate.

Varied Distance Rates

Transportation Type and **Distance Rate** If you selected Varied Rate, enter a distance rate to define the monetary amount that is reimbursed for the transportation type per unit driven.

Rate Adjustment Factor Enter an adjustment factor that the system applies for the transportation type.

Defining Expense Types

Access the Expense Types1 page.

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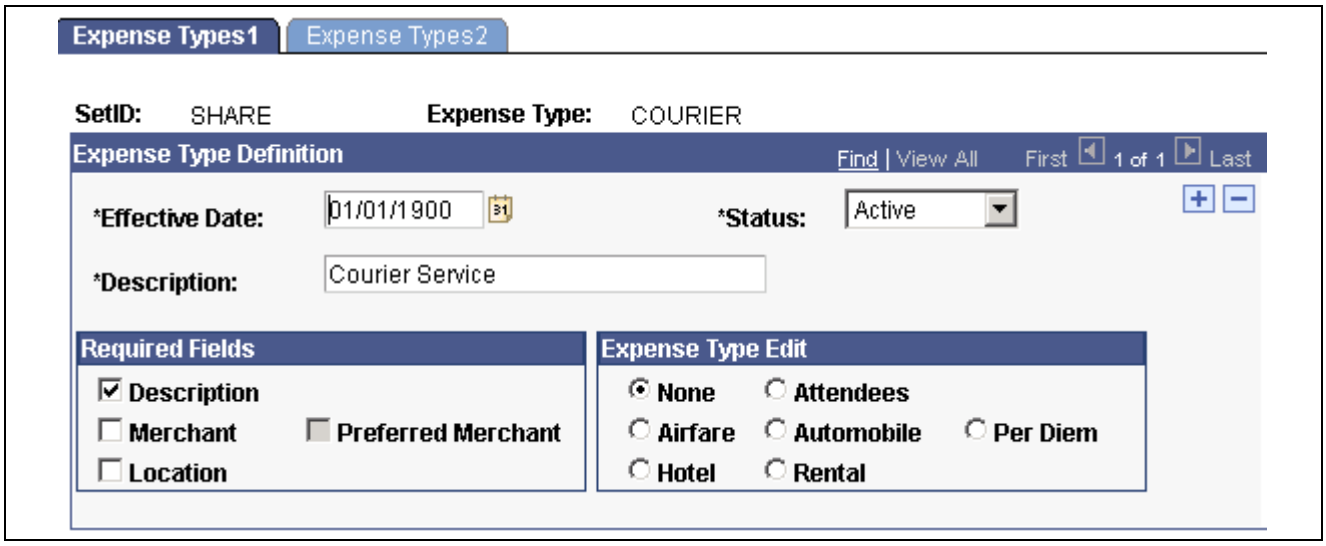

Expense Types1 page

Required Fields

Description, Merchant, Preferred Merchant, and **Location**

Select each option to appear as a required field on the expense sheet that a service provider completes for the expense type.

To define an expense location amount for this expense type, select the Location check box to make it a required field on the expense sheet.

Defining Additional Expense Types

Access the Expense Types2 page.

Per Diem Amount

Enter the amount that is authorized for this expense type. In the column that appears to the right of this field, select the per diem's currency.

Deduct For Breakfast, Deduct For Lunch, and **Deduct For Dinner**

Enter deduction amounts. The currencies for these amounts appear by default from the currency that you selected for the per diem.

Preferred Merchant

You can add more rows to create a list of merchants that service providers must use. If the expense type appears in an expense sheet and the service provider did not use a preferred merchant, the line item requires an explanation.

Defining Payment Terms Timing

Access the Payment Terms Timing Codes page.

Payment terms are stored in separate tables and form the basis of net due date, discount due date, and discount amount calculations. You define the payment terms and timing methods that the system uses for vendor payments. The system supports percentage and fixed amount discount calculations. PeopleSoft Payables uses these payment terms and timing methods to schedule payments for invoices and to calculate amounts remitted to vendors.

Defining Single Payment Terms

Access the Single Pay Terms page.

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Click the Refresh Display button if you modified an existing term definition and want to display the original, saved terms definition.

Search Where Used Click to access the Search Where Used page to view where this payment term ID is used.

Calculate Example Payment Data Click to calculate example payment data for the payment terms ID, based on currency, gross amount, and basis date values provided as input variables. This enables you to perform a *what if* analysis regarding the effect of various parameter settings on the calculated result, before choosing to save a particular term's definition.

Payment Terms Control

Terms Applicability Displays *Vendor-Only Terms.*

Split Net Terms Select to enable a definition of payment terms that contain multiple net terms and any associated discounts. For example, select this option to use one timing ID if the basis date is between the 1st and 15th, and another timing ID if the basis date is between the 16th and end of the month. Split terms definitions enable you to set up *variable net due date* terms. There are terms that, depending on the basis date, result in more than one possible set of net or discount due dates.

Net Due Terms

Basis From Day Enter the beginning day of the basis day range. The basis date's day value must be equal to or greater than this day or else the terms definition does not apply. This field is available for entry when the Split Net Terms check box is selected.

Basis To Day Enter the ending day of the basis day range. The basis date's day value must be equal to or less than this day or else the terms definition does not apply. This field is available for entry when the Split Net Terms check box is selected.

Timing ID Select to calculate the net payment due date for this day range within the single payment term.

Discount Terms Available Select if the terms that you are defining include discount terms.

Note. All available days, 1 to 31, must be accounted for in the basis from day and basis to day ranges.

Discount Terms

Timing ID Select to specify the discount portion of this single payment term.

Adjustment Days Enter the number of days used to adjust the discount due date for this single payment term. Define flexible discount terms by entering either *basis date relative* or *due date relative* discount due dates. This is useful if the discount terms are often calculated as, for example, 2 percent for the first 10 days following the start-of-terms (basis) date, or 2 percent up to 10 days before the payment due date.

Discount Terms Percent Enter the discount percent that is applied to the invoice gross amount to calculate the discount amount.

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Discount Terms Amount Enter the flat amount discount that is applied to the invoice regardless of the invoice amount.

Note. This value is applied using the transaction currency units defined for the voucher. The particular currency to use is not defined here but is determined by context.

Viewing Where Payment Terms Are Used

Access the Search Where Used page.

Multi-Payment Terms ID Displays the multipayment terms ID that uses this single payment terms ID.

Number of Terms Indicates the number of installments contained within the displayed multipayment terms ID that appears.

Number of Occurrences Indicates the number of times that this payment terms ID is used within the multipayment terms.

Calculating Example Data for Single Payment Terms

Access the Calculate Example Payment Data (single payment terms) page.

Gross Invoice Amount, Terms Basis Amount, and **Use Basis Amount** Enter a value to use as the terms basis amount for the example discount calculation. To use a different amount, select the Use Basis Amount check box, which enables the Terms Basis Amount field, and enter a different value.

Note. The terms basis amount value must be less than the gross invoice amount value.

Basis Date The system populates this field with the current date by default.

Calculate Example Payment Data Click the Calculate Example Payment Data button to calculate the payment data based on the values entered on the page.

Defining Multiple Payment Terms

Access the Multiple Pay Terms page.

Group single payment terms for payments split into multiple payments or installments.

Calculating Example Data for Multiple Payment Terms

Access the Calculate Example Payment Data (multiple payment terms) page.

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

Defining the Accounts Payable Interface

Access the Accounts Payable Interface page.

Interface Select *Other* to indicate a third-party application. Select *PeopleSoft AP* to indicate that you use PeopleSoft Payables.

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File Format

PeopleSoft Services Procurement uses comma-separated values as its only file format. If you select *Other* as the interface, the system exports invoice data to a flat file using this format, which you can use to export to your accounts payable system for invoice voucher generation.

If you select *PeopleSoft AP* as the interface, this field is disabled, because it is not applicable.

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CHAPTER 6

Using Default Hierarchies

This chapter provides overviews of default hierarchies used in PeopleSoft Services Procurement, and discusses how to define the region hierarchy.

Understanding PeopleSoft Services Procurement Default Hierarchy

PeopleSoft Services Procurement enables you to set up several default hierarchy structures to use throughout your transaction processing. By setting up defaults, data entry is more consistent, saves time, and cuts down on redundancy and user error. Default values enable an Enterprise to predefine key values that automatically default onto requisitions and work orders.

The most common defaults for requisitions and work orders come from the requester or service coordinator user defaults or from the service type and the business unit. When requesters or service coordinators create requisitions or work orders, the system first determines whether there is default information available for requester, then the service coordinator, then the service type, in that order respectively. If there are no default values defined at the service type level, the system then uses defaults that are defined at the business unit level.

PeopleSoft Services Procurement provides default capability for those values that are relatively static in nature (values that remain the same in everyday operations and would become repetitive to enter for every transaction). For example, if you set up your ChartField defaults with the most appropriate values for your service request, you have little need to drill down to the requisition's distribution level to enter any values. The ChartField values at that level are set by default.

Note. Although it is possible to establish several defaults for your requisition and work orders, you can override most values at the requisition and work order component levels.

Understanding Transaction Defaults

This table details the levels in the transaction default hierarchy from which the selected transaction values can appear by default. The Default Source indicates where the Transaction Field Value comes from. If there is more than one default source listed, then follow this order: review from left to right, with the left-most source taking precedence, and continues from left to right in that order.

The default values listed default onto requisitions, work orders, timesheets, and progress logs.

Transaction Field Value	Default Source
Service Method	Service Method field on the Service Types page.

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Transaction Field Value	Default Source
Category	Category field on the Category Definition page, where Category is the item category defined for the service type on the Service Types page.
Score	Score field on the Service Types and Services Procurement Bus Unit pages.
Allow Multicurrency Reqs (allow multicurrency requisitions)	Allow Multicurrency Reqs field on the Services Procurement Bus Unit page.
Currency	Currency field on the Services Procurement Bus Unit page.
Location	Location field on the Services Procurement Bus Unit page.

Requisition Defaults

The following table lists values that default onto requisitions.

See Chapter 14, "Creating and Managing Requisitions," page 211.

Transaction Field Value	Default Source
Business Unit	Business Unit field from the Requester's Overall Preferences page.
Requester	Requester field from the Requester's Procurement user preferences page.
Currency	Currency field from the Requester Setup page; Currency field from the Purchasing Business Unit Definition page.
Service Type	Service Type field from the Service Requester Defaults page.
Service	Service field from the Service Requester Defaults page.
Requesting Dept	Department field from the Requester's Procurement user preferences page.
Job Title	Description field from the Service/Project Role Attributes page.
Location	Ship To field from the Requester Setup page; Ship To Location field from the Requester's Procurement user preferences page.
Time Approver	Time Approver field from the Service Requester Defaults page.
Allow Expenses	Allow Expenses field from the Service Type page; Allow Expenses field from the Services Procurement Bus Unit page.
Expense Approver	Expense Approver field from the Service Requester Defaults page.
Time Reporting Option	Time Reporting Option field from the Service Type page; Time Reporting Option field from the Services Procurement Bus Unit page.
Scope of Work	Comments field from the Service/Project Role Attributes page.

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Transaction Field Value	Default Source
Rate and Unit of Measure (Resource Only)	Rate and Unit of Measure fields from the Maintain Rate Sheets page.
Unit of Measure (Resource Only)	If no rate sheet exists for the service and region, then the value comes from the Days or Hours Unit of Measure field on the Services Procurement Installation Options page.
Competencies (Resource Only)	Competencies field from the Service/Project Role Attributes page.
Other Skills (Deliverable Only)	Competencies field from the Service/Project Role Attributes page are concatenated into the Other Skills field.
Education Level (Resource Only)	Education Level field from the field Service/Project Role Attributes page.
Experience (Resource Only)	Experience field from the Service/Project Role Attributes page.
Interview Required (Resource Only)	Interview Required field from the Service/Project Role Attributes page.
Track Resources(s) (Deliverable Only)	Track Resource(s) field from the Service Types and Services Procurement Bus Unit pages (Work Order Settings tab).
Service Coordinator and Service Team (non-VMS)	Service Coordinator or Service Team field from the Service Requester Defaults page.
Service Coordinator and Service Team (VMS)	Service Coordinator or Service Team field on the VMS Details by Supplier and Business Unit page. See Chapter 10, "Establishing and Managing VMS," page 187.

ChartFields

This table details the default values for various ChartFields used on requisitions.

ChartField	Default Source
PC Bus Unit (Project Business Unit)	Projects Business Unit field from the Service Requester Defaults page.
Project	Project field from the Service Requester Defaults page.
Dept (department)	ChartField Dept field from the Requester's Setup page; Department field from the requester's Procurement user preferences page.
Location	Ship To field from the Requester Setup page; Ship To Location field from the requester's Procurement user preferences page.
GL Unit	ChartFields GL Unit field from the Requester Setup page; GLUnit field on the Purchasing Business Unit Definition page.
Account (Labor)	Account field from the Category Definition page, where Category is the item category defined for the service type.
Account (Expense Distrib.Type)	Default Expense Account field from Services Procurement Bus Unit page. If not found, then the Account associated to the category for the service type.

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Sourcing Defaults

The following table list values that default onto sourcing pages.

See Chapter 15, "Managing Requisition Sourcing," page 237.

Transaction Field Value	Default Source
Supplier Information - Sent To, Provider Contact, Notification Method, Maximum Submittals	Various fields from Region/Service Type combination for resource based or Region/Service combination for deliverable based, Region only or Service/Service Type only (order determined by sourcing preference defined on Business Unit); Services Procurement Bus Unit page.

Work Order Defaults

The following tables lists values that default onto work orders.

See Chapter 18, "Managing Work Orders," page 281.

Note. If you create a work order that is linked to a requisition, many of the values that automatically default onto the requisition will also default onto the work order.

This table represents default values for work orders that are not linked to requisitions.

The Default Source indicates where the Transaction Field Value comes from. If there is more than one default source listed, then follow this order: review from left to right, with the left-most source taking precedence, and continues from left to right in that order.

Transaction Field Value	Default Source
Business Unit	If the service coordinator creates a work order, then Business Unit value defaults from the Business Unit field on the Service Coordinator's Overall Preferences page, otherwise it comes from the Business Unit field on the Requester's Overall Preferences page.
Service Type	If the service coordinator creates a work order, then the Service Type value defaults from the Service Type field on the Service Coordinator Defaults page, otherwise it comes from the Service Type field on the Service Requester Defaults page.
Service	If the service coordinator creates a work order, then the Service value defaults from the Service field on the Service Coordinator's Defaults page, otherwise it comes from the Service field on the Service Requester Defaults.
Requesting Dept	Department field from the requester's Procurement user preferences page.
Job Title	Description field from the Service/Project Role Attributes page

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Transaction Field Value	Default Source
Location	Ship To field from the Requester Setup page; Ship To Location field on the requester's Procurement preferences page; Ship To Location field from the Service Coordinator's Procurement user preferences page.
Time Approver	Time Approver field on the Service Requester Defaults page; Time Approver field from the Service Coordinator Defaults page.
Allow Expenses	Allow Expenses field on the Service Type page; Allow Expenses field from the Services Procurement Bus Unit page.
Expense Approver	Expense Approver field from the Service Requester Defaults page; Expense Approver from the Service Coordinator Defaults page.
Invoice Approver	Invoice Approver field from Service Requester Defaults page; Invoice Approver field from the Service Coordinator Defaults page.
Supplier Invoice Approver	Non VMS: From The work order's Service Provider Contact field. VMS: From the work order's VMS Service Coordinator field. If the work order's VMS coordinator is a Service Team, and there are more than one member of the team, then no default is provided and it must be supplied by the user, otherwise the sole member of the team is defaulted into the Supplier Invoice Approver field.
Time Reporting Option	Time Reporting Option field from the Service Type; Time Reporting Option field from the Services Procurement Bus Unit page.
Scope of Work	Comments field from the Service/Project Role Attributes page.
Currency	Currency field from the Requester Setup page; Currency field from the Purchasing Business Unit Definition page.
Rate and Unit of Measure (Resource Only)	Rate and Unit of Measure fields from the Maintain Rate Sheets page.
Unit of Measure (Resource Only)	If no rate sheet exists for the service and region, then the value comes from the Days or Hours Unit of Measure field on the Services Procurement Installation Options page.
Competencies (Resource Only)	Competencies field from the Service/Project Role Attributes page.
Other Skills (Deliverable Only	Competencies from the Service/Project Role Attributes page are concatenated into the Other Skills field.

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Transaction Field Value	Default Source
Education Level (Resource Only)	Education Level field from the Service/Project Role Attributes page.
Experience (Resource Only)	Experience field from the Service/Project Role Attributes page.
Track Resources (Deliverable Only)	Track Resource(s) field from the Service Type page; Track Resource(s) field from the Services Procurement Bus Unit page (Work Order Settings tab).
Work Order Alerts	Work Order Alerts values from the Service Requester Defaults page; Service Coordinator Defaults page; Service Type page; Services Procurement Bus Unit page (Work Order Settings tab).
Survey ID	Survey ID field from the Surveys by Service Types page.
Require Survey	Require Survey field form the Service Types page.
Automatically Send Survey	Automatically Send Survey field from the Service Types page.
Survey Role Distribution List	Role Distribution List field from the Setup Survey page.
Service Coordinator and Service Team (non-VMS)	Service Coordinator or Service Team field on the Service Requester Defaults page. When the service coordinator creates a work order, the service coordinator who creates the work order is defaulted into the field.
Service Coordinator and Service Team (VMS)	Service Coordinator or Service Team field on the VMS Details by Supplier and Business Unit page. See I'll add the link to the section in the VMS chapter

ChartFields

This table details the default values for various ChartFields used on work orders.

See Chapter 6, "Using Default Hierarchies," Requisition Defaults, page 148.

Understanding Service Requester Defaults

This section discusses how to define service requester defaults.

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Service Requester Defaults

Use the Service Requester Defaults page to simplify the requisition and work order data entry process for requesters. When you define service requester default values, requesters can use those values when creating multiple requisitions and work orders. This streamlines data entry for each requester, because default information appears on requisitions and work orders automatically. You can then authorize established purchasing users to enter and process requisitions for all or specific requesters.

Service requester default values include, but are not limited to the following fields:

- Project Business Unit
- Project
- Service Type
- Service (Project Role)
- Service Coordinator/Team
- Time Approver
- Invoice Approver
- Allow Time/Expense Overage %
- Requisition Notification Method
- Work Order Alerts
- Expense Approver

In addition, the following values are defaulted from the requesters Procurement User Preferences

- Location
- Ship To

See Also

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Setting Up Service Requester Defaults, page 99

Understanding Service Coordinator Defaults

This section discusses how to define service coordinator defaults.

Service Coordinator Defaults

Use the Service Coordinator Defaults page to simplify the work order data entry process for service coordinators.

Service coordinator default values include, but are not limited to the following fields:

- Project Business Unit
- Project
- Service Type

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- Service (Project Role)
- Time Approver
- Invoice Approver
- Authorized to Delegate
- Authorized to Change Sourcing Rules
- Alert Notification Method
- Work Order Alerts
- Expense Approver

In addition, the following values are defaulted from the service coordinators Procurement User Preferences:

- Location
- Ship To

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Coordinator Defaults, page 100

Defining the Region Hierarchy

Use the region hierarchy to determine the best suppliers to source the requisition request. Use the Region Codes and Tree Manager pages to build the region default structure and associate locations to the regions.

Once you establish the region hierarchy, use it to define rates and valid suppliers for sourcing.

The location specified on a requisition or work order is used to determine the related region for identification of associated rates.

Note. If the Use Region Tree Structure option is not selected on the Services Procurement Installation Options page, the Locations by Region page is used instead of the Region Tree to associate locations to regions for purposes of determining rates.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Building the Region Hierarchy, page 76

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CHAPTER 7

Integrating with Other PeopleSoft and Third-Party Applications

This chapter discusses how to:

- Integrate with PeopleSoft Accounts Payables.
- Integrate with PeopleSoft Project Costing.
- Integrate with PeopleSoft Purchasing.
- Integrate with PeopleSoft HCM (Human Capital Management).
- Integrate with PeopleSoft Resource Management.
- Integrate with PeopleSoft Recruiting Solutions.

Integrating with Accounts Payables Applications

This section discusses how to export approved PeopleSoft Services Procurement transactions to PeopleSoft Payables or to a third-party accounts payable application to create invoices.

Here are the steps to export services transactions:

1. If you are using PeopleSoft Payables, use the Voucher Batch Req page to run the Voucher Build Application Engine process to generate the voucher.
2. If you are not using PeopleSoft Payables, use the Export To Payables Application Engine process to export invoice data to a flat file.

Note. You specify the accounts payable application interface using the Accounts Payable Interface page.

If the currency on the invoice is different from the currency defined for the vendor, the system uses the rate type on the Services Procurement Business Unit Options page to convert the invoice amount into the vendor's currency.

Page Used to Integrate with Accounts Payables Applications

Page Name	Object Name	Navigation	Usage
Export To Payables	SPA_GEN_INV_EXPORT	Services Procurement, Services Settlement, Export to Payables	Export invoicing data to a PeopleSoft Payables staging table or to a flat file.

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Exporting Services Transactions for Invoicing

Access the Export To Payables page.

Export To Payables page

Enter the run control parameters for exporting invoicing data.

Process Results

The Export To Payables process writes to PeopleSoft Payables staging tables or a flat file based on the PeopleSoft Accounts Payable interface defined for the SetID.

If you selected *PeopleSoft AP* as the accounts payable application interface using the Accounts Payable Interface page, the PeopleSoft Application Engine (SPF_IEXPMAIN) exports invoicing data approved in PeopleSoft Services Procurement to staging tables (VCHR_HDR_STG, VCHR_LINE_STG, and VCHR_DIST_STG) in PeopleSoft Payables.

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

If you selected *Other* as the accounts payable application interface using the Accounts Payable Interface page, the process exports invoicing data approved in PeopleSoft Services Procurement to a fixed format, comma-separated values (CSV) flat file, which you can use to import data into an accounts payable application and generate invoices.

Integrating with PeopleSoft Project Costing

This section discusses how to export approved time and expense transaction data to PeopleSoft Project Costing.

Here are the steps:

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

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

Pages Used to Integrate with PeopleSoft Project Costing

Page Name	Object Name	Navigation	Usage
Export Time and Expenses to Staging table for Projects	SPF_PROJ_EXP	Services Procurement, Manage Projects and Activities, Send Time/Expenses to Projects	Define run control parameters for exporting time and expense data to a staging table.
Cost Collection - Services Procurement	PC_SP_TO_PC	Project Costing, Cost Collection, Services Procurement	Load PeopleSoft Services Procurement staged data into PeopleSoft Project Costing.

Exporting Time and Expense Data to PeopleSoft Project Costing

Access the Send Time/Expenses To Projects page.

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

Process Results

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

Note. Run the Cost Collection process in PeopleSoft Project Costing for Services Procurement Application Engine process (PC_SP_TO_PC) to load the staged data into PeopleSoft Project Costing.

Integrating With PeopleSoft Purchasing

This section discusses how to pass approved service work orders information to the PeopleSoft Purchasing application.

Here are the steps:

- The requester or service coordinator clicks the Process Purchase Order button at the bottom of the Work Order page to submit the work order details to the purchase order staging table PO_ITM_STG.
- After you click the Process Purchase Order button, a link to the quick source application engine appear at the bottom of the Work Order - Cost page.

  Use the quick source process to create purchase orders from data in the staging table.

  Note. This process occurs regardless if a requisition is associated to a work order.

Note. If a new resource is assigned to the work order from a different vendor or for a different currency, a new purchase order will be created. The original work order amount will be broken out between the original work order and the replacement work order.

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See Also

Chapter 18, “Managing Work Orders,” page 281

Integrating With PeopleSoft HCM

When you implement both PeopleSoft Services Procurement and HCM applications, you can configure HCM as the system of record to maintain user details. When the HCM Person Integration installation option is enabled on the Services Procurement Installation Options page, the enterprise administrators can register a Services Procurement user as an HCM person with a unique employee ID and create unique operator login profiles within the HCM database.

The following six users are either registered in the HCM database with a unique Person ID, or they are created in the SCM database without a Person ID. Each user has a specific role that enables them to perform specific tasks within the application:

- *Service Procurement Administrator:* This user can register all other users in the Services Procurement system, as well as perform basic application setup.

  This user is created in the HCM database and has a unique person ID.

- *Approver:* This enterprise user may be designated as requisition, work order, or time and progress log approver.

  This user is created in the HCM database and has a unique person ID.

- *Requester:* This enterprise user determines specific requirements for a resource and creates a requisition listing those requirements.

  The requester might designate a service coordinator to source the requisition and handle the fulfillment process. This user is created in the HCM database and has a unique person ID.

- *Service Coordinator:* This user may work for the enterprise or the supplier.

  The user who handles the sourcing of requisitions to different suppliers and also handles supplier bids to ensure that the request is filled with the most qualified resource.

  The service coordinator must have a unique service procurement person ID.

- *Service Provider Contact:* This is a non-enterprise user who manages a team of service providers and handles bidding with the service coordinator.

  This user is registered in the SCM database and does not have a unique person ID.

- *Service Provider:* This supplier resource is submitted as a potential candidate for a sourced requisition.

  The service provider is registered in the SCM database and has a unique services procurement person ID. Once this user is registered in the SCM database, personal data is sent back to the HCM database, where a new person entry and operator login profile is created for the service provider.

See Also

Appendix C, “HCM Integrations,” page 459

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Integrating With PeopleSoft Resource Management

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

The following diagram illustrates the integration between PeopleSoft Services Procurement and PeopleSoft Resource Management:

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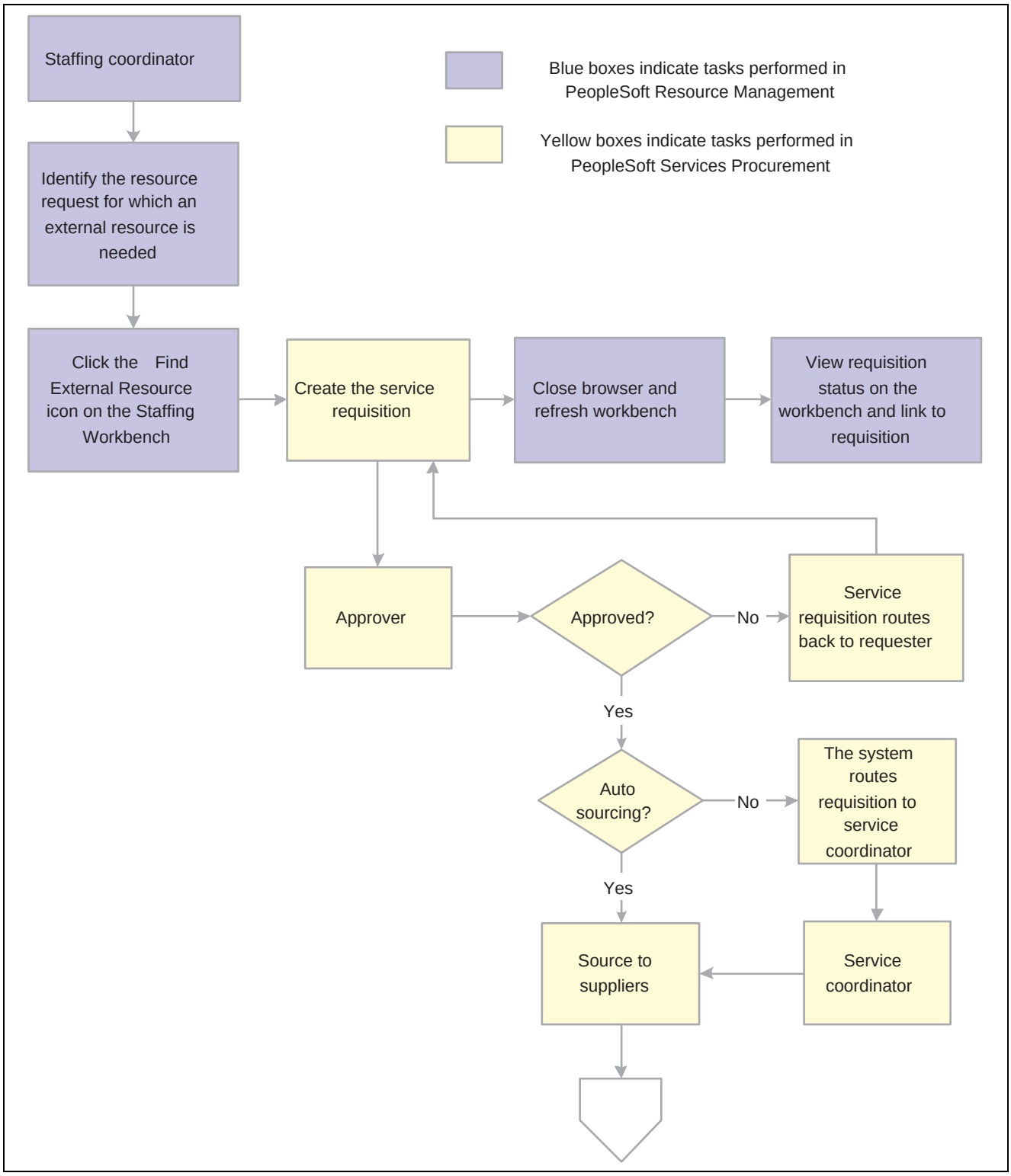

Services Procurement integration with Resource Management (1 of 2)

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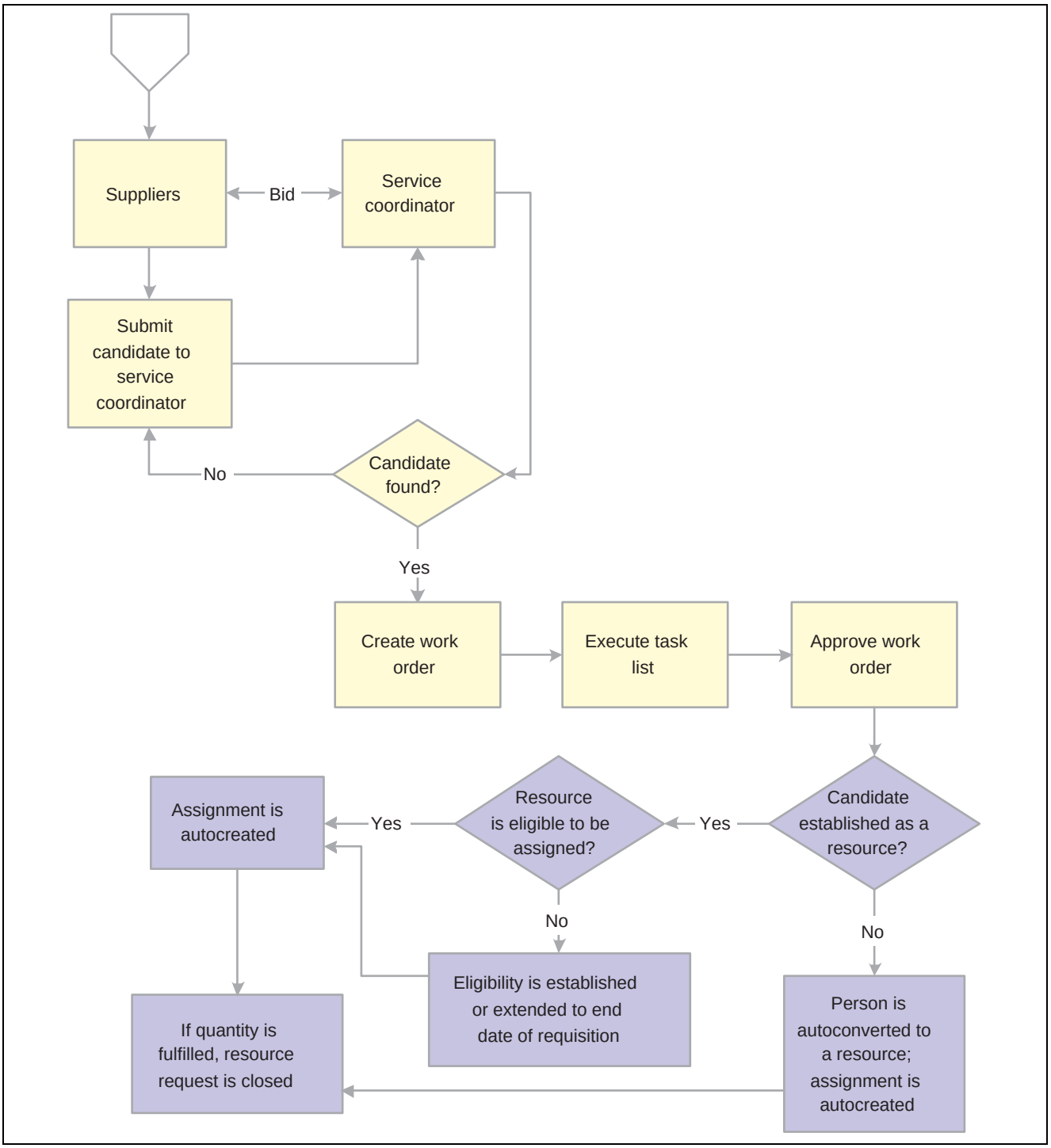

Services Procurement integration with Resource Management (2 of 2)

Service orders that are created in Resource Management are sent to Services Procurement for fulfillment by way of the Staffing Workbench. The user transfers directly to the Service Procurement requisition pages with populated data from the Resource Management system. The normal requisition process flow is followed, which includes updates to Resources Management upon filling the requisition and submitting and releasing the work order. The work order process creates an assignment and establishes the candidate as a resource on the Resource Management side.

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See Also

PeopleSoft Enterprise Resource Management 9.0 PeopleBook , "Integrating PeopleSoft Resource Management with Other Applications," Understanding Integration with PeopleSoft Services Procurement

Integrating With PeopleSoft Recruiting Solutions

PeopleSoft Recruiting Solutions provides a single point of entry for both permanent and contingent worker requests. Requests for contingent workers that are created in Recruiting Solutions may be routed to Services Procurement for fulfillment. If the Recruiting Solutions users chooses to post the job to Services Procurement, the user transfers directly to the Services Procurement requisition pages. Data from the Recruiting Solutions job posting is transferred to the Services Procurement requisition by way of an XML message in the HR-XML consortium standard "Position Opening" message format. Standard requisition defaulting logic is used to fill in any data used by Services Procurement that is not provided from Recruiting Solutions where available, and all remaining data must be defined manually.

The requisition then undergoes the normal workflow path for approval and sourcing within Services Procurement. Once the requisition is filled and the related work order is approved, Recruiting Solutions is updated with information about the worker by way of an XML message in the HR-XML consortium standard "Candidate" message format.

Note. Cancellation of a requisition created by Recruiting Solutions must be initiated from the Recruiting Solutions system.

Note. All Recruiting Solutions requesters in the HCM database must have a user profile defined in the SCM database and they must also be set up as Services Procurement requesters.

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CHAPTER 8

Implementing PeopleSoft Services Procurement Workflow

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

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

Understanding Workflow

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

PeopleSoft Services Procurement leverages the PeopleSoft eProcurement workflow engine. Services requisitions use the same workflow rules as the PeopleSoft eProcurement requisition, so if you are using both applications, you only have to set up workflow for requisitions once. PeopleSoft Services Procurement lines have a category of services, and they route differently than the PeopleSoft eProcurement lines.

You can also approve at the line level for requisitions rather than just the requisition header level. Approvals can be role-based or driven by views. For work order approvals, the system looks at the work order requestor's supervisor ID on the User Profile - Workflow page to send the approval.

Also, PeopleSoft Services Procurement workflow provides email notifications and worklists for all activities in the requisition fulfillment process.

With workflow notifications, you can:

- Enable or disable notifications on the Workflow Notifications page.
- Define email notifications that are sent as part of workflow in the requisition fulfillment process.
- Automate parts of the sourcing process by defining sourcing rules on the Automatic Sourcing page.

Note. Since PeopleSoft Services Procurement leverages the PeopleSoft eProcurement workflow engine process, the same workflow rules apply for both applications.

See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using Approval Workflow Within PeopleSoft eProcurement".

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Understanding Approval Management

Approval management is the process of taking a transaction through the organization until it is accomplished or stopped. Using the Manage Approvals feature, approvers and reviewers join the business analysts, and requesters to complete the approval workflow process. When the process is complete, the transaction is promoted to its next stage. In the case of a requisition, for example, it's sourced as a purchase order.

After a transaction, such as a service order or requisition, is created, the system routes it to the Manage Approval component. A message is also sent to the Worklist along with the transaction for which you must take action. You can take action from the Worklist or, when using PeopleSoft eProcurement, by using the Manage Approval feature. In either case, you can preview, in a graphical format, the path a transaction approval will take and who has already approved the transaction, and see any comments previous approvers have entered.

Note. The worklist item is not removed from the approver or reviewers worklist until it is marked as worked.

While the system awaits approval action, the approval workflow engine maintains the overall state of the transactions approval status, invokes routings, and interacts with the application classes.

During the approval process these actions take place:

- The system notifies approvers and reviewers that there is a pending transaction that needs their attention.
- Approvers and reviewers access the transaction details, provide comments, and take action (approve, deny, or push back) for the transaction.
- The system checks for additional routings in the same routing path.

  If all routing paths have been completed for the stage then the next routing path is started in the next stage. If there are multiple routing paths, the system routes them in parallel.
- Once all approvers on a transaction have approved, the engine notifies the eProcurement application.

  The requisition is then prepared for sourcing.

See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Using the Approval Monitor.

Mass Approval

The approver may select multiple requisitions, and complete the approval with out being routed to a secondary page. The approver must participate in a role that is associated to the new eProcurement role action of MASS_APPROVER.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Roles for Role Actions, page 96.

See *PeopleSoft Enterprise eProcurement 9.0 PeopleBook*, "Using Approval Workflow Within PeopleSoft eProcurement".

See Also

"PeopleSoft Services Procurement Preface," page xxxiii

Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology

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Configuring the Workflow System

To set up workflow notifications, use the Workflow Notification (SPB_WF_NOTIFY) component. To set up automatic sourcing, use the Automatic Sourcing (SPF_AUTOSOURCE) component.

This section discuss how to:

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

Pages Used to Configure the PeopleSoft Services Procurement Workflow System

Page Name	Object Name	Navigation	Usage
Maintain Workflow	PV_ADM_WORKFLOW	Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow	Configure a workflow system.
Workflow Notifications	SPB_WF_NOTIFY	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Workflow, Workflow Notifications • Services Procurement, Define Services Procurement, Workflow Setup, Workflow Notifications	Enable or disable notifications for activities in the requisition fulfillment process. See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Defining Notification Templates for Approval Workflow.
Automatic Sourcing	SPF_AUTOSOURCE	• Services Procurement, Define Services Procurement, Sourcing Setup, Automatic Sourcing • Set Up Financials/Supply Chain, Product Related, Services Procurement, Workflow, Automatic Sourcing	Specify the rules for automatic sourcing.

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Page Name	Object Name	Navigation	Usage
Define Template	WL_TEMPLATE	• Services Procurement, Define Services Procurement, Workflow Setup, Notification Template • Set Up Financials/Supply Chain, Product Related, Services Procurement, Workflow, Email Definition	Specify the content of email notifications that are used in PeopleSoft Services Procurement workflow. See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Entering Generic Template Definitions.
Blackberry Email Responses	WL_TEMPL_RESP	Select the Blackberry Email Response tab on the Define Templates page.	Create email responses.
Generic Template Definition	WL_TEMPLATE_GEN	• Set Up Financials/Supply Chain, Common Definitions, Approvals, Generic Templates • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Email Notification Templates	Enter generic template definitions.
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs	Use this page to identify the URL that the notification process places within the email. This URL is then used to navigate the user back into their system to perform the required task. **Note.** An example of the format to use is *http://servername/psp /employeeportaldomain/*.
Services Procurement Installation Options	INSTALLATION_SP	Services Procurement, Define Services Procurement, General Setup, Installation Options	Set up PeopleSoft Services Procurement installation options.
Permission List - Pages	ACL_MENU2	PeopleTools, Security, Permissions and Roles, Permission List	Create and maintain permission lists.
Process Definitions	PRCSDEFN	PeopleTools, Process Scheduler, Processes	Define each specific run request by identifying a variety of variables.

Using the Maintain Workflow Page

Access the Maintain Workflow page.

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

Setting Up Workflow Notifications

Access the Workflow Notifications page.

Note. You cannot configure source notification on this page. The system obtains the notification method for sourcing activity from the Sourcing Selection page when a requisition is sourced.

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

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

See Also

PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook, "Using Workflow and Managing Approvals," Defining Notification Templates for Approval Workflow

Setting Up Sourcing Emails

The following steps details the process for scheduling sourcing emails.

1. Enable the Schedule Sourcing Emails option on the Services Procurement Installation Options page.
2. Add APPLICATION_ENGINE Component Permissions to EPSP4000 Permission List.

   Give Full Access to AE_REQUEST page only.
3. Create a new URL identifier named as SP_SRC_EM.

   Use the URL Maintenance page to create the identifier.
4. Create a generic email template named as SP_SRC_EM.

   Use the Generic Template Definition page to create the template.

   Use the following values to create the template:

   - Instructional Text: Type names or email addresses in the To, CC, or BCC fields using semi-colons as separators.
   - Sender: User
   - Subject: %5 requisition %2 has been approved and is ready to be filled.

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- Message Text: %5 requisition %2 has been approved and is ready to be filled. To review the requisition and submit candidates click %10.

  Requisition/Line: %2/%3.

  Project: %4.

  Job Title: %5.

  Service Type: %6.

  Role: %7.

  Location: %8.

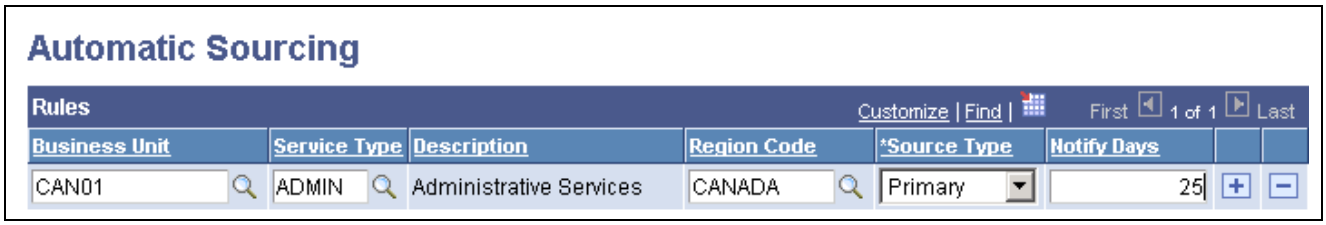
  Start Date: %9.

- Set up the Process Scheduler Job.

  Use the Process Scheduler page to schedule a job and source the email notifications.

Specifying Automatic Sourcing Rules

Access the Automatic Sourcing page.



Automatic Sourcing page

Enter a value into the Service Type field to define sourcing rules for specific service types (per business unit), or leave the Service Type field blank to define sourcing rules for all service types.

If you specify a number in the Notify Days field, you postpone automatic sourcing until the specified numbers of days have passed since the approval date. In this case, the PeopleSoft Application Engine process (SP_WF_SRC) checks requisitions that are approved but not yet filled within the notification days. Once the notification days are reached, the system automatically sources the requisition.

If you leave the Notify Days field blank, requisitions are sourced after approval, and you do not need to run the SP_WF_SRC application engine.

After the requisition is approved, the system automatically sources it based on the selections on this page. If you select a source type of *Primary* and a region code of *Bay Area,* when the requisition is approved, the system automatically sources the requisition to whichever supplier is listed as a primary source type and from the Bay Area region.

This prevents you from having to source each requisition manually.

- If service type and region code have values, the system looks for suppliers by service type and region and matches the source type.
- If only the service type has a value, the system looks for supplies by service type and source type.
- If only region code has a value, the system looks for supplies by region that also match the source type and requisition business unit.

The system searches for the business unit, then service type, then region, and then finds a supplier with a primary source code to match it; where it looks depends on how much information you included.

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Note. If a requisition was sourced in the preceding 24-hours, the Application Engine process does not source it again. If a vendor already submitted a candidate for the requisition, that vendor is excluded from automatic sourcing.

Setting Up Work Order Workflow

This section discusses how to use workflow approval setup.

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Pages Used to Set Up Work Order Workflow

Page Name	Object Name	Navigation	Usage
Approval Transaction Registry	SAC_AW_TXN	• Set Up Financials/Supply Chain, Utilities, Approvals, Approval Transaction Registry • Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the Approval Transaction Registry link on the Maintain Workflow page.	Set up the transaction registry. See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Defining the Approval Transaction Registry.
Configuration Options	SAC_AW_TXN_NOTIFY	Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the Approval Transaction Registry link on the Maintain Workflow page. Click the Configuration Options tab.	Define the workflow configuration options.
User List Definition	SAC_USER_LIST	• Set Up Financials/Supply Chain, Utilities, Approvals, User List • Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the User List Definition link on the Maintain Workflow page.	Set up user list definitions. See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Defining User Lists.
Approval Process Definition	SAC_AW_PRCS_MAIN	• Set Up Financials/Supply Chain, Utilities, Approvals, Approval Process • Services Procurement, Define Services Procurement, Workflow Setup, Maintain Workflow Click the Approval Process Definition link on the Maintain Workflow page.	Define workflow approval process stages. See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Setting Up Approval Workflow Process Definitions.

Using Workflow Approval Setup

This section discusses workflow approval setup.

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PeopleSoft Service Procurement delivers work order workflow preconfigured. Use the delivered workflow configuration as is or you can make minor adjustments for the business practices. You should understand the workflow technology before making any changes.

Changing Approval Criteria

To change workflow approval criteria:

1. Access the Approval Process Definition using the *SP_WORKORDER* value.
2. Click Criteria to access the Criteria Definition page.

   For each path and step, you can set up criteria that the system uses to determine whether you go down that path or perform that step.

   For example, if you have an approval path that requires approval for work orders over 10,000 USD, the system looks at submitted work order, and compares the amount to the criteria on the Criteria page. If it is under 10,000, the system automatically approves it. If it is over 10,000, the system determines which step to perform.
3. Access the Approval Step Definition - Step page.

   Set the number of approvers needed. This determines how many levels or approval or number of approvers are required for work orders.

   See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Setting Up Approval Workflow Process Definitions.

Changing Approvers

To modify approvers:

1. Access the User List page using the *SP_WORKORDER* value.
2. The system is set up to use the value for the Supervisor field that appears on the User Profile - Workflow page.

   If you want the workflow to select an approver by role, you change the User List Source to Role, and select a role from the prompt table.

   See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Defining Users for Approval Workflow.

   See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Roles for Role Actions, page 96.

   See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Setting Up Approval Workflow Process Definitions.

Changing Templates

To change a delivered workflow template:

1. Access the Generic Templates page.

   You can modify existing templates or create new ones using this page.
2. Add the new or revised template to the appropriate workflow action on the Approval Transaction Registry page using the Template Name field in the Notifications group box.

   See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Defining Notification Templates for Approval Workflow.

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See *PeopleSoft Enterprise Supply Chain Management 9.0 Common Information PeopleBook*, "Using Workflow and Managing Approvals," Defining the Approval Transaction Registry.

Using Requisition Approval Workflow

This section discusses how to use the requisition approval process.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology

Pages Used for Requisition Approval Workflow

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

Using the Requisition Approval Process

Access the Requisition Approval page.

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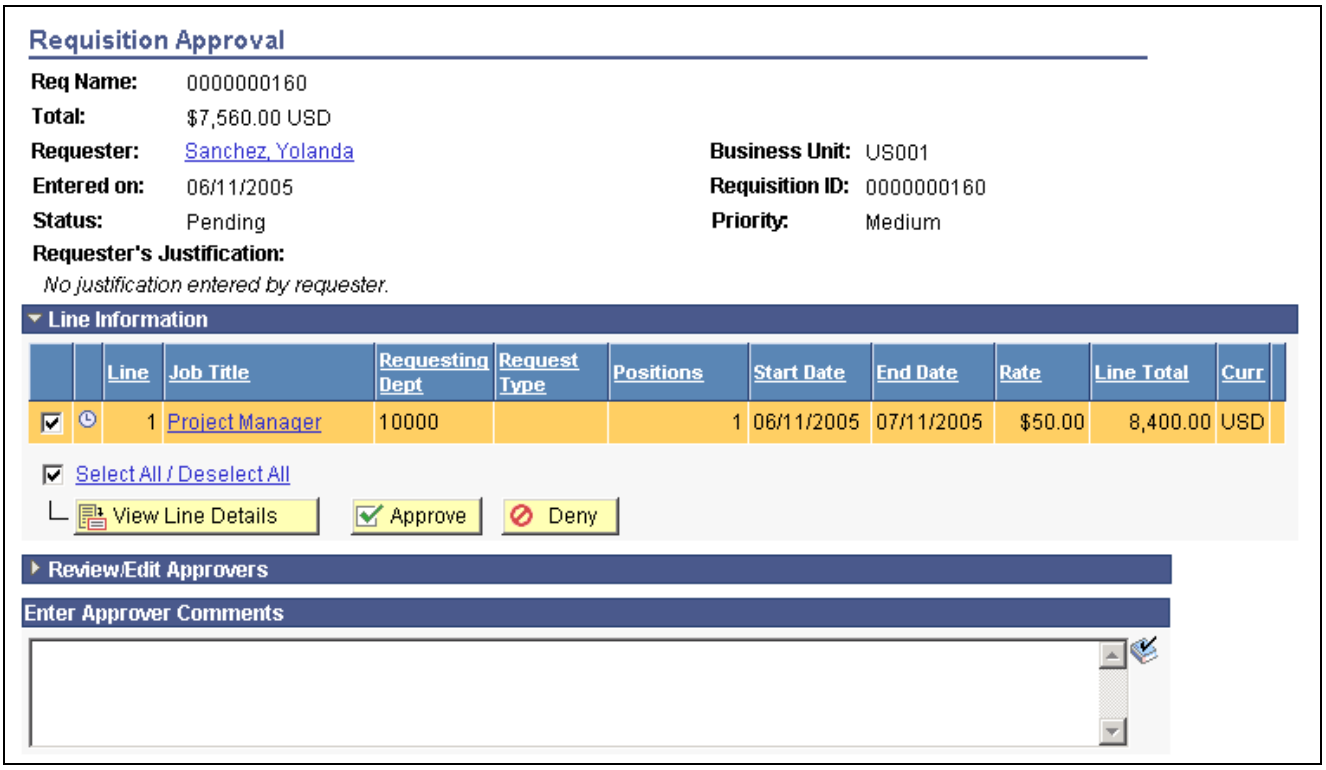

Requisition Approval page (1 of 2)

Requisition Approval page (2 of 2)

Use the Requisition Approval page to approve, deny, or hold a requisition during the workflow approval process. You can also add approvers and reviewers to the workflow routing. If you are a reviewer, this page is display only.

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

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Deny Click to deny this requisition. A worklist entry is sent to the original requester with any comments that the approver enters.

Note. When approvers click this button, they automatically access the Deny Requisition Confirmation page, where they can enter a reason code and comments for the denied transaction line.

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

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

Confirmation

Use this section to view the confirmation number that is assigned to the requisition upon approval.

Review/Edit Approvers

Click to enter another approver or reviewer for this requisition. This approver is added after the approval. The system adds the requisition to the new approver's worklist, and the approver must approve the requisition before it can continue through the approval process. Any combination of approvers and reviewers can be added to this requisition by clicking the Insert Approver button.

Note. There is also another identical button that is used for another function. Click the Start New Path button to start a new approval path for the requisition approval process.

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

Note. If you click the Start New Path button, this field is used to add a new approver or reviewer to the new requisition approval path.

Note. Once a requisition is fully approved, it is removed from the reviewer's to do list whether or not it has actually been reviewed. The requisition then appears on the worklist belonging to the service coordinator responsible for sourcing the requisition.

See Also

Chapter 14, "Creating and Managing Requisitions," page 211

Using the Work Order Approval Workflow

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

See Also

Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology

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Pages Used for Work Order Approval Workflow

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

Using the Work Order Approval Process

Access the Work Order Approval page.

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

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

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

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

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

See Also

Chapter 18, "Managing Work Orders," page 281

Reassigning Tasks

You can reassign tasks along the workflow process to other users, either temporarily or indefinitely. This enables a requester, approver or service coordinator to reassign a single task or all tasks during a specific date range. The system administrator can also assign user tasks either during a specific date range or indefinitely to another user.

This section discusses how to:

- Reassign tasks temporarily.
- Reassign tasks indefinitely.
- Reassign specific tasks.

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

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Pages Used to Reassign Tasks

Page Name	Object Name	Navigation	Usage
General Profile Information	USER_SELF_SERVICE	My System Profile	Reassign all tasks temporarily.
Workflow	USER_WORKFLOW	PeopleTools, Security, User Profiles, User Profiles, Workflow	Reassign all tasks either temporarily or indefinitely.
Worklist	WORKLIST_REASSIGN	Worklist, Worklist Details, Reassign	Reassign a specific task.

Reassigning Tasks Temporarily

Access the General Profile Information page.

Select the alternate user ID for the individual to whom you want to reassign your tasks during a specified duration of time.

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

Reassigning Tasks Indefinitely

Access the User Profile - Workflow page.

Use this page to reassign tasks to another user for an indefinite period of time.

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

Supervising User ID Enter the supervisor user ID for the user to whom the task is to be reassigned.

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

Reassigning Specific Tasks

Access the Worklist page.

Click the Reassign button.

User ID Enter the user ID.

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CHAPTER 9

Establishing and Managing the MSP Environment

This chapter provides an overview of the Managed Services Provider (MSP) environment and discusses how to:

- Set up the MSP environment.
- Process MSP transactions.

Understanding the MSP Environment

In an MSP environment, the MSP manages requisitions from customers, and also takes on the role of service coordinator by sourcing requisitions to their own staff or third-party service providers. A markup is charged by the MSP for this service. In addition, the MSP may "host" external suppliers acting as service coordinators for their customers.

In order to support this business process, the concept of MSP markups is supported in the PeopleSoft Services Procurement product. MSP markup functionality is only active when the installation is set for an MSP environment. Suppliers that are part of the MSP's internal organization are identified when setting their source type to *Internal* in the supplier network.

Warning! If you set the installation options to an MSP environment, you will experience implications in the way rates are displayed and calculated throughout the system. Therefore this should only be done if the organization operates in an MSP environment.

Markups

When the MSP acquires resources, an additional markup is applied on top of the supplier's rate in order to cover the MSP cost for managing the process. You define the MSP fee at the business unit level, with override available at the service type level. The MSP fee is effective dated, which indicates that the rate in effect at the time services are performed is the rate that is used for work order consumption and invoicing purposes.

The list below indicates the various ways in which MSP information is displayed to services coordinators, internal provider contacts, requesters, requisitions approvers, and external providers.

- Service coordinators and internal provider contacts view amounts that include MSP markup fees, as well as view the breakdown between supplier rate and MSP rate, which makes up the total amount shown.
- Requesters, requisition approvers, and work order approvers view amounts that include MSP markup fees, but they do not have visibility of the MSP markup amount that is included in the total amount shown unless they have been given a role associated with the role action for viewing the MSP breakdown.
- External provider contacts view amounts that do not include MSP markup.

  MSP markup fees are also included on the supplier invoice when the service provider is from an internal supplier.

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Note. In the MSP environment, the filled amount for a requisition may not match the work order amount. This will occur if the MSP rate changes between creation of the requisition line and creation of the work order.

Common Element Used in This Chapter

The following definitions are used throughout this chapter.

Managed Services Provider (MSP) An organization that manages the sourcing and filling of service requisitions on behalf of their customers.

Setting Up the MSP Environment

To define MSP percentage, use the MSP Fees by Business Unit (SPB_MSP_BY_BU) component. To define MSP percentage or rate, use the MSP Fee by Service Type (SPB_MSP_BY_SRVC) component.

To set up supplier by business unit, use the Supplier by Business Unit (SPM_SPLR_BY_BU) component.

This section discusses how to:

- Set up installation options.
- Define MSP by service type.
- Set up MSP fees by business unit.
- Set up the supplier network.

Pages Used to Set Up the MSP Environment

Page Name	Object Name	Navigation	Usage
Services Procurement Installation Options	INSTALLATION_SP	• Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement • Services Procurement, Define Services Procurement, General Setup, Installation Options	Define PeopleSoft Services Procurement installation options.
Services Procurement Business Unit Definition	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options • Services Procurement, Define Services Procurement, General Setup, Business Unit Definition, Services Procurement Definition	Define PeopleSoft Services Procurement business units.

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Page Name	Object Name	Navigation	Usage
Service Types	SPB_ROLE_TYPE	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Services, Service Types • Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types	Define service types.
MSP Fee by Service Type	SPB_MSP_BY_SRVC	Click the Manage MSP Fees button on the Service Types page.	Define the MSP fee percentage or rate.
MSP Fees by Business Unit	SPB_MSP_BY_BU	Click the Manage by MSP Fees button on the Services Procurement Business Unit Definition page.	Define MSP fees percentage.
Networked Supplier Details	SPM_SPLR_BY_BU_PG	• Services Procurement, Define Service Suppliers, Suppliers by Business Unit • Services Procurement, Define Services Procurement, Service Supplier Setup, Supplier Network Setup Click the Supplier link in the Supplier Network Setup page or select a new supplier and click the Add button.	Create the supplier network. Associate suppliers with PeopleSoft Services Procurement business units.

Setting Up Installation Options

Access the Services Procurement Installation Options page.

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Services Procurement Installation Options page

MSP Installation (managed services provider installation) Click to enable the managed services provider functionality in PeopleSoft Services Procurement. This check box should not be selected unless the organization is an MSP.

If selected, the PO Work Order Integration and PO Service Contracts check boxes are disabled. The HCM Integration check box will also be disabled.

Conversely, if the PO Work Order Integration or HCM Integration check boxes are selected, the Managed Services Provider Installation check box is disabled.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options

Defining MSP by Services Type

Access the MSP by Service Type page.

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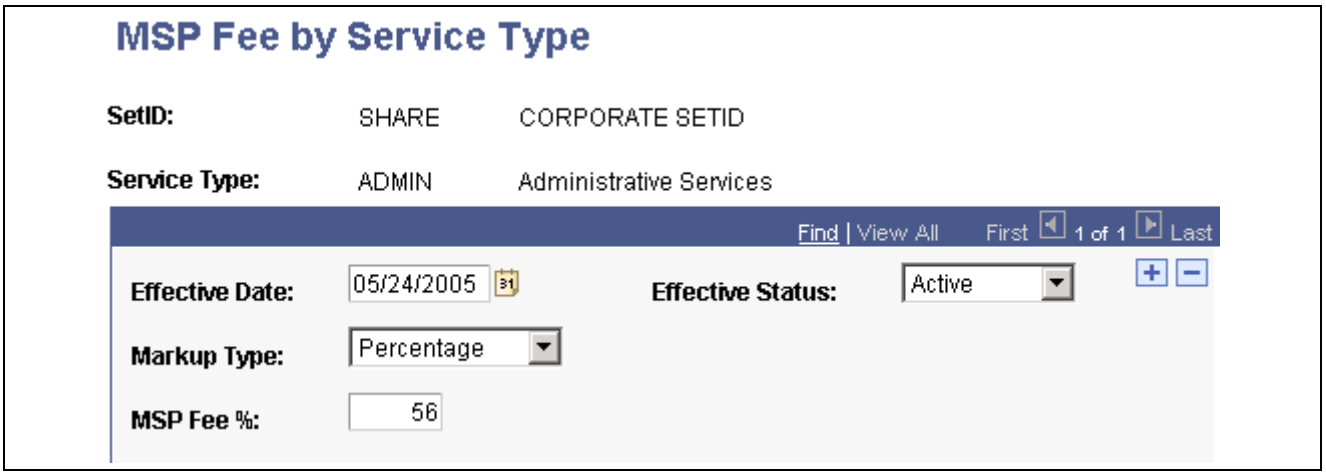

MSP Fee by Service Type page

Markup Type For service types with a service method of *Resource,* select the markup type of *Percentage* or *Rate.*

Note. It is not possible to select Markup Type for service types with a service method of Deliverable. In this case only percentage markups are available.

Managed Services Provider Fee % If the markup type is Percentage, enter a percentage by which the managed services provider will mark up the supplier rate for performing the service coordinator function.

Note. The MSP fee that you define on the Service Type page will override the business unit MSP and default onto requisitions, work orders, and timesheets. If there is no fee defined for the service type, the MSP fee defined at the business unit level will be used.

Rate If the markup type is Rate, enter a rate by which the managed services provider will mark up the supplier rate for performing the service coordinator function.

Note. The MSP fee that you define on the Service Type page will override the business unit MSP and default onto requisitions, work orders, and timesheets. If there is no fee defined for the service type, the MSP fee defined at the business unit level will be used.

Unit of Measure If the markup type is Rate, enter a unit of measure for the specified markup rate.

Setting Up MSP Fees by Business Unit

Access the MSP Fees by Business Unit page.

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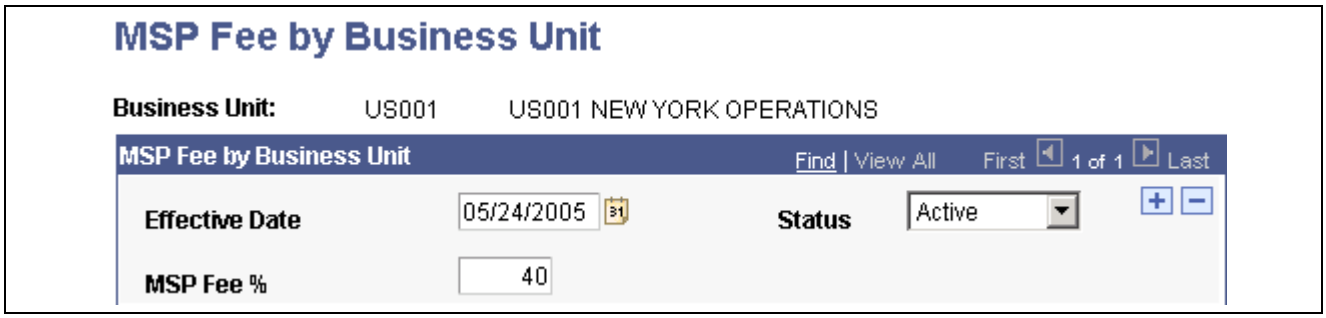

MSP Fees by Business Unit page

The Manage by MSP Fees link will appear only when you select the Managed Services Provider Installation check box on the Services Procurement Installation Options page.

MSP Fee % Enter a percentage by which the managed services provider will mark up the supplier rate for performing the service coordinator function.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 26

Setting Up the Supplier Network

Access the Supplier Network page.

Source Type Select *Internal* to indicate that the supplier is part of the MSP organization for this business unit. If the service provider is internal, the supplier providing the services will view and be paid the fully loaded rates.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining the Supplier Network Setup, page 77

Processing MSP Transactions

This section discusses how to:

- Use MSP with requisitions.
- Source with MSP.
- Submit bids with MSP.
- Create batch invoices with MSP.
- View invoice line summaries with MSP.

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Pages Used to Process MSP Transactions

Page Name	Object Name	Navigation	Usage
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisition	Enter basic service requisition information.
Manage Requisition	PV_REQ_STATUS	Services Procurement, Manage Requisitions	Manage requisitions that are entered by the requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.
Manage Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Selection	SPR_SOURCE_SELECT	Click the Sourcing Select button on the Manage Sourcing page.	Enter sourcing requirements.
Incoming Bids	SPF_SUP_COM_IN	Services Procurement, Maintain Bids (external)	View incoming bids.
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Services Procurement, Review Reqs/Submit Bids (external)	Review requisitions sourced to the supplier.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Bid button on the Supplier Sourcing Review page.	Submit bids.
Supplier Bid Response	SPF_SUP_BIDRSP1	Click the Create Bid button on the Incoming Bids - Summary page.	Reply to bids.
Work Order - Service	SPF_WO_REQ_VEN_DT	Services Procurement, Manage Services Work Orders Click the Add button or click an existing work order link on the Manage Services Work Order page.	Enter work order detail information.
Work Order - Cost	SPF_WO_COST_PO_PG	Click the Cost tab on the Work Order - Service page.	Enter cost information for the work order.
Create Batch Invoice	SPF_GEN_CLINV	Service Procurement, Services Settlement, Create Batch Invoices	Generate and print invoices.

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Page Name	Object Name	Navigation	Usage
Create Manual Invoice	SPF_INV_HDR_ADD	Services Procurement, Manage Invoices Select a business unit or invoice ID and click the Add button on the Manage Invoices page.	Create invoice header information.
Manage Invoice - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoice page.	Modify the selected invoice.
Manage Invoice - Line Details	SPF_INV_TIME_DTL	For resource based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View invoice line details or make adjustments.

Using MSP with Requisitions

Access the Create Requisition page.

Supplier Rate If you have entered a Rate, the system provides a Supplier Rate by subtracting the MSP rate from the Rate.

This field does not display to requesters or approvers.

MSP Rate Displays the MSP rate for this requisition. This field displays to Service Coordinators only. The system provides this default value from the MSP Fee by Business Unit page.

Rate Enter a total rate this requisition. If you are using a rate sheet, the system provides the default value from the rate sheet, which you can override here.

If there is a rate sheet, the system adds the MSP rate to the Supplier Rate to calculate the rate.

MSP Fee % (managed services provider fee percentage) Displays the MSP fee percentage for this requisition. This field displays to service coordinators only.

See Also

Chapter 14, “Creating and Managing Requisitions,” page 211

Sourcing with MSP

Access the Sourcing Selection page.

MSP Rate Displays the MSP rate for this requisition. This field displays to Service Coordinators and MSP supplier contacts only. The system provides this default value from the MSP Fee by Business Unit page.

Loaded Rate Displays the total rate for this requisition, supplier rate plus MSP Rate. This field does not display to non-MSP Service Provider contacts.

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See Also

Chapter 15, “Managing Requisition Sourcing,” page 237

Submitting Bids with MSP

Access the Submit Bid page.

Save for Later Click to save all the submittal data without submitting the bid to the service coordinator. When you click this button, the system sets the bid status to Saved. After saving a bid, the system takes you to the draft bid page.

See Also

Chapter 16, “Submitting and Managing Bids,” page 253

Creating Batch Invoices with MSP

Access the Create Invoice page.

Internal Supplier Select to indicate that the supplier is internal and that the MSP markup will be included in the invoice amount.

See Also

Chapter 22, “Managing Settlements,” page 359

Viewing Invoice Line Summaries with MSP

Access the Manage Invoices - Line Summary page.

Estimated Tax The MSP fee is not included in the tax calculation for external suppliers, but is for internal suppliers.

Estimated Total The MSP fee is included in the totals for internal suppliers.

See Also

Chapter 22, “Managing Settlements,” page 359

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CHAPTER 10

Establishing and Managing VMS

This chapter provides an overview the Vendor Managed Services (VMS) and discusses how to:

- Set up VMS.
- Process VMS transactions.

Understanding VMS

The VMS provider manages enterprise service requests, and also takes on the role of service coordinator by routing service requests to multiple staffing suppliers. VMS providers manage the fulfillment process by maintaining work orders, time reports, and invoicing for the enterprise. VMS providers are paid for all services performed by the suppliers in their network at a rate that includes the VMS markup rate or percentage.

In order to support this business process, the concept of VMS is supported in the PeopleSoft Services Procurement product. VMS functionality is only active when you select the Enable VMS option for a Services Procurement business unit or service type. The service type level is an override to the business unit. Once you enable the VMS option, you must specify a VMS supplier and location, as well as a rate and supplier service coordinator or service team that correspond to the VMS provider in order to create VMS managed requisitions and work orders for the business unit.

Note. A service team must have a least one coordinator associated with the VMS supplier to be available for selection as a VMS team.

Markups

When the VMS provider acquires resources, an additional markup is applied on top of the supplier's rate in order to cover the VMS cost for managing the process. You define the VMS fee at the business unit level, with override available at the service type level. The VMS fee is effective dated, which indicates that the rate in effect at the time services are performed is the rate that is used for work order consumption and invoicing purposes.

The list below indicates the various ways in which VMS information is displayed to services coordinators, requesters, approvers, supplier service coordinator and service coordinator teams.

- Service coordinators and provider contacts internal to the VMS can view amounts that include VMS markup fees, as well as view the breakdown between supplier rate and VMS rate, which makes up the fully loaded rate.
- Requesters, requisition approvers, and work order approvers view amounts that include VMS markup fees, but they do not have visibility of the VMS markup amount that is included in the total amount shown unless they have been given a role associated with the SP_VMS_MSP_BREAKDOWN role action.

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- Sourcing notification routes to the supplier service coordinator or service coordinator team defined for the VMS.

  The service coordinator or team then sources the requisition to suppliers in the VMS supplier network. The VMS markup information is visible to the VMS Service Coordinators and suppliers internal to the VMS.

  Note. VMS rates are not visible to external suppliers.

- External provider contacts view amounts that do not include VMS markup.

  VMS markup fees are included on all supplier invoices for VMS managed work orders. These invoices are generated for the VMS supplier rather than the end supplier.

Note. Markups can only be defined for the markup type of "percentage," and not "rate."

Common Elements Used in This Chapter

VMS (vendor managed services)	Provides a single point of contact for an enterprise for their services needs. A VMS provider can route approved service requests to multiple staffing services suppliers for fulfillment and then manage the work order, time reporting, and invoice settlement processes for those service companies.
Third Party Supplier	The service provider who performs the service works for a third party supplier.
Fully Loaded Rates	Includes both the supplier rate and the VMS markup rate.

Setting Up VMS

To define VMS by business unit and service type, use the VMS by Business Unit and Service Type (SPB_VMS_BUSRVC_LST) component.

To define VMS by business unit, use the VMS by Business Unit (SPB_VMS_BY_BU) component. To define VMS percent by business unit, use the VMS Percent by Business Unit (SPB_VMS_INFO_BU) component.

To define VMS details by supplier, business unit, and service type, use the VMS Details by Supplier, Business Unit, and Service Type (SPB_VMS_INFO_SRV) component.

To change the VMS service coordinator, use the Replace VMS Coordinator component (SPB_REPL_VMS_SC).

This section discusses how to:

- Enable the VMS option for a Business Unit.
- Define VMS suppliers by business unit.
- Define VMS details by supplier and business unit.
- Define VMS supplier by business unit and service type.
- Define VMS details by supplier, business unit, and service type.

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Pages Used to Set Up VMS

Page Name	Object Name	Navigation	Usage
Services Procurement Business Unit	BUS_UNIT_TBL_SP	• Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn • Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Options	Define PeopleSoft Services Procurement business units. Define your own consolidation structures for accounting and reporting purposes.
VMS Supplier by Business Unit	SPB_VMS_BY_BU	Click the Manage VMS Supplier link on the Services Procurement Bus Unit page.	Define the effective dated VMS vendor and vendor location information.
VMS Details by Supplier and Business Unit	SPB_VMS_INFO_BU	Click the Manage VMS Details button on the VMS Suppliers by Business Unit page.	Define effective dated fees by percentage and assign related service coordinator or coordinator team for VMS by business unit.
VMS Supplier by Business Unit and Service Type	SPB_VMS_BU_SRVC	• Click the VMS by BU and Service Type link on the Services Procurement Bus Unit page. • Services Procurement, Define Services Procurement, Service Type Setup, VMS by BU and Serv Type	Use this page to indicate whether there is an override of the business unit VMS settings for this service type and view the current VMS supplier and location.
VMS Details by Supplier, Business Unit, and Service Type	SPB_VMS_INFO_SRVC	Click the Manage VMS Details button on the VMS Supplier by BU and Service Type page.	Use this page to define effective dated VMS markups and assign related service coordinator or team by business unit and service type.

Enabling the VMS Option for a Business Unit

Access the Services Procurement Bus Unit page.

Enable VMS Select to determine whether requisitions or work orders are under VMS management by default. If you select this option, you can define markup costs that are charged by the VMS for service that do not have a service type level VMS override defined.

If you disable this option and there are existing VMS rows, the system populates a warning message to inform you that the VMS rows are ignored when creating new requisitions and work orders.

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Note. VMS functionality is not available if you have selected the MSP installation option on the Services Procurement Installation Options page.

Note. If you select this option, you must define at least one VMS supplier and VMS fee for the designated business unit.

Defining VMS Suppliers by Business Unit

Access the VMS Suppliers by Business Unit page.

VMS Suppliers by Business Unit page

Effective Date Enter the date to indicate when the rate is in effect. This date is used to determine the appropriate rate at the time services are performed for work order consumption and invoicing purposes.

VMS Supplier Enter the name of the supplier that will provide vendor management for the specified business unit.

VMS Location Enter the location of the supplier that will provide vendor management for the specified business unit.

Defining VMS Details by Supplier and Business Unit

Access the VMS Details by Supplier and Business Unit page.

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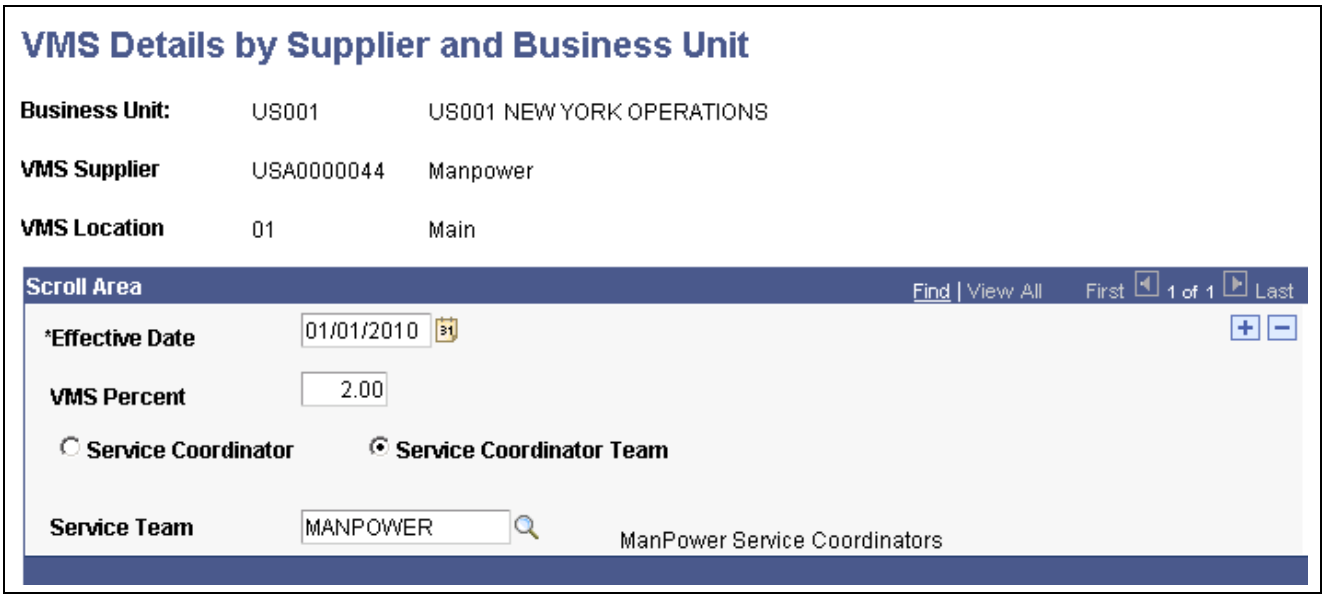

VMS Details by Supplier and Business Unit page

VMS Percent Enter VMS fee percentage.

Service Coordinator Select to identify a specific service coordinator as the VMS provider.

Service Coordinator Team Select to identify an entire service coordinator team as the VMS team.

Coordinator Select a specific service coordinator.

Note. This option only appears when the Service Coordinator option is selected.

Service Team Select a specific team of service coordinators.

Note. This option only appears when the Service Coordinator Team option is selected.

Note. Rate based VMS fees are defined at the Service Type level only.

Defining VMS Suppliers by Business Unit and Service Type

Access the VMS Supplier by BU and Service Type page.

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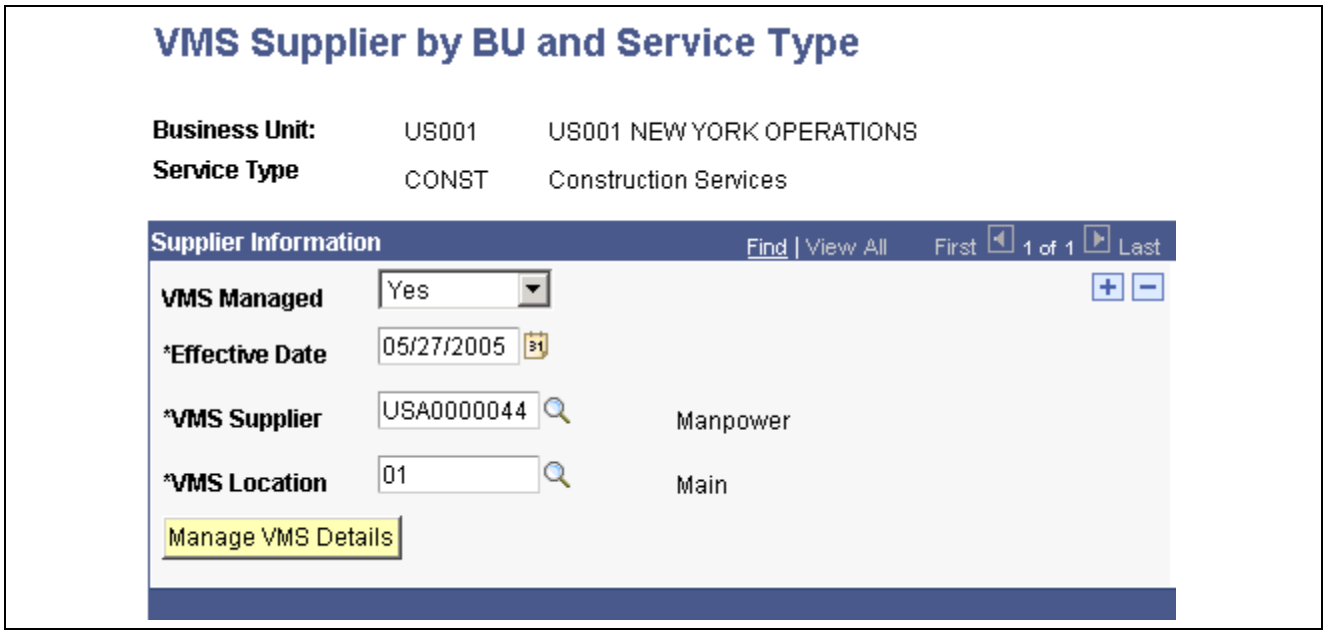

VMS Supplier by BU and Service Type page

VMS Managed Select an available effective-dated VMS managed option: Values include Yes, No, and BU (business unit).

Yes: If you select this option, the VMS Supplier and VMS Location fields, and the Manage VMS Details button is available.

Note. You must associate a VMS supplier and location, and related VMS details for the supplier, business unit, and service type when you select this option.

No: If you select this option, requisitions created for this effective date will not be VMS Managed.

BU: If you select this option, requisitions or work orders created for this effective date will follow the VMS setup defined at the Business Unit level.

Manage VMS Details Click to access the VMS Details by Supplier, Business Unit, and Service Type page, where you can define rates and service coordinator or team for the VMS.

Defining VMS Details by Supplier, Business Unit, and Service Type

Access the VMS Details by Supplier, Business Unit, and Service Type page.

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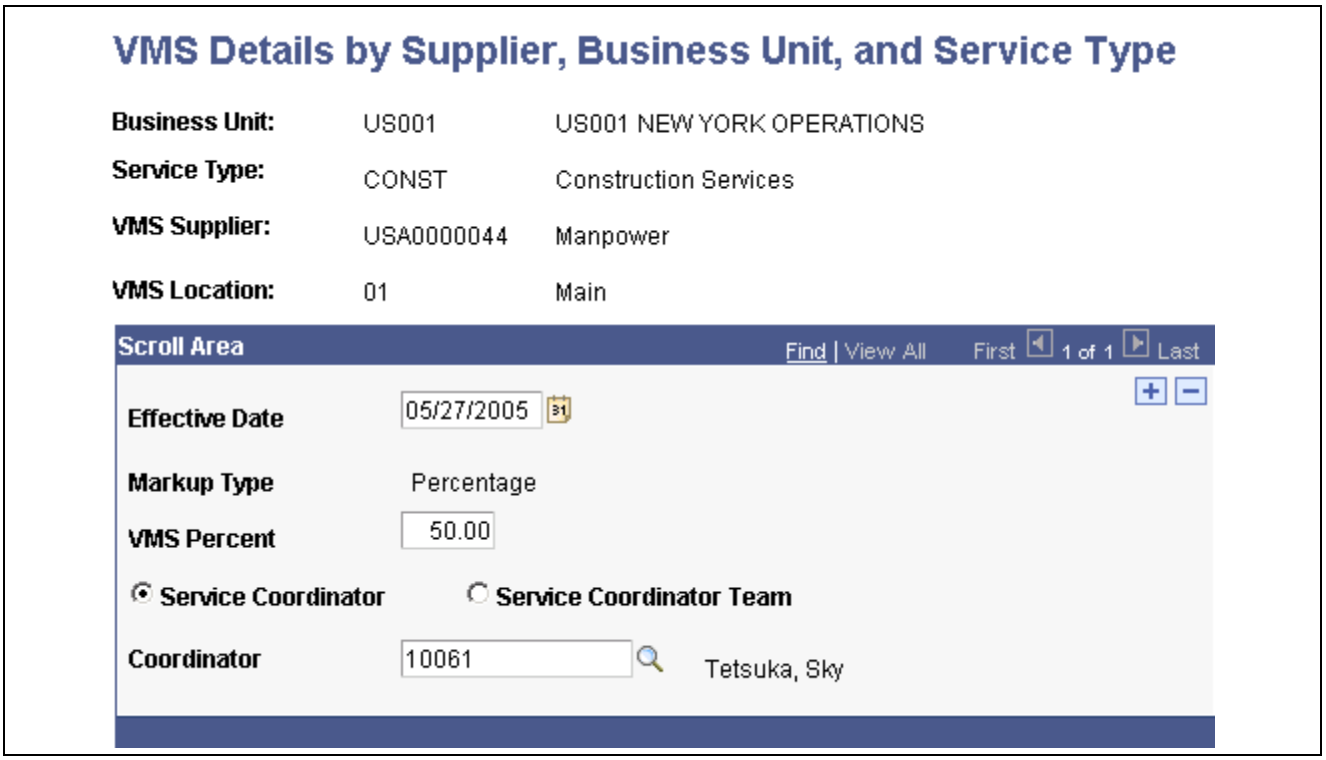

VMS Details by Supplier, Business Unit, and Service Type page

The markup types available depends on the selected service type. Deliverable service types must have a markup type of *Percentage*, but resource service types can have a markup type of either *Percentage* or *Rate*. The other fields on the page vary based on the selected markup type. When the markup type is *Percentage*, the *VMS Percent* field appears on this page. However, when the markup type is *Rate*, the VMS Rate, Currency, and UOM (unit of measure) fields appear on this page.

Markup Type For service types with a service method of *Resource,* select the markup type of *Percentage* or *Rate.*

Note. It is not possible to select Markup Type for service types with a service method of Deliverable. In this case, only percentage markups are available.

Processing VMS Transactions

This section discusses how to:

- Use VMS with requisitions.
- Use VMS with requisition management.
- Use VMS with sourcing and bid management.
- Use VMS with work orders.
- Use VMS with invoices.

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Pages Used to Process VMS Transactions

Page Name	Object Name	Navigation	Usage
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisition	Enter basic service requisition information.
Manage Requisition	PV_REQ_STATUS	Services Procurement, Manage Requisitions	Manage requisitions that are entered by the requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.
Manage Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Selection	SPR_SOURCE_SELECT	Click the Sourcing Select button on the Manage Sourcing page.	Enter sourcing requirements.
Incoming Bids	SPF_SUP_COM_IN	Services Procurement, Maintain Bids (external)	View incoming bids.
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Services Procurements, Review Reqs/Submit Bids (external)	Review requisitions sourced to the supplier.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Bid button on the Supplier Sourcing Review page.	Submit bids.
Supplier Bid Response	SPF_SUP_BIDRSP1	Click the Create Bid button on the Incoming Bids Summary - Inbox page.	Reply to bids.
Work Order - Service	SPF_WO_REQ_VEN_DT	Services Procurement, Manage Services Work Orders Click the Add button or select an existing work order link on the Manage Services Work Order page.	Enter work order detail information.
Work Order - Cost	SPF_WO_COST_PO_PG	Services Procurement, Manage Services Work Orders Click the Cost tab on the Work Order - Service page.	Enter cost information for the work order.
Create Batch Invoice	SPF_GEN_CLINV	Service Procurement, Services Settlement, Create Batch Invoices	Generate and print invoice.

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Page Name	Object Name	Navigation	Usage
Create Manual Invoice	SPF_INV_HDR_ADD	Services Procurement, Manage Invoices Enter Business Unit and/or Invoice ID and click the Add button on the Manage Invoices page.	Create invoice header information.
Manage Invoice - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoice page.	Modify the selected invoice.
Manage Invoice Line Details	SPF_INV_TIME_DTL	For resource based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View invoice line details and/or make adjustments.
Replace VMS Service Coordinator	SPB_REPL_VMS_SC	• Services Procurement, Maintain Users, Replace VMS Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup, Replace VMS Coordinator • Services Procurement, Define Services Procurement, User and Team Setup, Services User Setup Select a person ID in #3, and then click the Edit Service Provider link in 4. Click the Replace VMS Coordinator link.	Use this page to replace VMS service coordinators.

Using VMS with Requisitions

Access the Create Requisitions page.

If a requisition is under VMS management, the VMS rate, service coordinator or team ID, percentage information, and VMS supplier and supplier location fields appears on the requisition page. The system checks to ensure that the VMS option is specified at the BU or BU and Service type level.

Note. When the requisition is under VMS management, the fully loaded rate that displays on the requisitions includes VMS markups.

See Also

Chapter 14, “Creating and Managing Requisitions,” page 211

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Using VMS with Requisition Management

Access the Manage Requisitions page.

This page displays fully loaded prices that include the VMS markup for requisition lines that are VMS managed.

Note. If a user has the role action to view the breakdown of VMS rates, the supplier rate, the VMS markup rate, and the fully loaded rate appear on the requisition.

See Also

Chapter 14, "Creating and Managing Requisitions," Managing Service Requisitions, page 232

Using VMS with Sourcing and Bid Management

Access the Sourcing Selection page.

This page displays fully loaded prices that include the VMS markup for requisition lines that are VMS Managed, as well as the breakdown between supplier rate and VMS markup.

The VMS breakdown also appears on the bid management pages for service coordinators and service provider contacts associated with the VMS supplier. Service provider contacts not associated with the VMS supplier only see the rate before VMS.

See Also

Chapter 15, "Managing Requisition Sourcing," page 237

Using VMS with Work Orders

Access the Work Order - Details page.

This page displays VMS Managed information such as VMS supplier and supplier location. If the work order is not under VMS management, no VMS information appears on the work order. If a work order is linked to a requisition, all VMS information defaults onto the work order.

The rate that displays on the work order includes the VMS markup. The VMS markup calculation is based on the markup type defined for the business unit or service type and business unit.

Note. When the markup type is defined as percentage, the system fetches the effective dated VMS percentage from the setup tables and overrides the requisition VMS percentage with the new effective date percentage on work order.

When the markup type is defined as rate, the system fetches the effective dated VMS rate, currency, and unit of measure information from the setup tables and overrides the requisition VMS rate with the new effective date VMS rate on work order.

See Also

Chapter 18, "Managing Work Orders," page 281

Using VMS with Invoices

Access the Create Invoice page.

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VMS Managed Select to view VMS managed work order time and progress logs that are available for selection. All invoices for VMS managed work orders are consolidated for end suppliers under the same VMS supplier. Invoices are paid to the VMS supplier for all suppliers under their management.

Note. This option is only available if there is a VMS supplier selected.

See Also

Chapter 22, "Managing Settlements," Creating Invoices, page 362

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CHAPTER 11

Using Service Contracts

This chapter provides an overview of service contracts and discusses how to create service contracts.

Understanding Service Contracts

You must have PeopleSoft Purchasing installed to take advantage of services contracts. Service contracts are used to secure standard rates with suppliers to hire service providers at specific rates.

When service coordinators source a requisition and include contract suppliers, the system finds all the contract suppliers that match the role and unit of measure combination. Service contracts are only applicable to resource-based roles that have a rate associated with them.

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

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

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

Creating Service Contracts

This section discusses how to:

- Create service contracts.
- Use service contracts in bidding.
- Use service contracts with purchase orders.

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Pages Used to Create Service Contracts

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

Creating Service Contracts

Access the Contracts page.

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

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options.

To create a service contract:

1. Create a new contract using the *General Contract,Prepaid Voucher, Prepaid Voucher w/Advance PO* (prepaid voucher with advance purchase order), *Purchase Order, Recurring PO Voucher* (recurring purchase order voucher), *Recurring Voucher*, or *Release to Single PO Only* contract type.
2. Select *Role* as the type.
3. Enter the resource-based project role as the type ID.
4. Access the Details for Line page.
5. Add the negotiated rate for the vendor location in the Base Price field.
6. Approve the contract by changing the contract status to *Approved.*

See Also

PeopleSoft Enterprise Source to Settle Common Information 9.0 PeopleBook, "Using Voucher and Order Contracts"

Using Service Contracts in Bidding

To check for contract rates on bids:

1. Enter and source a requisition.

   Service coordinators have visibility into those vendors who have contracts.
2. Suppliers bid on the requisition.
3. If the supplier, role, unit of measure, and location match the contract, the system provides the contract rate as a default if less than or equal to the requisition rate.

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Using Service Contracts with Purchase Orders

To check for contract rates with purchase orders:

1. Create a work order.
2. Once the work order is approved, create a purchase order.

If the supplier, role, currency, and location match the contract, the system uses the contract rate if it is less than the work order rate. The system overrides the work order rate with the contract rate when the work order is released.

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CHAPTER 12

Managing Services Projects

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

- Create services projects.
- Manage services projects.

Understanding Services Projects

PeopleSoft Services Procurement facilitates managing projects by enabling service providers to log time directly against work orders and activities that are associated with projects.

When you use projects in PeopleSoft Services Procurement, you can enter and modify project details. You can search or sort projects by different criteria, and you can access the Project Activities page to define activities by project when Project Costing is installed.

Note. Service Projects are only associated to requisitions and work orders through the ChartField distribution. Projects are only available in PeopleSoft Services Procurement if the ChartField configuration is defined with the project ChartField set to a status of Active.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Project and Activities Definitions, page 49

Prerequisites

Set up the following attributes before entering project information when the Project Costing product has been installed:

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

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Project and Activities Definitions, page 49

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 26

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Creating Services Projects

To create services projects, use the Services Projects (SPA_PROJECT) component.

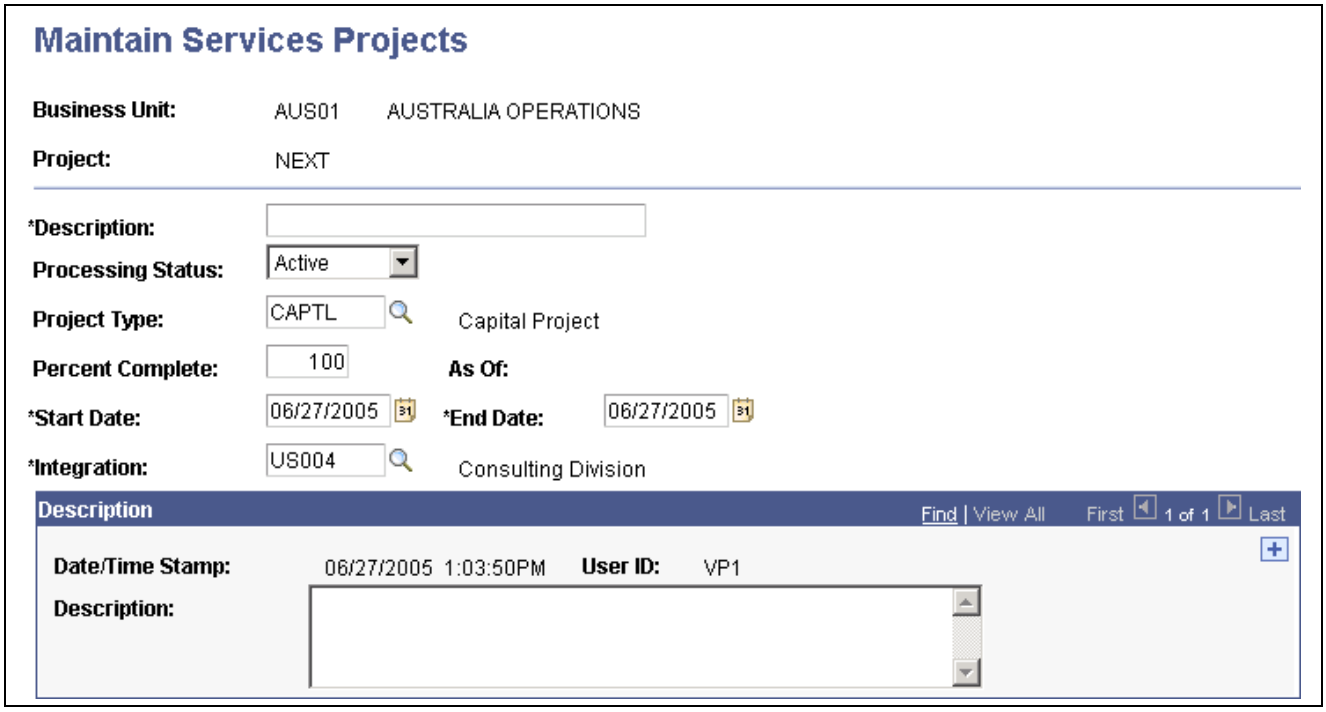
This section discusses how to enter general project information.

Pages Used to Create a Service Project

Page Name	Object Name	Navigation	Usage
Manage Services Projects	SPA_MANAGE_PROJ	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Services Projects	View, search, and sort the list of available projects. Access the project that you want to modify.
Maintain Services Projects	SPA_PROJECT	Click the Add button on the Manage Services Projects page.	Enter general project information.

Entering General Project Information

Access the Maintain Services Projects page.



Maintain Services Projects page

Description Enter the project description.

Processing Status Select a processing status of *Active* or *Inactive*. If you have the PeopleSoft Project Costing installed, you may have projects with a processing status of *Pending*. Pending projects are not accessible from the Services Projects page. You must navigate to PeopleSoft Project Costing to access pending projects.

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

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

Integration Appears if you have installed PeopleSoft Project Costing. Enter a business unit to define the PeopleSoft Project Costing-General Ledger integration template that the system uses to send transactions from PeopleSoft Project Costing to PeopleSoft General Ledger.

Managing Services Projects

This section discusses how to view, search, and sort projects.

Pages Used to Manage Services Projects

Page Name	Object Name	Navigation	Usage
Manage Services Projects	SPA_MANAGE_PROJ	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Services Projects	View, search, and sort the list of available projects. Access the project that you want to modify.
Maintain Services Projects	SPA_PROJECT	Click the Add button on the Manage Services Projects page.	Enter general project information.

Viewing, Searching, and Sorting Projects

Access the Manage Services Projects page.

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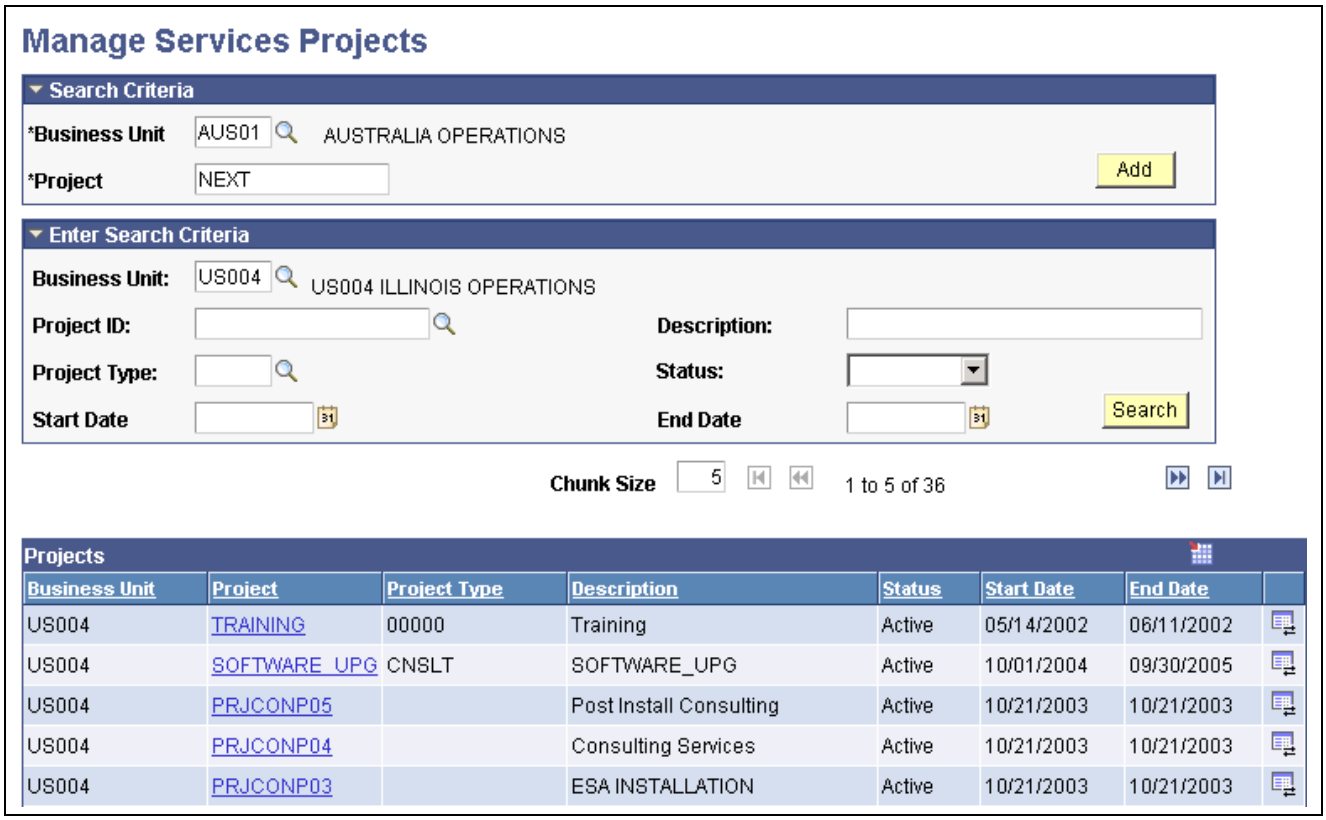

Manage Services Projects page

Roster

Project

Click a project name link to access the Maintain Services Project page.

Click to access the Project Activities page and view the activity that is associated to the project.

Note. This option is only available when PeopleSoft Project Costing is installed.

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CHAPTER 13

Managing Services Activities

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

- Define activities when project costing is not installed.
- Manage activities.

Understanding Activities in PeopleSoft Services Procurement

Activities are specific tasks that you allocate time or progress against. When Project Costing is not installed, activities are generic, not related to projects, and are associated to work orders based on service type or service. Use activities to further define the work order scope.

Understanding Activities When PeopleSoft Project Costing is Installed

When Project Costing is installed, activities are associated to specific projects. This is typically used when service providers are assigned to work on multiple projects in multiple departments concurrently. Use activities on timesheets to break down the various costs that are associated with a project or work orders. In this scenario, any project for which you incur costs directly must contain at least one activity.

Note. When you associate a project to an activity, you must have a project business unit and project defined as a ChartField in order to charge time or progress against it.

Understanding ChartFields When PeopleSoft Project Costing is Installed

Use the Standard ChartField Configuration page to determine which ChartFields are available to use on requisitions and work orders. The values that default onto each ChartField on a requisition line or manual work order come from the business unit or user defaults. You can specify multiple ChartField combinations on a requisition. Those combinations are editable until the requisition line is submitted for approval. ChartField combinations are carried over when a work order is created from a requisition. If a work order is created manually and is not linked to a requisition line, the ChartField combinations are specified on the work order and may be modified until released. The ChartField combinations from the requisition line or work order are subsequently used in the integration with PeopleSoft Purchasing and Accounts Payables.

Prerequisite

When Project Costing is installed, you must create a project in PeopleSoft Project Costing or PeopleSoft Services Procurement before you can assign activities to it.

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Defining Activities When Project Costing is Not Installed

This section discusses how to:

- Define service activity information.
- Associate activities by service.

You can also associate activities by service type.

Pages Used to Define Activities When Project Costing is Not Installed

Page Name	Object Name	Navigation	Usage
Service Activities	SPB_SETID_ACTIVITY	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Service Activities	Define service activities.
Maintain Activities by Service Type	SP_ACT_BY_SVTYP	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Activities by Service Type	Select a service type and associate activities to it.
Maintain Activities by Service	SPB_SRC_ACT	Services Procurement, Define Services Procurement, General Setup, Project/Activity Definitions, Activities by Service	Select a service and associate activities to it.
Work Order Activities	SPF_WO_ACT (resource based), SPF_PRLOG_MS_PG (deliverable-fixed)	Services Procurement, Manage Services Work Order Click the existing work order, select the Work Order - Cost tab, and then click the Activities link.	Select activities to associate with the work order.
Work Order Activities	SPF_WO_RATE_ACT (deliverable-rate based), SPF_PRGLOG_MS_PG (deliverable-milestone)	Services Procurement, Manage Services Work Order Click the existing work order, select the Work Order - Cost tab, and then click the Activities link.	Select activities to associate with the work order.

Define Service Activity Information

Access the Service Activities page.

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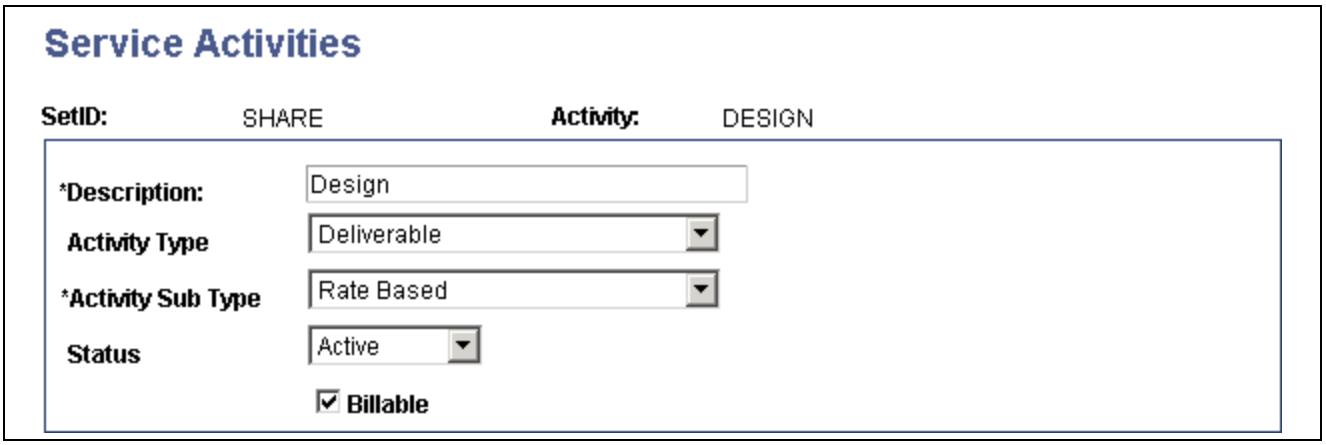

Services Activities page

Description Enter the activity description.

Activity Type Select to indicate whether the activity is resource or deliverable-based.

Activity Sub Type Depending on the value that you select in the Activity Type field, the system dynamically displays values.

If you select *Resource* as the activity type, the system returns values of *Generic Activity* and *Specific Activity*.

If you select *Deliverable* as the activity type, the system returns values of *Milestone* and *Rate Based*.

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

Billable Select if the activity is billable.

Associating Activities by Service

Access the Activity by Service page.

Activity Select an existing activity to associate with a service.

Allow Delete Activity Select to enable the deletion of activities from the Activities by Requisition page when creating a deliverables-based requisition for the service. If you do not select this option, you can delete activities from the Activities by Requisition page when creating a requisition for the service.

Managing Activities

This section discusses how to modify an activity.

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Page Used to Manage Activities

Page Name	Object Name	Navigation	Usage
Maintain Services Activities	SPA_PROJ_ACT	• Click the Add Services Activity link on the Manage Services Activities page. • Click the Activities link on the Manage Services Activities page.	Enter, view, or modify service activity information.

Modifying an Activity

Access the Services Activity page in edit mode.

Modify the Description, Status, and Visibility fields as required.

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

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CHAPTER 14

Creating and Managing Requisitions

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

- Create service resource requisition lines.
- Create service deliverables-based requisition lines.
- Review and submit requisitions.
- Manage service requisitions.
- Cancel service requisition lines.
- Close services requisitions.

Understanding Requisitions

This section lists prerequisites and discusses requisitions.

Prerequisites

Before you enter requisitions into the system, you must:

- Have authorization to process requisitions on the Requisition Authorizations of the Procurement User Preferences page.
- Identify the user ID as a requester on the Requester Setup page, where you add defaults for requisitions.
- Have a role action of SP_REQUESTER.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Service Requester Defaults, page 99

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Roles for Role Actions, page 96

Requisitions

Requesters can use PeopleSoft Services Procurement to create and maintain service requisitions. After you enter and submit a requisition, send it to the approver for approval. Approved requisitions are then sourced to qualified suppliers that meet the requisition requirements. Use tools such as bid factors and supplier scores to rate the best candidates.

On the same requisition, you can add lines for service items using PeopleSoft Services Procurement and commodity items using PeopleSoft eProcurement.

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Requisition Lines

A service requisition is made up of multiple lines. These lines may be a mixture of resource and deliverable services. Requesters can use PeopleSoft Services Procurement to create, edit, cancel, or extend requisition lines. Use PeopleSoft Purchasing to close services requisitions. Lines associated to a resource service method may be created for multiple positions.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Creating Requisitions Online".

Resource Requisition Lines

Resource requisition lines enable you to request the services of an individual service provider. Upon awarding the requisition line to the supplier, the service coordinator or requester generates a services work order and memorializes these attributes as terms and conditions. Upon the work order release, the service provider may create timesheets to record hours worked.

Timesheet information subsequently triggers self billed invoicing functionality for payment to the supplier.

A resource based requisition line may have multiple positions, issue a single sourcing notification to suppliers, and create work orders for each position. The Service Coordinator can fill the requisition line with multiple bids, up the total position quantity. Position information appears on the requisition, approval, sourcing, and bid pages so the requester, service coordinator, and service provider contact can track how many positions are filled or available, as well as obtain average fill rates and amounts for the requisition line.

It is possible to reduce the number of positions on a requisition line that is not already filled. The requester can perform this action so long as the line is not sourced. After sourcing, only the service coordinator can perform this action.

Note. It is not possible to reduce the number of positions below the number of positions that are already filled. If the number of positions is reduced to equal the number of positions that are already filled, the requisition line status is changed to Filled and an email notification is sent to all sourced suppliers having a notification method of "email and worklist".

Deliverables-Based Requisition Lines

Deliverables-based requisition lines reflect requirements generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider. There is no specific service provider in mind for the deliverable-based requisitions, so a statement of work defines the requirements.

Note. Although no specific service provider is assigned initially, it is possible to track individuals on the related work order for security purposes

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You can define a deliverables-based requisition with its unique attributes. These attributes carry over into the sourcing event to analyze and score supplier submittals in accord with the requisition requirements. Upon awarding the requisition line to the supplier, the service coordinator or requester generates a services work order and memorializes these attributes as terms and conditions. Upon the work order release, the service provider contact records progress against a progress log, and you pay the supplier based on milestones, percentages, a fixed amount, or rates.

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

The progress log becomes the basis of the self billed invoicing functionality for payment to the supplier.

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Canceling Requisition Lines

Requesters can cancel individual or multiple requisition lines. When a requester cancels a requisition, the system automatically sends cancellation notifications to all impacted parties, including all sourced suppliers.

Depending on the business unit settings, reason codes may be required when cancelling a line.

Note. If all requisition lines are canceled, the requisition header status is automatically set to Canceled. Impacted budget distribution amounts are immediately adjusted to reflect canceled amounts.

Note. If a work order is already created for a requisition line, the line cannot be canceled.

Closing Services Requisitions

Use PeopleSoft Purchasing to close Services Procurement requisitions.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Closing Requisitions".

Supplier Rate Breakdown and Resource Requisitions

When you create a service requisition, depending on the business unit settings, the requester may or may not have the authority to enter a bill rate, which is the rate paid to the supplier. If they do have the authority to enter a rate, the installation options setting for "Pay Types Enabled" and the role actions of the requester will determine whether they enter only a total rate or the individual components of that rate. When pay types are enabled, the suppliers enter up to four types of pay rates when they bid on the requisition line: the service provider pay rate, any additional incurred costs, and standard and third-party markup rates, if applicable. The sum of the rates is the bid rate. This enables service coordinators to track the rate breakdown and set limits on the supplier markup rates.

After you fill a service requisition with the negotiated bill rate, the system generates a work order that shows the rate breakdown. You can not edit the rates if the work order is linked to a requisition, although you can enter new effective dated rates after release of the work order.

Rate Sheet Breakdown for Rates and Expenses

You can define default rates and expenses for contingent labor on the rate sheet. The rate breakdown structure on the rate sheet includes pay rate, supplier markup, third party markup, fixed costs, and expenses. The rate breakdown that you define prepopulates on requisitions or work orders based on the related region and service type. Minimum, maximum, and target levels can be defined on the rate sheet for each of the rate elements including expenses. Tolerance checking on the requisition validates pay rate, total rate, and expenses up front to help companies ensure compliance with negotiated or standardized rates, so that services costs are closely monitored.

If a requester has access to view the rate breakdown information on the requisition, all rates will be visible to that requester. The requester may also have the ability to edit the requisition rate at that time, depending on the business unit settings. However, if the requester has a role action to hide the rate breakdown information, he will not have the ability to view rate breakdown information.

In addition to configuring the system to show or hide rates for a requester, you can also configure the system to enable service coordinators to define the rate information for a requisition line or manual work order prior to submitting for approval.

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Post Approval Edits to Requisitions

If the requisition line has not yet been sourced, it is possible to make changes to the requisition line. All fields are available for edit. Any changes will trigger re-approval, which sets the requisition status back to pending. The service coordinator or team cannot source the requisition until it is successfully re-approved unless the business unit allows pre-approval sourcing. In that situation, you can source the requisition as soon as it is submitted for approval. The sourcing worklist entries remain in the worklist throughout the re-approval process and are replaced by new worklist entries upon approval. If the requisition is denied, the original worklist entries will remain until the requisition is either re-submitted and approved or canceled.

Extending Requisitions

Requesters can extend completed service requisition lines. If you need to extend a requisition, you must go to the latest extension of the requisition to extend it further. When you extend from the requisition, the system creates a new requisition ID and line by transferring the requester to the Create Services requisition page.

The system populates values from the original requisition onto the new requisition line as a default. The start date of the new requisition is equal to the end date of original requisition plus one day. The status of the new requisition is pending approval. Once the requisition is approved, you can source the extended requisition to the supplier for confirmation of availability and rates.

The new requisition references the Requisition ID and line number of the original requisition line. The system also marks the original requisition as extended. You can edit the reference, request type, department, time approver, end date, rate, and service coordinator/team of the new requisition. The remaining fields are not editable.

Note. The currency conversions calculations are based on the date the requisition has been extended.

Note. If you extend a requisition, you cannot extend the associated work order directly. You must perform any subsequent extensions from the extended requisition. Likewise, if the work order related to a requisition line has already been extended, it is not possible to extend further from the requisition

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See Also

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Setting Up User Preferences, page 99

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Creating Bid Factors, page 83

“PeopleSoft Services Procurement Preface,” page xxxiii

Chapter 25, “Supplier Scoring for PeopleSoft Services Procurement,” page 435

Multicurrency with Requisitions

If the purchasing business unit has multicurrency enabled for requisitions, the requester can change the currency on the service requisition. Rate sheet validation can occur in either the requisition currency or the base currency. After the requisition is approved and sourced, suppliers enter bids in the requisition currency, but have visibility of the amounts in their location currency which can be different than the requisition currency.

With multicurrency, you can:

- Support global customers by enabling services procurement transaction processes to occur in multiple currencies.

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- Enable rate sheet validation to occur in the requisition base currency or the transaction currency.
- Enable users to create expense sheets in a currency different from the requisition currency.
- Create invoices in the vendor location currency, even if different from the requisition currency.

If multicurrency requisitions are enabled, the requester's currency appears by default. The requester can change this currency until the requisition is submitted for approval. Each requisition line that you add for the same requisition header must use the same currency.

If multicurrency requisitions are disabled, the purchasing business unit currency is used and cannot be changed.

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

Common Elements Used in This Chapter

Position Individual instance of a resource-based service. The number of positions for a service line determines the number of service providers who will fill the requisition line.

Total Positions The number of people needed for the service defined on a requisition line.

Position Cost The estimated cost for one individual to perform the specified service for the duration indicated. This includes both the service rate and expense rate for the duration.

Line Total The total estimated cost for all positions on the line (position cost x total positions).

Note. Any additional costs such as shift pay or assignment pay is not included in the calculation for the line total.

Number of Filled Positions The number of people already selected to fill positions for the service. This field is incremented each time a position is filled through bid management and decremented each time a related work order is cancelled.

Average Filled Rate The average of the individual rates agreed for each person filling a position for the requisition line.

Average Filled Amount The average of the individual estimated total amounts for which each position was filled.

Total Filled Amount The sum of all filled amounts for each position filled.

Creating Service Resource Requisition Lines

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

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- Enter service requisition information.
- Enter scoring criteria.
- Suggest vendors.

Creating a Services Resource Requisition Line

To complete the service requisition process:

1. Access the Create Requisition page and add a requisition name.
2. Access the Create Requisition - Services page.

   The service type, service, time approver and service coordinator appear by default from the service requester defaults. The location appears by default from the requester setup ship to location.
3. Enter the service.

   The system automatically defaults the job title, scope of work, competencies, education level, experience, telecommute, and travel required fields based on attributes associated with the service.
4. Because this is a resource-based requisition line, you must enter a rate and unit of measure for the service.
5. If expenses are allowed for the requisition line, enter the expense rate and unit of measure or just the expense amount.
6. Click the Scoring Criteria link on the Create Requisition - Services page to access the Bid Factors by Requisition Line page.

   Use this page to adjust the weightings of each bid factor to determine its level of importance.
7. Service coordinator and time approver appear by default from requester defaults.
8. Once all data is defined, click the Go to Submit Requisition button at the bottom of the page to access the Requisition Checkout page.

   Use this page to update the requisition name or to add comments.
9. Expand the requisition line to view or edit accounting lines.

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

See Also

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” page 57

“PeopleSoft Services Procurement Preface,” page xxxiii

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Pages Used to Create Service Resource Requisition Lines

Page Name	Object Name	Navigation	Usage
Create Requisition	PV_REQ_HDR	Services Procurement, Create Requisition	Enter basic service requisition information.
Create Requisition - Services	SPF_REQ_INFO_PG	Select Continue on the Create Requisition page.	Enter service requisition line information.
Location Address	SPF_ADDRESS_LOC	Click the location link on the Create Requisition-Services page.	View the location address.
Currency Information	EXCH_RT_DTL_INQ	Click Currency Exchange Information link on the Create Requisition - Services page.	View the currency information and exchange rate.
Bid Factors by Requisition Line	SPF_BDFTR_REQ_PG	Click the Scoring Criteria link on the Create Requisition - Services page.	Adjust the weightings of each bid factor to determine its level of importance.
Bid Factor List Items	SPF_BDFTR_LST	Click the Bid Factors List Items button on the Bid Factors by Requisition Line page.	Enter bid factors where the bidder selects from a list.
Suggest a Vendor	SPF_SUG_VENDOR	Click the Suggest Vendor link on the Create Requisition - Services page.	Enter vendor information for a new vendor that isn't in the system yet.
Requisition Checkout	PV_REQ_FORM	Click the Go to Submit Requisition button on the Create Requisition - Services page.	Save the requisition and submit for approval.
Line Comments	PV_REQ_COMMENTS	Click the Comments button on the Requisition Checkout page.	Enter line comments.

See Also

PeopleSoft Enterprise eProcurement 9.0 PeopleBook, "Managing Requisitions in PeopleSoft eProcurement"

Entering Service Requisition Information

Access the Create Requisition page.

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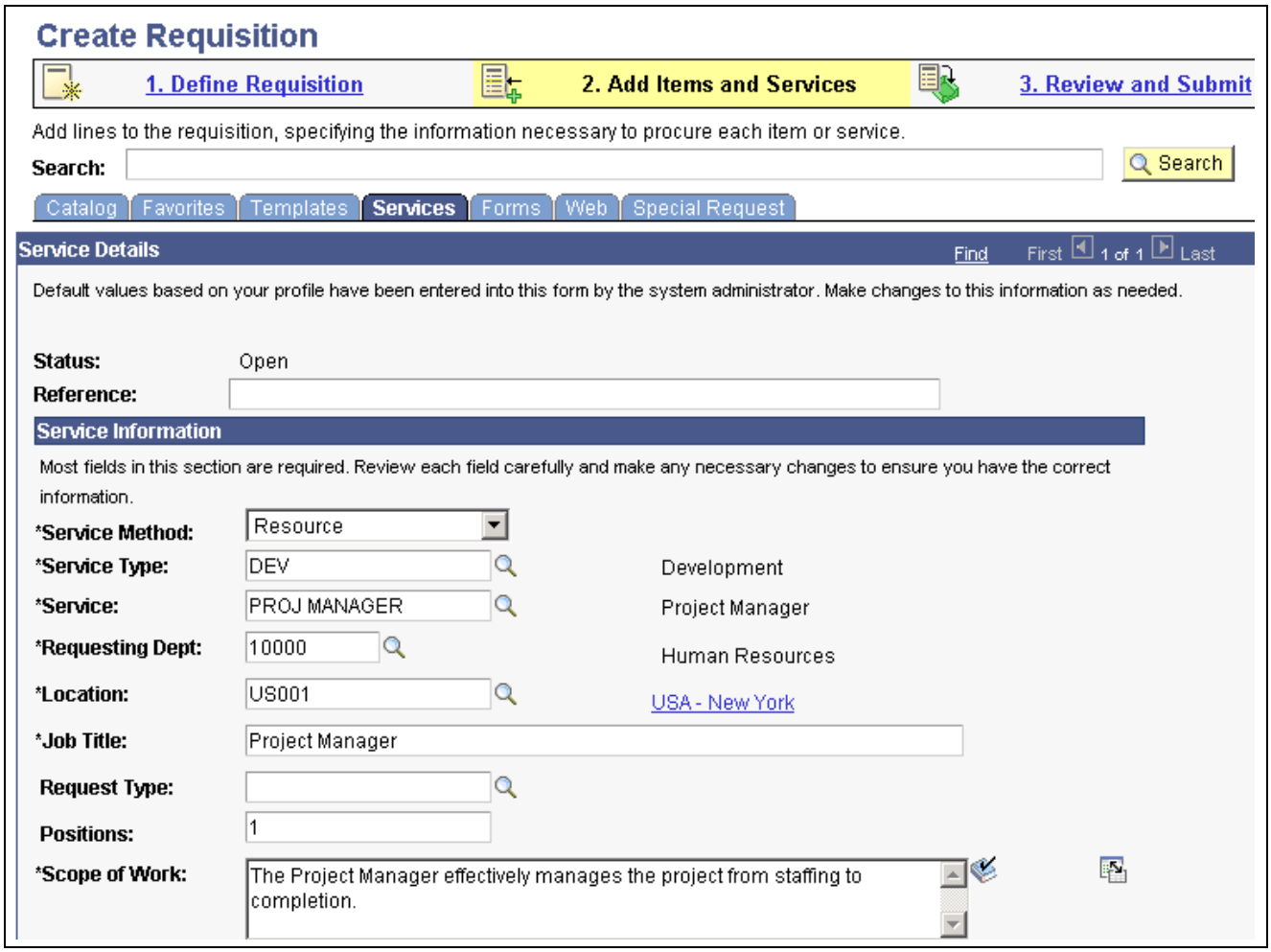
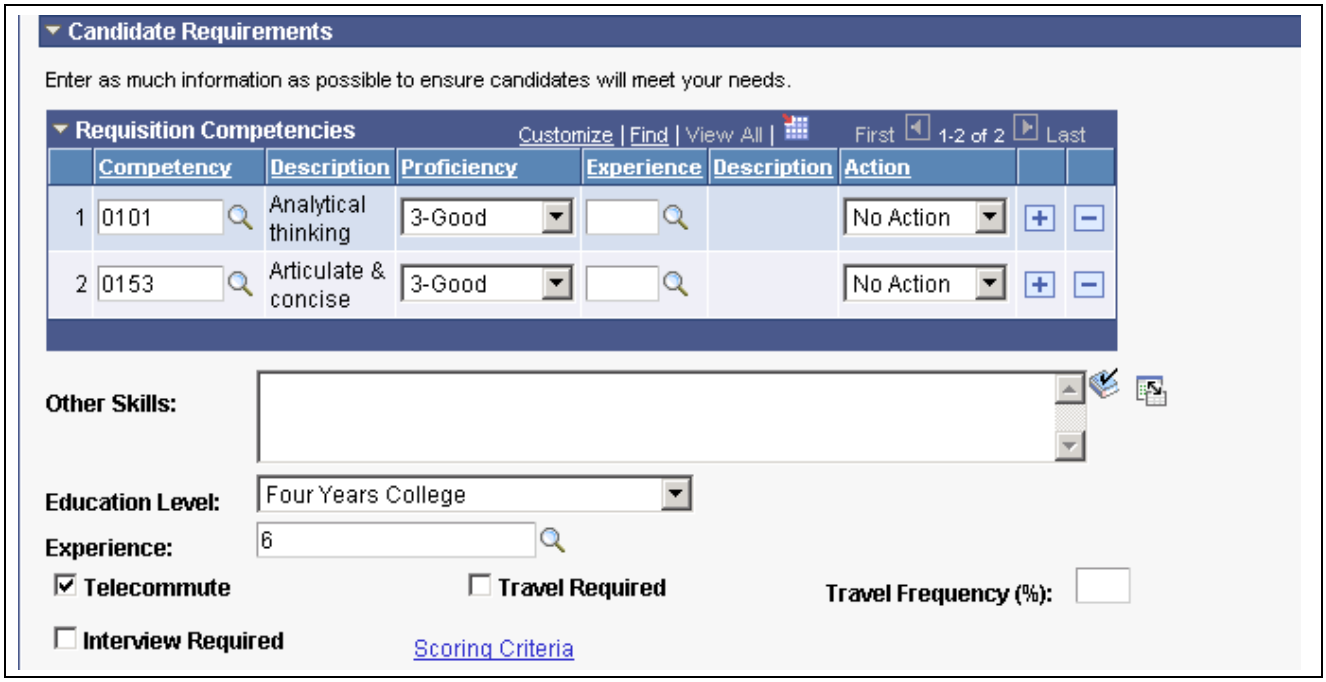


Create Requisition page (1 of 5)



Create Requisition page (2 of 5)

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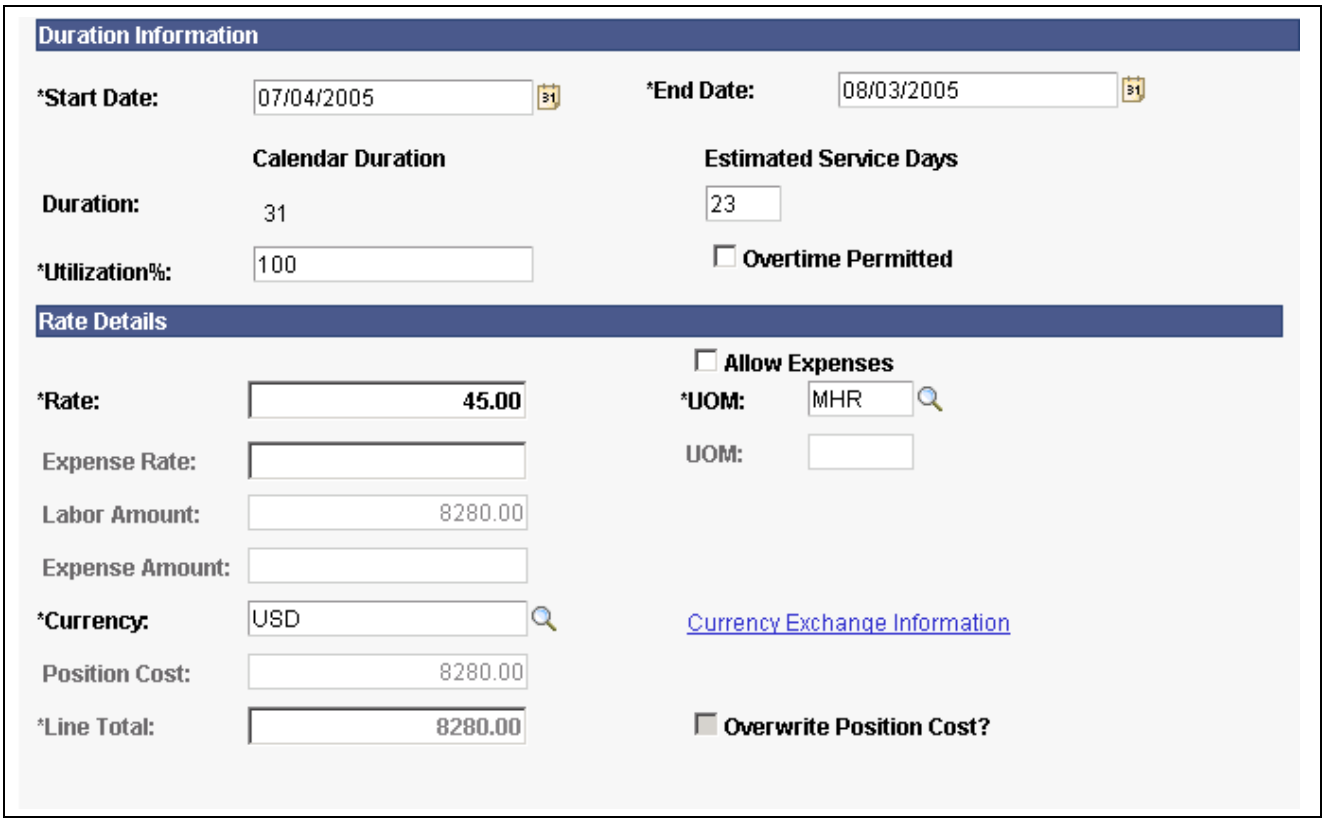
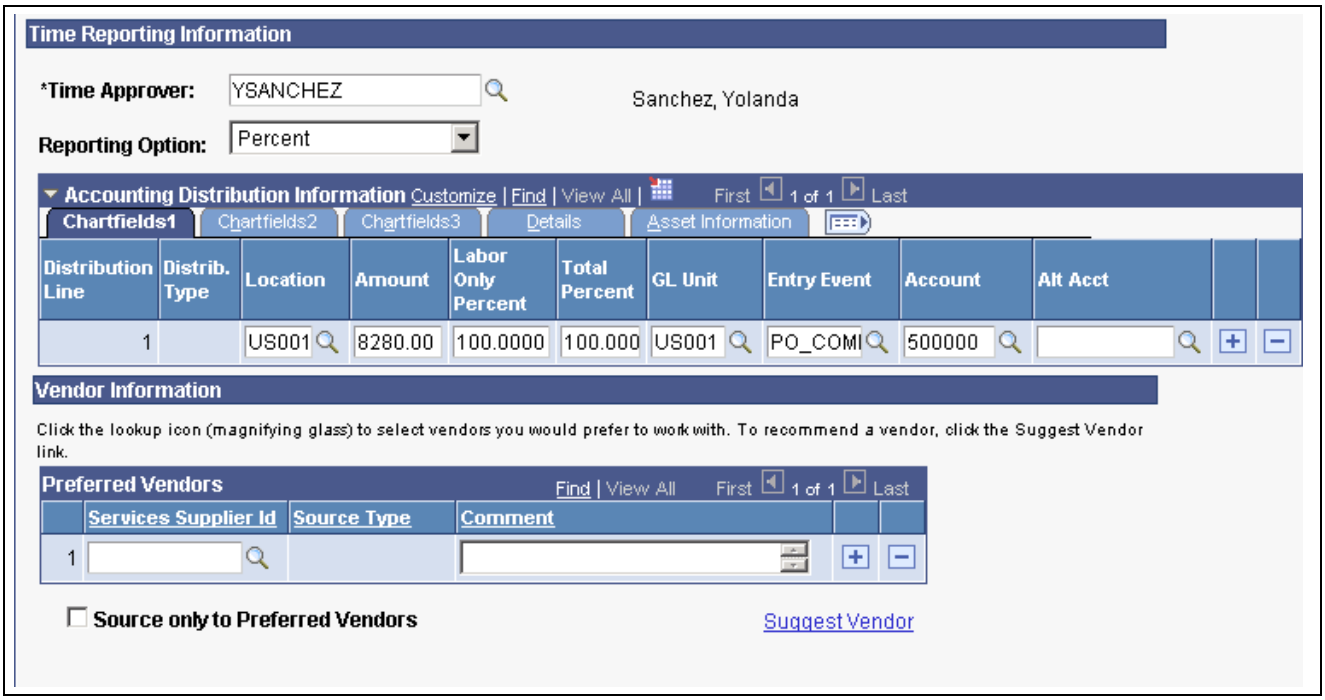


Create Requisition page (3 of 5)



Create Requisition page (4 of 5)

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Create Requisition page (5 of 5)

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

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

Note. If the HCM integration option is selected on the Services Procurement installation options page, you will notice the HCM Fields section on the Create Requisition page.

See Appendix C, "HCM Integrations," page 459.

Service Information

Service Method Enter the service method for this requisition. Available values include *Resource* and *Deliverable*. If defined, the service method initially appears by default based on the service type from the service requester defaults.

Service Type Enter the service type for this requisition; for example, information technology, professional, or hardware engineering. Initially, it appears by default from the service requester defaults, if they are defined. Available service types depend on the service method that you select.

Service Enter the specific service or role that is to be performed, for example, Java developer. You can only select services linked to the service type specified. Initially, it appears by default from the service requester defaults, if they are defined.

Location Enter the location where the job is to be performed. Initially, it appears by default from the requester defaults.

Note. Use this field to derive the region for rate sheet selection.

Job Title Enter the internal classification of the position. Appears by defaults from the service attributes, if defined.

Request Type Select an appropriate request type. Values are defined by the Service Administrator.

Note. This is not a required field.

Positions Enter the number of service providers who will fill the requisition line.

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Note. You can specify up to 999 positions for a requisition line.

Scope of Work Enter the scope of the project in this free-form field. It appears by default from the comments field on the service attributes.

Candidate Requirements

Requesters can use this section to enter desired candidate competencies that relate to the service requisition. When candidate skills are deemed insufficient, a configurable rule is initiated to block, warn, or take no action.

Once candidate competencies are defined, service coordinators can view the competencies before sourcing the request to suppliers. This enables the service coordinator to source requisitions to the most appropriate suppliers.

Competency Select a competency to quantify and compare skills. Default values are provided from the service attributes.

Proficiency Select a proficiency for the competency. The rating model associated to the competency determines the available values.

Experience Select the years of experience required for the competency.

Action Link an action to a specific competency. Values include *Block*, *No Action*, and *Warn*.

Block: The provider contact is not allowed to submit a candidate if a candidate does not posses the required skill.

No Action: No action is taken if a candidate does not posses the required skill.

Warn: A warning message is displayed to the provider contact and the service coordinator if the candidate does not posses a required skill.

Note. The action will designate the appropriate message when a requisition competency does not match with a providers competency.

Other Skills Enter a brief description of any additional skills that a candidate should possess to fill the position.

Education Level Select the education level that a candidate must possess to fill the position. This value appears by default from the competencies defined on the service attributes.

Experience Enter the number of years of experience that a candidate must possess for the service. It appears by default from the competencies defined on the service attributes.

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

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

Travel Frequency Enter the percentage of time travelling if travel is required.

Interview Required Select this check box if a candidate interview is required. This appears by default from the service attributes. When you select this option, you must record interview information prior to offering the position.

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Scoring Criteria Click to access the Bid Factors by Requisition Line page, where you can adjust the weightings of each bid factor to determine its level of importance.

Note. Bid factor elements are used to evaluate candidate submittals to determine which candidate is the best match for the requisition. The total of the bid factor weightings must add up to 100 before you can leave the page. If you do not visit this page, the system evenly weights each of the bid factors to reach a total of 100. The service coordinator can update the bid factor weightings at sourcing time.

Duration Information

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

Calendar Duration Displays the number of days between the start and end dates.

Estimated Service Days A value appears by default after you enter the start and end dates. This is used for calculating the quantity based on units of measure. The unit of measure that signifies a day is defined in the installation parameters.

Utilization % (utilization percent) Enter the percentage of time that the candidate will spend during the engagement. For example, if the candidate typically works a half-day, the utilization is 50 percent. If the candidate typically works 3 days per week, the utilization is 60 percent.

Overtime Permitted Select this check box if overtime is permitted for this requisition. The system calculates overtime if the unit of measure is defined as hourly.

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

Note. This is for information purposes only. Any premiums paid for overtime will depend on the predefined time reporting rules.

Rate Details

Rate Enter the rate of pay that is associated with the service requisition. Modifications to the rate amount are validated against rate sheets that you define for the service and region. The tolerance amount for the rate sheet is checked by using base currency values that are stored at the requisition level. The currency values are not validated if rate sheets are not defined for the project role and region. If you enter a rate amount that is out of tolerance with the rate sheet, you receive either an error or a warning message.

If you select SP Pay Types Enabledon the Services Procurement Installation Options page and the requester does not have the *Hide Rate Breakdown* role action, rates are defined separately for each component of the rate breakdown.

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

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

Although this setting defaults from the Services Procurement Business Unit page, you can override it here.

UOM (unit of measure) Select the unit of measure associated to the labor rate entered.

Expense Rate Enter the expense rate that is associated with the service requisition. The system uses the duration to calculate an expense amount using the expense rate and unit of measure.

Note. If you enter a value in the Expense Amount field, the expense rate is refreshed based on the amount entered.

This field is disabled when the Allow Expenses check box is not selected.

UOM (unit of measure) Select the unit of measure associated to the expense rate entered.

Labor Amount Displays the total labor amount calculation, which is based the rate, UOM, and service days specified.

Expense Amount Enter the total expense amount for the requisition. The system calculates the value using the expense rate and unit of measure, but you can override the value.

Note. This field is disabled when the Allow Expenses check box is not selected.

Currency Enter the currency that is associated with the rate.

Note. You can change the currency only on the first requisition line and only if multicurrency requisitions are allowed. The value from that line appears by default on all subsequent requisition lines.

All new currency field values and the base and transaction currency values that you create in a PeopleSoft Services Procurement requisition are passed to the requisition records that are created in the PeopleSoft eProcurement tables.

Position Cost Displays the estimated cost for one individual to perform the specified service for the duration indicated. This includes both the service rate and expense rate for the duration.

Note. This field is available when the Override Position Cost check box is selected.

Line Total Displays the total for labor and expense for all positions for the duration of the requisition.

Overwrite Position Cost Select this check box to edit the calculated value for position cost.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Rate Sheets, page 71.

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Time Reporting Information

Time Approver Enter the name of the person who will approve timesheets that are related to this requisition line. Initially, it appears by default from the service requester defaults, if they exist.

Note. Available time approvers are limited to those having one of the roles defined in the *SP_TIME_APPROVER* role action.

Expense Approver This field appears when the Allow Expenses check box is selected. Enter the name of the person who approves expenses that are related to the requisition line. Initially, it appears by default from the service requester defaults, if they exist.

Note. Available time approvers must be associated with one of two roles defined in the *SP_TIME_APPROVER* role action.

Reporting Option Select an available time reporting option. Values include:

Actuals: Select to indicate that the service provider will report actual time against each ChartField distribution line defined on the work order. This option applies to resource based requisitions and work orders only.

Default: Select to indicate that the default reporting option defined for the business unit is used for the requisition.

Percent: Select to indicate that the service provider or service provider contact will report total time or progress against the work order and the distribution percentage is used to automatically allocate time or progress across the pre-defined ChartFields for accounting.

See Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 323.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 118.

Account Distribution Information

Use this section to charge funds to the appropriate department or project.

Note. If you create a requisition with multiple positions, all positions share the same ChartField distribution fields.

Amount Enter the amount that is to be charged to a particular ChartField combination.

Note. Changes to the labor percentage or total percentage triggers an automatic recalculation of the distribution line amount.

Labor Only Percent Enter the labor percent allocation for the requisition line that is charged to a ChartField combination.

Note. Changes to the total percentage or amount triggers an automatic recalculation of the labor percentage for the distribution line.

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Total Percent Enter the percent allocation of the total amount for the requisition line that is charged to a ChartField combination.

For example, if you have one distribution and you enter 100 for that distribution line, the system charges 100% of the requisition request to the same department or project. However, if you have two distribution lines, and you enter 50% for the first distribution line and 50% for the second distribution line, the system evenly distributes the requisition line amount among both distributions.

Note. Changes to the labor percentage or amount triggers an automatic recalculation of the total percentage for the distribution line.

Account Enter the account that is to be charged to a particular ChartField combination.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Defining and Using ChartFields".

Vendor Information

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

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

Source Type Displays the source type. Values are *Primary, Secondary,* and *Tertiary.*

Source only to Preferred Vendors Select to indicate that the service coordinator should source this requisition only to the suppliers defined on the requisition.

Note. This check box is only available if the requester is authorized to source to preferred vendors on the service requester defaults.

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

Service Coordinator Information

Service Coordinator Select to source the requisition request to a specific service coordinator.

Coordinator Enter the name of the person who is responsible for filling the requisition line. Initially, it appears by default from the service requester defaults, if they exist.

Note. This field is only available when you select the Service Coordinator option.

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

Service Coordinator Team Select to source the requisition request to a service team.

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Note. When creating a requisition, the default service coordinator or team is assigned by first looking for a default team on the service requester, then it looking for a team by region and service type, and then looking on the business unit

Service Team Enter the service team that is responsible for filling the requisition request.

Note. This field is only available when you select the Service Coordinator Team option.

Other Page Elements

Add Another Service Click to add another service requisition line.

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

Delete Current Service Click to delete current service requisition line.

Go to Submit Requisition Click to access the Requisition Checkout page where you can submit the requisition for approval.

Cancel Changes Click to cancel the current requisition line.

Entering Scoring Criteria

Access the Bid Factor by Requisition Line page.

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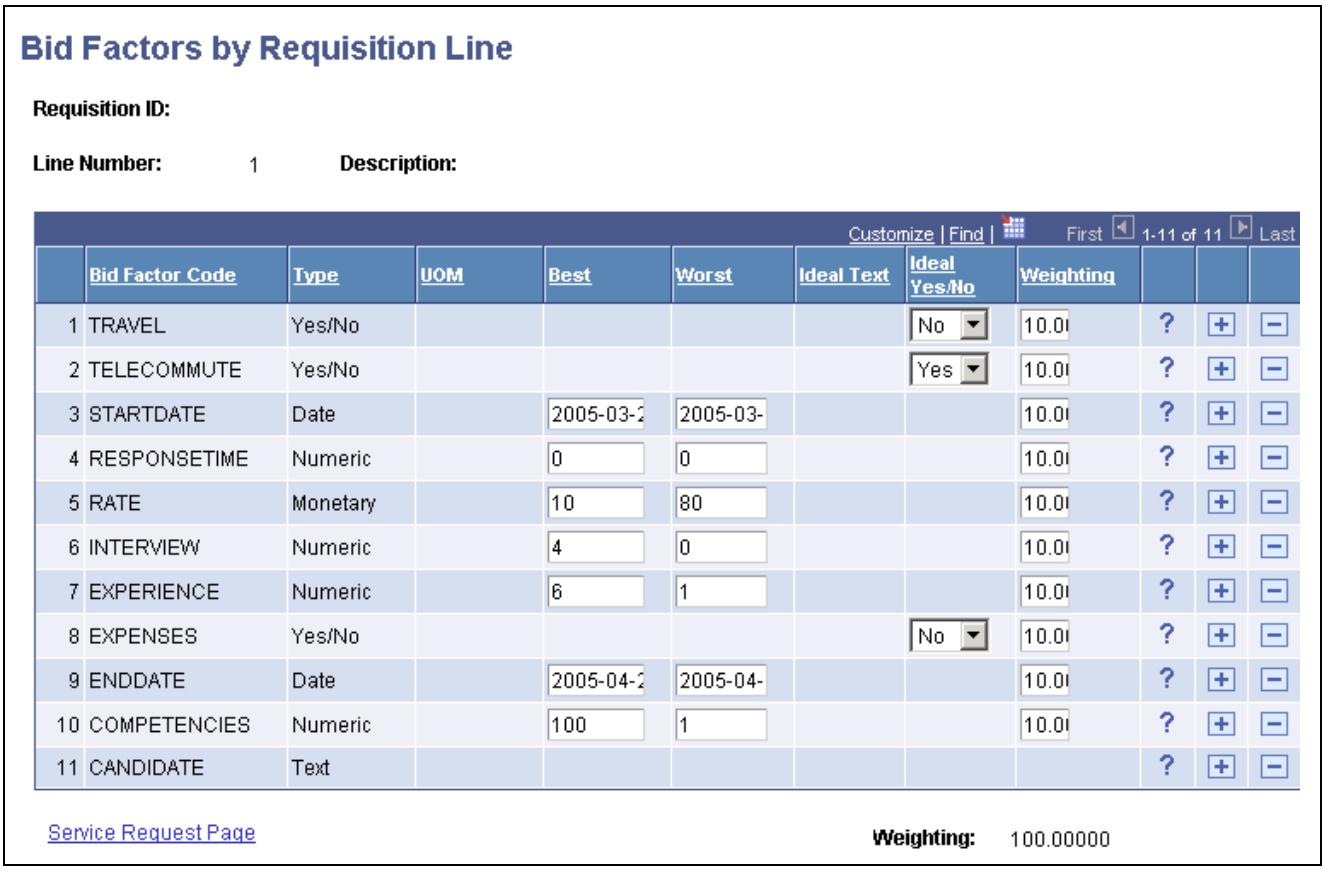

Bid Factors by Requisition Line

Requisition ID:

Line Number: 1 **Description:**

Customize | Find | First 1-11 of 11 Last

	Bid Factor Code	Type	UOM	Best	Worst	Ideal Text	Ideal Yes/No	Weighting
1	TRAVEL	Yes/No					No	10.0
2	TELECOMMUTE	Yes/No					Yes	10.0
3	STARTDATE	Date		2005-03-2	2005-03-			10.0
4	RESPONSETIME	Numeric		0	0			10.0
5	RATE	Monetary		10	80			10.0
6	INTERVIEW	Numeric		4	0			10.0
7	EXPERIENCE	Numeric		6	1			10.0
8	EXPENSES	Yes/No					No	10.0
9	ENDDATE	Date		2005-04-2	2005-04-			10.0
10	COMPETENCIES	Numeric		100	1			10.0
11	CANDIDATE	Text						

Service Request Page **Weighting:** 100.00000

Bid Factors By Requisition Line page

On a resource based requisitions, the system automatically selects every bid factor with a resource service type bid factor selected on the Bid Factor Mapping page.

Bid Factor Code Displays PeopleSoft Services Procurement bid factor codes that appear by default from the Bid Factors page.

Note. You can add improvised bid factors, or modify existing bid factors while you create the requisition. Improvised bid factors are not predefined for PeopleSoft Services Procurement.

Best and **Worst** Enter the best and worst possible responses that a candidate can answer for a particular question.

Ideal Yes/No Select the ideal response that a candidate can give for a particular question. Values are *Yes* and *No*.

Weighting Adjust the weightings of each bid factor to determine its level of importance. For example, suppose that the candidate start date is the most important qualification, you might choose to weigh that bid factor more heavily than others.

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

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Click the Question button to view the bid factor question that is associated with the bid factor code. For example, suppose that a bid factor code is experience, the bid factor question that is associated with that code might be: How many relevant years of experience does the candidate have?

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 83

Suggesting Vendors

Access the Suggest a Vendor page.

Vendor Name Enter the name of the preferred vendor.

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

Notify by email Select to send an email notification to the administrator that includes the suggested vendor details. The administrator can elect to add the vendor to the enterprise network.

Creating Service Deliverables-Based Requisition Lines

This section discusses how to:

- Create deliverables-based requisitions lines.
- Associate bid factors to deliverables-based requisitions.

Deliverable-Based Expense Capture

To support the tracking of resources for deliverable-based engagements, the Track Resource option is available in the service type definition. This option initiates the process of identifying the resources for the engagement.

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Pages Used to Create Service Deliverables-Based Requisition Lines

Page Name	Object Name	Navigation	Usage
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisitions SelectContinueto access the Create Requisition page.	Enter basic service requisition information.
Bid Factors by Requisition Line	SPF_BDFTR_REQ_PG	Click the Scoring Criteria link on the Services page.	Adjust the weightings of each bid factor to determine its level of importance.
Currency Information	EXCH_RT_DTL_INQ	Click Currency Exchange Information link on the Services page.	View the currency information and exchange rate.
Suggest a Vendor	SPF_SUG_VENDOR	Click the Suggest Vendor link on the Services page.	Enter vendor information for a new vendor that isn't in the system yet.

Creating Deliverables-Based Requisition Lines

To create a deliverables-based requisition line:

1. Access the Create Requisition page.
2. The job title, scope of work and other skills appear by default based on attributes associated with the service.
3. Because this is a deliverables-based requisition, you must enter a price for the entire deliverable rather than hourly rates.
4. The service coordinator and progress log approver appear by default from service requester defaults.
5. Select whether you want to track resources for the deliverable-based requisitions.
6. The system provides the settlement options as a default from the service.

See Also

Chapter 12, "Managing Services Projects," page 203

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Service Setup, page 57

Associating Bid Factors to Deliverables-Based Requisitions

Access the Bid Factors by Requisition Line page.

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

Bid factors enable suppliers to indicate how much they charge for individual price components of the total project amount. You can include lines for each service that you are sourcing. The suppliers answer all the bid factor lines and questions associated with each bid factor code when bidding on the services requisition.

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

See Also

Chapter 15, "Managing Requisition Sourcing," page 237

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Bid Factors and Requisitions, page 80

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 83

Reviewing and Submitting Requisitions

This section discusses how to use the Review and Submit page to submit requisitions.

Page Used to Review and Submit Requisitions

Page Name	Object Name	Navigation	Usage
Review and Submit	PV_REQ_FORM	Click the Go To Submit Requisition button on the Create Requisition page.	Review and submit your requisition request.

Reviewing and Submitting Requisitions

Access the Review and Submit page.

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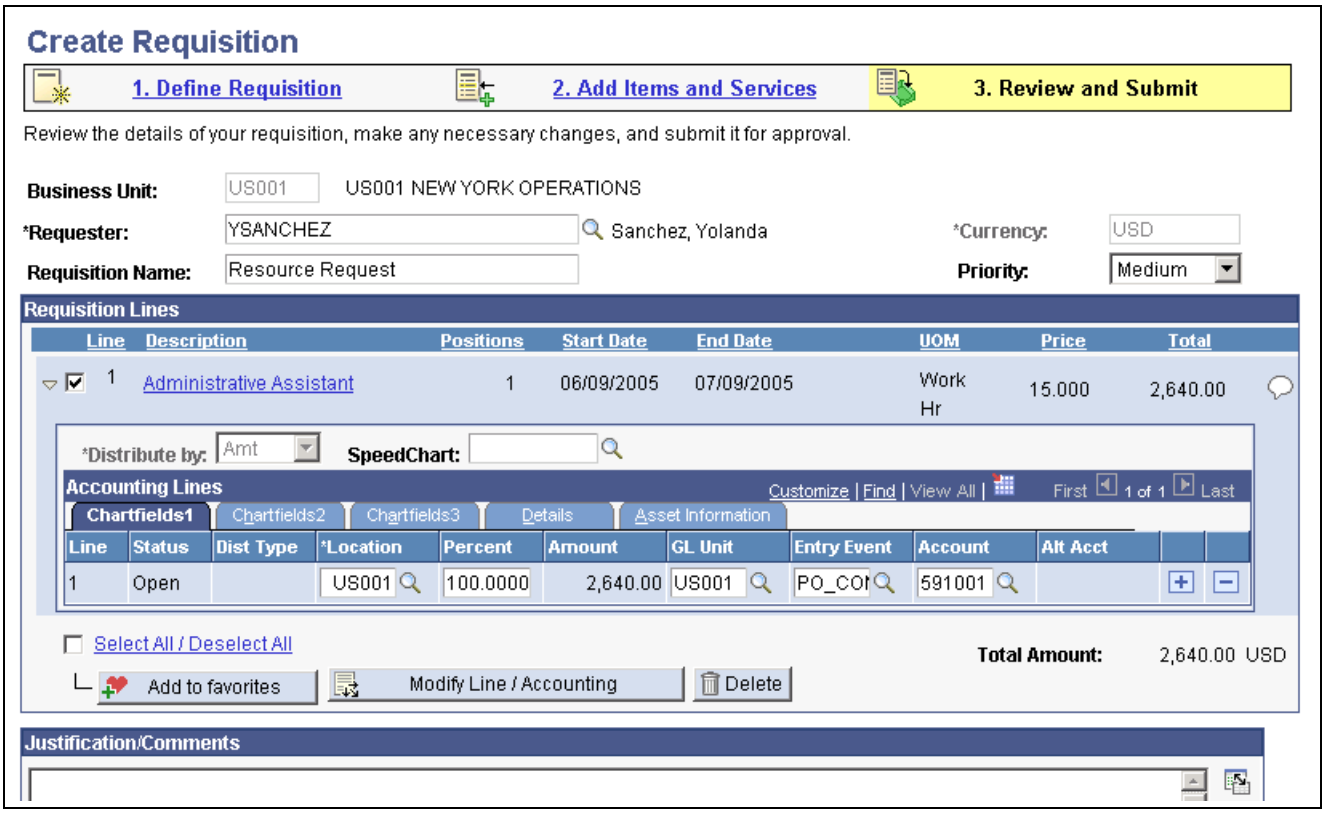

Review and Submit Requisition page

Requester Enter the requestor of the service requisition

Note. You are only allowed to edit the requester if you are authorized to request on behalf of other users on the Requester Procurement User Preferences page.

Requisition Name Enter the requisition name.

Priority Select the priority of the service requisition. The default is medium priority.

Requisition Lines

Description Click the link in the Description column to edit the service requisition.

Modify Line/Accounting Click the Modify Line/Accounting button to update the distribution information for multiple lines.

Justification/Comments Add comments for the service requisition line. Comments can be shown to the supplier if the Send to Vendor check box is selected.

Save as Template If you have PeopleSoft eProcurement installed on the system with PeopleSoft Services Procurement, and you have requisition lines for items, you can use this check box to add the line as a catalog item to the template. However, if you select this check box for a PeopleSoft Services Procurement requisition line, you receive an error message, because you can't add services to templates.

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Managing Service Requisitions

This section discusses how to:

- Manage requisitions.
- Review service requisition details.
- Cancel requisitions or requisition lines.

Pages Used to Manage Service Requisitions

Page Name	Object Name	Navigation	Usage
Manage Requisitions	PV_REQ_STATUS	Services Procurement, Manage Requisitions	Manage requisitions that are entered by the service coordinator or requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.
Requisition Details	SPF_REQ_STATUS_PG	Expand the collapsible grid section for the requisition request, and then click the Requisition button on the Manage Requisitions page.	View details on a services requisition.
Job Summary	SPF_REQ_SUMMARY_PG	Click the linked job title on the Requisition Details page.	View the requisition line summary.
Requisition Line Position Details	SPF_REQ_LN_FILL	• Click the Filled Positions button on the Requisition Detailspage • Click the Filled Position link on the Job Summary page.	View individual position information for a requisition line.
Requisition History	SPF_REQ_HISTORY	Click the Status link on the Requisition Details page.	Review the history of your requisition request, including the service coordinator or team that was assigned to the requisition at the time history was recorded.
Change Request List	PV_CHNG_RQST_LIST	Click the Inquire Change Request link on the Manage Requisitions page.	Inquire about your change requests.
Manage Receipts	PV_RECV_UPDATE_REQ	Click the Inquire Receipts link on the Manage Requisitions page.	Manage receipts.

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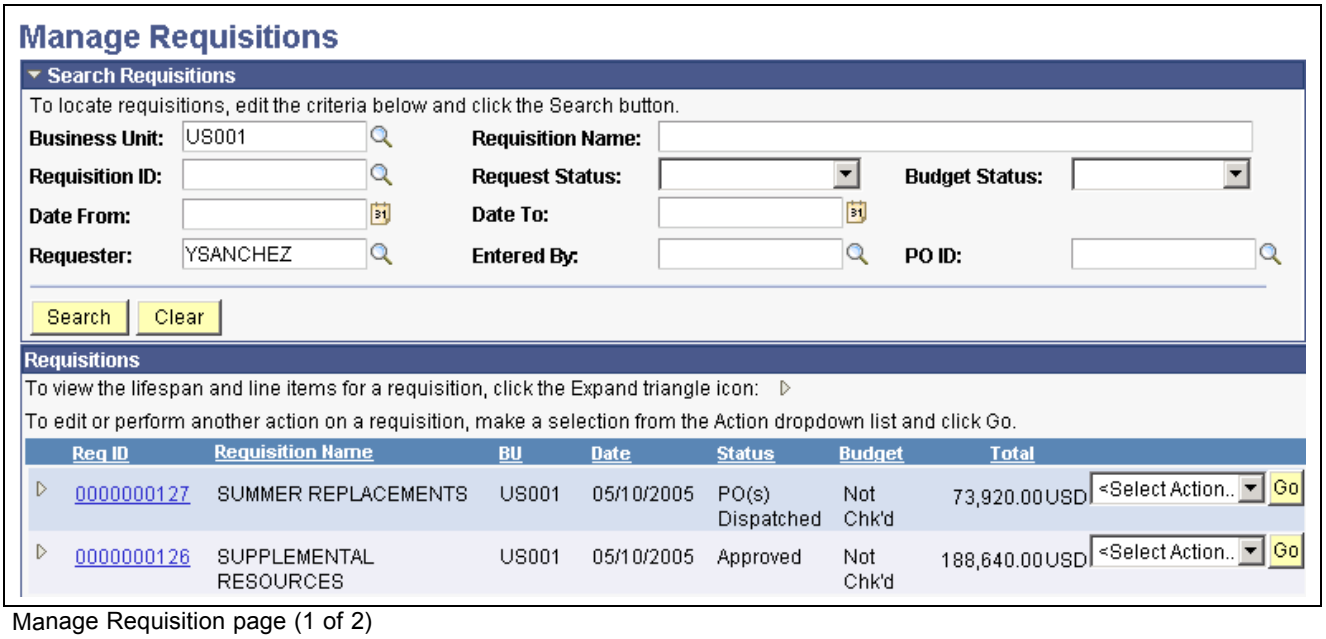
Page Name	Object Name	Navigation	Usage
Requisition to PO Xref, (requisition to purchase order cross-reference)	RUN_POY100	Click the Requisition Report link on the Manage Requisitions page.	Run the requisition to PO cross reference report.
Requisition Schedule and Distribution	PV_REQ_APP_DTL_GRD	Click the Requisition Schedule and Distribution link on the Requisition Details page.	View the requisition schedule and description.
VAT Details	REQ_INQ_DIST_VAT	Click the VAT Details button on the Requisition Schedule and Distribution page.	Use to view VAT calculations and information for the selected schedule or distribution. **Note.** You only have access to VAT information if the PeopleSoft Purchasing business unit has enabled VAT on requisitions and VAT is applicable for the requisition.
Requisition Life Cycle	PV_REQ_CYCLE_PAGE	Click the Requisition Life Cycle link on the Requisition Details pages.	View the location of a requisition in the requisition life cycle.
Close Requisition	RUN_REQRECON	Services Procurement, Reconciliations, Close Requisitions	Close all qualified requisitions using the Run Close Requisitions process, and generate the Requisition Reconciliation report.

Managing Requisitions

Access the Manage Requisitions page.



Manage Requisition page (1 of 2)

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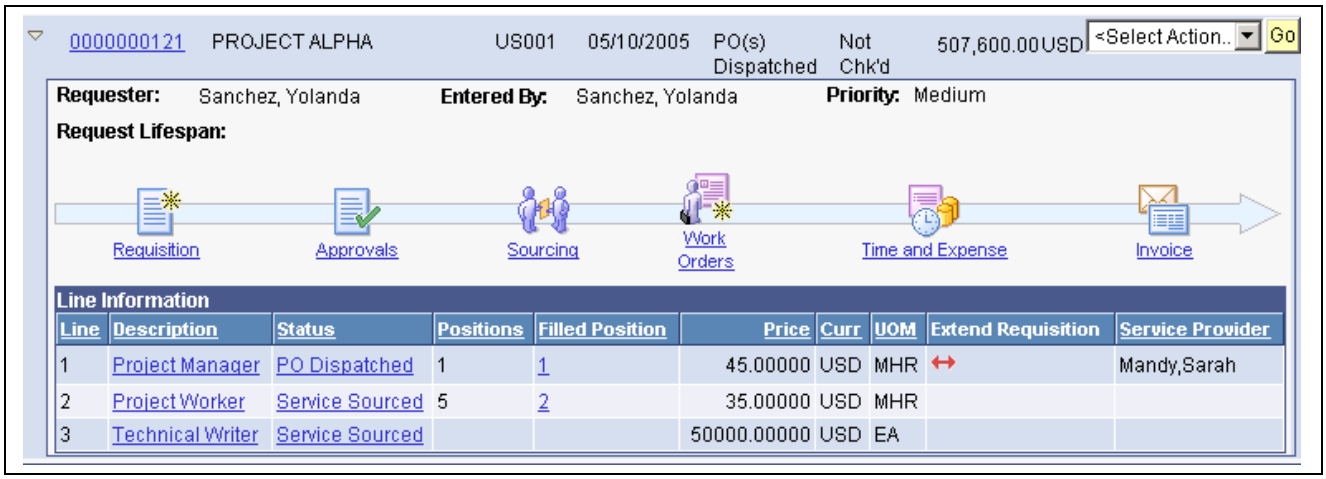

Manage Requisition page (2 of 2)

The Manage Requisitions page is the central location for maintaining requisitions. Use the Search and Sort features to streamline the search results for a requisition. Use the Expand Section button to view the lifespan and details for the requisition. Select the Select Action option to cancel, budget check, and edit the requisition.

Requisition ID — Click to access the Requisition Details page, where you can view the details of the requisition.

Requester — Enter a name to display requisitions that only this person enters. Leave this field blank to display requisitions for all requesters for whom you are authorized to view.

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

Select Action — Select an action for the requisition. Values include:

- *Cancel Requisition:* When you select this value, the system takes you to the Requisition Details page where you can cancel the requisition request.

  To cancel all eligible requisition lines, click the Cancel Requisition button. To cancel selected lines, check the box to the left of each requisition line to be canceled and click the Cancel Selected Lines button. In both cases, the system displays a Cancel Requisition Confirmation page, where you can enter a reason code and comments prior to confirming the cancellation transaction.

  The sourcing status for the requisition is changed to Complete.

- *Check Budget:* When you select this value, the system automatically checks to ensure that the requisition is within a specified budget range.

  Note. When the commitment control enabled, the service coordinator cannot offer the position or release the manual work order until the requisition has been budget checked.

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- *View Approvals:* When you select this value, the system navigates you to the Approval Status page, where you can view the approval information for the requisition line.
- *Edit Requisition:* When you select this value, the system takes you to the original requisition.
- *Copy Requisition:* When you select this value, the system takes you to the original requisition.

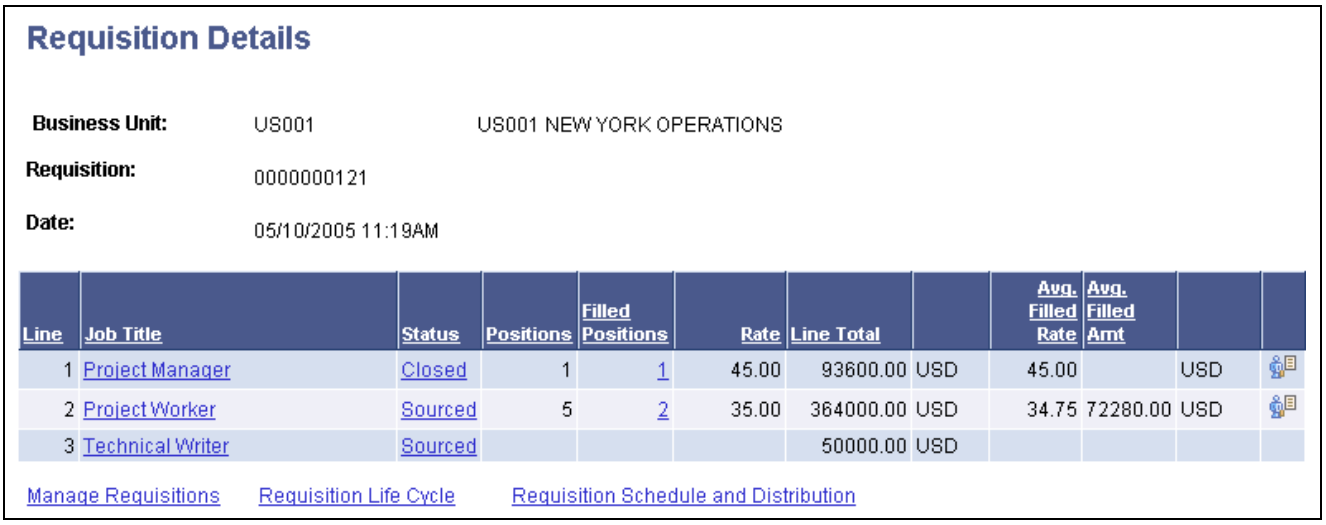
Click to extend the life of the requisition.

When you extend a requisition, you must go to the latest extension of the requisition to extend it further. The system creates a new requisition ID and line by transferring the requester to the Create Services requisition page.

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

Reviewing Requisition Details

Access the Requisition Details page.



Requisition Details page

Status Click to access the Requisition History page, where you can view the history of the requisition line details.

Positions Individual instance of a resource-based service. The number of positions for a service line determines the number of service providers who will fill the requisition line. View the total number of positions available for the service request.

Filled Positions View the number of positions that have already been filled for the service request.

Requisition Life Cycle Click to view the location of a requisition in the requisition life cycle.

Requisition Schedule and Distribution Click to view the requisition schedule and description.

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Click to access the Work Order page, where you can view information about the linked work order.

Note. This button only appears if you have a work order linked to the requisition line.

See Also

Chapter 18, “Managing Work Orders,” page 281

Chapter 8, “Implementing PeopleSoft Services Procurement Workflow,” page 163

Chapter 15, “Managing Requisition Sourcing,” page 237

Canceling Requisitions or Requisition Lines

You can cancel requisitions on the Requisition Details page, which you access from the Manage Requisitions page. In addition, if you are using Services Procurement without eProcurement, it is possible to cancel individual requisition lines from either the Mange Requisitions page or the Requisition Details page.

To access the Requisition Details page and cancel a requisition, select the *Cancel Requisition* option from the Select Option dropdown list on the Manage Requisitions page and then press the Go button.

Once you select the Go button on the Manage Requisition page, the system navigates you to the Requisition Details page, where you can cancel the entire requisition if you have both eProcurement and Services Procurement installed, or a selection of lines if you have only Service Procurement installed.

You can also cancel individual requisition lines one at a time directly from the Manage Requisitions page by opening the line details for the requisition and selecting the Cancel button on the individual line.

If you cancel a requisition from the Requisition Details page, select the Cancel Requisition button. To cancellation selected lines, check the box to the left of each requisition line to be cancelled and click the Cancel Selected Lines button.

Note. When you cancel the requisition or requisition line, the system displays a Cancel Requisition Confirmation page, where you can enter a reason code and comments prior to confirming the cancellation transaction. The reason code functionality is available if the business unit is defined with optional or mandatory reason codes for requisition cancellation.

Note. When you cancel a requisition line, notification is sent to all impacted parties. The system also removes the cancelled requisition line entry from any impacted worklists.

Note. Line-level cancellation is only available for if you’re using PeopleSoft Services Procurement as a standalone application.

Closing Services Requisitions

Use the Close Requisitions page to close all qualified services requisitions and to run the Requisitions Reconciliation Report.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, “Closing Purchase Orders”.

See Appendix E, “PeopleSoft Services Procurement Reports,” page 505.

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CHAPTER 15

Managing Requisition Sourcing

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

- Source requisitions.
- Manage sourcing.

Understanding Sourcing

This section lists prerequisites and discusses PeopleSoft Services Procurement sourcing rules.

Prerequisites

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

- The requisition must be approved.

  Note. In most cases, the requisition must be approved prior to sourcing. However, if you've selected the Allow Sourcing Prior to Approval option on the Services Procurement Business Unit page, you can source a requisition request prior to approval.

- Suppliers must be defined for the business unit supplier network.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining the Supplier Network Setup, page 77

PeopleSoft Services Procurement Sourcing Rules

PeopleSoft Services Procurement sourcing rules enable the service coordinator to send approved requisitions to suppliers who are best qualified to fill a requisition. When service requisitions are submitted or approved, depending on the business unit settings, service coordinators can source the requisitions using predefined sourcing rules.

PeopleSoft Services Procurement sourcing rules enable you to define suppliers by different attributes to streamline the sourcing process. Suppliers can be defined by region to ensure that you hire only service providers who are located near you to minimize travel costs.

Suppliers who provide resource-based services can be defined by service type. This enables you to define which suppliers provide the best candidates for a particular service type. To further refine the resource-based supplier list, you can define suppliers by region and service type combination.

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Suppliers who provide deliverables-based services can be defined by service and project role. This enables you to define which suppliers best fit a particular service. To further refine the deliverables-based supplier list, you can define suppliers by region and service combination.

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

You can also use bid factor criteria to determine the top bid submittals for a particular requisition. You can source requisitions to both internal and external suppliers.

PeopleSoft Services Procurement provides supplier metrics to help score, analyze, and compare suppliers based on various aspects of the requisition life cycle. Use supplier scoring to determine the best suppliers to satisfy requisition requirements.

See Also

"PeopleSoft Services Procurement Preface," page xxxiii

Chapter 25, "Supplier Scoring for PeopleSoft Services Procurement," page 435

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Understanding Bid Factors, page 80

Sourcing Requisitions

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

- View the worklist.
- Source requisition requirements.
- View activities by requisition.
- Adjust bid factor weightings.
- Manage sourcing rules by requisition line.
- Reassign requisition lines.
- View the sourcing review.
- View the sourcing history.

Understanding the Requisition Sourcing Process

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

1. Access the Manage Sourcing page.

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

2. Access the Sourcing Selection page.

   If the business unit is set up for sourcing prior to approval, select pre-approval pending or approved requisition lines to source to suppliers that are listed according to the sourcing rules. If the business unit is not set up for sourcing prior to approval, select only approved requisition lines to source.

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3. Access the Reassign Requisition page.

   If the requisition line should be sourced by another service coordinator, you can reassign it to the appropriate service coordinator. The system creates a worklist entry for the new service coordinator.

   Note. You can access this page only if your system administrator gives you the proper permission to reassign requisitions.

   Note. You can only reassign a requisition before you source it to a supplier.

4. Click the Bid Factor Weighting link on the Sourcing Selection page to access the Bid Factor Weighting page.

   Use this page to adjust your bid factor weightings for a specific requisition.

5. Click the Rules by Requisition Lines link on the Sourcing Selection page to access the Sourcing Rules by Requisition Lines page.

   Use this page to change the sourcing preferences on the requisition.

   Note. You can access this page only if your system administrator gives you the proper permission on the Service Coordinator Defaults page. Changing information on the Sourcing Rules by Requisition Lines page overrides all previously defined sourcing to preferred suppliers, and it also refreshes and filters a new list of suppliers that meet the new sourcing preferences.

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

   Note. Click the Submit button to trigger a PeopleSoft Strategic Sourcing event. All bid factors are associated with this event.

7. Access the Sourcing Review page, and review the list of suppliers to whom you have sourced the requisition.
8. Access the Sourcing History page, and view the history for individual suppliers.

Common Elements Used in This Chapter

Service Coordinator Recruiter responsible for sourcing and filling requisitions.

Pages Used to Source Requisitions

Page Name	Object Name	Navigation	Usage
Worklist	WORKLIST	Home, Worklist	Locate approved requisitions for sourcing using the worklist filter sPro Approved Requisition.

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Page Name	Object Name	Navigation	Usage
Manage Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	Review requisitions and source them to suppliers. Check incoming and outgoing bids, generate work orders, view the requisition life cycle, or cancel a requisition.
Sourcing Selection	SPF_SOURCE_SELECT	From the Worklist page, click the link that corresponds with the requisition ID that you want to source.	Enter sourcing requirements.
Job Summary	SPF_REQ_SUMMARY_PG	Click the linked requisition ID.	Provides a summary of the requisition job requirements.
Location Address	SPF_ADDRESS_LOC	Click the linked location code.	View the location where the service will be performed.
Bid Factor Weighting	SPF_BDFTR_WEIGHT	Click the Bid Factors Weighting link on the Sourcing Selection page.	Adjust the bid factor weightings for a specific requisition.
Activities by Requisition	SPF_REQ_ACT	Click the Activities by Requisition link on the Sourcing Selection page.	View activities defined for a requisition. You can add activities only if *Allow add activities* is enabled for the selected service. **Note.** The Activities by Requisition link only appears for deliverables-based requisitions.
Sourcing Rules by Requisition Line	SPF_SRCRULES_REQ	Click the Sourcing Rules by Requisitions link on the Sourcing Selection page.	If you have the proper permission, change the sourcing preferences for the requisition.
Re Assign Requisition Line	SPF_SRC_REASSIGN	Click the Re-assign link from the Sourcing Selection page.	Reassigns a requisition line to a different service coordinator.
Sourcing Review	SPF_SOURCE_REVIEW	Click the Sourcing Review link on the Sourcing Selection page.	Review sourcing requirements.
Sourcing History	SPF_SOURCE_HISTORY	Click the Sourcing History button on the Sourcing Review page.	Review sourcing history.

Viewing the Worklist

Access the Worklist page.

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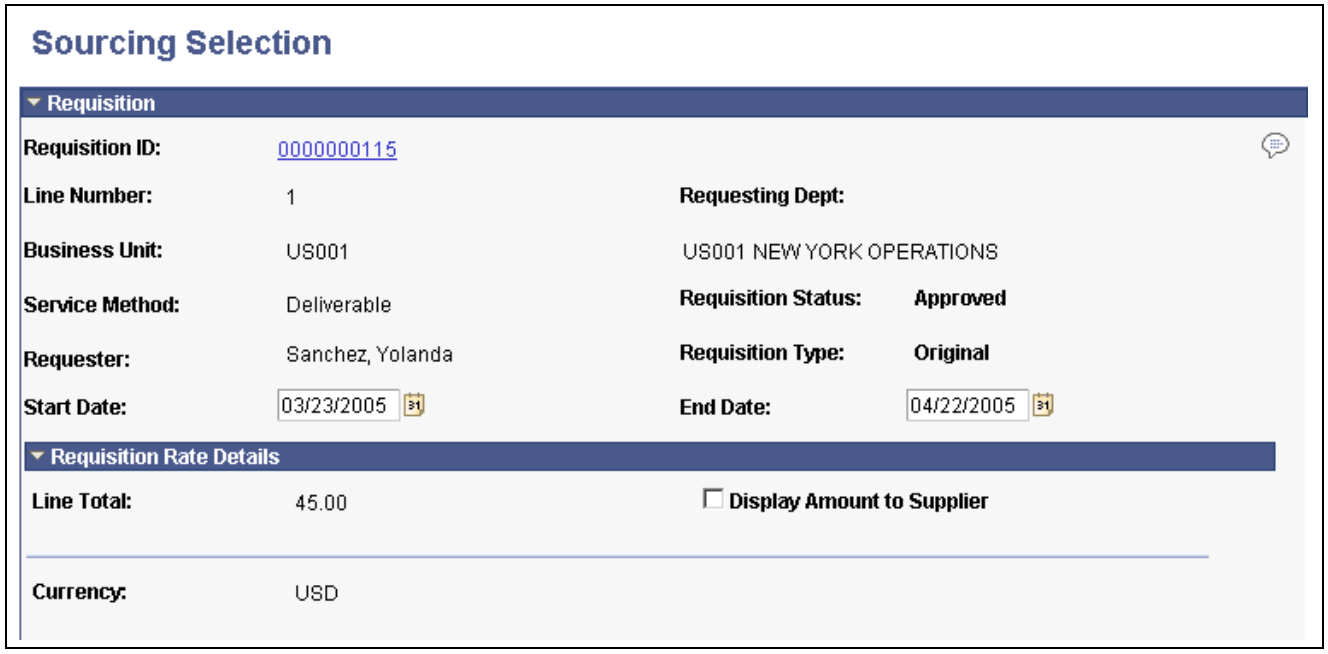
Link Click the link that corresponds to the requisition ID that you want to source using the worklist filter sPro Approved Requisition. Click this link to access the Sourcing Selection page, where you can source the requisition.

Note. When an extended requisition is approved, the service coordinator receives a worklist entry with a column indicating that the requisition is extended and approved.

Sourcing Requisition Requirements

Access the Sourcing Selection page.



Sourcing Selection page (1 of 3)

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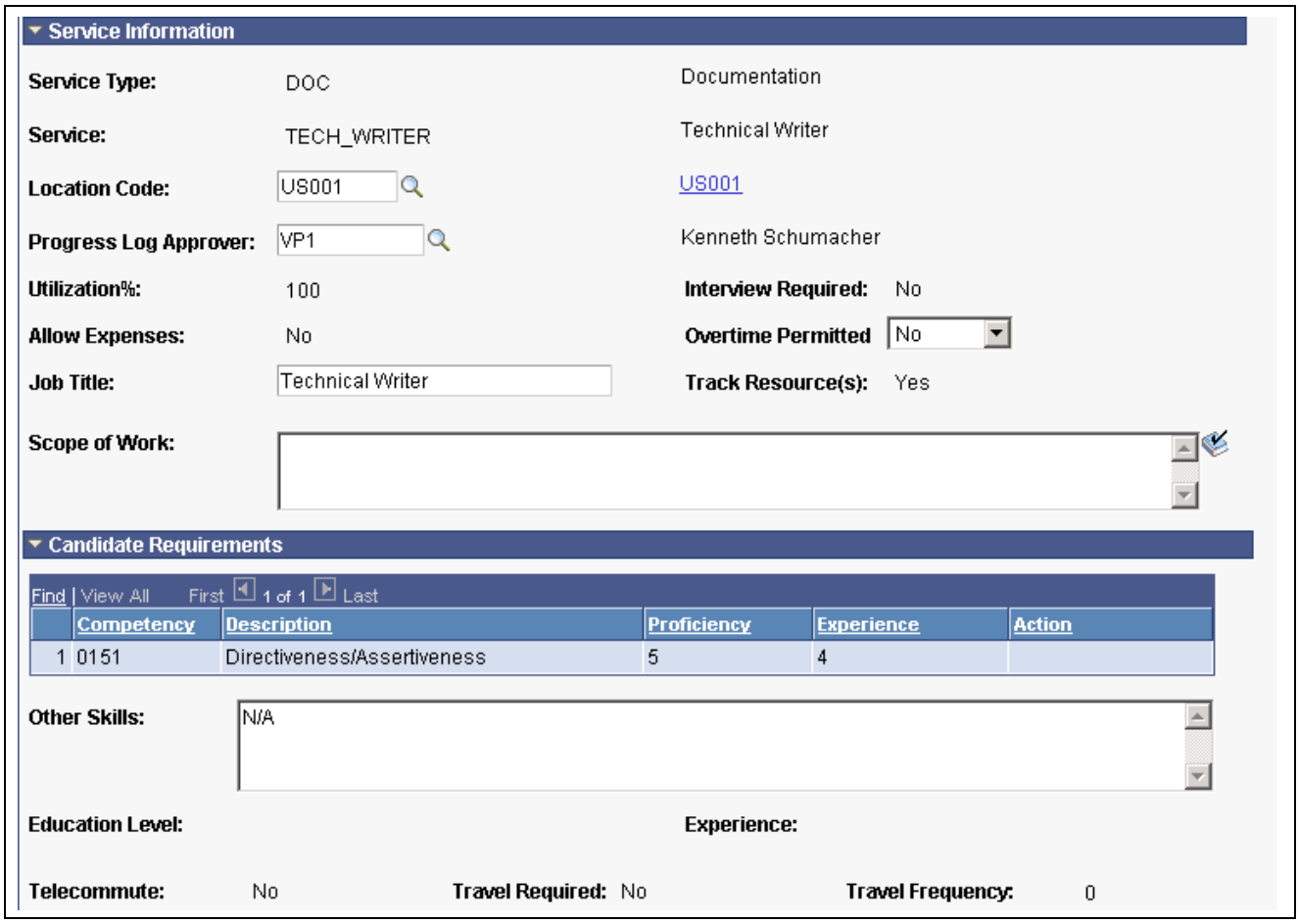
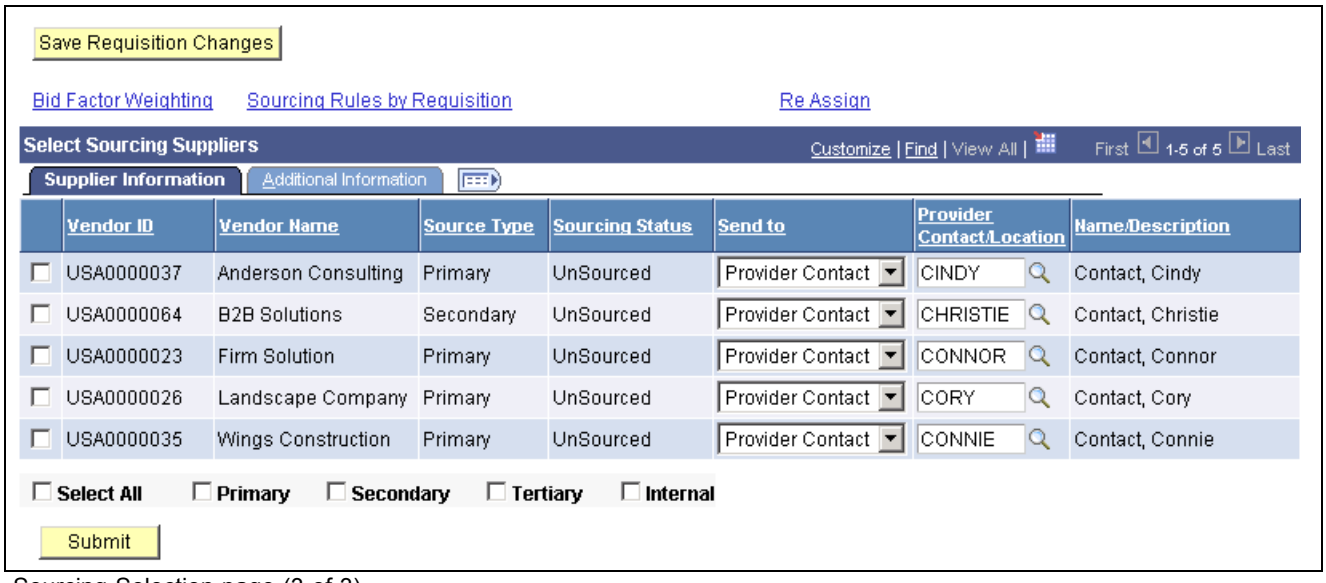


Sourcing Selection page (2 of 3)



Sourcing Selection page (3 of 3)

Use this page to review and source the requisition request.

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Note. The service coordinator can edit many of the requisition fields from this page prior to sourcing the requisition to suppliers. Once the fields are modified, click the Save Requisition Changes button to save the requisition changes.

Note. If you have the MSP (managed services provider) option enabled on the Installations Options page, MSP rate information appears on the Sourcing Selection page.

Supplier Information Tab

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

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

Send To Select to source the requisition request to either the supplier location or a specific contact at the supplier location.

Values include: *Location* and *Provider Contact*.

Provider Contact/Location Displays the provider contact name or the location, depending on the selection for the *send to* field.

Additional Information Tab

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

Filled Position The number of people already selected to fill positions for the service. This field is incremented each time a position is filled through bid management and decremented each time a related work order is canceled.

Selection Level View the vendor selection level values. This value reflects the method that is used to include a vendor in the sourcing selection list.

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

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

Note. The selection level indicates the level that is used when selecting a supplier.

Contract Indicates whether the supplier has a contract.

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

Max Submittal Limit/Position(maximum submittal limit and position) Enter the maximum number of candidates that a supplier can submit per position for the requisition line. For example, if the requisition line has 5 positions and the maximum submittal limit is set to 3, the supplier may submit up to 15 candidates.

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Click the Score Analysis button to view the analyzed score.

Service Coordinator Edits

If the requisition has not been sourced, the service coordinator can edit the Start Date, End Date, and Location. The Start Date can be moved forward, but not backwards. When you change the start date, the system automatically adjusts the end date by the original duration; you can change the end date, but you will be warned if the new duration is less than the original duration. The start date, end date and location fields are display only once the requisition is sourced.

Regardless of whether the requisition has been sourced or not, the service coordinator can edit the time approver, job description, competencies, and the scope of work.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Suppliers by Region, page 79

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining the Supplier Network Setup, page 77

Viewing Activities by Requisition

Access the Activities by Requisition page.

Activities added to the requisition can be added to the work order. The service provider contact can record progress against these activities.

Select a service activity and click the Save button.

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

Adjusting Bid Factor Weightings

Access the Bid Factor Weighting page.

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

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

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

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 83

Managing Sourcing Rules by Requisition Line

Access the Sourcing Rules by Requisition Line page.

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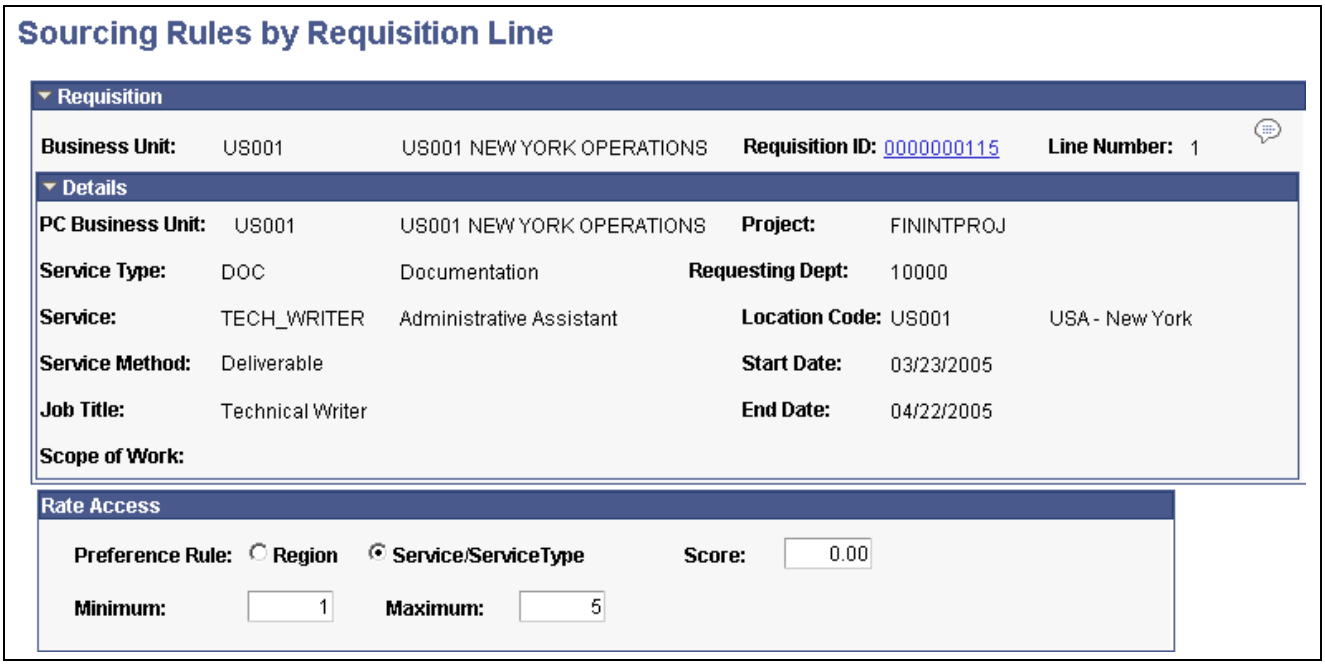

Sourcing Rules by Requisition Line page

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

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

Score Indicate the minimum score that a supplier must have to be selected for sourcing.

Minimum Enter the minimum number of suppliers to find using the sourcing rules.

Maximum Enter the maximum number of suppliers to find using the sourcing rules.

Include All Contract Suppliers Select to include all suppliers that have an existing contract for the desired role.

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

Save Click to save to save changes. When you click the Sourcing Selection Page link, the Sourcing engine runs again using the new parameters.

Reassigning Requisition Lines

Access the Re Assign Requisition Line page.

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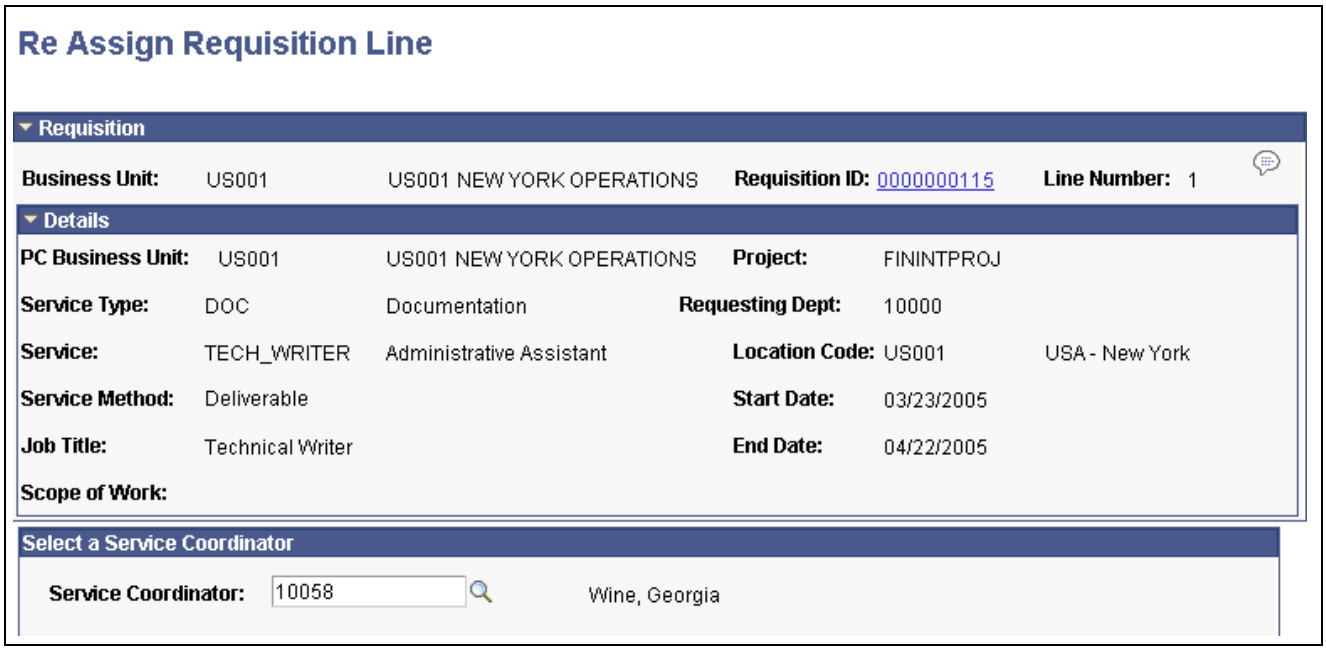

Re Assign Requisition Line page

Service Coordinator Enter a service coordinator to reassign the lines.

Viewing the Sourcing Review

Access the Sourcing Review page.

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Sourcing Review page

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

No. of Submittals (number of submittals) View number of bids from the supplier.

Viewing the Sourcing History

Access the Sourcing History page.

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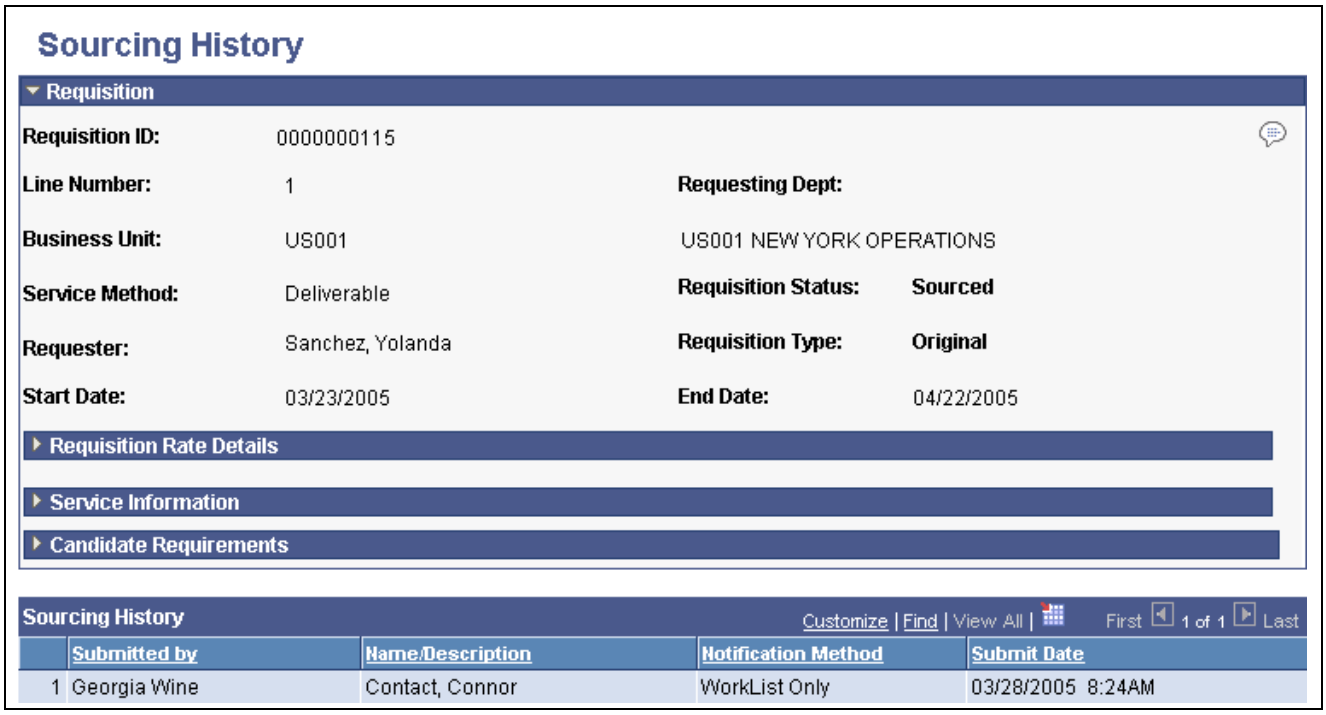

Sourcing History page

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

Managing Sourcing

This section discusses how to manage sourcing.

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Pages Used to Manage Sourcing

Page Name	Object Name	Navigation	Usage
Managing Sourcing	SPF_SRC_MANAGE_PG	Services Procurement, Review and Source Requisitions	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Review	SPF_SOURCE_REVIEW	Click the Sourcing Review button on the Manage Sourcing page.	Review sourcing requirements.
Sourcing Selection	SPF_SOURCE_SELECT	Click the Sourcing Select button on the Manage Sourcing page.	Enter sourcing requirements.
Sourcing Review	SPF_SOURCE_REVIEW	Click the Sourcing Review link on the Sourcing Selection page.	Review sourcing requirements.
Sourcing History	SPF_SOURCE_HISTORY	Click the Sourcing History button on the Sourcing Review page.	View sourcing history.
Requisition Life Cycle	PV_REQ_CYCLE_PAGE	Click the Requisition Life Cycle button on the Managing Sourcing page.	View the requisition life cycle.
Define Requisition Rates	SPF_DEFN_REQ_RATES	Click the Define Requisition Rates button on the Manage Sourcing page.	Define requisition rate details.

See Also

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Maintaining Service Types, page 66

Managing Sourcing

Access the Managing Sourcing page.

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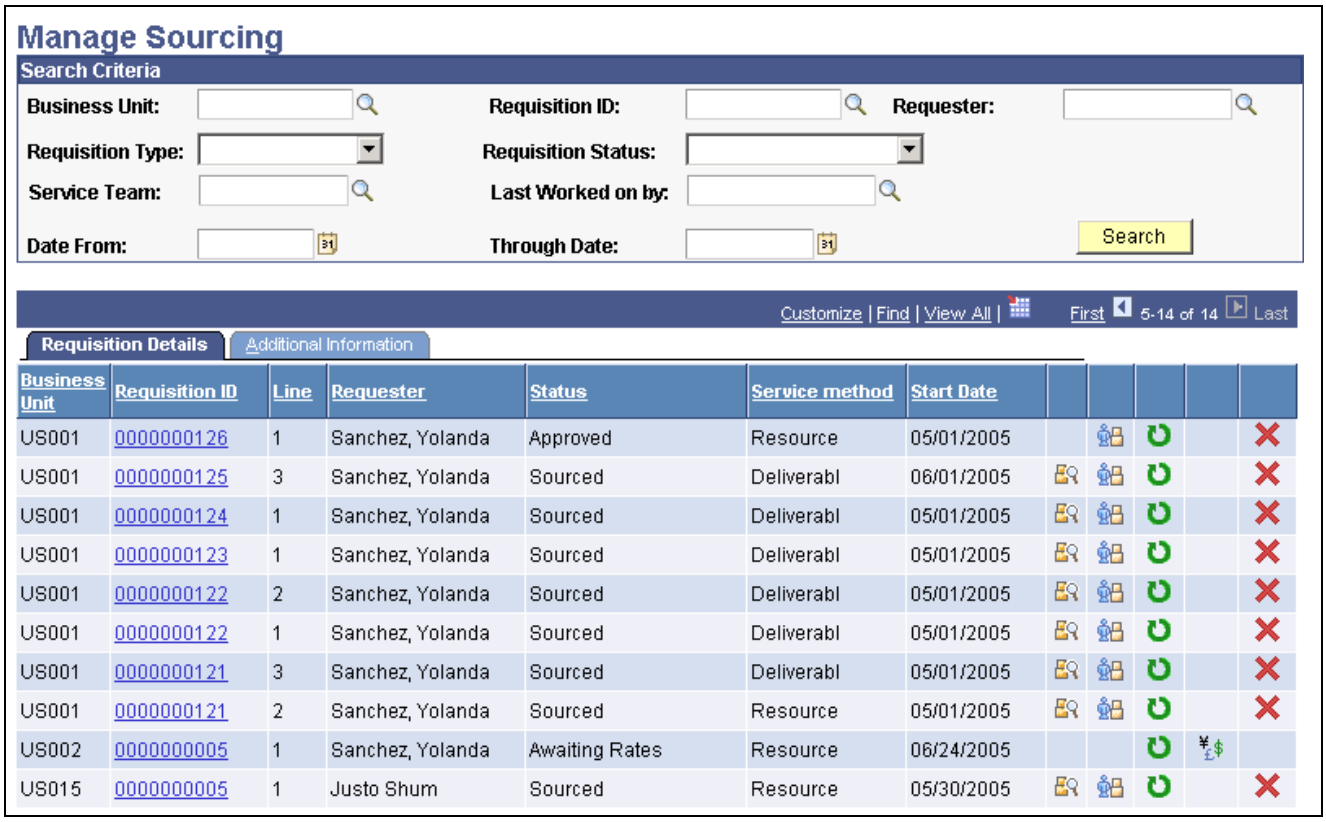

Manage Sourcing page

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

To search for the requisitions associated to the team but either not yet assigned or assigned to another team member, first select a valid Service Team, then select a Service Coordinator and click the Search button. The Service Team and Service Coordinator fields are only available for Service coordinators assigned to a team(s). If you are on a team, all the teams for which you are a member display in the Service Team drop down list. If you aren't on a service team, you can only access requisitions where you are the service coordinator. If you select a requisition from another team member, you have the same access and change privileges for the requisition as the other team member. If you act on a requisition, the system updates the requisition to show you as the service coordinator. This indicates who last worked on the requisition.

Requisition Type Select to view original or extended requisitions.

Requisition Status View requisitions by status. Statuses include:

- *Approved*
- *Canceled*
- *Closed*
- *Denied*
- *Filled*
- *On Hold*
- *Open*

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- *Pending*
- *Pre-Approval Pending*
- *Pre-Approval Sourced*
- *Sourced*

Note. If you select the *Pre-Approval Pending* or the*Pre-Approval Sourced* value, the system returns requisition values that were sourced but not yet approved.

These options are only available when you select the Pre-Approval Parallel Sourcing option on the PeopleSoft Services Procurement Business Unit page.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining PeopleSoft Services Procurement Business Units, page 30.

Click to access the Sourcing Review page.

Click to access the Sourcing Selection page.

Click to access the Requisition Life Cycle page.

Click to cancel the selected requisition line.

Note. When the service Coordinator cancels a requisition line, a confirmation page displays, and the service coordinator can enter the reason code and related comments if the business unit is set up to use reason codes.

Click to access the Define Requisition Rates page, where you can define requisition rate details.

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CHAPTER 16

Submitting and Managing Bids

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

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

Understanding the Requisition Bidding Process

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

Requisitions can be either resource or deliverables based. If the requisition is resource based, the supplier submits a candidate to fill the requisition. If the requisition is deliverables based, the supplier submits a proposal for filling the requisition.

PeopleSoft Services Procurement enables the suppliers to:

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

Here is the basic task flow of the requisition bidding process for suppliers:

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

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Note. Negotiation between the supplier and service coordinator is typically an ongoing process. Once the service coordinator chooses the action *Fill Requisition,* a break in communication occurs. This action officially ends the bid process between the service coordinator and the supplier.

5. Access the Service Provider Roster page to manage service provider information.

See Also

"PeopleSoft Services Procurement Preface," page xxxiii

Prerequisites

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

Submitting Candidates for Resource Requisitions

This section discusses how to:

- Review supplier sourcing requirements.
- Submit candidate information for resource-based requisitions.
- Create candidate profiles.

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Pages Used to Submit Candidates for Resource Requisitions

Page Name	Object Name	Navigation	Usage
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Services Procurement, Review Reqs/Submit Bids	Review requisitions sourced to the supplier.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Another Bid button on the Supplier Sourcing Review page.	Submit candidate information.
New Candidate	SPF_CANDIDATE_SEC	Click the Create Candidate button on the Submit Bid page.	To submit a candidate who is not yet profiled in the system, create a new candidate profile.
Resume Attachments	SPF_RESUME_ATTACH	Click the Resume Attachment button on the Submit Bid page.	Attach the candidate's resume to the bid.
Bid Attachments	SPF_BID_ATTACH	Click the Add Attachment link on the Submit Bid page.	Upload attachments to bid.
Sourcing History	SPF_SOURCE_HISTORY	Click the View History button on the Supplier Sourcing Review page.	View sourcing history.
Comments	PV_SP_REQ_COMMENTS	Click the Comments button on the Supplier Sourcing Review page.	Use to view comments associated with the requisition. **Note.** Comments are only visible if the requester has selected the send to vendor option when creating the comments.

Review Supplier Sourcing Requirements

Access the Supplier Sourcing Review page.

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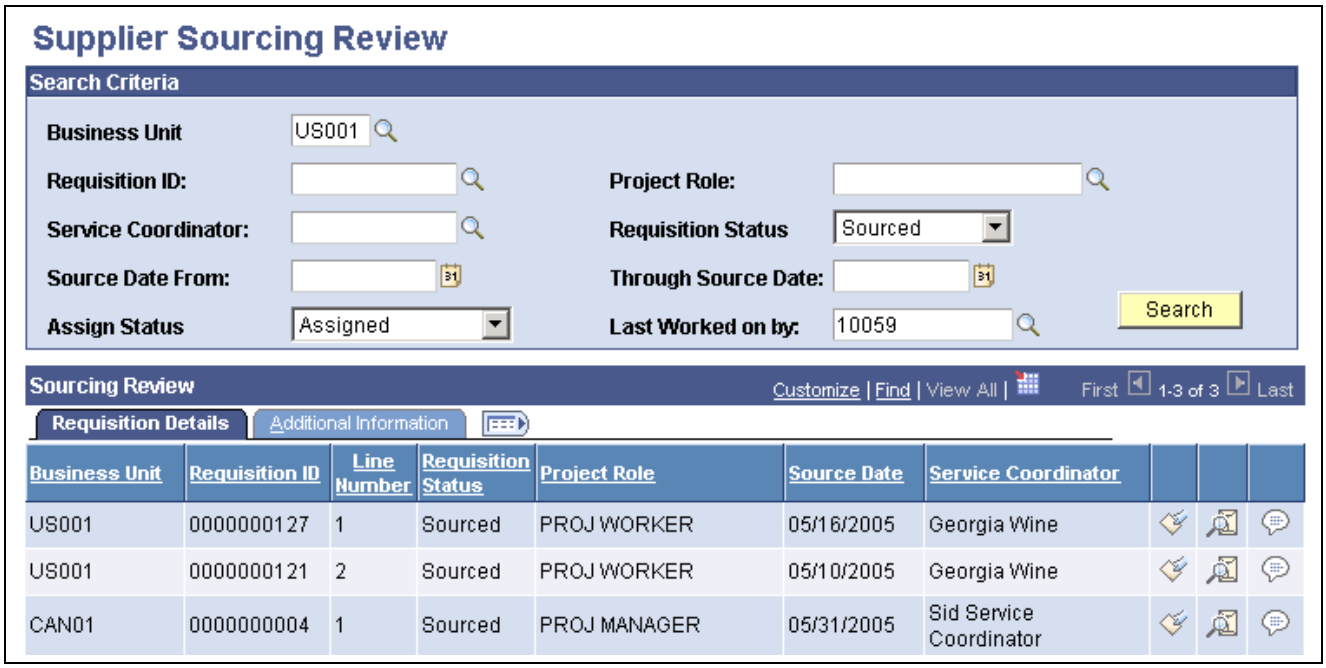

Supplier Sourcing Review page

Use the Search Criteria group box at the top of the page to enter specific search criteria. You can search by business unit, requisition ID, service coordinator, as well as various other search criteria. Once you enter the specific search criteria, click the Search button to view the results.

Use the Sourcing Review section at the bottom portion of the page to view requisitions that were sourced to suppliers. Click the Additional Information tab to review more details about the requisition.

Click to access the Submit Bid page, where you can submit candidate information.

Click to access the Sourcing History page, where you can review the sourcing history of the requisition.

Click to access the Comments page, where you can review comments associated with the requisition.

Note. Comments are only visible if the requester has selected the option to send to the comments to the vendor.

Available Positions The number of positions not yet filled for a requisition line.

Number of Positions Number of available positions needed to fill the service request.

Filled Position The number of people already selected from this supplier to fill positions for the service.

Note. This field is incremented each time a position is filled through bid management and decremented each time a related work order is canceled.

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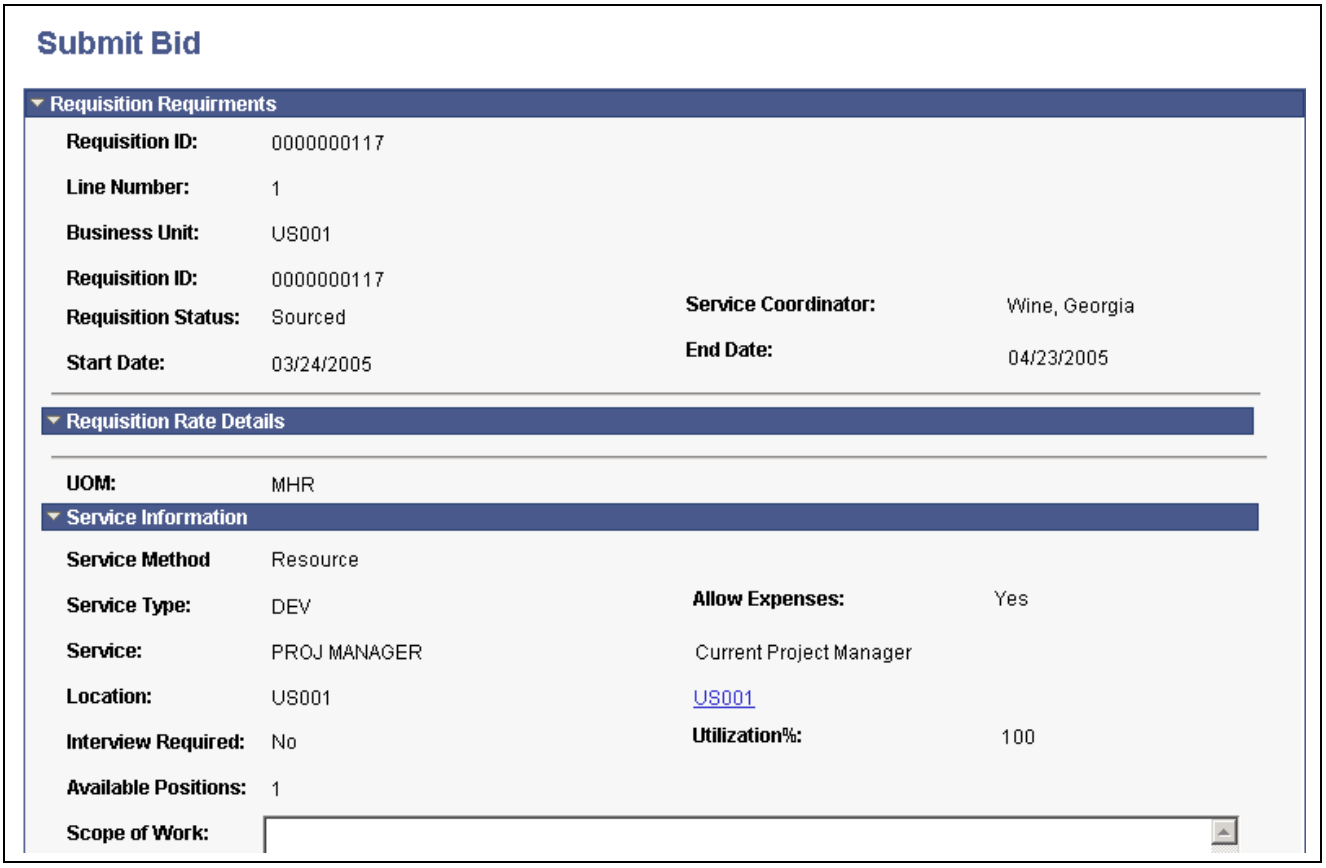
Submitting Candidate Information for Resource-Based Requisitions

Access the Submit Bid page.



Submit Bid page (1 of 4)

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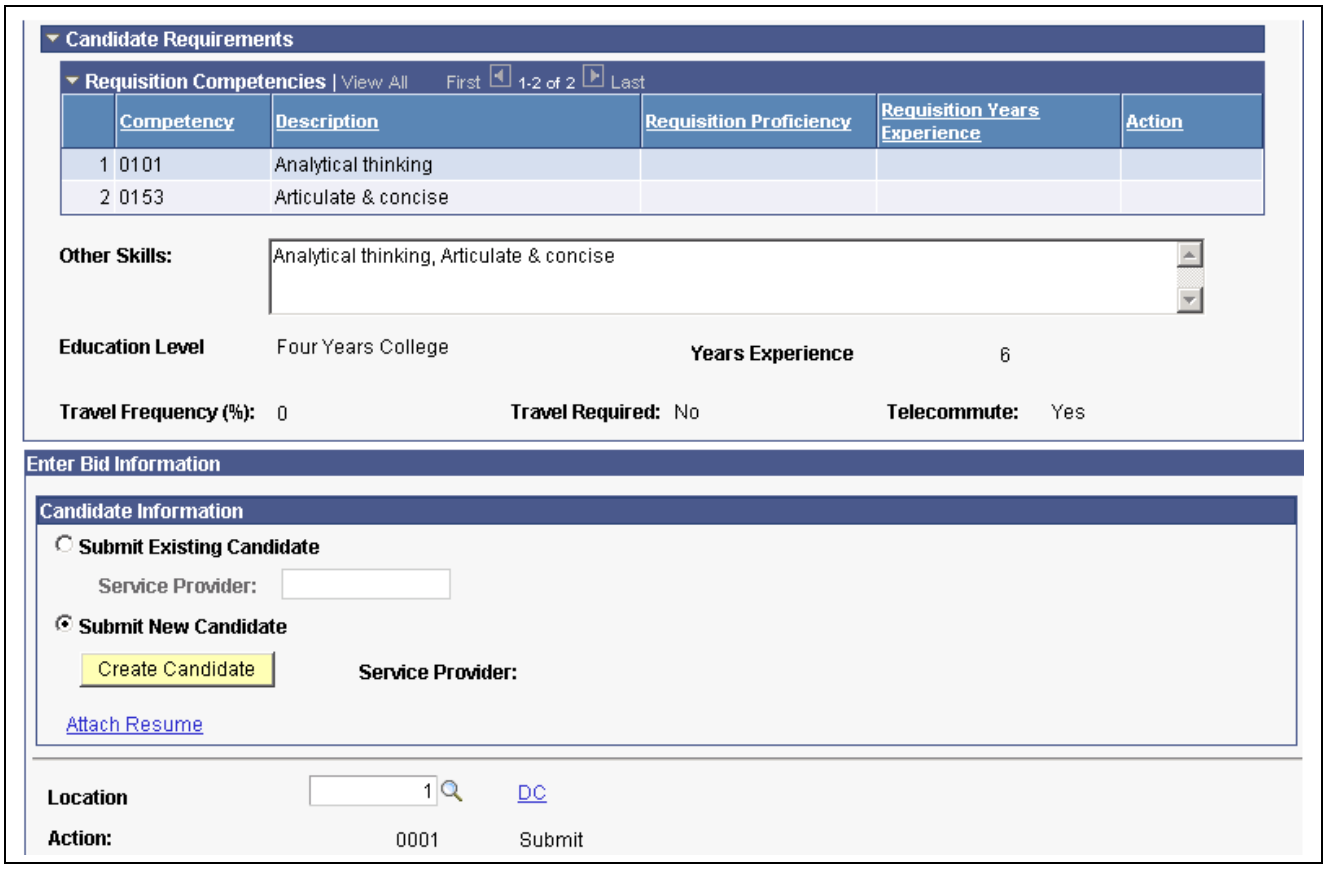
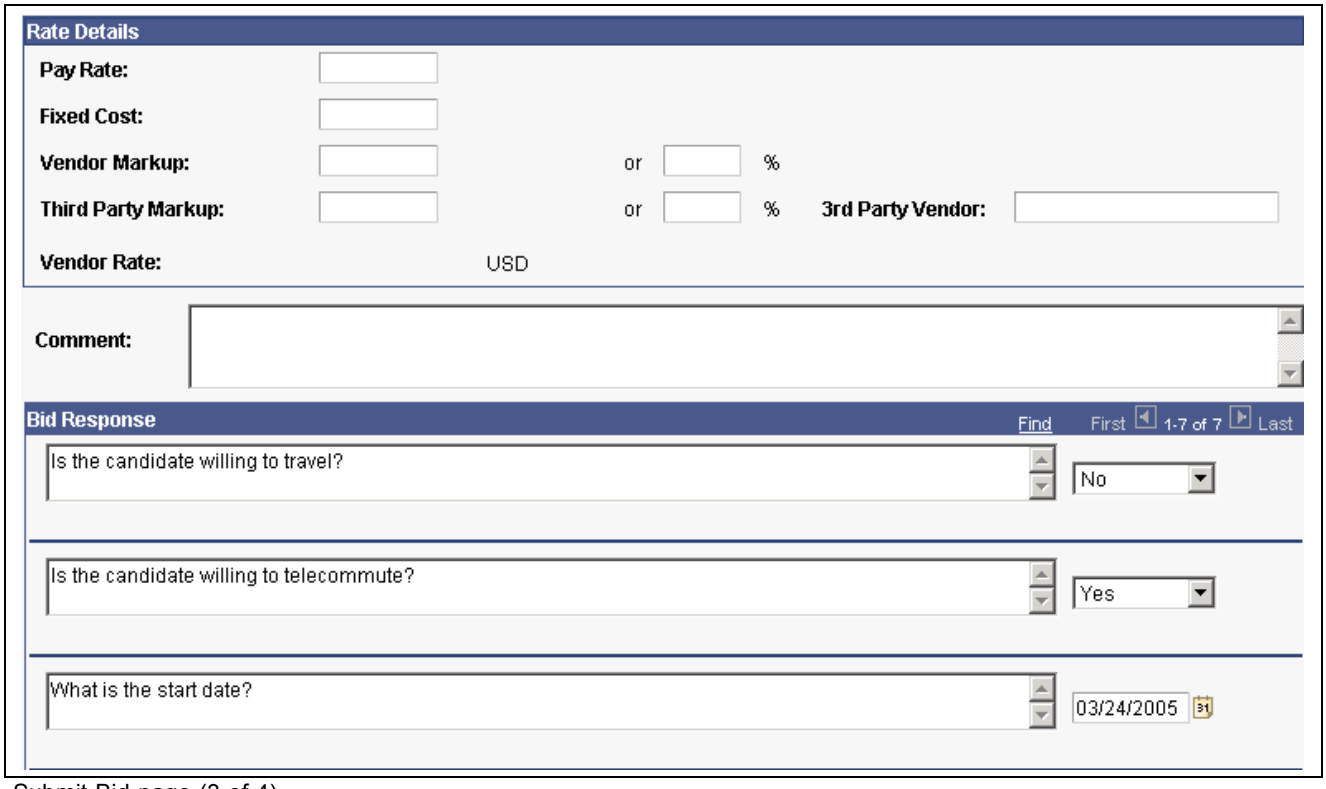


Submit Bid page (2 of 4)



Submit Bid page (3 of 4)

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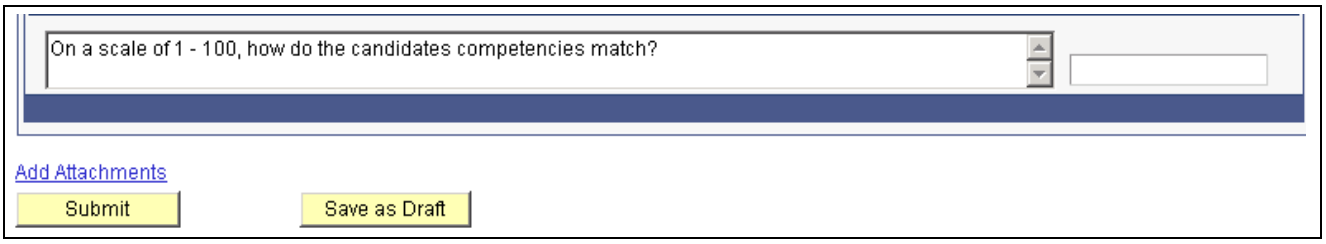

Submit Bid page (4 of 4)

Enter Bid Information

Submit Existing Candidate Select to submit a candidate who already has a candidate profile.

Note. When a supplier selects this option, the service provider field becomes available.

Service Provider Select an available service provider to submit as a candidate.

Submit New Candidate Select to submit a new candidate.

Create Candidate Click to access the New Candidate page, where you can create a new candidate profile.

Note. This button is active only after the supplier selects the Submit New Candidate option.

Attach Resume Click to attach a resume for the candidate.

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

Location Enter the vendor location for this service provider.

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

Note. The supplier must answer each bid factor question at the bottom of the submit bid page before submitting a candidate. Bid factor weightings affect the final score of the candidate.

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

If the system is set to use the rate breakdown feature, the supplier may enter the pay rate, fixed cost, markup, and third party markup. The sum of the rates is the bid rate.

Rate Details

Pay Rate Enter base rate for the service provider.

Fixed Cost Enter fixed overhead rate.

Vendor Markup Enter the markup rate for the vendor.

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Third Party Markup Enter third party markup rate, if any.

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

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

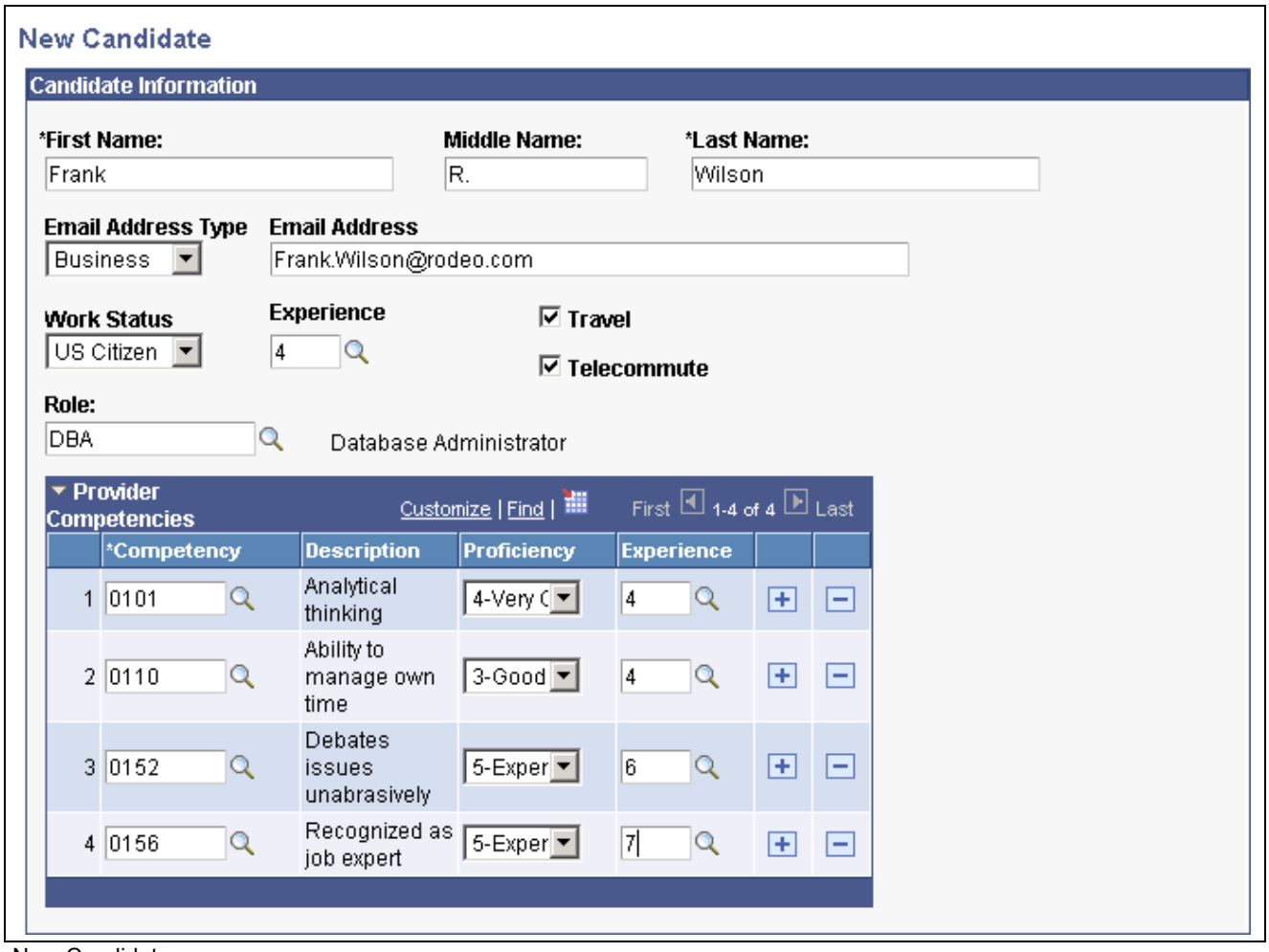
Save as Draft Click to save the bid as a draft.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Understanding Bid Factors, page 80

Create Candidate Profiles

Access the New Candidate page.



New Candidate page

Work Status Identify the work status for the new candidate. For example, green card holder and citizen.

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Years Experience	Identify the number of years of experience for the new candidate.
Travel	Select if the candidate is willing to travel.
Telecommute	Select if the candidate is willing to telecommute.
Role	Identify the main role of the new candidate.
Competency	Identify the main skills associated with the new candidate.

Note. If a candidate is chosen to fill the requisition, the system administrator must add that person as a service provider on the User Profile Setup page. Then the candidate has a user name and password and can log in to the system to enter time and expenses.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 87

Submitting Bids for Deliverables-Based Requisitions

This section discusses how to submit bids for deliverables-based requisitions.

Pages Used to Submit Bids for Deliverables-Based Requisitions

Page Name	Object Name	Navigation	Usage
Supplier Sourcing Review	SPF_SOUR_REVIEW_SP	Services Procurement, Review Reqs/Submit Bids	Review requisitions sourced to suppliers.
Submit Bid	SPF_SUBMITAL_PAGE	Click the Submit Bid button on the Supplier Sourcing Review page.	Submit bid.
Bid Attachments	SPF_BID_ATTACH	Click the Add Attachment link on the Submit Bid page.	Upload attachments to bid.
Sourcing History	SPF_SOURCE_HISTORY	Click the View History button on the Supplier Sourcing Review page.	View sourcing history.
Comments	PV_SP_REQ_COMMENTS	Click the Comments button on the Supplier Sourcing Review page.	View comments associated with the requisition. **Note.** Comments are only visible if the requester has selected the option to send to the comments to the vendor.

Submitting Bids for Deliverables-Based Requisitions

Access the Submit Bid page.

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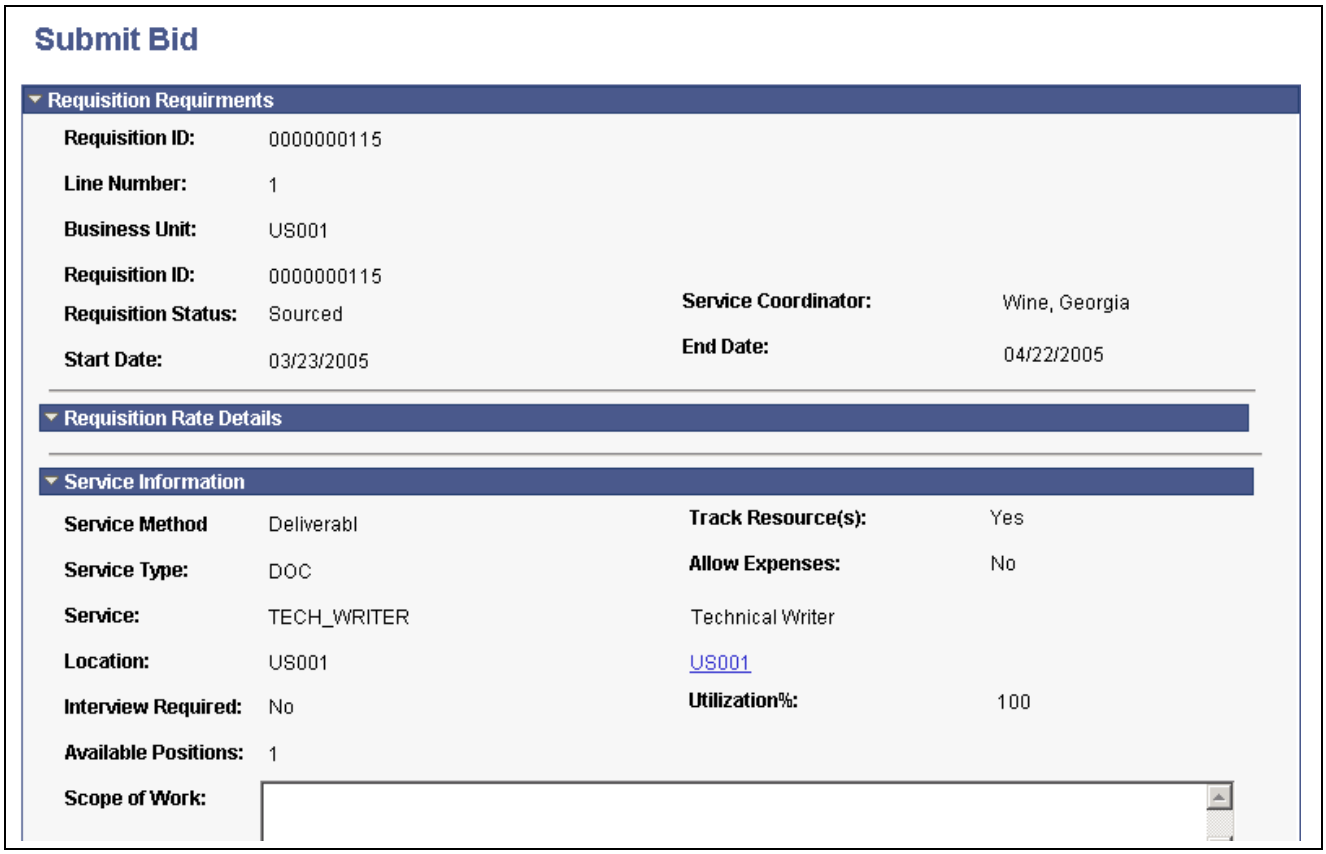

Submit Bid page 1 of 2

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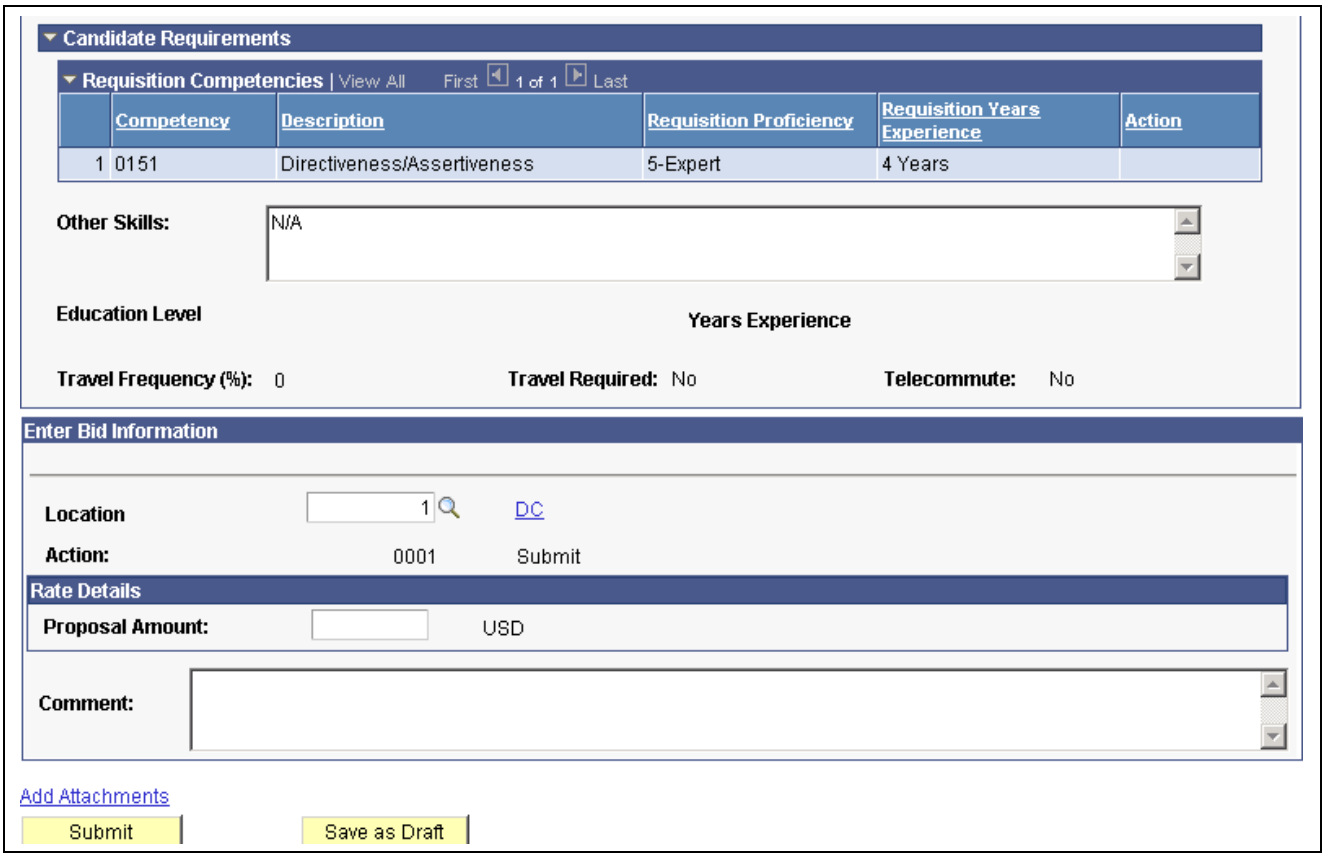

Submit Bid page (2 of 2)

Enter Bid Information

Location Enter the vendor location.

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

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

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

Viewing Incoming Bids and Creating Bid Responses

This section discusses how to:

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

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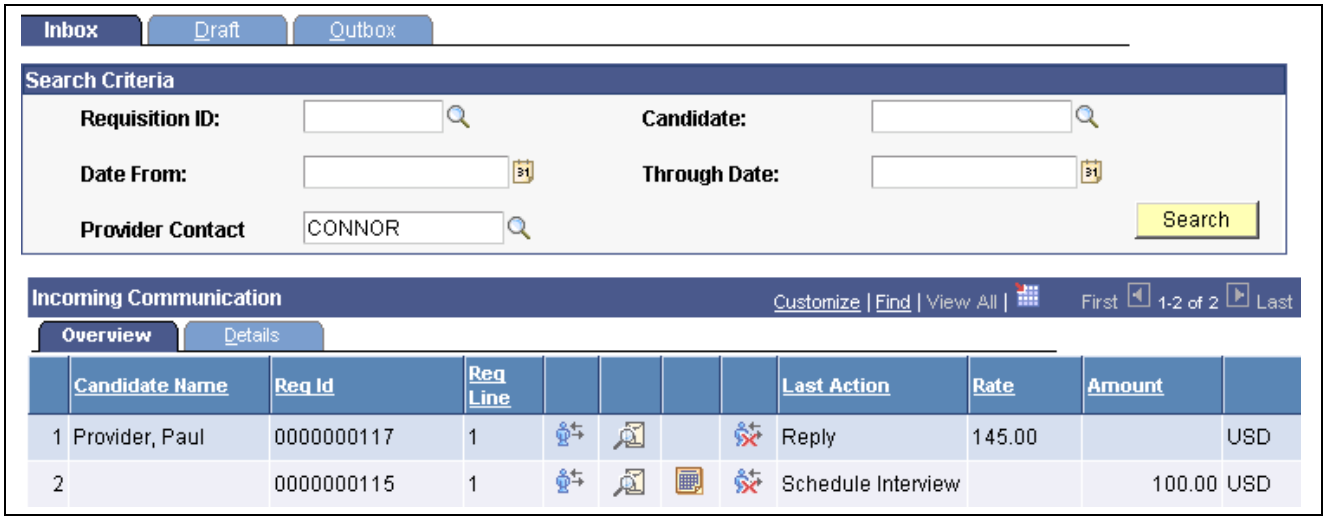
Pages Used to View Incoming Bids and Create Bid Responses

Page Name	Object Name	Navigation	Usage
Incoming Bid Summary - Inbox	SPF_SUP_COM_IN	Services Procurement, Maintain Bids	View incoming bids.
Supplier Bid Response	SPF_SUP_BIDRSP1	Click the Create Bid button on the Incoming Bids Summary - Inbox page.	Create bid.
Communication History	SPF_BID_HISTORY	Fulfill Service Requisitions, Bid History Click the Bid History button on the Incoming Bid Summary - Inbox page.	View bid history.
Interview Schedule	SPF_INTERVIEW_SCHD	Click the Interview Schedule button on the Incoming Bid Summary - Inbox page.	View interview schedules.

Viewing Incoming Bid Information

Access the Incoming Bid Summary - Inbox page.



Incoming Bid Summary - Inbox page

Requisition ID Displays the requisition ID.

Req Line (requisition line) Displays the requisition line.

Click the Create Bid button to access the Supplier Bid Response page, where you can enter a bid for the selected requisition.

Click the Bid History button to access the Communication History page, where you can view the bids to the selected requisition.

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

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

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

Last Action Displays the action of the incoming bid.

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

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

Creating Bid Responses

Access the Supplier Bid Response page.

Use this page to respond to the service coordinator.

Action Select a bid response as a reply to the service coordinator. Values include *Accept Offer*, *Withdraw*, *Reply*, *Decline Offer*, and *End Communication*.

Reviewing Draft Bids

This section discusses how to view draft bids. Submittals or bids that are saved as draft rather than submitted are included on this page.

Pages Used Review Draft Bids

Page Name	Object Name	Navigation	Usage
Draft	SPF_SUP_COM_DFT	Services Procurement, Maintain Bids Click the Draft tab.	Review and edit bids that were saved as drafts.
Supplier Bid Response	SPF_SUP_BIDRSP1	Click the Edit button on the Draft page.	Create bid.
Communication History	SPF_BID_HISTORY	Click the Bid History button on the Draft page.	View bid history.

Reviewing Draft Bids

Access the Draft page.

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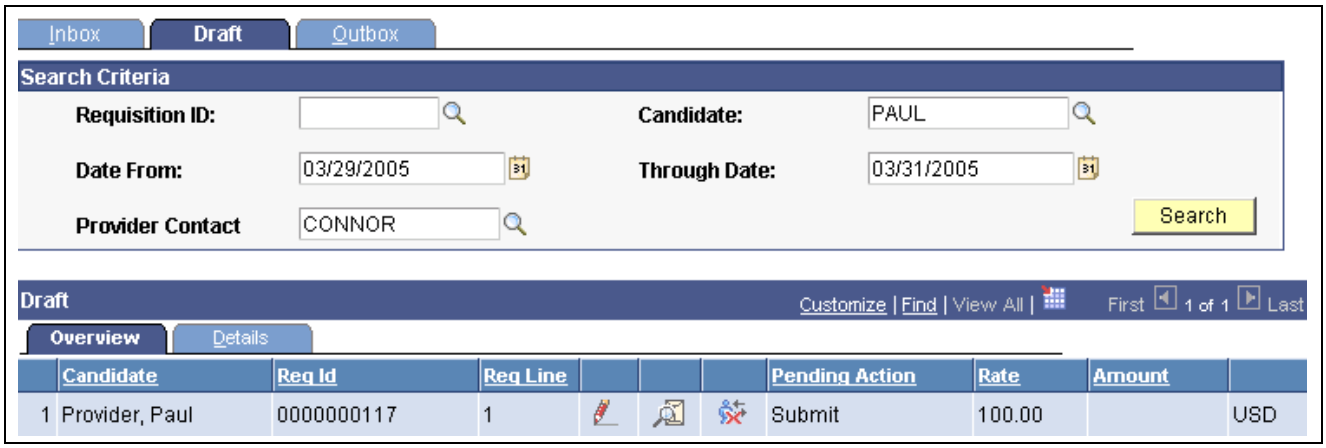

Draft page

Click to access the Supplier Bid Response page, where you can edit the supplier bid response and submit it for consideration.

Viewing Outgoing Bids

This section discusses how to view outgoing bid information.

Pages Used to View Outgoing Bids

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

Viewing Outgoing Bid Information

Access the Outgoing Bids page.

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

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

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

Click to navigate to the Supplier Bid Response page. If the requisition has not been filled, you can still edit the Bid Response.

Note. If the Service Provider Contact edits bids that have been submitted, the system sends a notification to the Service Coordinator and the Requester, if the Service Coordinator has already forwarded the bid on to the Requester for review.

See Also

Chapter 8, "Implementing PeopleSoft Services Procurement Workflow," page 163

Chapter 17, "Reviewing and Awarding Bids," page 269

Managing Service Providers

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

Pages Used to Manage Service Providers

Page Name	Object Name	Navigation	Usage
Service Provider Roster	SPB_PROV_ROST_PG	Services Procurement, Manage Service Providers	Review and update service provider information.
Maintain Service Provider	SPB_PERS_PROV_PAGE	Click the Add Service Providers link on the Service Provider Roster page.	Maintain service provider information.
Manage Time/Expense Sheets	SPA_MANAGE_TE	Click the Timesheet History button on the Service Provider Roster page.	View timesheet history.

Managing Service Providers

Access the Service Provider Roster page.

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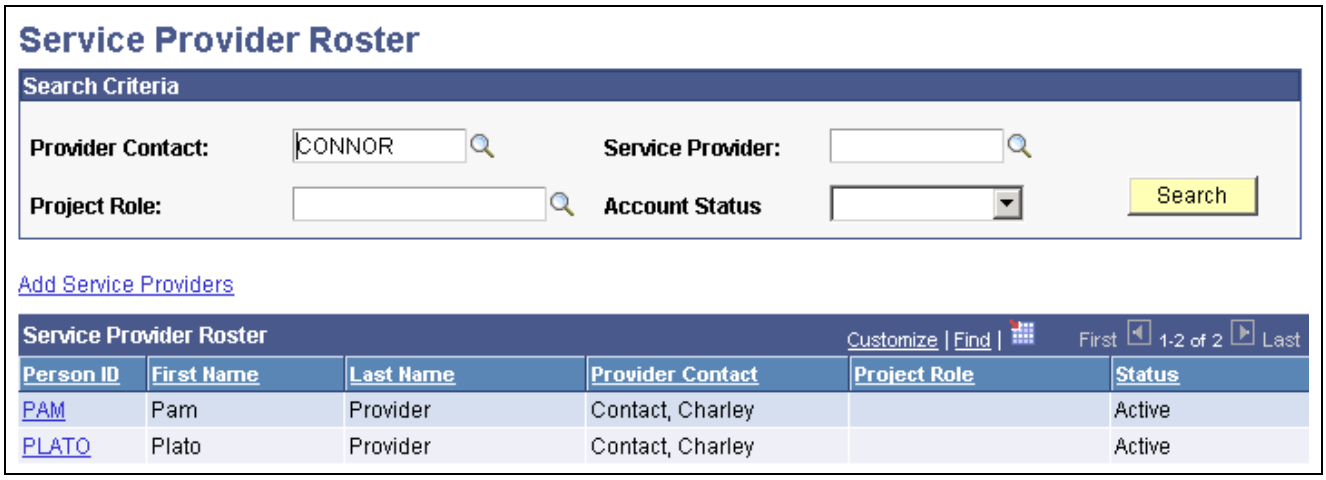

Service Provider Roster page

Provider Contact Enter a value to filter the data.

If you leave this field blank, the Service Provider contact can view all Service Providers for the organization.

Service Provider Enter a value to filter the data.

Add Service Providers Click to add service providers.

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

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CHAPTER 17

Reviewing and Awarding Bids

This chapter provides an overview of the service coordinator's communications with the supplier and discusses how to:

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

Understanding Supplier Communications

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

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

- Review incoming and outgoing supplier bid information.
- Exchange continuous bid communication (service coordinator and requester).
- Respond to bid submissions (service coordinator only).
- Schedule interviews for submitted candidates (service coordinator only).
- Select a qualified bid to fill the position (service coordinator only).

To communicate with suppliers:

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

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

3. Use the Outgoing Bids page to view the responses sent.
4. Access the Interview Schedule page to schedule and rate interviews (service coordinator and requester).
5. Use the Analyze Events page to Analyze bid amounts and line scores for all bids submitted for the requisition request.

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

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See Also

"PeopleSoft Services Procurement Preface," page xxxiii

Prerequisites

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

Viewing Incoming Supplier Bids and Creating Bid Responses

This section discusses how to:

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

Pages Used to Review Incoming Bids and Create Bid Responses

Page Name	Object Name	Navigation	Usage
Incoming Bids (for service coordinators)	SPF_CLI_BID_IN	Services Procurement, Assess and Award Bids	View incoming bids submitted by suppliers.
Incoming Bids (for requesters)	SPF_REQ_BID_IN	Services Procurement, Requisition Fulfilment, Review Submittals, Incoming Bids	View incoming bid response details submitted by the service coordinator.
Job Summary Details	SPF_REQ_SUMMARY_PG	Click the linked requisition number or line number on the Incoming Bids page.	View job summary details.
Bid Response (for service coordinators)	SPF_CLIBID_RSP	Click the Bid Response button on the Incoming Bids page.	View supplier bids and submit bid responses to the supplier or forward the bid to the requester for review (for service coordinators).
Bid Response (for requesters)	SPF_REQ_BID_RSP	Click the Bid Response button on the Incoming Bids page.	View supplier candidates and submit bid responses to the service coordinator (for requesters).
Analyze Events (for service coordinator)	AUC_AWARD_LN_PG	Click the Analyze Events button on the Incoming Bids page.	Analyze bid amounts and line scores for all supplier bids that respond to your requisition request.

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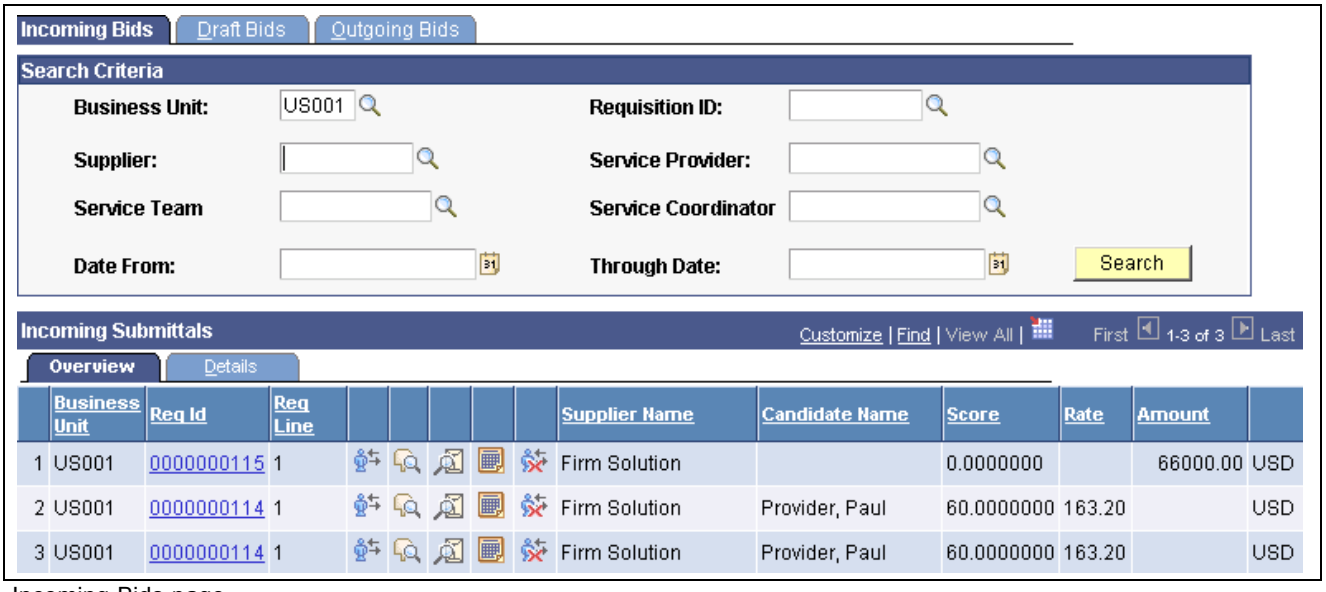
Page Name	Object Name	Navigation	Usage
Analyze Events - Award Details (for service coordinators)	AUC_AWARD_DTL_PG	Select which bid to award and click the Award Details link on the Analyze Events page.	View the details of your events.
Vendor Information (for service coordinators)	AUC_AWARD_VNDR	Click the Bidder Name link associated with an event to view.	View vendor information.
Line Bid Factors (for service coordinators)	AUC_LN_BF_SEC	Click the Add/Edit Bid Factors link on the Analyze Events page.	Add line bid factors while analyzing events.
Assign Contract Clauses	AUC_LN_BF_CLAUSES	Click the Add Clauses to Bid Factor link on the Line Bid Factors page.	Assign contract clauses.
Search Bid Factors by Group	BID_FCTR_GRP_SRCH	Click the Add Bid Factors by Group link on the Line Bid Factors page.	Add bid factors by group.
Submittal History	SPF_CLIBID_HIS	Click theSubmittal History button on the Incoming Bids page.	View the history for your bid responses.
Interview Schedule	SPF_INTERVIEW_SCHD	Click the Interview Schedule button on the Incoming Bids page.	Create and update an interview schedule for a candidate.
Interview Schedule Details	SPF_INTERVIEW_DTL	Click the Evaluate Candidate button on the Interview Schedule page.	View the details for your interview schedule and rate the candidate.

Viewing Bid Responses

Access the Incoming Bids page.



Incoming Bids page

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Req ID (requisition identification)	Click the 10-digit requisition ID to view the details of the requisition.
Req Line (requisition line)	Displays the requisition line number.
	Click to view the Bid Response page and to respond to the supplier or requester.
	Click to view the Bid Analysis page to compare competing bids.
	Click to view the Bid History page.
	Click to view the Interview Schedule page.
	Click to generate a bid response that ends the communication regarding the particular bid. Once communication has been ended, it is no longer possible to consider that bid for a requisition.
Candidate Name	Displays the service provider submitted by the supplier.
	Note. The candidate name is blank for bids on deliverables-based requisitions.
Score	Displays calculated score based on the previous response.
Rate	Displays rate in requisition currency for resource-based requisitions.
	Note. The rate is blank for deliverables-based requisitions.
Amount	Displays amount in requisition currency for deliverables-based requisitions.
	Note. The amount is blank for resource-based requisitions.
Supplier Name	Displays the name of the supplier bidding on the requisition.
Last Action	Review the last actions submitted by the supplier.
Date	Displays the date and time that the supplier responded to the bid.
Sent From	Displays the name of the user who sent the bid.

Responding to Bids

Access the Bid Response page.

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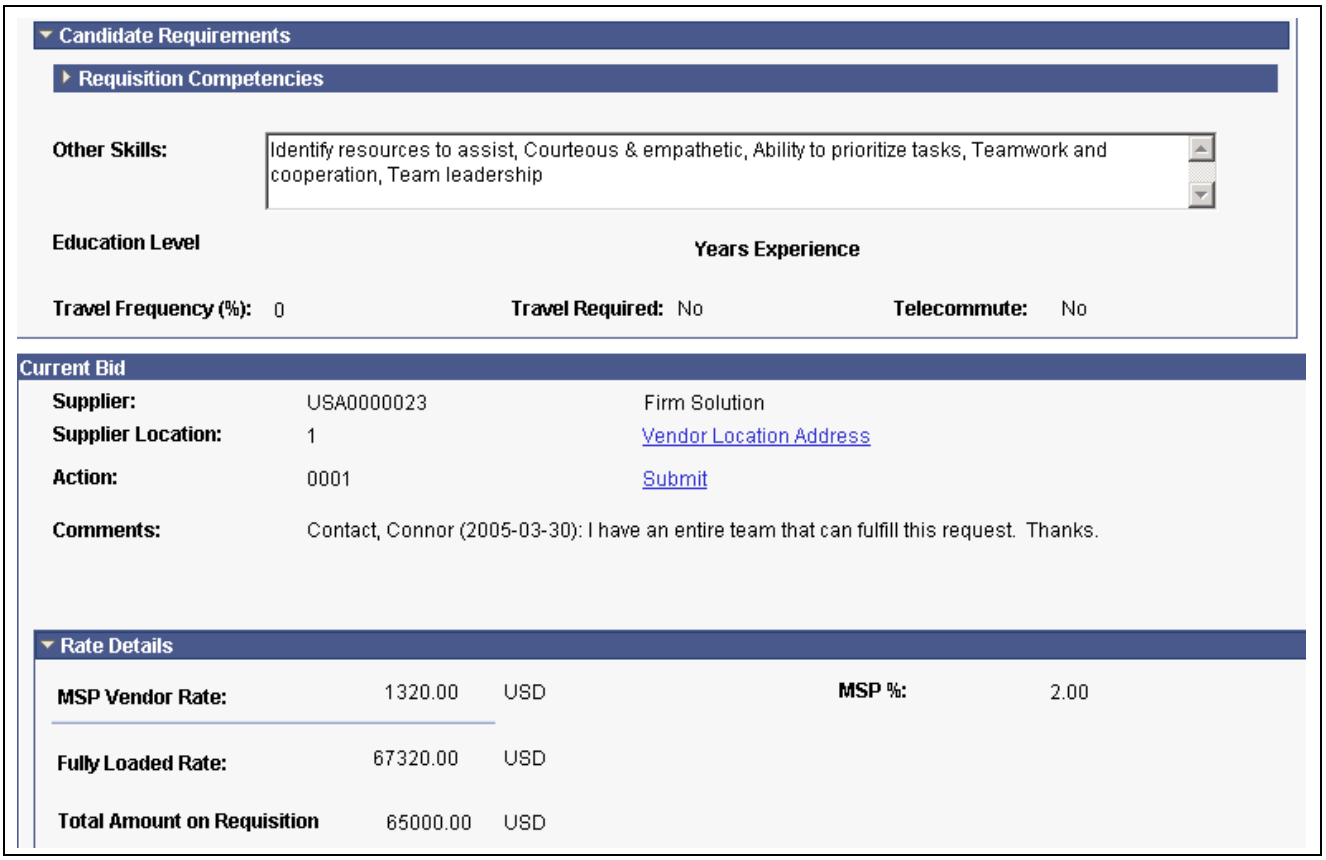
Bid Response page (1 of 3)



Bid Response page (2 of 3)

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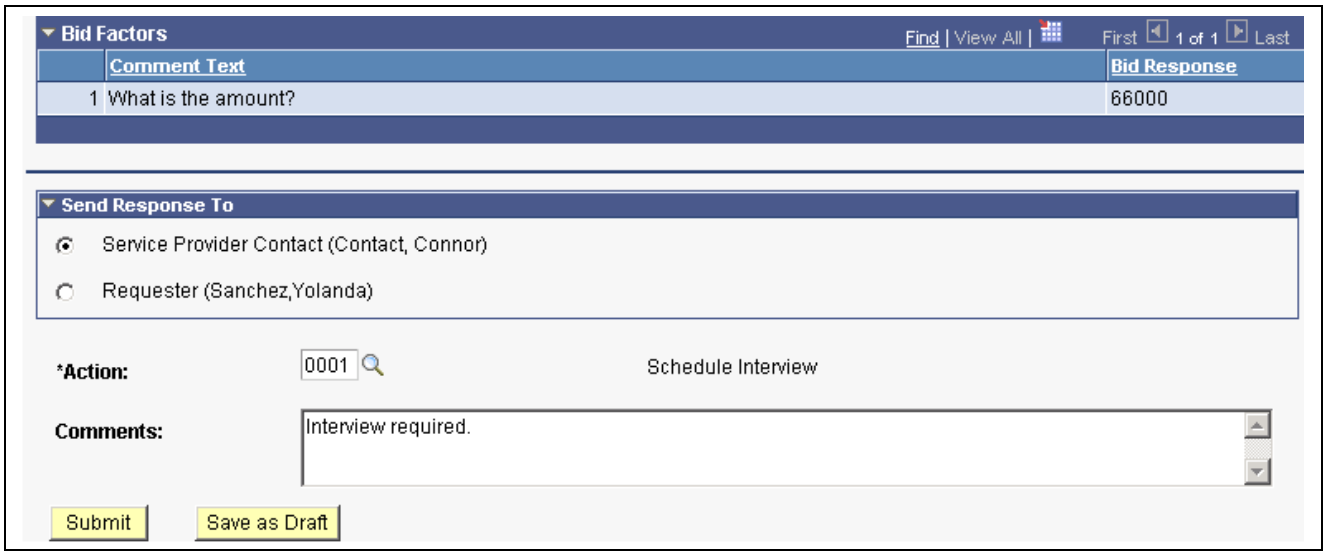

Bid Response page (3 of 3)

Send Response To

Select the appropriate option in this group box to send communications to the requester who originally submitted the requisition or to the service provider contact who submitted the bid.

Note. A service coordinator can send a response to either the requester or the service provider contact, not both. If a response is sent to a requester, the service coordinator and requester can only select bid actions that are specific to their communications. Additional bid actions that are intended for the service provider contact are filtered out.

Current Bid

Click to enter the new bid action response.

Action

Select an action and optionally respond to suppliers with comments. Values include:

- *Schedule Interview*
- *Offer Position*
- *Fill Requisition*
- *Reply*
- *Decline*
- *End Communication*

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

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

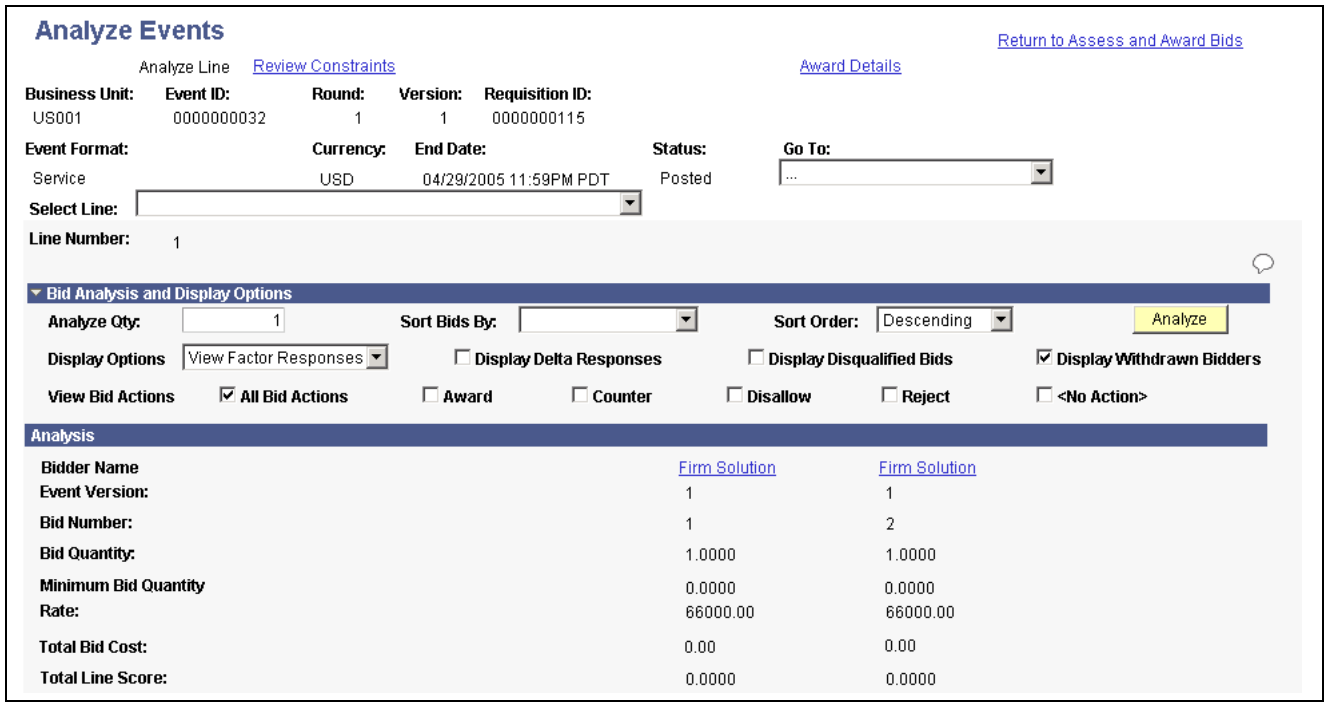
When Commitment Control is on, the service coordinator cannot offer the position or manually release the work order until the requisition has been budget checked.

See Also

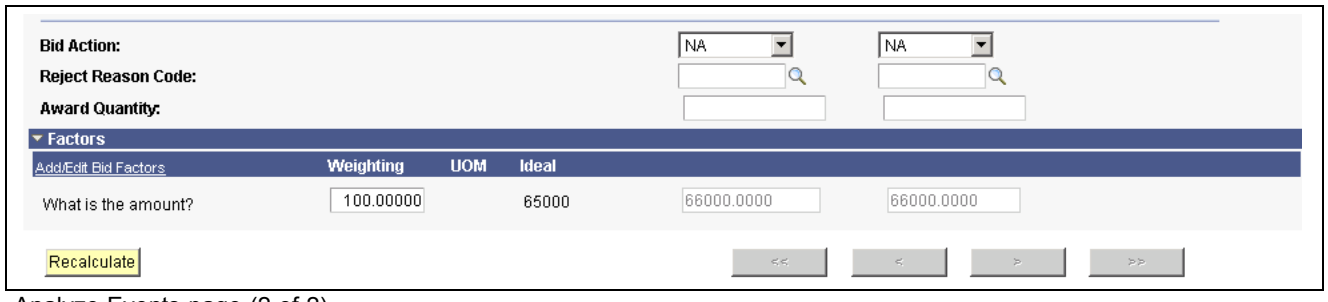
Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Creating Bid Factors, page 83

Analyzing Events

Access the Analyze Events page.



Analyze Events page (1 of 2)



Analyze Events page (2 of 2)

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Award Event To award an event to a bidder, select *Award* in the field that appears under the bidder's name. You can only award the event to one bidder.

Posting an Award

Access the Events Details page.

Post Award Click to post your bid event and award the contract to a supplier. Posting the award sends a worklist item to the requester to generate a work order. A worklist item also is sent to the service coordinator if he is authorized to create work orders as defined in the service coordinator defaults.

Note. Once you post the award, the line details appear on screen.

Viewing Outgoing Bids

This section discusses how to view outgoing bids.

Pages Used to View Outgoing Bids

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

Viewing Outgoing Bids

Access the Outgoing Bids page.

Click to edit the request.

Click to view the Bid History page.

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Click to view the Interview Schedule page.

See Also

Chapter 8, “Implementing PeopleSoft Services Procurement Workflow,” page 163

Creating and Maintaining Interview Schedules

This section discusses how to:

- Create an interview schedule.
- Evaluate an interview.

Understanding the Interview Process

Here is an overview of the interview process:

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

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

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

   Note. The interviewer has the requestor or approver role.

2. Access the Interview Schedule Details page (service coordinator, requestor, and interviewers).

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

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

3. Save the page.

If *Use Ratings* is enabled on the business unit, upon completing the interview, the interviewer rates the candidate using the star rating system. Once the Interview Completed check box is selected, the system calculates the average interview score for that candidate by selecting the rating for all completed interviews and dividing it by the number of completed interviews. This value is then saved in the strategic sourcing bid factor tables, and it is used to calculate the candidate’s overall score.

Note. The calculation of scores only happens if the interview bid factor is associated with this requisition. If the interview bid factor is not used, the rating on the interview page is used for information purposes and is not used to determine the candidates overall score.

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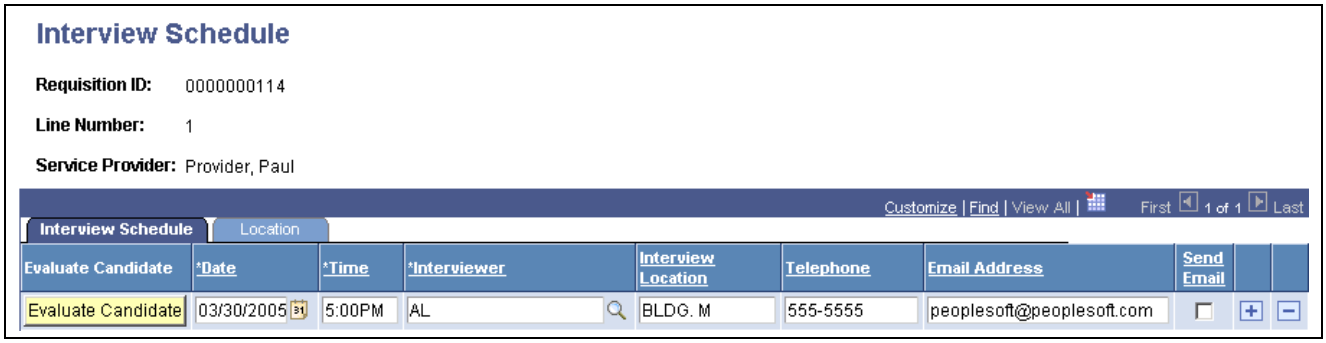
Pages Used to Create and Maintain Interview Schedules

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

Creating an Interview Schedule

Access the Interview Schedule page.



Interview Schedule page

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

Requesters can view the service providers scheduled for interviews.

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

Evaluating an Interview

Access the Interview Schedule Details page.

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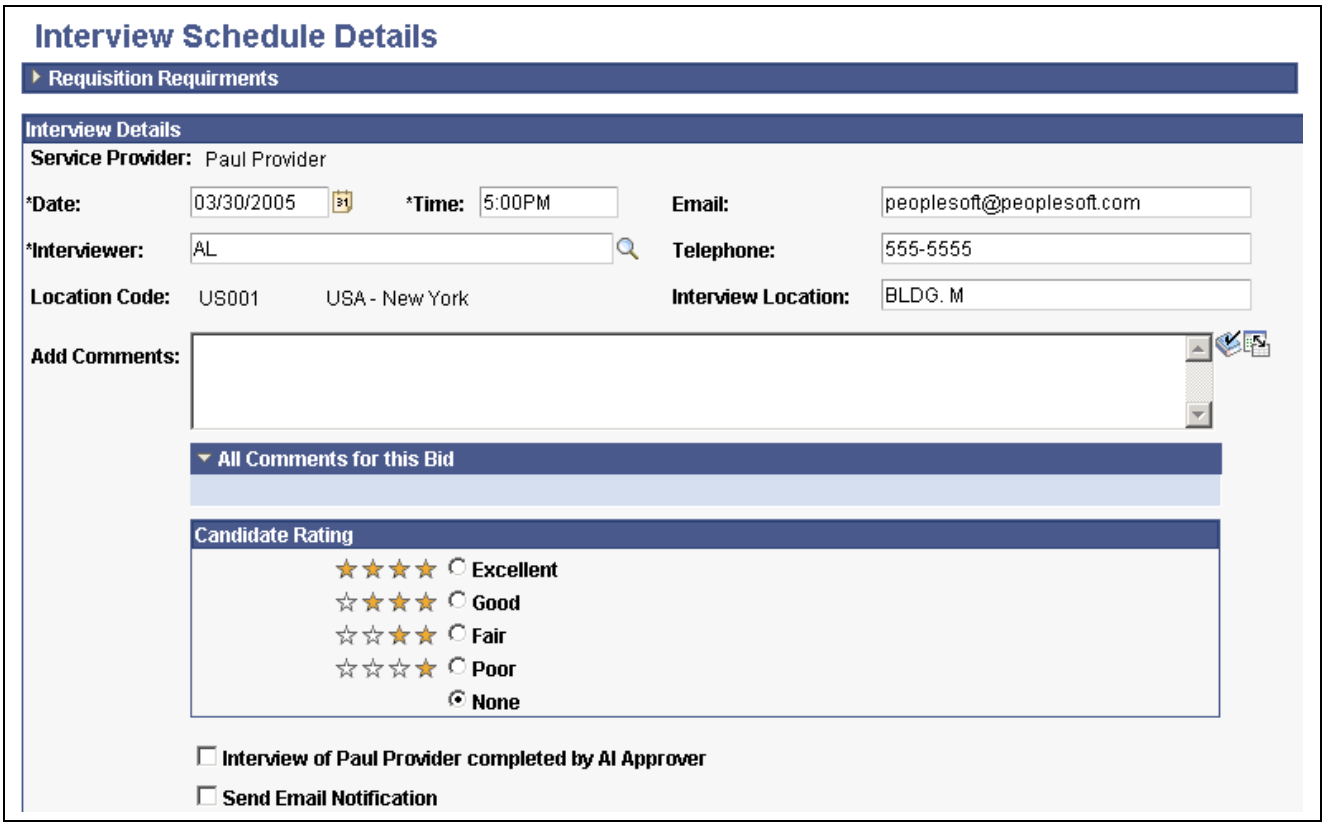

Interview Schedule Details page

Candidate Rating Select a candidate rating. Options include: Excellent, Good, Fair,Poor, and None.

Interview Completed Select to indicate that the interview was completed.

Send Email Notification Select to notify interviewers and the service provider contact of the interview schedule information.

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

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CHAPTER 18

Managing Work Orders

This chapter provides an overview of services work orders and discusses how to:

- Create and manage work orders.
- Create purchase orders with the Quick Sourcer.
- Manage purchase orders.
- Closing purchase orders.
- Manage work order sourcing and assigning new resources.
- View the service provider list.
- View logistical tasks.
- View value-added tax (VAT) and sales and use tax (SUT) information.

Understanding Services Work Orders

This section lists prerequisites and discusses:

- Work order status.
- Access to work orders.
- VAT and sales and use tax SUT for services.

In PeopleSoft Services Procurement, you can create work orders for resource-based and deliverable-based work orders that specify the basic terms and conditions of a project. Resource-based work orders reflect work that is typically conducted by a single service provider. Work orders of this nature are logged against the total hours worked. Deliverable-based work orders or request for proposal (RFP) work orders are work orders that reflect work generally conducted by an entire work team. Progress on deliverable-based work orders are logged against an entire project, not just the hours worked by a single service provider. There is no specific service provider in mind for deliverable-based work orders, so a statement of work defines the requirements. The rate and the unit of measure (UOM) are not applicable for deliverable-based work orders, so the user enters a work order amount instead of rate information.

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

Work order functionality in PeopleSoft Services Procurement includes the following capabilities:

- Generate a work order from a filled requisitions.
- Manually create a work order and link it to an approved or sourced requisitions.

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- Manually create a work order that is not related to a requisition.
- View tax information.
- View and run the logistical tasks.
- Route a work order for approval using defined workflow rules.
- Reassign a work order to another service provider.
- Extend the duration of a work order and track the related rate changes and approvals for the extension.
- Adjust the rate on a work order using effective dates.
- Link a work order to a purchase order using the Quick Source process.
- Control expenditures to ensure that a work order does not exceed the agreed amount.
- Notify a service provider or service provider contact that the work can begin.

Note. If you have already selected a service provider, you can create a work order without creating a requisition

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See Also

"PeopleSoft Services Procurement Preface," page xxxiii

Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 323

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintain Logistical Tasks, page 72

Work Order Status

Throughout the work order process, it passes through various work order management phases. The following are valid work order statuses:

- *Open:* The new work order is created.
- *Submitted:* The work order is submitted for approval.
- *Approved:* The work order is approved.
- *Released:* The linked purchase order has been dispatched.

  Time or progress can be logged against the work order.
- *Cancelled:* The requester or service coordinator cancels the work order.
- *Closed:* The work order is closed.
- *Denied:* The work order is denied for approval.
- *Terminated:* The work order is terminated prior to the expected end date.
- *Finalized:* All time or progress is recorded and invoiced.

  Any associated purchase order is reconciled with the work order.

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

Access to Work Orders

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

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Role Type	Access
Requester	Based on permissions, the requester may have complete access to work order functions.
Service Coordinator	Based on the set up on the Service Coordinator defaults page, this person can enter a work order, extend a work order, or delegate requisition sourcing.
Logistical Task Assigned To	This user can only view assigned logistical tasks associated with the work order.
Work Order Approver (dynamically assigned based on workflow rules)	This user has access to change the work order approval details only.
Service Provider Contact	The Service Provider Contact has view access for work order and authorization for assigning service providers for deliverable work orders with tracking enabled.

VAT and SUT on Services

VAT is a governmental consumer sales tax, a straight percentage that is added to the cost of a good or service. At each step in the supply chain, VAT is calculated by multiplying the cost of the good or service by the tax rate, charged by the seller to the buyer. While at each step in the supply chain except the last, the buyer can normally recover the VAT incurred. Thus, the liability for VAT is essentially the value added at each step in the supply chain.

SUT is a governmental retail sales tax, a straight percentage that is added to the cost of a good or service. Normally, everyone but the final consumer is exempt from this tax. Sales tax is charged, collected, and remitted to the government by the retailer, while use tax is not handled by the retailer, but still due to the government, and must therefore be self-assessed and remitted by the purchaser.

The major difference between VAT and SUT is that almost everyone pays VAT and recovers the VAT they paid except the end consumer, whereas only the end consumer pays SUT. Everyone in the middle of the supply chain is exempt from SUT.

The PeopleSoft tax tables require you to define:

- Tax authorities, which contain individual tax rates and accounting information used to post the tax liability to a general ledger.
- Tax codes, which consist of a group of tax authorities.

The system calculates VAT and SUT when you create a work order. This enables you to estimate VAT and SUT charges at an earlier stage in the supply chain, so that you have a more accurate understanding of the final amount. The system triggers SUT and VAT defaulting and calculations when you save the work order. If PeopleSoft Services Procurement is integrated with PeopleSoft Purchasing, the system copies VAT and SUT codes and percentages as a default from PeopleSoft Purchasing purchase order to the PeopleSoft Services Procurement work order upon work order release.

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See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, "Integrating with Sales and Use Tax Applications"

Prerequisites

Before you can create a work order, the following conditions must be met:

- If selecting a requisition line on the work order, the requisition line status must be *Approved* or *Sourced.*
- The requisition must be filled for automatic work order generation from the sourcing and bid pages.
- A supplier network must be defined for the business unit.
- Projects must be defined if Project Costing is installed.
- Activities must be defined.
- Service types and services must be defined.

To create the logistical tasks associated with the work order, you should:

- Define tasks.
- Define a task group.
- Associate tasks with the task group.
- Associate the task group with existing service types.

Creating and Managing Work Orders

This section discusses how to:

- Manage service work orders.
- View work order details.
- View work order cost information.
- View work order consumption information.
- View work order approvals and alerts.
- View work order survey information.

Understanding the Work Order Process Flow

Here is an overview of the steps in the work order process flow:

1. Access the Manage Services Work Order page to manually create a service work order.

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Note. You can click the generate work order button from the Bid Response page, the Assess and Award Bids page or the Requisition Line Position Details page for a filled requisition line to automatically generate a service work order.

2. For manually created work orders, enter the business unit, work order ID, and service type in the Add New Work Order group box on the Manage Services Work Order page.

   Note. The Service Type field determines whether the work order is resource-based or deliverables-based.

3. For manually created work orders, click the Add button to access the Maintain Service Work Order page.
4. Enter the required information on the Maintain Services Work Order page.

   If you create a work order that is tied to a requisition, many fields (such as Start Date and End Date, Project, Service Provider, and so forth) appear by default from the original requisition. In addition, you must enter data in the Invoice Approver and Time Approver or Progress Log Approver and Expense Approver and Progress Log Template fields.
5. Save the page.
6. Click the View Task List link on the Maintain Services Work Order page to ensure that all mandatory pre-approval logistical tasks are complete.
7. After all mandatory pre-approval logistical task are complete, click the Submit button on the Maintain Services Work Order page.

   Upon submittal, the work order submittal page displays approval information and the work order status changes to *Submitted* or *Approved,* if the work order creator has sufficient authority to approve work orders or the work order approval process is not used for the Business Unit.
8. Once a work order is submitted for approval, it is routed to the work order approver as defined by the workflow rules.

   There can be more than one approver for each work order, and it depends on the number of approvers set up in the workflow rules. A new task item appears on the approver's worklist indicating that the work order needs approval. An email notification is sent to the approver's in box. Once approved, the work order status changes from *Submitted* to *Approved.*

   See Chapter 8, "Implementing PeopleSoft Services Procurement Workflow," page 163.
9. Access the Services Work Order Roster page, and locate the approved work order.

   Click the Edit Work Order button on the Work Order Roster page to update the approved work order.
10. (Optional) Click the View Task List link on the Work Order - Details page to verify that all postapproval logistical tasks are complete.

    You must complete all postapproval tasks before releasing the work order.
11. If purchase orders are integrated with work orders, click the Process Purchase Order button on the Maintain Services Work Order page to complete purchase order distribution and accounting information, and then click the Quick Source link on the Cost tab to build the purchase order automatically.

    Note. The Quick Source link appears for manually created work orders, as well as work orders that are associated with requisitions.

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12. Click the button next to the created purchase order ID to verify that the purchase order has been approved, budget checked, doc tolerance, and dispatched.

    Use the purchase order page to perform these actions.

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

Pages Used to Create and Manage Work Orders

Page Name	Object Name	Navigation	Usage
Manage Services Work Orders	SPF_WORDER_ROSTER	Services Procurement, Manage Services Work Orders	Add and maintain work orders.
Work Order - Service	SPF_WO_REQ_VEN_DT	Services Procurement, Manage Service Work Orders Click the Add button on the Manage Services Work Order page. Click a Work Order ID link on the Manage Services Work Order page.	Enter service information for the work order.
Work Order - Cost	SPF_WO_COST_PO_PG	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Cost tab.	Enter cost information for the work order.
View Shifts for Service	SPF_SHIFT_BY_SRV	Services Procurement, Manage Services Work Orders, Work Order - Service Click the View Shifts for Service link at the bottom of the work order.	View any shifts associated with this service.
View Assignments for Service	SPF_ASGN_BY_SRV	Services Procurement, Manage Services Work Orders, Work Order - Service Click the View Assignments for Service link at the bottom of the work order.	View any assignments associated with this service.
Track Resources	SPF_WO_TRK_RSRC	Services Procurement, Manage Services Work Orders, Work Order - Service Click the Track Resources link at the bottom of the work order.	Add and track new services providers for deliverable services.
Progress Log Activity	SPF_PRGLOG_MS_PG	Click the Activities link on the Work Order - Cost page.	View activities associated with a progress log for deliverable services.

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Page Name	Object Name	Navigation	Usage
Work Order Rates	SPF_WO_PAYRATE	Click the Enter Effective Dated Rate button on the Work Order - Cost page.	(Optional) Update the work order rate by effective date.
Work Order - Approvals and Alerts	SPF_WO_APPROVER	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Approvals and Alerts tab.	Enter approval and alert notification information related to work orders.
Work Order - Comments	SPF_WO_COMMENTS	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Comments tab.	Enter comments related to work orders.
Work Order - Surveys	SPF_WO_SUR_USR	Services Procurement, Manage Services Work Orders, Work Order - Service Select the Surveys tab.	Enter survey information related to work orders. **Note.** The Survey tab is only available if the *Using Surveys* option is enabled for the business unit and the work order is saved.
Service Work Order History	SPF_WO_HISTORY	Click the Work Order History link on the Manage Services Work Order page. Click the Work Order History link at the bottom of the Work Order-Services page.	View status and approval changes, including the service coordinator or team that was assigned to the work order at the time history was recorded.
Service Work Order Template History	SPF_WO_TE_TEMPLATE	Click the Time Template History link on the Work Order - Cost page.	View templates that were linked to the work order.
Document Attachment	SPF_WO_ATTACH	Click the Statement of Work link at the bottom of the Work Order - Service page.	Upload file attachments for a work order.
Quick Source	PV_RUN_REQSORC_1	Click the Quick Source link on the Work Order - Cost page.	Run the process that creates purchase orders related to work orders. **Note.** This process is only accessible if purchase orders are integrated with work orders.

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Page Name	Object Name	Navigation	Usage
Maintain Purchase Orders	PO_LINE	Click the Purchase Order button on the Maintain Services Work Order - Cost page.	Access the purchase order where you can run commitment control, check doc tolerance, and dispatch purchase orders. **Note.** This process is only accessible if purchase orders are integrated with work orders.
Work Order Approval Status	SPF_WO_APPR_STATUS	Click the Work Order Approval Status button on the Manage Services Work Order page.	View work order approval information. **Note.** The work order approval button is only accessible if *Enable Approval Process* option is enabled for the business unit on the work order tab.
Work Order Cost Consumption	SPF_WO_COST_CONSUM	Services Procurement, Manager Services Work Orders, Work Order - Service Click the Consumption tab on the Work Order page.	View the cost consumption details **Note.** This only appears once the work order is released.
Work Order Approval	SPF_WO_APPR_PG	Click a Approval Worklist entry for the work order.	Approve or deny the submitted work order.
Work Order Activity	SPF_WO_ACTIVITY	Click an Activity link on the Work Order - Cost page.	Identifies the activities associated with a resource-based work order.

Managing Services Work Orders

Access the Manage Services Work Order page.

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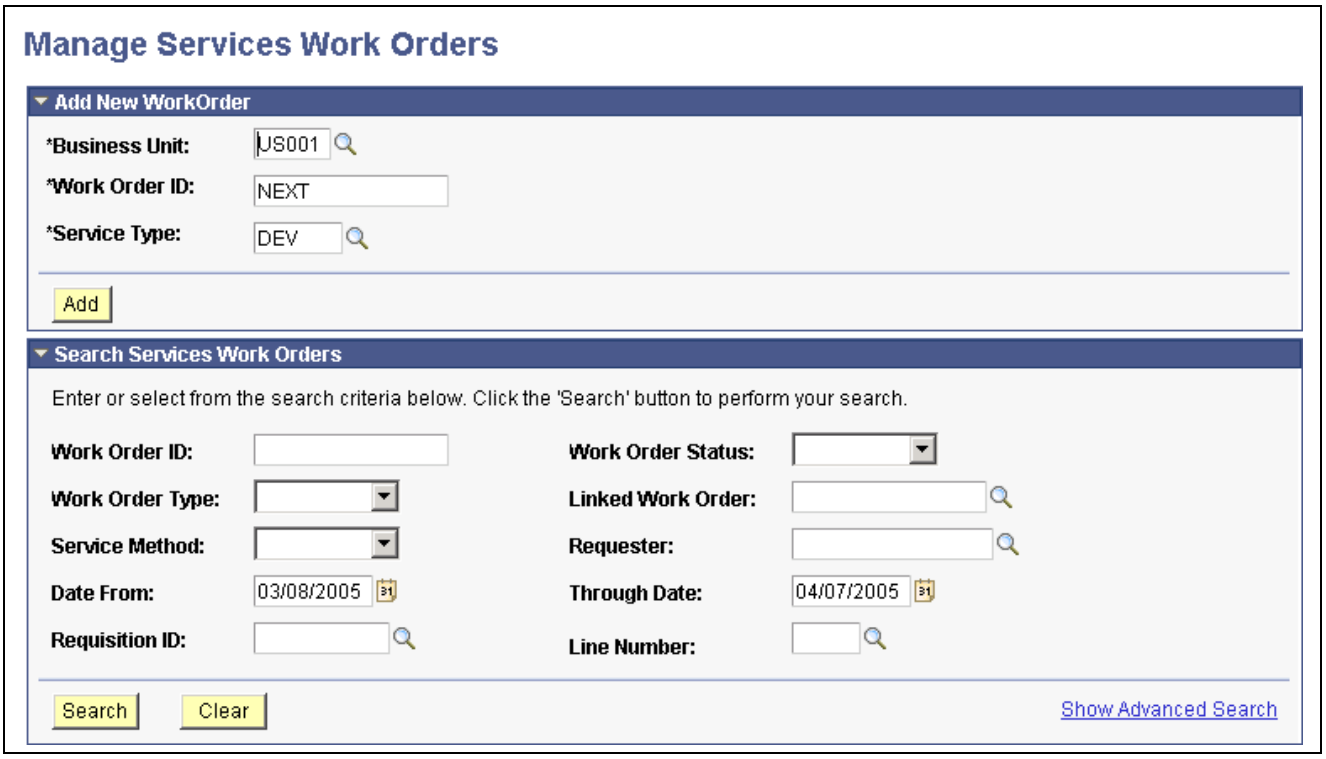


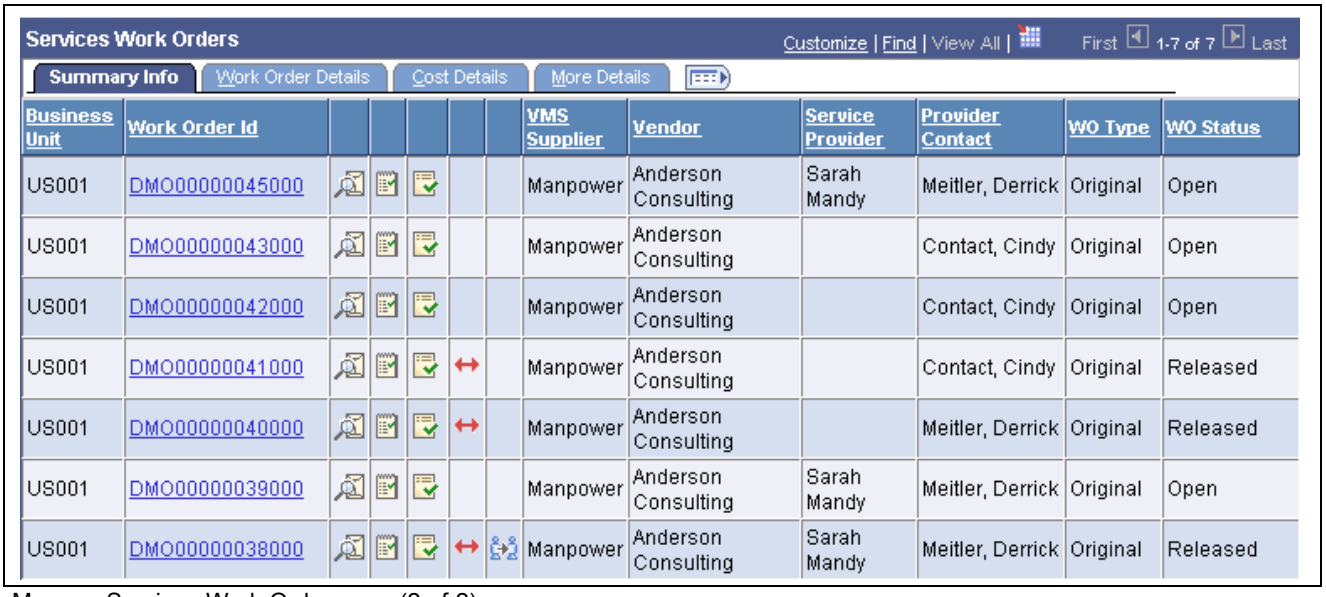
Manage Services Work Order page (1 of 2)

The Manage Work Order page is the central location for maintaining the work orders. Use the search and sort features to streamline the search results for the work order. Once you enter the search criteria, proceed to the roster area where you can edit, establish workflow, and cancel work orders.

Use this page to create new service work orders, view existing work orders details, and extend work orders.

Enter criteria in the Search Services Work Order group box to search for specific work orders.

Click the Show Advanced Search link to view more search fields, including Business Unit, Survey ID, Work Order Name, Vendor ID, Service Provider, Provider Contact, and Service Coordinator.



Business Unit	Work Order Id	VMS Supplier	Vendor	Service Provider	Provider Contact	WO Type	WO Status
US001	DMO000000045000	Manpower	Anderson Consulting	Sarah Mandy	Meitler, Derrick	Original	Open
US001	DMO000000043000	Manpower	Anderson Consulting		Contact, Cindy	Original	Open
US001	DMO000000042000	Manpower	Anderson Consulting		Contact, Cindy	Original	Open
US001	DMO000000041000	Manpower	Anderson Consulting		Contact, Cindy	Original	Released
US001	DMO000000040000	Manpower	Anderson Consulting		Meitler, Derrick	Original	Released
US001	DMO000000039000	Manpower	Anderson Consulting	Sarah Mandy	Meitler, Derrick	Original	Open
US001	DMO000000038000	Manpower	Anderson Consulting	Sarah Mandy	Meitler, Derrick	Original	Released

Manage Services Work Order page (2 of 2)

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Work Order ID Enter the work order ID assigned when the work order was created.

Date From/Through Date Select a range of creation dates for the requisitions to be retrieved.

Click to access the Services Work Order History page, where you can view a summary and history of the work order.

Click to access the Service Work Order - View Task Checklist page, where you can view the logistical tasks for the work order.

Click to access the Work Order Approval Status page, where you can review the work order approval information.

Click the Extend Work Order button to extend the duration of the work order contact.

Note. Click this button to access the Maintain Services Work Order page, where you can enter a new end date for the work order. Logistical tasks that are associated with the work order type, extension, are associated with the new extended work order.

A new purchase order amount associates with the extended work order, which requires additional approval.

You can extend resource-based work orders only.

Note. This button appears for resource-based work orders only.

Click the Assign New Resources button to assign a new service provider to the work order either by manually replacing the service provider or going through the fulfillment process

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Note. Click this button to access the Maintain Services Work Order page, where you can enter a new start date and select a new service provider for the work order.

You can assign new resources to resource-based work orders only.

Viewing Work Order Details

Access the Work Order - Service page.

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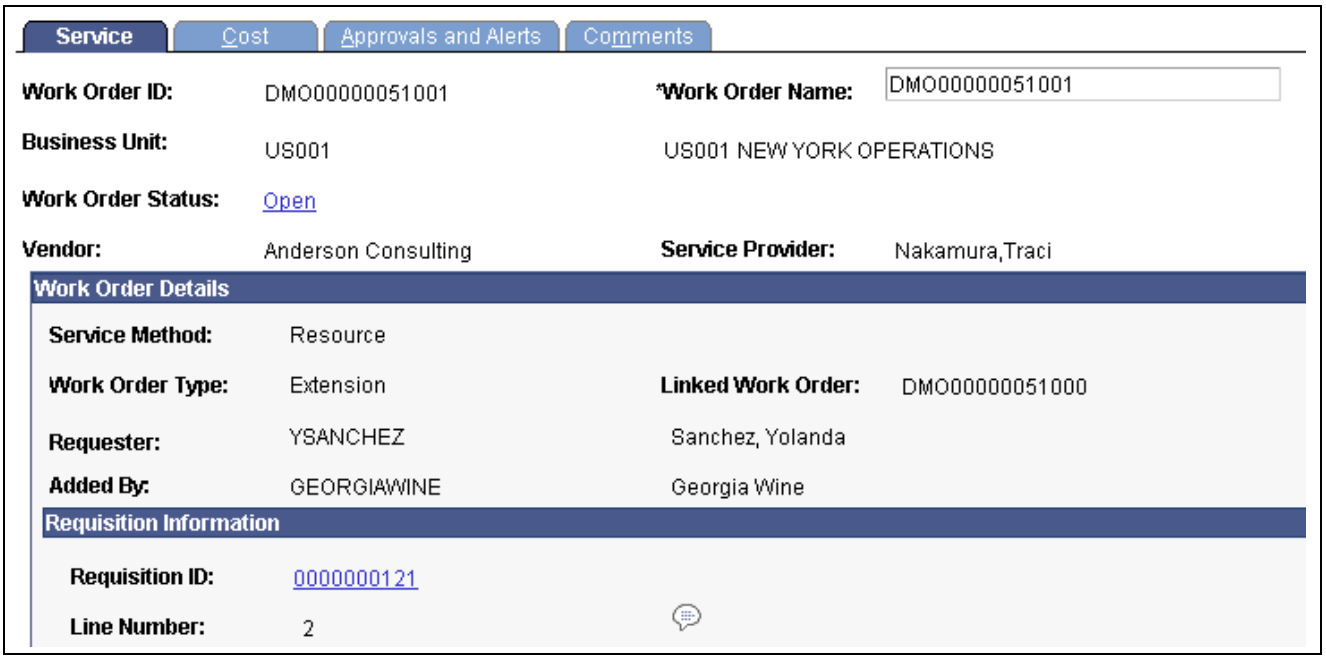
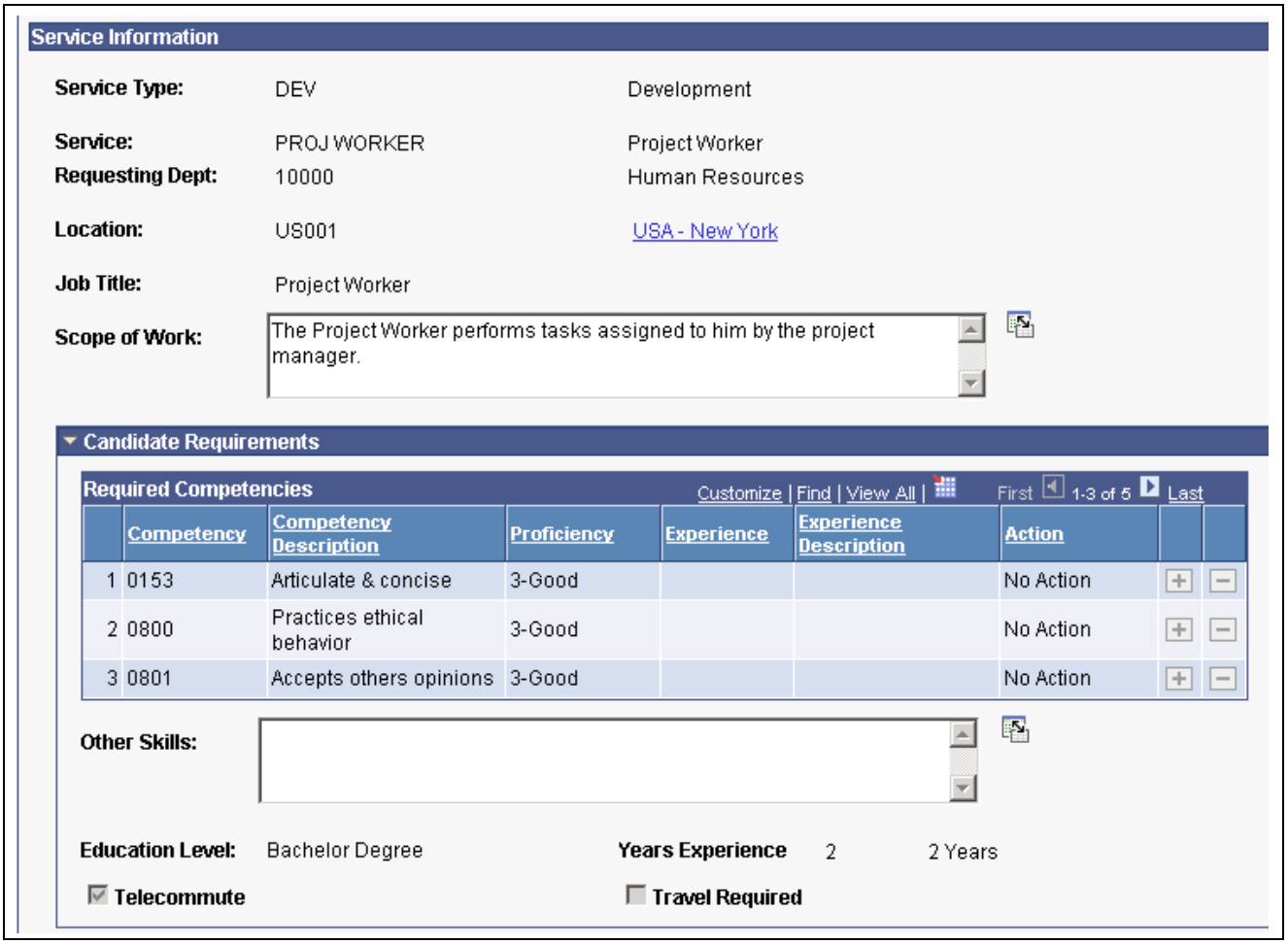


Work Order - Service page (1 of 4)



Work Order - Service page (2 of 4)

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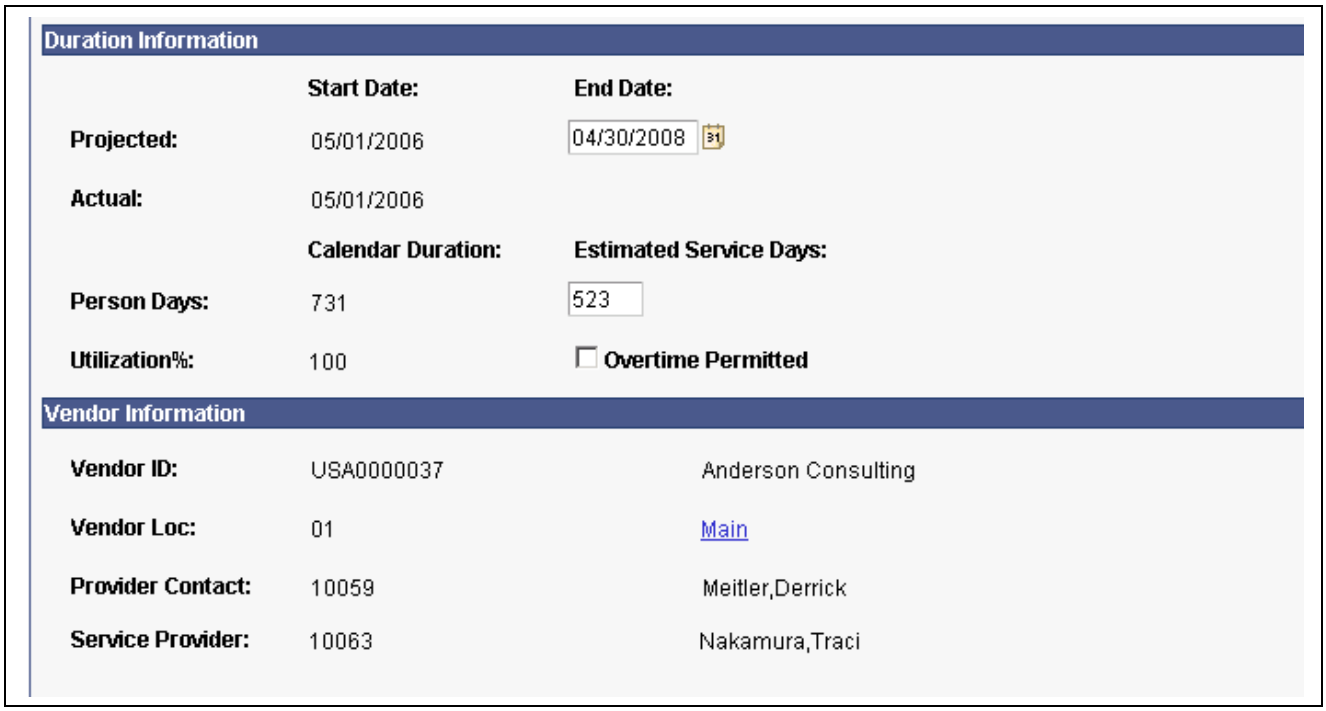
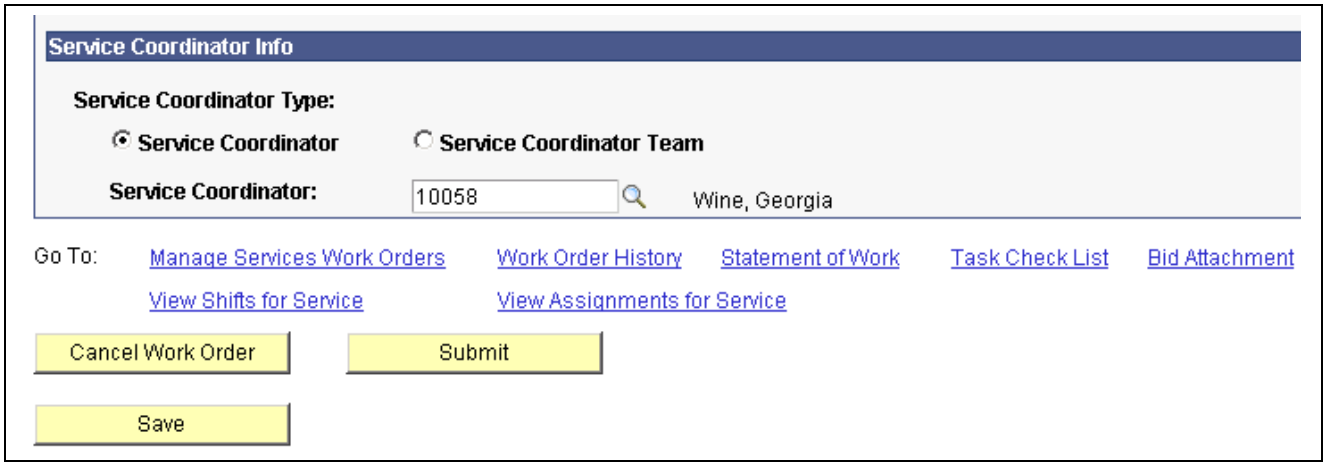


Work Order - Service page (3 of 4)



Work Order - Service page (4 of 4)

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

Work Order Status Displays the status of the work order. Values are:

- *Open*
- *Submitted*
- *Approved*
- *Released*
- *Canceled*
- *Closed*
- *Denied*

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- *Terminated*
- *Finalized*

Work Order Name Enter a name descriptive name for the work order. Defaults to the requisition name if one associated to the work order, or to the work order ID.

Work Order Details

Service Method Displays the service method of *Deliverable Based* or *Resource Based.*

Note. The service method is determined by the service type selected in the Add New Work Order group box.

Work Order Type Displays the work order type. Work order values are *Original, Extension, Replaced,* or *Reassigned.*

Note. Work order types determine the logistical task group and logistical tasks that are associated with the work order. Pre-approval and postapproval logistical tasks are determined by the work order type values.

Linked Work Order Displays a linked work order. A new work order is linked to an existing work order by either extending, reassigning, or replacing the existing work order. When you extend, reassign, or replace an existing work order, information from the original work order appears by default on the new work order.

Requisition Information

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

The system displays links to original sourcing requisitions. Click a Requisition ID link to access the Requisition Line Job Summary page for that requisition.

Note. You can generate a work order from filled requisitions by clicking the Work Order button on the Requisition Details page or Assess and Award Bids page.

Line Number Enter the requisition line number. When you link a requisition line, information from that line appears by default on the work order. Some of that information is not editable on the work order.

Service Information

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

Note. This can only be changed to a service type with the same service method.

Services Select the specific service to be performed, for example, *Program Manager* or *Java Developer.* The services are linked to the service type on the Services by Service Type page.

Track Resource Select this check box if this is a deliverable service method work order and you want the service provider resources to be included on the work order.

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Requesting Dept Select the requesting department which must be valid HCM department (if HCM is enabled on the Services Procurement installation); otherwise select a valid department for PeopleSoft Financials/Supply Chain Management.

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

Job Title Enter the job title for the work order.

Note. This value defaults from the service attributes.

Scope of Work Enter freeform comments to describe the type of work that the candidate needs to perform on the work order.

Candidate Requirements

This group box contains various candidate requirements. The default values come from the requisition if there are skills associated to the requisition; otherwise the values come from the competencies associated to the work order.

Competencies This display-only field is used to screen candidates that do not have the competencies required for the work order.

Proficiency This display-only field indicates the minimal level that the candidate should possess in order to be qualified for the position.

Note. Proficiency is for informational purposes only

Experience This display-only column indicates the minimum years of experience the candidate should possess, and is for informational purposes only.

Action Select *Block, No Action,* or *Warn* depending on the action you want to occur if the service provider entered on the work order does not have the required competencies.

Other Skills Enter any freeform text in this field to indicate additional skills which may be required for the position.

Settlement Options View the settlement method for a work order, which is based on the service selected. Progress will be recorded based on the method defined. Values include:

- *Fixed Amount*: Progress payments are made against milestone activities where the supplier enters the amount to be paid on the progress logs.

  You can record progress multiple times against the same milestone for work order to allow payment upon partial completion of a activity.

- *Milestone*: Payments are made when agreed upon milestones are met.

  For example, you could agree to pay the construction company 25% of the total fee when the foundation is complete. The supplier can only select each milestone activity once for completion.

- *Percentage*: Payments are made based on the percentage of completion for the total work order amount entered on the progress log.

- *Rate Based*: Payments are based on an agreed upon rate for service activities.

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For example, you could agree to pay a contractor pouring concrete a specific rate per cubic foot. For this example, the actual cubic feet poured is entered in the progress log and the payment is based on that agreed rate.

Note. This field applies to deliverable-based work orders only.

Duration Information

Projected Enter a projected start and end date for the work order. The Start Date reflects the date when the work is projected to begin. The End Date reflects the date when the work is anticipated to end.

Actual Enter the actual dates when the work begins and ends. You must enter the actual start date before releasing the work order. Enter actual end date after the work order is canceled, terminated, or closed.

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

Note. This option appears for resource-based work orders only.

Estimated Service Days Displays the total number of service days estimated for the work order. The value can be overwritten and the work order total is recalculated.

Note. This option appears for resource-based work orders only.

Utilization % Enter the percentage of time that the candidate spends in a work week. For example, if the candidate typically works a half day, the utilization would reflect 50%. If the candidate will work 3 days per week, the utilization will reflect 60%. The default value is 100%.

Note. This option appears for resource-based work orders only.

Overtime Permitted Select the check box if overtime is allowed for the work order.

Note. This option appears for resource-based work orders only.

Vendor Information

Vendor ID Enter the vendor ID.

Vendor Loc (vendor location) Enter the vendor location. If only one location exists for the vendor, it automatically appears on the work order.

Track Resource(s) Select to track the service provider resources for deliverable-based engagements.

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Service Coordinator Information

VMS Supplier(vendor managed service supplier) View the name of supplier that is managed by a third-party vendor service.

Note. This field appears only for work orders that are VMS managed, which is based on the settings for the Business Unit or Service Type.

VMS Location(vendor managed service location) View the supplier location that is managed by a third-party vendor service.

Note. This field appears only for work orders that are VMS managed, which is based on the settings for the Business Unit or Service Type.

Service Coordinator Type Determines whether an individual service coordinator or a team is responsible for the work order. If the work order is VMS managed, this field is view only.

Service Coordinator Select the specific individual service coordinator or team assigned to the work order. If the work order is VMS managed, this field is view only.

Links and Other Status Buttons

Links change based on status of a work order.

Manage Service Work Orders Click to access the Manage Services Work Orders page.

Submit Click to submit the work order for approval.

Note. If the pre-approval logistical tasks aren't complete, an error message appears and the status does not change to *Submitted.*

Cancel Work Order Click to cancel the work order.

Note. If you cancel the work order, and if the work order is tied to a requisition line, the status of the requisition line is changed to Sourced. Once the status of the requisition line is changed to Sourced, the requisition line is available for resourcing to suppliers.

Close Work Orders Click to close the work order once the service has been completed. The actual end date is specified when the work order is closed and no time or progress may be entered past this date.

Terminate Click to terminate the candidate. The work order is terminated prior to the expected date.

Release Click to release the work order. Once the work order is released, the supplier is notified that he can begin to log time or progress logs.

Note. If the post-approval logistical tasks aren't complete, an error message appears and the status does not change to *Released.*

Finalize Click to indicate that all time or progress is recorded and invoiced. Any associated purchase order is reconciled with the work order.

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Extended Work Order	Click to extend the duration of the work order and track related rate, approval, and logistical task changes. This button appears for resource-based work orders only.
Assign New Resources	Click to assign a different service provider for this work order. This button appears for resource-based work orders only. Depending on the business unit setup, clicking the Assign New Resource button may enable users to choose the option to manually reassign the service provider or go through the fulfillment process. **Note.** If you want to reassign resources without using sourcing to a specific service provider, the work order has a type of *Reassign.* If you want to reassign resources using the bid process, it will populate the same work order associated to requisition and will allow you to source it. Source it to different vendor from the original requisition, then submit the bid, accept and fill, and a new work order type of *Replace* will be created.
Work Order History	Click to track status and approval changes.
Statement of Work	Click to access the Document Attachment page, where you can attach files associated with previously created work orders.
Task Check List	Click to view logistical tasks that are associated with the work order.
Bid Attachments	Click to access the Bid Attachments page, where you upload attachments to bids.
Process Purchase Order	Click to submit the approved work order details to Purchasing application.
View Shifts for Service	Click this link to access the View Shifts for Service inquiry page. This link is available only if the business unit is enabled to use shifts and if there are any valid shifts by service combinations associated with this work order. See Chapter 18, "Managing Work Orders," Viewing Shifts Associated with Services, page 297.
View Assignments for Service	Click this link to access the View Assignments for Service inquiry page. This link is available only if the business unit is enabled to use assignments and if there are any valid assignments by service combinations associated with this work order. See Chapter 18, "Managing Work Orders," Viewing Assignments Associated with Services, page 298.

See Also

Chapter 21, "Managing Progress Logs," page 351

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," page 57

Chapter 22, "Managing Settlements," page 359

Viewing Shifts Associated with Services

Access the View Shifts for Service page.

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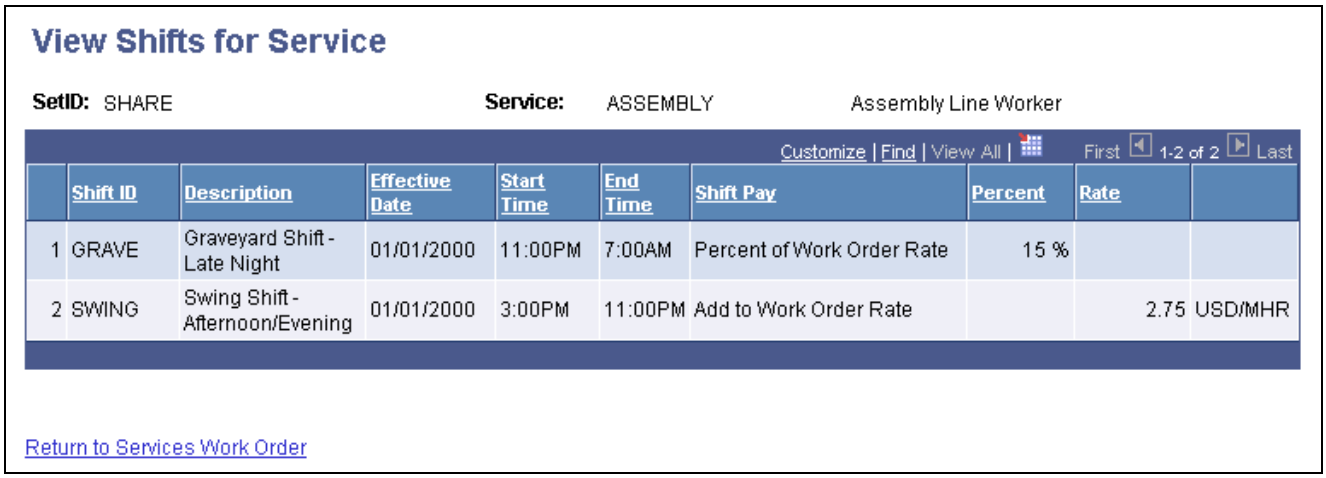


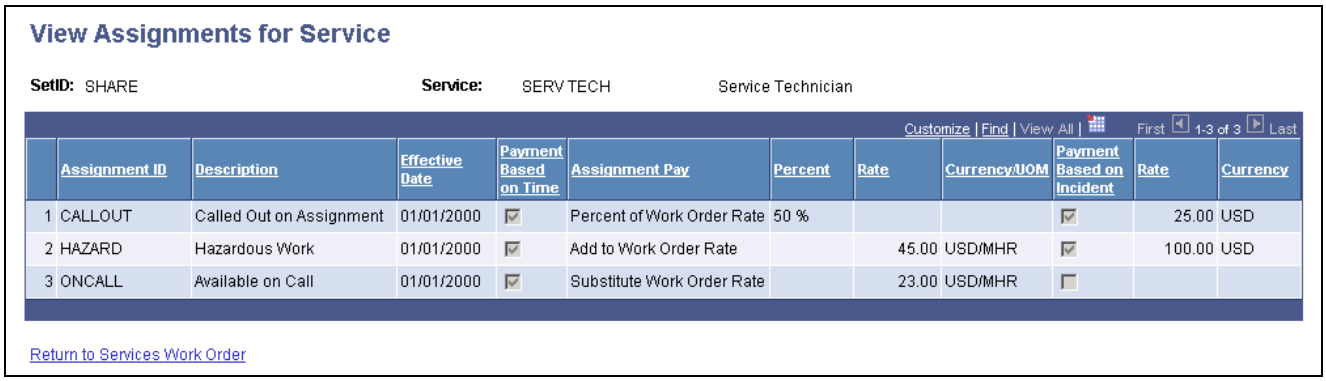
View Shifts for Service page

Use this page to view the shifts that are associated with a specific service.

Important! When a work order is associated to a time template that uses a 24-hour clock and the Derive Shifts from Time of Day option is selected, the start and end times that appear on this page are the start and end times from the time template rather than from the Shifts by Service definition because the time template information takes precedence.

Viewing Assignments Associated with Services

Access the Assignments for Services page.



View Assignments for Service page

Use this page to view the assignments that are associated with a specific service.

Viewing Work Order Cost Information

Access the Work Order - Cost page.

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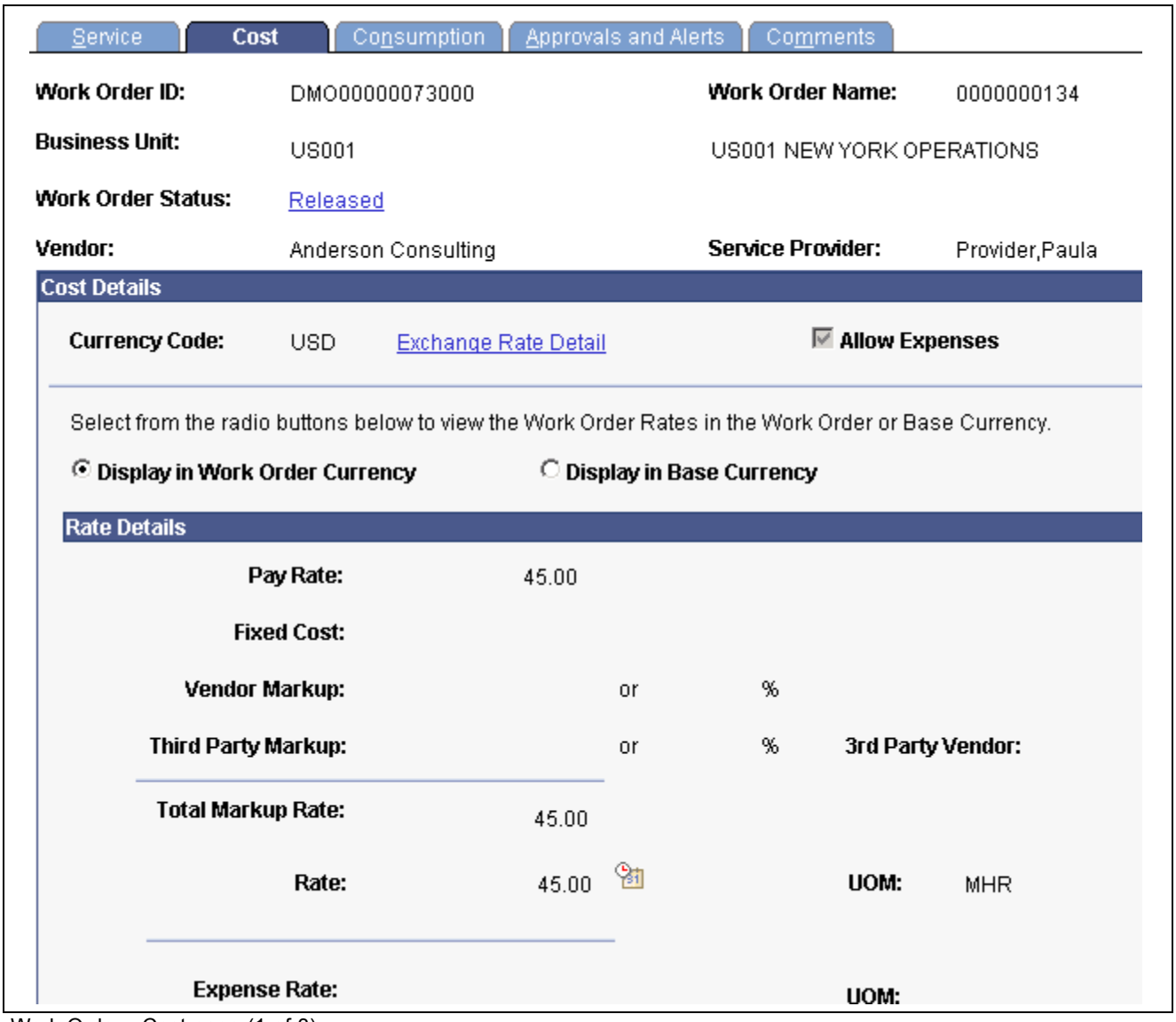

Work Order - Cost page (1 of 3)

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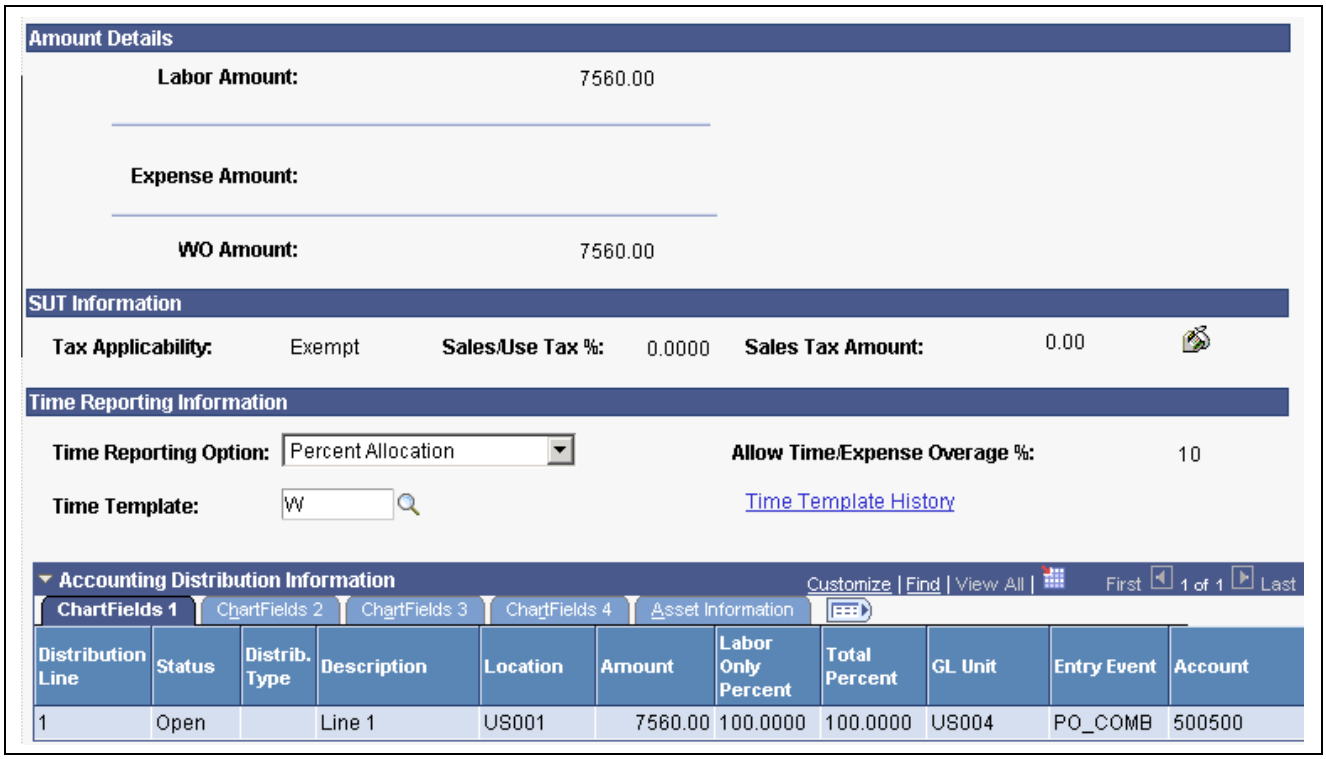

Work Order - Cost page (2 of 3)

Work Order - Cost page (3 of 3)

If you select the Use Pay Types check box on the Services Procurement Business Unit Options page and if the service method is Resource, then, the system displays the Rate Breakdown group box. Rate breakdowns are not used for work orders when the service method is Deliverable.

If you create a manual work order and rate sheet information is defined, rate breakdown and expense information defaults from the associated rate sheet.

Note. User role actions determine which users can view rate breakdown information.

Note. Manual work orders created by a requester are routed to the Service Coordinator for rate definition prior to approval if the rate definition for the Business Unit is set to not allow rate definition for the Requester.

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Cost Details

Currency Code Displays the currency code associated with the work order.

Exchange Rate Detail Click the Exchange Rate Detail link for currency and exchange rate information.

Allow Expenses Select to report expenses for work orders.

Display in Work Order Currency and Display in Base Currency Toggle between Work Order and base currency.

Select Display in Work Order Currency to view the currency code and rate in the work order currency.

Select Display in Base Currency to view the currency code and rate in base currency.

Rate Details

Pay Rate Enter or view the amount that is paid to the service provider.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Fixed Cost Enter or view additional amounts that are used to cover fixed costs of the supplier related to providing the service.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Vendor Markup Enter or view markups charged by the supplier for providing the resources to perform the service.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Third Party Markup Enter or view additional markups that are charged when the supplier secures resources from a subcontractor.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Total Markup Rate Displays the total markup rate. The system adds the Pay Rate, Fixed Cost, Vendor Markup, and Third Party Markup fields to determine this value.

Note. This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Rate Enter the rate of pay associated with the work order when pay types are not enabled. You can view the rate of pay when pay types are enabled. Modifications to the rate amount are validated against rate sheets defined for the project role and region. If you enter a rate amount that is out of tolerance withe rate sheet, you receive either an error or a warning message.

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Click to enter effective dated rate. When time is logged against the work order, the rate effective for the time period is used to calculate the timesheet amount.

Note. When a requisition is filled and a work order is created, there may be two entries in the effective-dated rate. The first entry is for the requisition rate and the second rate is the filled rate. This provides visibility of the rate history and enables comparison.

Note. If the rate is increased, the work order amount may be consumed at a quicker rate. An extension may need to be created if the amount is consumed before completion of the work order.

UOM (unit of measure) Enter the unit of measure associated to the defined rate, or select a unit of measure from the list of available values.

Expense Rate Enter the rate allowed for expenses.

Amount Details

Labor Amount Displays the total amount calculated for labor. It does not include any tax values and is updated when a new time report is entered.

VMS Fee(vendor managed service fee) Displays the total amount calculated for the vendor managed services fees.

Note. This value only appears for work orders that are VMS managed.

Loaded Amount Displays the sum of the labor amount and the VMS fee.

Expense Amount Displays the total amount of expense calculated for the work order. The system calculates the expense amount as the work order rate multiplied by the work order duration.

WO Amount(work order amount) Displays the total amount for the work order, including labor, expense, and any applicable VMS markup.

Note. You can edit the Expense Rate, UOM, and Amount fields only if the requisition is not associated with a work order. If the requisition is associated with a work order, the values appear by default from the requisition and can only be viewed.

Note. The work order total calculation does not include any amounts for shift or assignment pay.

SUT Information (sales and use tax information) and VAT Information (value-added tax information)

Tax Applicability Displays sales and use tax applicability for this work order.

Sales/Use Tax % (sale and use tax percent) Displays the total SUT percentage.

Sales Tax Amount Displays the total taxable amount.

VAT Percent Displays the total percentage for all VAT authorities included for the VAT code.

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VAT Entity Displays the entity in the organization that reports VAT.

The VAT entity is determined from the PeopleSoft General Ledger business unit associated with the PeopleSoft Purchasing business unit.

If an entry exists for the PeopleSoft General Ledger business unit, then VAT calculations are performed on the work order. If not, VAT fields are hidden on the work order.

VAT Amount Displays the VAT amount charged in the transaction line currency.

Time Reporting Information

Time Reporting Option The time reporting option indicates whether actual allocation or percentage allocation is used for recording time against the work order. If actual allocation is selected, the service provider must specify which ChartField distribution line the time is associated with. If percentage allocation is selected, time is prorated automatically across all ChartField distribution lines based on the percentage of the work order labor total for each line.

Time Template History Click to access the Services Work Order Template History page, where you can view the history of the time template.

Activities Click to access the Activities page, where you can view activities associated with the work order.

See Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 323.

Accounting Distribution Information

Use this section to enter and review distribution information.

Note. If the work order is linked to a requisition, all distribution information defaults from the requisition. You can override the distribution information here.

Note. In the case of multi-position requisitions, work order distribution amounts are recalculated to prorate the amounts for a single position, which is based on the percentage defined on each distribution line on the requisition.

Purchase Order Information

Click to access the purchase order generated for the work order.

The purchase order must be approved, budget checked (if Commitment Control is enabled), have valid doc tolerance, and must be dispatched before releasing the work order.

Note. If the pre-approval logistical tasks aren't complete, an error message appears and the status does not change to *Submitted.*

Process PO (process purchase order) Click to populate the purchase order staging tables.

Note. This button appears only if purchase orders are integrated with work orders.

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Quick Source Click to access the Requisition Sourcer run control page, where you can automatically build a purchase order.

Note. This option does not appear before a work order is approved or after the work order is released.

Viewing Work Order Consumption Information

Access the Work Order - Consumption page.

Note. This page only appears when the work order is released.

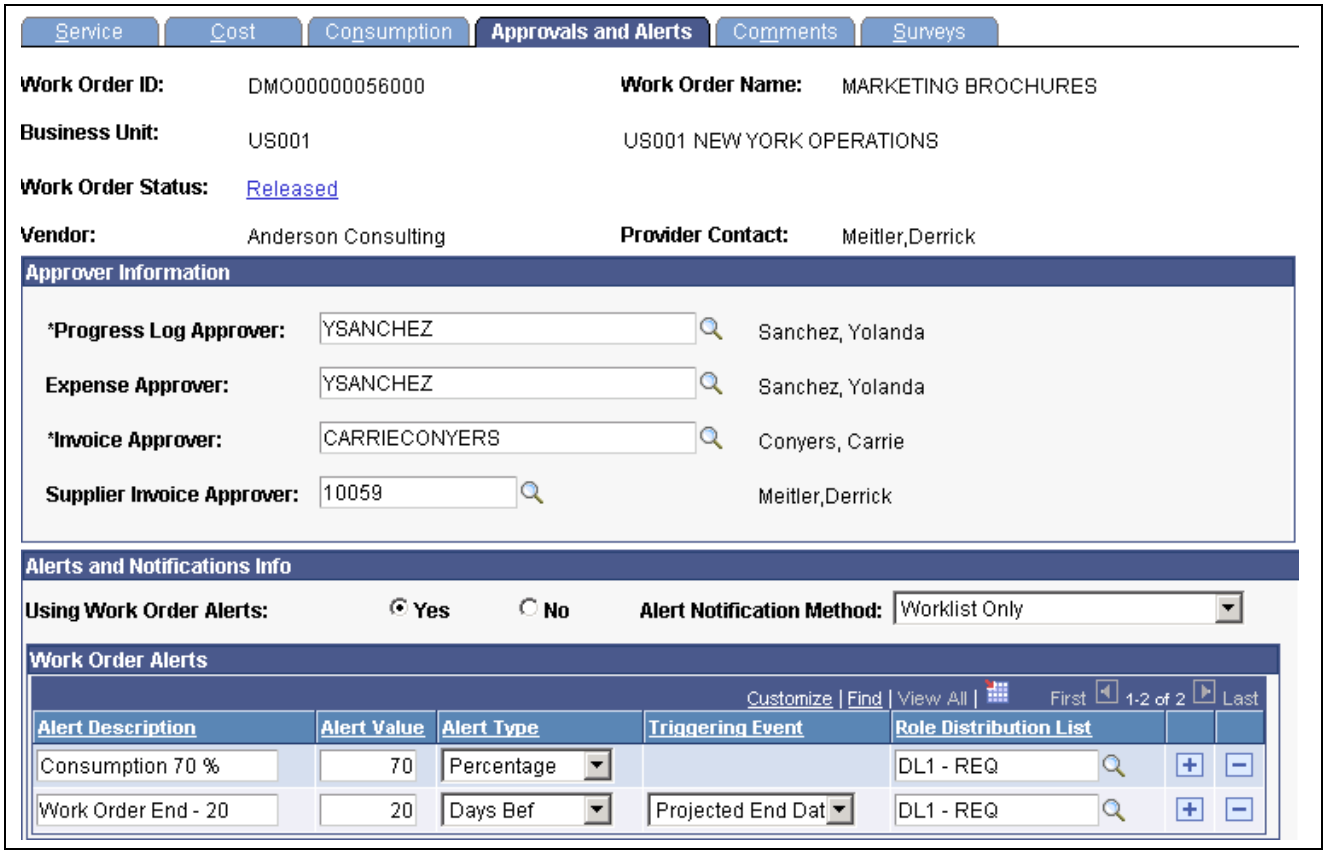
Billable Amount Displays the total billable amount service providers reported against a particular work order. It does not include any tax values and is updated when a new time report is entered.

This amount reflects any shift or assignment pay.

Note. These fields appear once the work order is released and time and expense sheets have been logged.

Viewing Work Order Approvals and Alerts

Access the Work Order - Approvals and Alerts page.



Work Order - Approvals and Alerts page

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Time Approver This field appears for resource-based work orders. Select the name of the person who approves timesheets associated with the work order. The value appears by default from the requester or service coordinator defaults. The lookup contains all users with a role associated to the role action *SP_TIME_APPROVER*.

Progress Log Approver This field appears for deliverable-based work orders. Select the name of the person who approves progress logs associated with the work order. The value appears by default from the requester or service coordinator defaults. The lookup contains all users with a role associated to the role action *SP_PLOG_APPROVER*.

Expense Approver This field appears when expenses are allowed for the work order. Select the name of the person who approves expenses associated with the work order. The value appears by default from the requester or service coordinator defaults. The lookup contains all users with a role associated to the role action *SP_EXP_APPROVER*.

Invoice Approver Enter the name of the person responsible for approving the invoices associated with this work order. The value appears by default from the requester or service coordinator defaults. The lookup contains all users with the role action *SP_INVOICE_APPROVER*.

Supplier Invoice Approver This field appears if the selected supplier is set to approve invoices. Enter the name of the supplier user responsible for approving the invoices associated with this work order. This field defaults to the service provider contact for work orders that are not VMS managed, and to the service coordinator or team member with role action*SP_SPLR_INV_APPROVER* for work orders that are VMS managed. If the invoice is not VMS managed, the lookup contains all service provider contacts for the supplier with the appropriate role action. If the invoice is VMS managed, the lookup contains all service coordinators for the VMS supplier.

If this option is selected after work orders have already been opened for the supplier, then the Supplier Invoice Approver name on these work orders will be missing. Therefore, the system issues a warning whenever this option is selected to remind the user to review all open work orders for this supplier and to assign a supplier invoice approver.

If the Supplier Invoice Approver is missing on any work orders, invoicing will bypass submitting the invoice to suppliers for approval even though this option is selected to Include in Invoice Approval.

Using Work Order Alerts This default value comes from the Service Requester Defaults, Service Coordinator Defaults, Service Type, or Business Unit—in that order. Select *Yes* if you want alert notifications to be generated for the triggers entered in the Work Order Alerts grid. Select *No* if no work alerts are needed.

Alert Notification Method This default value comes from the Service Requester Defaults, Service Coordinator Defaults, Service Type or Business Unit—in that order. Select if you wish alert notifications to be generated for the triggers entered in the Work Order Alerts grid. Specify if the alerts should be *Worklist* entries only or both *Worklist and Email*.

Alert Description Enter a brief description for the work order alert notification. Alert information defaults from requester or service coordinator default information, service type, or business unit.

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

Note. This value is represented in days and percent.

For example, if you create a work order alert description of "Consumption 80%, the alert value will be "80". When the system reaches an 80% consumption rate, the work order event triggers. As well, if you create a work order alert description of Work Order End - 10, the alert value will be "10," to indicate that the work order will trigger 10 days before the work order projected end.

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

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

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

Triggering Event Select to indicate the trigger for the when the work order notification. For the Days Before alert type, the valid triggering events are *Actual End Date*, *Projected Start Date*, and *Projected End Date*. For the Days After alert type, the valid triggering events are *Actual Start Date*, *Actual End Date*, *Approval Date*, *Cancel Date*, *Closed Date*, *Entered Date*, *Projected End Date*, *Projected Start Date*, *Released Date*, and *Terminated Date*. For Alert Types or Days Before or Days After, the triggering event is used in conjunction with the alert value to determine when the alert is sent.

Role Distribution List Select the list of users that will receive the work order notification.

See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," Defining Role Distribution Lists, page 396.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Defining Work Order Settings, page 37

Viewing Work Order Survey Information

Access the Work Order - Surveys page.

See Chapter 23, "Using Surveys in PeopleSoft Services Procurement," Editing and Submitting Work Order Surveys, page 400.

Creating Purchase Orders with the Quick Sourcer

If you are creating a purchase order for a work order, you must use the link on the work order page.

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Note. You cannot release a work order without creating and dispatching the purchase order first.

This section discusses how to:

- Enter parameters for the AutoSelect Requisitions process (PO_REQSORC).
- Enter parameters for the PO Calculations (purchase order calculations) process (PO_POCALC) and the Create Purchase Order process (PO_CREATE).

Understanding the Quick Sourcer Process

The Quick Sourcer process combines the following PeopleSoft Purchasing processes:

Process	Description
AutoSelect Requisitions process	Applies the *priority one* vendor to each requisition line.
PO Calculations process	Verifies that the requisition has been completely filled from inventory stock. If it has not, the process passes the remaining quantity that is needed to the Create Purchase Order process. This is not applicable to services since they cannot be filled from inventory
Create Purchase Order process	Creates a purchase order for requisition quantities that were not filled by the Build Inventory process. You can set up the system so that if there is not enough inventory stock, an MSR is issued for part, and a purchase order is created for the remaining quantity that is needed. For services, there will never be anything filled from the build inventory process

Pages Used to Create Purchase Orders with the Quick Sourcer

Page Name	Object Name	Navigation	Usage
Quick Sourcer - Autosource Parameters	PV_RUN_REQSORC_1	Click the Quick Source link on the Work Order - Cost page.	Enter parameters for the AutoSelect Requisitions process.
Quick Sourcer - Purchase Order Values	PV_RUN_REQSORC_2	Click the Purchase Order Values link on the Quick Sourcer - Autosource Parameters page.	Enter parameters for the PO Calculations process and the Create Purchase Order process.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Using Purchase Order Sourcing"

Entering Parameters for the AutoSelect Requisitions Process

Access the Quick Sourcer - Autosource Parameters page.

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The values for the parameters are filled in automatically if you run the process from the link on the work order page.

Request Type	Displays *Purch Ord* as the requisition type by default.
Item ID Required	Displays a check box that is clear, because work orders do not have an item ID.
From Business Unit and **To Business Unit**	Displays the work order business unit by default.
Work Order ID	Displays the work order ID by default.
Vendor	Displays the work order vendor by default.
From Requisition IDand **To Requisition ID**	Displays the work order requisition ID by default, if the work order is linked to a requisition.

Entering Parameters for the PO Calculations and Create Purchase Order Processes

Access the Quick Sourcer - Purchase Order Values page.

Buyer	Displays the buyer defined on the procurement user defaults.
Consolidation Method	Determines whether purchase orders are consolidated by business unit, vendor, and buyer (select *B*) or by business unit and vendor only (select *V*) The consolidation method applies only to staged rows that are identified for consolidation.
Pre-Approve Vendor	Select to approve the vendor that the PO_POCALC process selects automatically. You can run the PO Calculations process and the Create PO process as a unit, without having to approve the vendors. Appears selected by default. For services the vendor is the supplier from the work order
Build PO's as Approved	Select to create POs with an *Approved* status when you run the Create PO process. If you select this option, the process examines auto approval criteria set at the business unit level. Appears selected by default.
Expedite Staged POs	Select to source all requisitions that are located in the staging table. Appears selected by default.
Hold from Further Processing	Select to place the resultant purchase orders on hold and prevent further processing.
Calculate PO Line Numbers	Select to ignore staged entry line numbers when the Create PO process creates new purchase orders and assigns sequential line numbers, beginning with 1. If you do not select this option, the performance is faster, but you might have purchase orders with nonsequential line numbers that do not begin with 1. Appears selected by default.
Allow Dispatch When Approved	Select to make the resultant purchase orders eligible for dispatch. Appears selected by default.

See Also

PeopleSoft Enterprise Purchasing 9.0 PeopleBook, "Using Purchase Order Sourcing"

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Managing Purchase Orders

Access the Manage Purchase Orders page.

Use this page to run budget checking (if commitment control is enabled for PeopleSoft Purchasing), check doc tolerance, and dispatch purchase orders.

Note. You can edit the sales and use tax information only if purchase orders are not integrated with work orders

Budget Check Click the Budget Check button to run budget checking for this purchase order. This button is available if commitment control is enabled for PeopleSoft Purchasing.

Note. When Commitment Control is enabled, the services coordinator cannot offer the position or manually release the work order until the requisition has been budget checked

Doc Tol Status(document tolerance status) If document tolerance checking is enabled, the system displays the document tolerance status. The system runs the Document Tolerance process (before budget checking) when you click the Budget Check button, or you can run the process separately. Document tolerance checks the change in percentage or a fixed dollar amount between the purchase order and requisition at the ChartField distribution level. Values are:

- *V* (valid): The purchase order has passed document tolerance checking.
- *N* (not checked): The purchase order requires document tolerance checking.

  If any amounts, quantities, or ChartFields are modified after the document tolerance is checked, the system resets the document tolerance status to *Not Checked.*
- *E* (error): Exceptions were generated for the purchase order during document tolerance checking.

  You can override document tolerance exceptions on the Document Tolerance Exception page.

Dispatch Click the Dispatch button to dispatch the purchase order.

Note. The purchase order must be dispatched before the work order can be released.

Closing Services Purchase Orders

This section discusses how to close services purchase orders.

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Page Used to Close Services Purchase Orders

Page Name	Object Name	Navigation	Usage
Close PO	RUN_PORECON	Services Procurement, Reconciliations, Close Purchase Orders	Close all qualified services purchase orders by running the Close Purchase Order (PO_POREP) process, and generate the Purchase Order Reconciliation report.

Closing Services Purchase Orders

Access the Close PO page.

Use the Close PO page to close qualified purchase orders to generate the Close Purchase Order Report.

See *PeopleSoft Enterprise Purchasing 9.0 PeopleBook*, "Using the Purchase Order Reconciliation Workbench".

See Also

Appendix E, "PeopleSoft Services Procurement Reports," page 505

Managing Work Order Sourcing and Assigning New Resources

This section discusses how to:

- Source work orders.
- Manage work order sourcing review.

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Pages Used to Manage Work Order Sourcing and Assign New Resources

Page Name	Object Name	Navigation	Usage
Manage Services Work Orders	SPF_WORDER_ROSTER	Services Procurement, Manage Services Work Orders	Add and maintain work orders.
Work Order Sourcing	SPF_SRC_MNG_WO_PG	Services Procurement, Review and Source Work Orders	View all work orders that are eligible for work order sourcing and review work orders that were already sourced.
Manage Work Order Sourcing Review	SPF_SOURCE_REVIEW	Click the Work Order Sourcing Review link on the Manage Services Work Order page.	Review the details of work orders that were sourced to suppliers.
Manage Work Order Sourcing - Work Order History	SPF_WO_SRC_HIST	Click the Sourcing History button on the Manage Work Order Sourcing Review page.	View the history of work orders that were sourced to suppliers.
Supplier Replacement Sourcing Review	SPF_SOUR_RVW_WO_SP	Services Procurement Review Replacement, Submit Bids (must be logged in as a supplier)	Review incoming replacements and submit candidates.

Sourcing Work Orders

Access the Work Order Sourcing page.

Replacement Start Date Enter the expected start date for the new service provider replacement work order.

Replacement End Date Enter the end date for the new service provider replacement work order.

Re Assign Click to access the Re Assign Requisition Line page, where you can select the work order that is being replaced if the replacement originated from the requisition line rather than from the work order page. If there are multiple work orders associated to the requisition line, the select the one that is being replaced.

Note. The information on this page is display only, if the replacement originated from a work order

Managing Work Order Sourcing Review

Access the Manage Work Order Sourcing Review page.

Note. By selecting the mandatory sourcing option on the Services Procurement Business Unit page, service coordinators must use this sourcing process to establish work order replacements for service providers.

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Assign New Resources Click this link to access the Replace Service Provider page, where you can reassign work order resources to a new service provider.

Viewing the Service Provider Assignment

This section discusses how to view the service provider assignments.

Pages Used to View the Service Provider Assignments

Page Name	Object Name	Navigation	Usage
Service Provider Assignments	SPF_WO_SP_LIST	Services Procurement, Service Provider Assignments	View a list of service providers assignments.
Service Provider - Details	SPF_WORDER_DETAIL	Click the Work Order ID link on the Service Provider List page.	View the work order details for a particular service provider.

Viewing the Service Provider List

Access the Service Provider List page.

Use this page to search the service provider list based on Work Order ID, Service Provider, and Start date.

Work Order ID Click to access the Service Provider - Details page, where you can view work order details for a specific service provider.

Viewing Logistical Tasks

This section provides an overview of the logistical task flow and discusses how to view logistical tasks.

Logistical Task Flow

Logistical tasks are administrative tasks that need to be executed and approved before a work order is released. Logistical tasks include both pre-approval and postapproval executions. Pre-approval tasks must be completed before the work order is approved. For example, a pre-approval logistical task might include assigning a new badge or ordering a new laptop. Postapproval tasks, on the other hand, must be completed before a work order is released to a service provider. For example, postapproval logistical tasks might include scheduling orientation or setting up the service provider email account.

Here is the basic flow of logistical tasks:

1. Create a service work order.
2. View the logistical task checklist.

   Once pre-approval tasks are complete, select the Execution Complete check box.
3. Submit the work order for approval.

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Once an open work order is submitted for approval, the system automatically checks for all pre-approval logistical tasks that are assigned to that work order. You must complete all pre-approval tasks before submitting the work order for approval.

4. Release the work order to the service provider.

   Once the work order is released to the service provider, the system automatically checks for all postapproval logistical tasks that are assigned to that work order. You must complete all mandatory post-approval tasks before releasing the work order. Automatic post-approval tasks will be marked as Completed.

   Once the work order is released to the service provider, the service provider can use it to log time and expense.

5. Terminate the work order. (optional)

   Once the termination process is initiated, notification is sent for any termination logistical tasks associated to the work order. The termination can not be completed until the termination tasks are marked completed.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintain Logistical Tasks, page 72

Pages Used to View Logistical Tasks

Page Name	Object Name	Navigation	Usage
Manage Services Work Orders	SPF_WORDER_ROSTER	Services Procurement, Manage Services Work Orders	Add and maintain work orders.
View Task Checklist	SPF_WO_TASK_CHKLST	Click the View Logistical Task List button on the Manage Services Work Order page.	View logistical tasks.
View Task Detail	SPF_WO_VIEW_TASKDT	Click the Task Description link under the Task Details group box.	View details of your logistical task.

Viewing a Task Checklist

Access the View Task Checklist page

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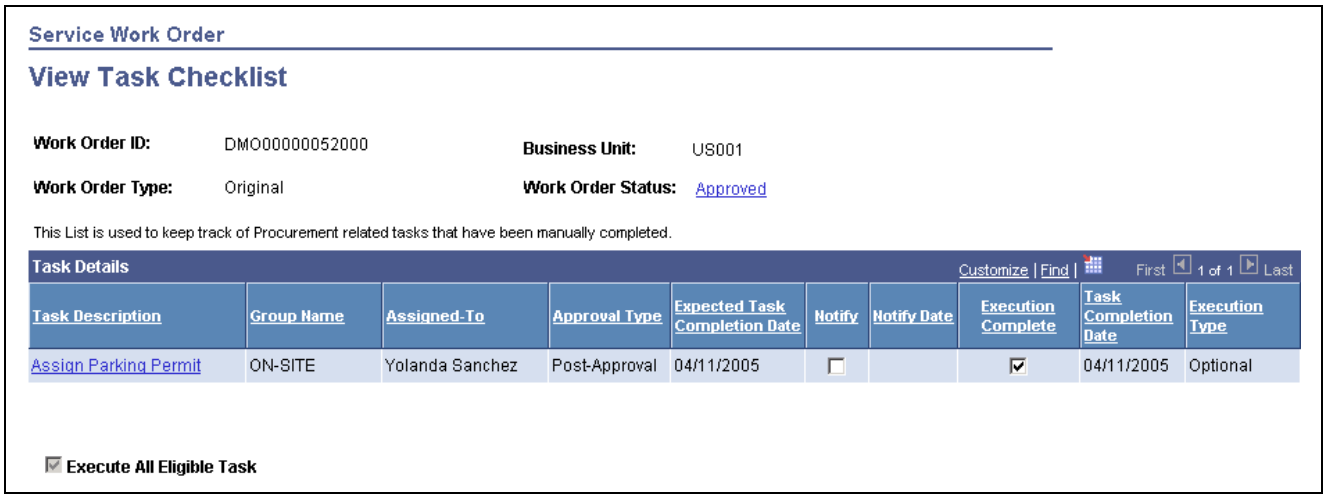

View Task Checklist page

Task Description Click to access the View Task Details page, where you can view the task details associated with the work order.

Group Name The system displays the task group to which the task has been assigned.

Assigned - To Displays the requester or approver to whom the task has been assigned.

Notify Select to send an email message to the person to whom the task is assigned.

Notify Date The system displays the date that the notification email was sent to person to whom the task is assigned

Execution Complete Select when the logistical task is complete.

Task Completion Date The system displays the date that the logistical task was performed.

Execution Type The system displays *Mandatory, Automatic,* or *Optional.*

Viewing VAT and SUT Information

This section discusses how to:

- View work order VAT.
- View work order sales and use tax information.

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Pages Used to View VAT and SUT Information

Page Name	Object Name	Navigation	Usage
Work Order VAT	SPF_WO_VAT	Click the VAT/Intrastat button on the Work Order - Cost page.	View VAT locations and defaults. **Note.** VAT defaults can be edited if purchase orders are not integrated with work orders.
Work Order Sales/Use Tax Information	SPF_WO_SUT	Click the Sales/Use Tax button on the Work Order - Cost page.	View sales and use tax information. **Note.** Sales and use tax information can be edited if purchase orders are not integrated with work orders.

Viewing Work Order VAT

Access the Work Order VAT page.

Use this page to review the VAT that appears by default for the work order. If the VAT information needs to be updated, update it on the generated purchase order before releasing the work order. Upon releasing the work order, the purchase order VAT information is copied on the work order where it is view only.

Note. You can edit the VAT defaults only if purchase orders are not integrated with work orders

Note. Because complex algorithms are used to obtain the VAT defaults, avoid manually changing these values as far as possible.

Return to Services Work Order Click to return to the Services Work Order page.

Expand All Sections Click the expand button to scroll to and access every section on the page. You can also expand one or more sections by clicking the arrow next to the section's name.

Collapse All Sections Click to collapse all sections that display only the header information. If you expand one or more sections, you can click the arrow next to the section's name to collapse the section.

Physical Nature Indicates whether an object is a good or a service. Many countries are required to report the sale and purchase of goods separately from services.

Note. Because these are service work orders, physical nature should always be *Services,* and you won't need to change it.

VAT Locations

Location Country Displays the PeopleSoft Purchasing business unit bill to location country.

Location State Displays the PeopleSoft Purchasing business unit bill to location state.

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Vendor Location Country Displays the vendor's order from location country.

Vendor Location State Displays the vendor's order from location state.

Service Performed Country Depending on the services performed option setting in the PeopleSoft Purchasing defaulting hierarchy (for example on the vendor or business unit), here are some ways in which the system can set the value for this field:

- If the option specifies the ship from location, this field is set to the vendor's ship from location country
- If the option specifies the ship to location, this field is set to the ship to location country.
- If the option specifies the buyer's location, this field is set to the PeopleSoft Purchasing business unit bill to location country.
- If the option specifies the suppliers location, this field is set to the vendor's order from location country.

Service Performed State This value appears only if the Service Performed Country requires that VAT be tracked by state or province. Depending on the services performed setting in the PeopleSoft Purchasing default hierarchy (for example on the vendor or business unit), the system sets the following values for this field:

- If services performed specifies the ship from location, this field is set to the vendor's ship from location state.
- If services performed specifies the ship to location, this field is set to the ship to location state.
- If services performed specifies the buyer's location, this field is set to the PeopleSoft Purchasing business unit bill to location state.
- If services performed specifies the suppliers location, this field is set to the vendor's order from location state.

Ship From Country Displays the vendor's ship from location country. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Ship From State If the ship to country is defined as tracking VAT by state and province, it displays the vendor's ship from location state. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Ship To Country Displays the ship to location country. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Ship To State If the ship to country is defined as tracking VAT by state and province, the system displays the ship to location state. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Reviewing VAT Defaults

Use this group box to view VAT defaults. You can only update VAT defaults if purchase orders are not integrated with work orders.

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Service Type The system displays the VAT service type of *Freight* or *Other.* The value in this field determines whether or not the special rules for freight transport within the European Union apply.

Place of Supply Driver Displays the usual place of supply (the place where VAT is usually liable) for the service. This value is used to help determine the place of supply country and the VAT treatment. Values are *Buyer's Countries, Supplier's Countries* or *Where Physically Performed.*

Reporting Country Displays the country for which this VAT is to be reported. This is the VAT entity and VAT registration country that determines many of the VAT defaults.

Defaulting State If the reporting country requires that VAT be tracked by state or province, this field displays the state within the reporting country that is used to retrieve values from the VAT Defaults table.

Vendor Registration Country and **Vendor Registration ID** Displays the registration country and ID of the vendor.

Exception Type Displays the exception granted to the VAT entity. Values are *None, Exonerated,* or *Suspended.* This value is specified on the VAT entity registration.

Certificate ID If applicable, displays the ID of the VAT exception certificate that may have been issued to the VAT entity.

Calculate at Gross or Net Indicates how VAT is calculated. The default value comes from the VAT entity driver. Values are:

- *Gross:* The system calculates VAT before it applies any early payment discounts.
- *Net:* The system calculates VAT after it deducts early payment discounts. If there are two percentage discounts, the system uses the larger of the two when it calculates VAT. The system does not use discount amounts, only discount percentages.

Recalculate at Payment Select this check box to enable the recalculation of VAT at payment time to allow for any early payment discounts, if you are calculating VAT at gross. This causes the system to adjust the VAT amount at the time of payment if the discount has been taken. This is set on the VAT entity driver.

Declaration Point For a good or a service, displays when you want VAT transaction information to be recognized for reporting purposes. Values are:

- *Invoice:* VAT is recognized at time of invoice.
- *Payment:* VAT is recognized at time of payment.
- *Delivery:* VAT is recognized on delivery.

This value may be set at four levels in the VAT hierarchy: VAT entity registration, purchase order options, vendor, and vendor location.

VAT Rounding Rule Displays the VAT rounding rule. The default value comes from the VAT country, VAT entity registration, vendor, or vendor location driver. Values are:

- *Natural Round:* Amounts are rounded normally (up or down) to the precision specified for the currency code. For example, for a currency

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defined with two decimal places, 157.4659 would round up to 157.47, but 157.4649 would round down to 157.46.

- *Round Down:* Amounts are rounded down. For example, for a currency defined with two decimal places, 157.4699 would round down to 157.46.
- *Round Up:* Amounts are rounded up with a rounding precision to one additional decimal place. For example, for a currency defined with 2 decimal places, 157.4659 would round up to 157.47, but 157.4609 would round down to 157.46.

Use Type

Determines the split between recoverable (taxable) and nonrecoverable (nontaxable) VAT.

For the Canadian public sector, the use type also determines the rebate of the nonrecoverable VAT. VAT rebates are calculated based on statutory rebate rates that are established for each public service body.

The value comes from the VAT defaulting hierarchy, from the item, item business unit, item category, vendor location, vendor, or purchasing options.

Include Freight

If selected, the system includes any freight amounts in the VAT basis by calculating VAT on the merchandise amount, plus any freight amount. This option is only available for exclusive VAT calculation. The value comes from the VAT entity registration driver.

Include Miscellaneous

If selected, the system includes any miscellaneous charge amounts in the VAT basis by calculating VAT on the merchandise amount, plus any miscellaneous charge amount. This option is only available for exclusive VAT calculation. The value comes from the VAT entity registration driver.

Place of Supply Country

For services, displays the country in which the VAT is liable. The default value comes from a complex algorithm.

Treatment

Displays the VAT treatment, based on a complex algorithm. Values are:

- *Domestic Goods Purchase:* If the ship from and ship to countries are the same, and the vendor is registered for VAT, the transaction is treated as domestic.
- *Domestic Services Purchase:* If the buyer and seller are both located in the country where the VAT is liable, the transaction is treated as domestic.
- *EU Goods Purchase:* If the ship from and ship to countries are different, the system determines whether both countries are located within the European Union.

  If so, the system looks at the VAT registration for each trading partner to determine whether the transaction should be treated as an intra-EU purchase, domestic, or outside the scope of VAT.
- *EU Services Purchase:* If each trading partner is located and registered in different EU countries, and the VAT on a service is liable in the buyer's country, the transaction is treated as a self-assessed EU services purchase.
- *Self-Assess Goods Import:* If the ship from country is different from the ship to country and either or both of the countries are located outside of the European Union, and the vendor is not registered in the ship to country, the transaction would be treated as an import.

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If the option on the entry in the VAT Country table for the VAT reporting country indicates that VAT on imports should be self-assessed, the transaction is treated as a self-assess goods import, and both input and output VAT are recorded.

- *Self-Assess Services Import:* If each trading partner is located and registered in different countries, and the VAT on a service is liable in the buyer's country, the transaction is treated as a self-assessed services import.
- *Zero-rated Goods Import:* If the ship from country is different from the ship to country and either or both of the countries are located outside of the European Union, and the vendor is not registered in the ship to country, the transaction would be treated as an import.

  If the option on the entry in the VAT Country table for the VAT reporting country indicates that only input VAT should be recorded on imports, the transaction is treated as a zero-rated goods import.
- *Outside of Scope:* If the supplier is not registered for VAT, or if the VAT is liable in a country other than the VAT reporting country, the transaction is treated as outside the scope of VAT.
- *No VAT Processing:* For transactions where the physical nature is goods, if the ship to country has not been defined as a VAT country and the VAT reporting country on the transaction is blank, no VAT information is recorded.

Within PeopleSoft, detail VAT treatment values on the transaction lines are used for applying the precise defaults applicable to the transaction lines. The treatment is determined based the rules applicable to the transaction.

Applicability Displays the VAT status, which comes from an algorithm. Values are:

- *Taxable*
- *Exempt* (not subject to VAT)
- *Outside of Scope of VAT*
- *Suspended*
- *Exonerated*

Record Output VAT Selection of this check box enables entry of vouchers where VAT is not included on the invoice but is payable to the VAT authority rather than the vendor. In this case, you are accounting for both input and output VAT for the purchase. This is the case for an intra-EU acquisition or when you must account for output VAT on a service supplied by a foreign supplier. This is also referred to as self-assessing for VAT. The value comes from an algorithm that uses the treatment and applicability to retrieve the applicable value from the VAT system setup data that PeopleSoft delivers.

VAT Code Displays the VAT code that defines the rate at which VAT is calculated for this line.

Transaction Type Displays the code that categorizes and classifies this transaction for VAT reporting and accounting.

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Adjust/Reset VAT Defaults

Any changes that you make to fields on this page may affect VAT defaults on this page. For accuracy and consistency, use the following fields to adjust affected VAT defaults or to reset all VAT defaults. Adjusting or resetting VAT defaults only affect fields within the VAT Defaults group box.

Adjust Affected VAT Defaults

Click this button to have the system adjust the VAT defaults that are affected by the changes. All changes that you have made to VAT defaults on this page that affect other VAT defaults on this page are retained.

Click the i button to list the fields to be adjusted.

Note. Always click the Adjust Affected VAT Defaults button after changing any defaults on the VAT page.

Levels

Enables you to specify the levels within the requisition transaction hierarchy to reset when you click the Reset All VAT Defaults button. Values are:

- *All lower levels:* Resets all VAT defaults at lower levels for this page, namely the requisition distribution level.
- *This and all lower levels:* Resets all VAT defaults on this page and at any lower levels of this page.
- *This level only:* Resets all VAT defaults on this page.

Reset All VAT Defaults

Click to have the system reset the VAT defaults based on the levels value that you selected. Any changes that you have previously made to VAT defaults will be lost.

Note. Reset completely redetermines the VAT defaults. This does not necessarily mean they are to be reset to their original values. For example, the user may not have changed any VAT default values, but if a VAT driver field has changed, then clicking Reset redetermines all defaults based on the new driver value.

Viewing Work Order Sales and Use Tax Information

Access the Sales/Use Tax Information for Maintain Services Work Order page.

Use this page to review the sales and use tax information for the work order. If the sales and use tax information must be updated, update it on the generated purchase order before releasing the work order. Upon releasing the work order, the purchase order SUT information is copied onto the work order where it is viewed.

Note. You can edit the sales and use tax information only if purchase orders are not integrated with work orders.

Ultimate Use Code

Enter an ultimate use code to override the default tax rate for a location.

Sales/Use Tax Exception Type and **SUT Excptn Cert** (SUT exemption certificate)

Defaults from the ship to location for the SUT destination. SUT exception type values include *Direct Pay, Exempt/Exonerated,* and *None.*

Calculate SUT(calculate sales and use tax)

Click to calculate the sales and use tax using the changes that you made on the page.

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See *PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook*, “Calculating Sales and Use Tax in Supply Chain Management”.

Calculation Parameters

Include VAT (include value-added tax)

This setting is relevant if each line has separate tax code values for SUT and VAT, in which case it is possible to have both on a given line resulting in a tax-on-tax situation. In these instances, the system calculates VAT, then SUT, either on the net-extended amount for the line or on the sum of the net-extended amount and VAT amount.

If this option is selected, it indicates that the VAT amount needs to be taxed and the system adds the VAT amount to the net-extended amount before calculating SUT.

Note. The Include Vat calculation parameter appears by default from the Ship To Location Sales/Tax setup page.

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.0 PeopleBook, “Calculating Sales and Use Tax in Supply Chain Management”

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CHAPTER 19

Managing Time in PeopleSoft Services Procurement

This chapter lists prerequisites and discusses how to:

- Create timesheets.
- Manage timesheets.
- Approve timesheets.
- Manage timesheet worklists.

Understanding Time in PeopleSoft Services Procurement

The service provider uses the timesheet to record and submit time to an approver for immediate, online approval. The service provider can also track daily activities and report issues. The timesheet approver can provide feedback to the service provider, including performance-rating information through the approval process.

When the service provider logs time against a work order, the time template determines the time reporting codes for that work order. There could be different rules for applicable pay types. For instance, you may pay the pay rate, fixed cost and markups for the first eight hours but only pay the pay rate and fixed costs after eight hours. There could be shift pay differentials or assignment pay differentials associated with the time being logged. When creating invoices against timesheets, the invoicing process considers the rates defined on the work order and the pay types and multipliers associated with the time reporting code to determine the rate for the supplier.

The timesheet provides the following capabilities:

- Records the number of hours worked on a project as hours per day or as start and stop times, and submits it to the time approver for approval.
- Records specific activities and tracks progress on a project.
- Records and reports project-related problems or issues to the time approver.
- Summarizes all the information entered to create a comprehensive time report.
- Records performance information regarding a service provider's performance on a project.

You use the Manage Timesheets page as the focal point for all time activity in PeopleSoft Services Procurement. Use this page to:

- Create, edit, submit, or view timesheets (supplier service provider).
- View, adjust, or approve timesheets (timesheet approver).
- Filter reports by selecting the criteria in the timesheet status, service provider, or date fields.

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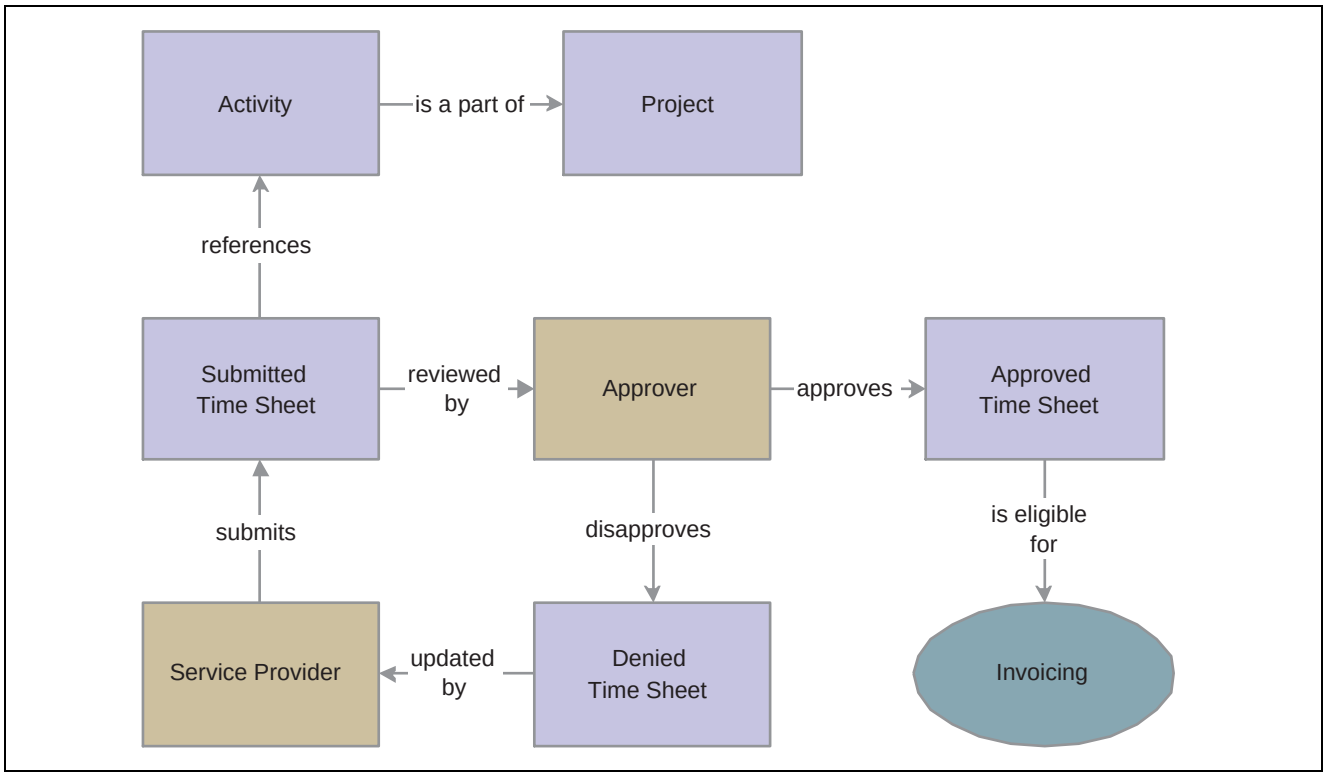
- Access pages used to modify time details.

Approval Process

The timesheet approval process begins when the service provider submits his or her time, along with any project issues, to the designated timesheet approver for review and approval. Any rejected timesheets are returned to the service provider for correction. Submitted timesheets are eligible for adjustment prior to approval. Approved timesheets are eligible for adjustment upon invoicing.

The following diagram illustrates the timesheet approval process:



Timesheet Approval Process

Approval Methods

There are three ways to approve a timesheet:

- Mass approval of multiple timesheets.
- Mass line approval for multiple lines.
- Line-by-line approval.

Prerequisites

These attributes must be set up before entering time information:

- Services time templates.
- Time reporting rules.
- (optional) Shifts and assignments, and any associated services.
- Calendars.

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- Email messaging.
- Time reporting codes.

A work order must also be defined before time transactions can be logged against it. The work order must be resource-based services (versus deliverables-based for progress logs), and it must be in a released status.

See Also

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” Maintaining Settlement Setup, page 118

Chapter 18, “Managing Work Orders,” page 281

Creating Timesheets

This section discusses how to:

- Enter time worked by week.
- Enter time worked by calendar and 24-hour clock.
- Submitting timesheets for approval.

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Pages Used to Create Timesheets

Page Name	Object Name	Navigation	Usage
Manage Timesheets	SPA_SP_R_MAIN_PG	Services Procurement, Maintain Timesheets (external)	View, search, and sort the list of timesheets. Access the timesheet that you want to modify. To add a new timesheet, select a reporting period end date, business unit, and work order. Click the Add button.
Enter Time	SPA_TIME_ENTRY	Click a linked time report on Manage Timesheets page to view an existing timesheet. Click the Create button on Manage Timesheets page to enter time on the timesheet.	Enter time worked.
View/Select Work Order Distribution For:	SPA_TIMEWO_DISTRIB	Click the Work Order Distribution button on the Enter Time page.	(Optional) Select the appropriate accounting line for the work order.
Timesheet Details	SPA_TIME_DETAILS	Click the Timesheet Details button on the Enter Time page.	View timesheet details.
Review Timesheet	SPA_TIME_SUBMIT	Click the View Summary button on the Enter Time page.	Review the timesheet summary.
Timesheet Attachment	SPA_TIME_ATTACH	Click the Add Attachment link on the Enter Time page.	Add, delete, or view an attachment for the timesheet. **Note.** You can add more than one attachment for each timesheet. Click the plus sign to include more attachments for the timesheet.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 118

Entering Time Worked by Week Using a Non 24-Hour Clock Template

Access the Enter Time page.

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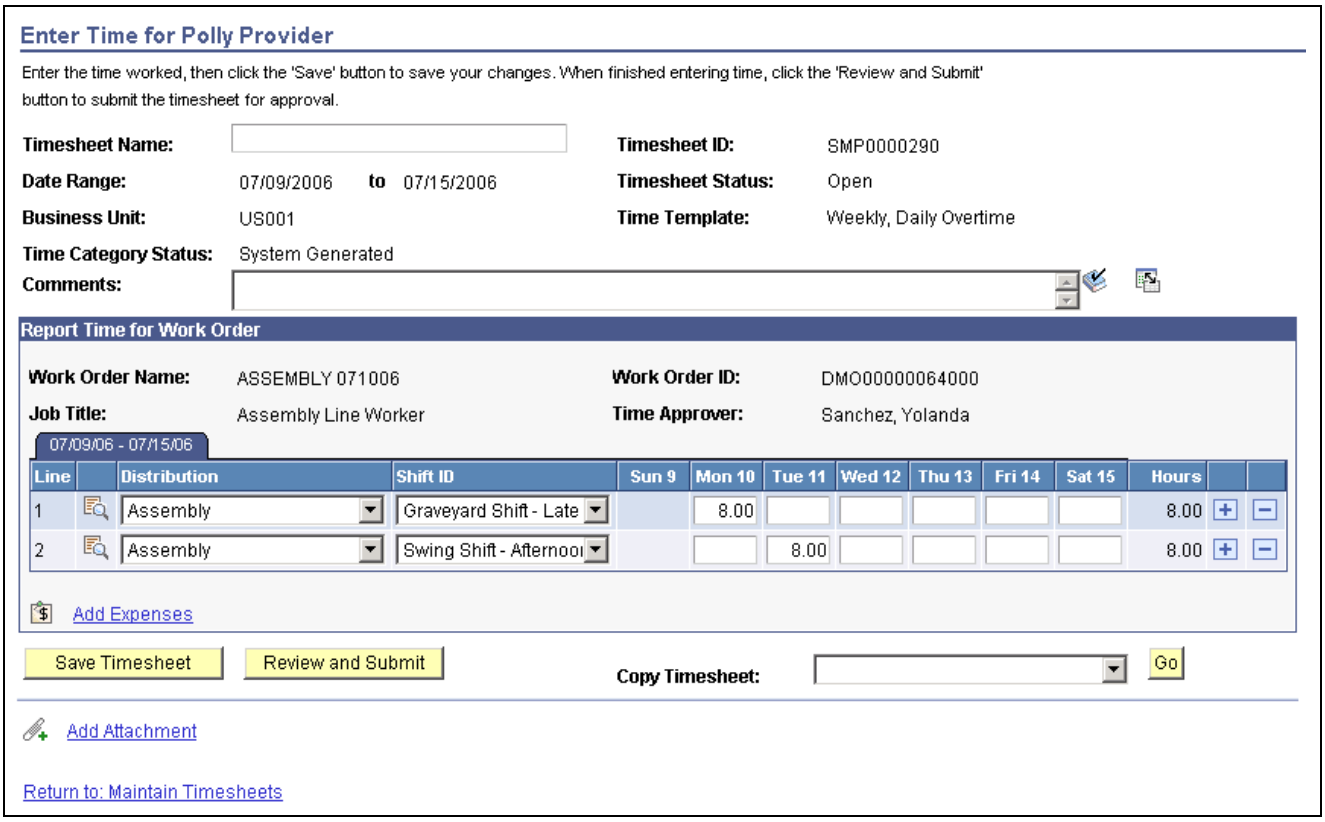

Enter Timesheet page (shifts)

The format of the time entry page is determined by the time template specified on the work order. In this example, the time template makes it possible to enter time on a weekly basis.

Report Time for Work Order

Click the Work Order Distribution button to access the View/Select Work Order Distribution For: page to select the appropriate accounting line for the work order. This column is available only for actual allocation time reporting.

Distribution This field is populated with the work order distribution line number selected on the View/Select Work Order Distribution For: page or can be manually selected for actual allocation time reporting.

Activity This field is available if Project Costing is not installed. It is populated with resource based service activities associated to the work order and generic service activities.

Shift Select the valid shift for the project, if applicable. This column is available if the Enable Shifts option was selected on the Services Procurement Bus Unit definition page, and if there are shifts associated to the service for the reporting time period.

Assignment Select the valid assignment for the project, if applicable. This column is available if the Enable Assignments option was selected on the Services Procurement Bus Unit definition page, and if there are assignments associated to the service for the reporting time period.

Time Period Enter the number of hours worked for the time period.

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Hours Displays the total hours by line for the time period reported.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Enabling the Use of Shifts and Assignments, page 137.

Report Incidents for Work Order

This section appears if the Enable Assignments option is selected on the Services Procurement Bus Unit definition page, if there are valid assignments associated to the service during the time period reported, and if the Based on Incidents option is selected on the Assignment by Service definition page.

Assignment pay rates come from the Assignment by Service definition if the Define for This Service option is selected; otherwise, the assignment pay rates come from the Assignment definition.

Assignments can be based on time or number of incidents. Any applicable MSP or VMS fees are in addition to the assignment pay rate.

Assignments have the following attributes:

- They do not have to have associated time.
- There can be multiple assignments in the same day.
- They can have both time and number of incidents associated to them on the same timesheet.

Date(s) Select the dates for the incident. You can report time against multiple assignments in the same day.

Assignment Select the appropriate assignment for the time period.

Incident(s) Enter the number of incidents for the assignment during the time period. The number of incidents is entered on a per line basis.

Other Buttons and Links

Save Timesheet Select to save the timesheet. When you save the timesheet, the timesheet appears in the Active Timesheet group box on the Manage Timesheets page.

Review and Submit Select to review and submit the timesheet to the timesheet approver.

Return to Maintain Timesheets Click this link to access the Manage Timesheets page.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Settlement Setup, page 118

Chapter 18, "Managing Work Orders," page 281

Entering Time Worked by Calendar and 24-Hour Clock

Access the Enter Time page.

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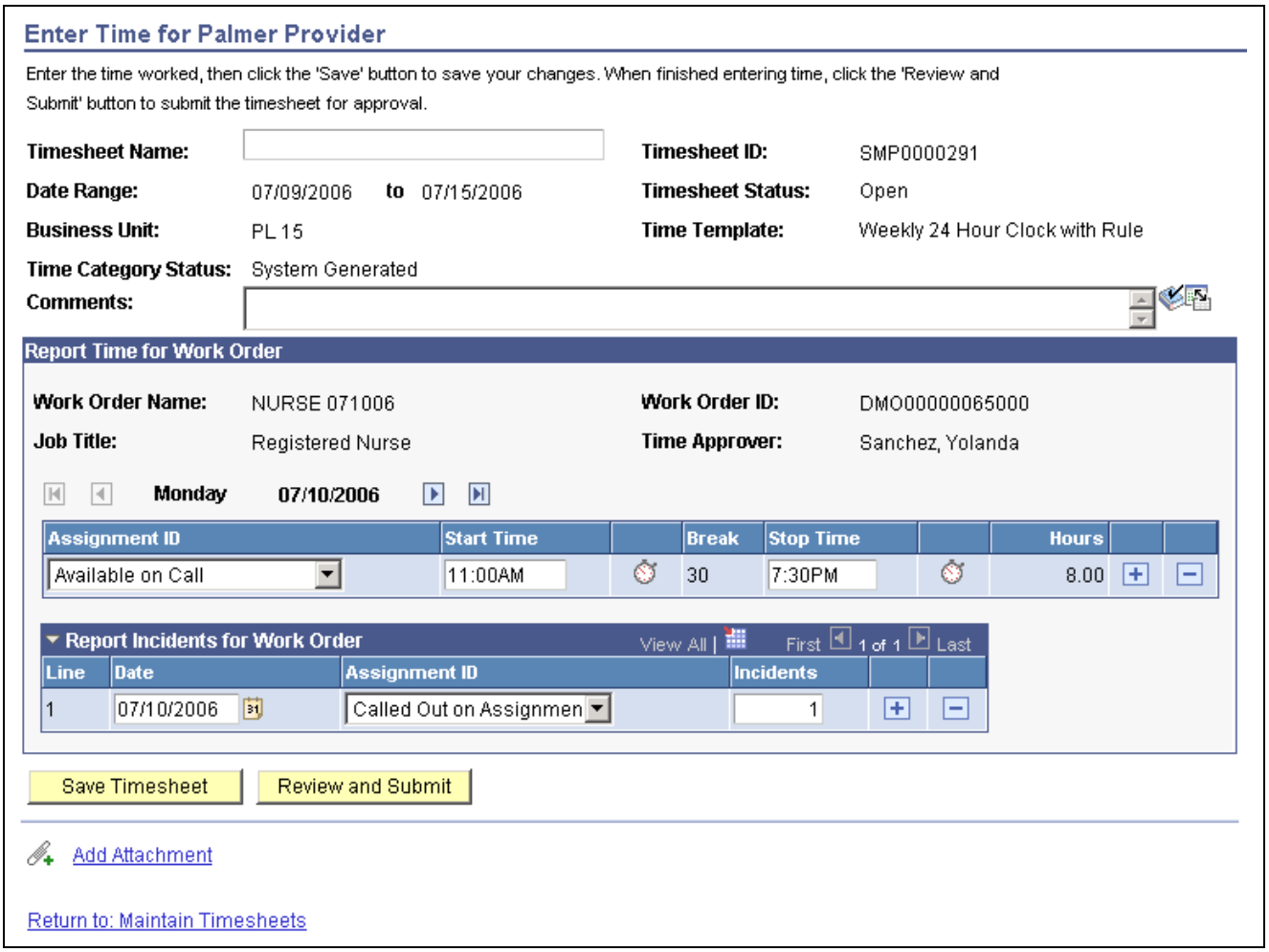

Enter Timesheet page (assignments)

The format of the time entry page is determined by the time template specified on the work order. In this example, the time template enables you to enter time using a 24-hour clock. This method of reporting time enables users to record time on a day-by-day basis, with both start and end times. For example, a user can enter time for a day with a start time of 8:00 a.m., a lunch break from 12:00 noon until 1:00 p.m., and an end time of 5:00 p.m. Time can be reported across two days, meaning that time greater than 24-hours can be reported. For such a timesheet, any hours reported as AM following hours reported for PM will be considered as AM of the next day.

Report Time for Work Order

Shift

Select the valid shift for the project, if applicable. This column is available if the Enable Shifts option was selected on the Services Procurement Bus Unit definition page, and if there are shifts associated to the service for the reporting time period. In addition, the Derive Shift From Time of Day option on the Service/Time Template page cannot be selected or this column will not display.

Shifts can be selected manually or automatically based on the time template.

Pay rates come from the service itself if the Define for this Service option is selected on the Shift by Service definition page. Otherwise, the pay rates come from the Shift definition page.

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- *Manual selection*: Used for non 24-hour clock templates and for 24-hour clock templates where the Derive From Time of Day option is not selected.

  Service provider selects the related shift for each line.

  Service providers can manually enter shifts based on the following scenarios:

  - Different shifts on different days.
  - Multiple shifts on the same day.
  - Gaps in time such as split shifts.

- *Automatic selection*: Used for 24-hour clock templates where the Derive From Time of Day option is selected.

  Service provider enters Start Time, Break time, and Stop Time for each line and the system automatically derives the shift based on the times entered. The system can derive multiple shifts for a single time line.

Shift Pay Rate Calculations

Shift rate calculation is based on the shift pay type. Any applicable MSP or VMS fees are added in addition to the shift rate.

See Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Defining Shifts for Use on Timesheets, page 127.

Assignment Select the valid assignment for the project, if applicable. This column is available if the Enable Assignments option was selected on the Services Procurement Bus Unit definition page, and if there are assignments associated to the service for the reporting time period.

Hours Displays the total number of hours worked for that week.

Report Incidents for Work Order

This section appears if the Enable Assignments option is selected on the Services Procurement Bus Unit definition page, if there are valid assignments associated to the service during the time period reported, and if the Based on Incidents option is selected on the Assignment by Service definition page.

Date(s) Select the dates for the incident. You can report time against multiple assignments in the same day.

Assignment Select the appropriate assignment for the time period.

Incident(s) Enter the number of incidents for the assignment during the time period. The number of incidents is entered on a per line basis.

Submitting Timesheets for Approval

To submit timesheets for approval:

1. Access the Enter Time page.
2. Click Submit for Approval.
3. Click OK on the Submit Confirmation page.

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Managing Timesheets

Use the Manage Timesheets menu to:

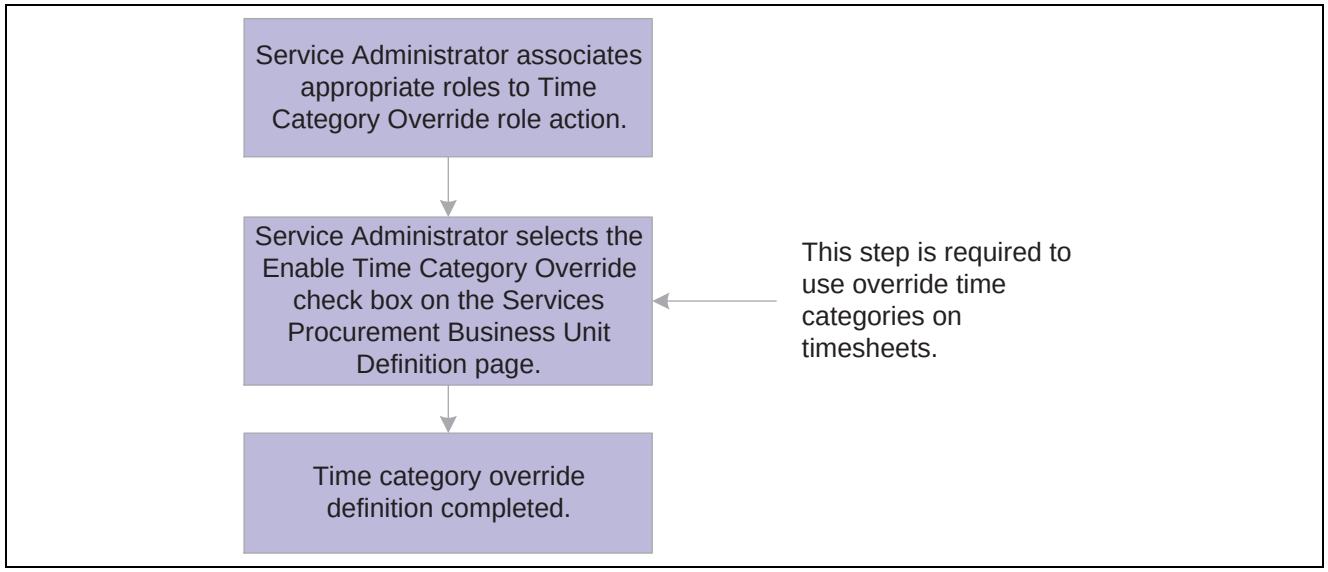
- Enter time on a new or existing timesheet.
- View or adjust timesheets.
- View associated timesheet information such as any applicable shift or assignment pay.
- Override time categories.

Overriding Time Categories

With PeopleSoft Services Procurement, you can override time categories on timesheets. In order to accomplish this, the following must be in place:

- The Enable Time Categories Override option must be selected on the Services Procurement Bus Unit definition page.
- The role action of SP_TIME_ADJUST_TRC must be associated with users who will be able to override time categories.

The following diagram illustrates the setup of the time category override feature:



Time Category Override Definition

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Pages Used to Manage Timesheets

Page Name	Object Name	Navigation	Usage
Manage Timesheets	SPA_SP_R_MAIN_PG	Services Procurement, Maintain Timesheets (external)	View, search, and sort the list of timesheets. Access the timesheet that you want to modify. To add a new timesheet, select a business unit, work order, time template, and date range. Click the Create button.
Enter Time	SPA_TIME_ENTRY	Click a linked time report on Manage Timesheets page to view an existing timesheet. Click the Create button on Manage Timesheets page to enter time on the timesheet.	Enter time worked.
Timesheet Details	SPA_TIME_DETAILS	Click the Timesheet Details button on the Enter Time page.	View timesheet details, including any associated shift or assignment information such as time line type or number of incidents.
Review Timesheet	SPA_TIME_SUBMIT	Click the View Summary button on the Enter Time page.	Review the timesheet summary. If there is any time based on incidents, the Assignments Incidents Summary grid appears.
Timesheet Attachment	SPA_TIME_ATTACH	Click the Add Attachment link on the Enter Time page.	Add, delete, or view an attachment for the timesheet. **Note.** You can add more than one attachment for each timesheet. Click the plus sign to include more attachments for the timesheet.

Managing Timesheets

Access the Manage Timesheets page.

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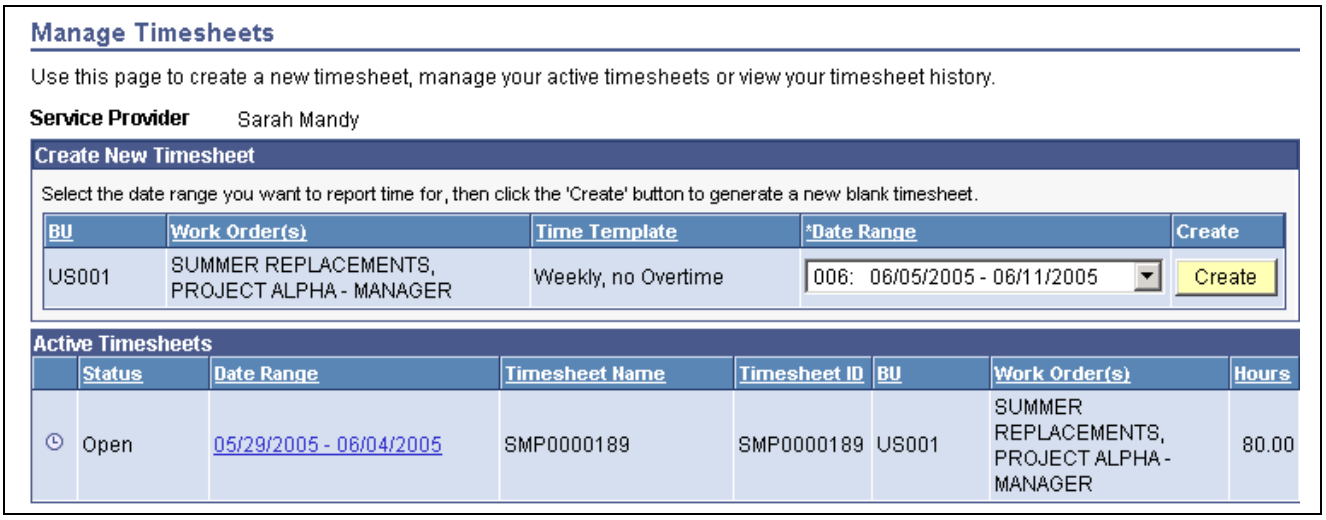
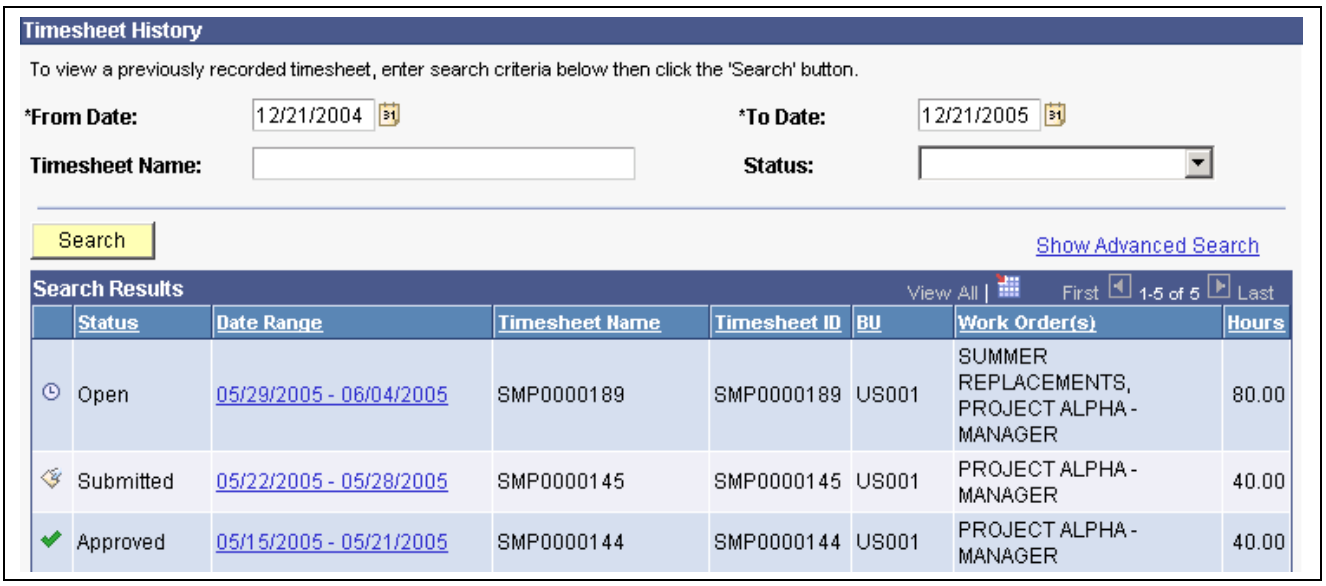


Manage Timesheets page (1 of 2)



Manage Timesheets page (2 of 2)

Create New Timesheet

The Create New Timesheet grid groups together a unique combination of work orders for a given work order time template.

Date Range Date specified for timesheet entry.

Note. This value always defaults to the next available timesheet. However, if there is no timesheet specified, the date defaults to the first day of the week.

Active Timesheet

This section is used to display timesheets that are in an active status. These timesheets can include timesheets that were created but never submitted, or timesheets that were denied and require re-submission.

To modify a timesheet, click the link that corresponds with the active timesheet,

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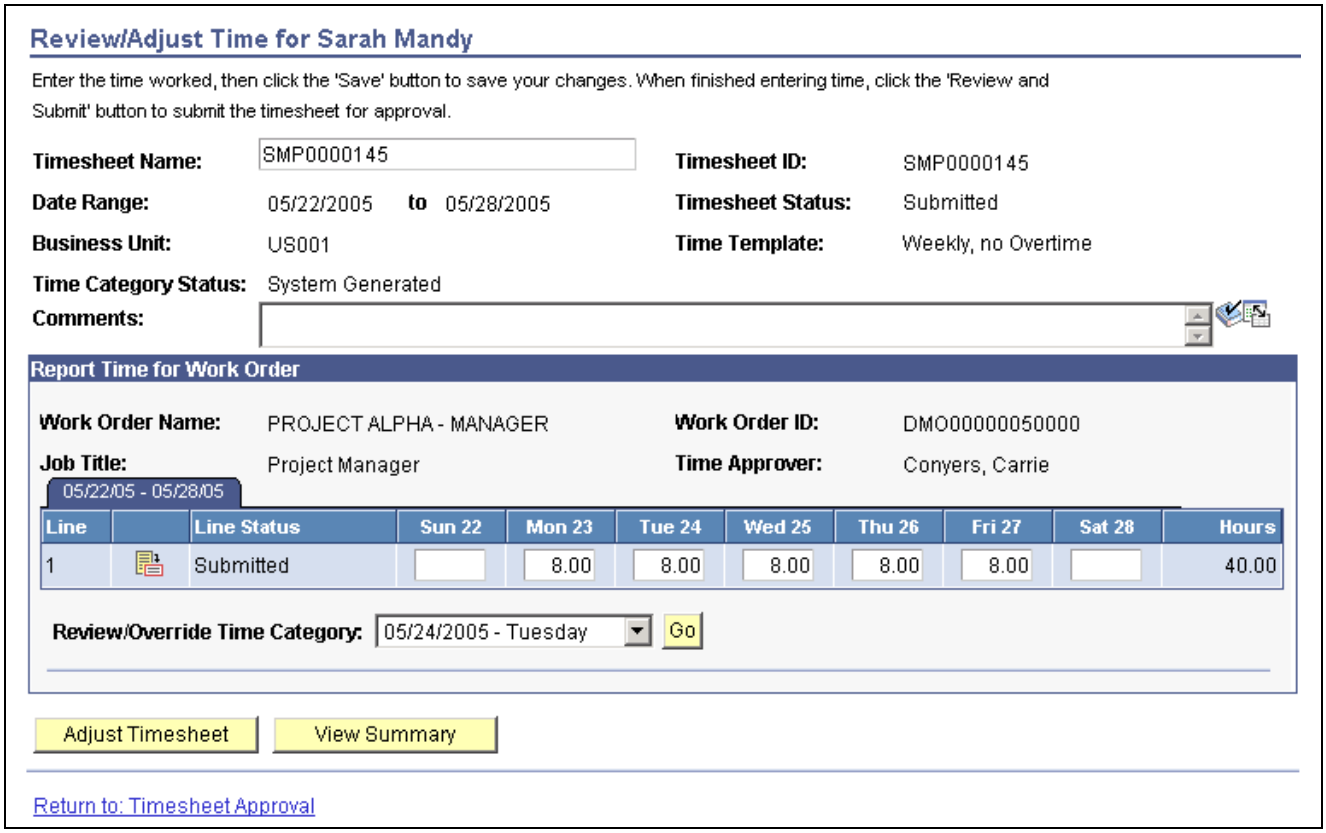
Timesheet History

This section is used to search and view past timesheets.

Reviewing and Adjusting Timesheets

Access the Review/Adjust Timesheet page.



Review/Adjust Time page

Note. You cannot change the work order ID if you are adjusting approved timesheets. You can, however, change the distribution, activity ID, shift, assignment and Time fields as required, if they are available.

Report Time for Work Order

If the user does not have the appropriate role action to adjust time, the label will read *Review Time for Work Order.*

(Time Reporting Period) Revise the number of hours and then click the Adjust Timesheet button.

Adjust Timesheet Click this button to update the timesheet and save your changes.

Review/Override Time Category Select the time period for which you want to override the time category on the Review/Override Time Categories page.

The actual navigation that you'll use to access the Review/Override Time Categories page is determined upon which service time template that was used to create the timesheet. After you have selected the time period that you want to override:

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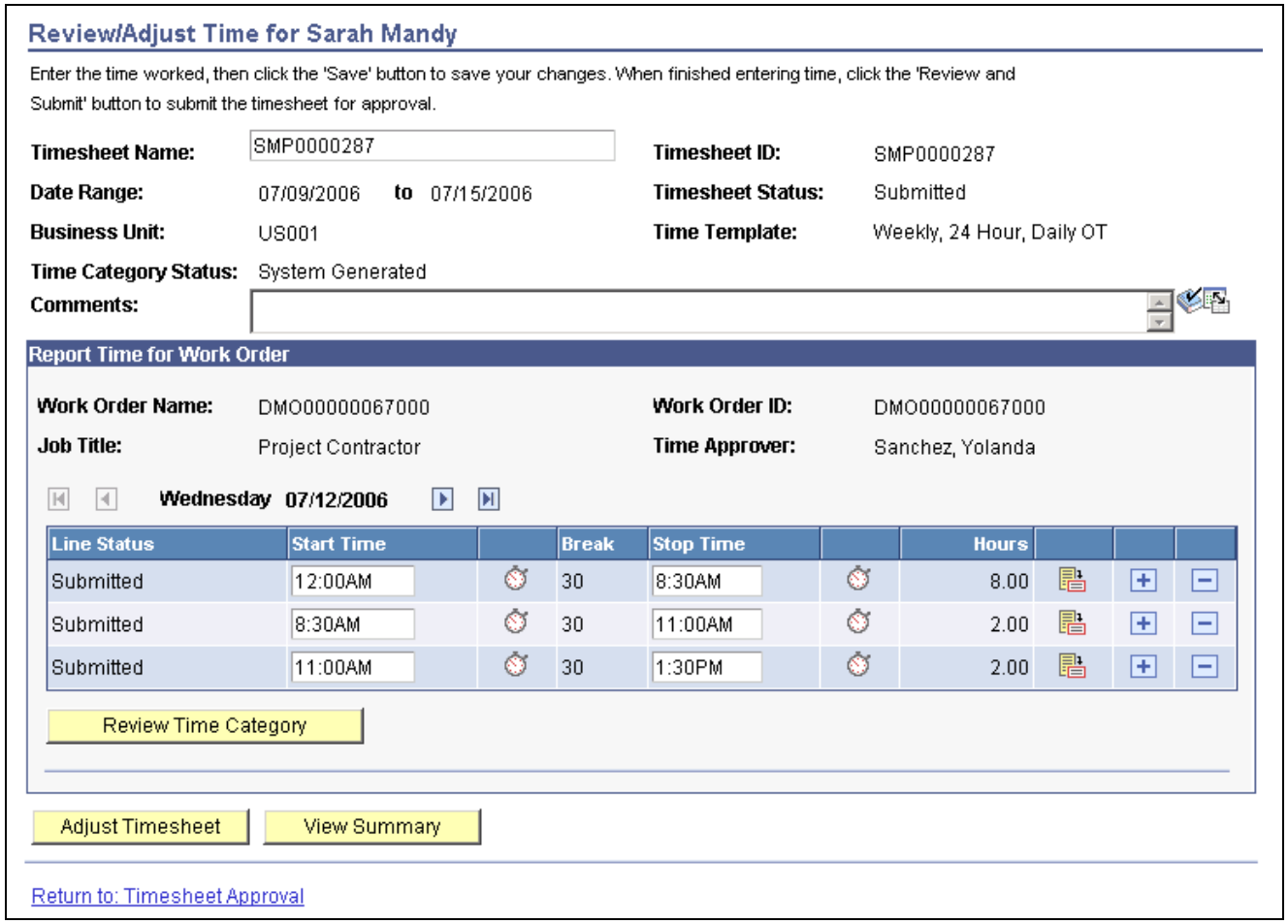
- For Non 24-Hour clock timesheets, click the Go button to access the Review/Override Time Categories page.
- For 24-Hour clock timesheets, click the Review/Override Time Category button.

Overriding Time Categories on Timesheets

Access the Review/Override Time Categories page.



Review/Adjust Timesheet page

Note. The title of this page will read “Review Time Categories” if the user does not have the appropriate role to override time categories.

Note. Fields on this page will appear differently based on the use of a 24-hour or a non-24-hour clock time template. Differences are discussed.

Time Category Status This field displays the current time category status for the reporting period. Values are:

- *System Assigned*: Indicates that no manual override has occurred.

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- *Approver Override*: Indicates that one of the approvers of the timesheet has manually overridden the system assigned value.

The Enable Time Reporting Override option on the Services Procurement Bus Unit definition page must be selected in order for this field to be available.

Time Category If the business unit is not enabled to override time categories, the label for this group box is Time Category. In addition, information is display-only.

Report Time for Work Order

If the user does not have the appropriate role action to approve time, the label will read "Review Time for Work Order" and the Review/Override Time Category field is unavailable.

In addition, if you do not have the appropriate approval role action, you will only be able to review the time information in this section.

Review/Override Time Category Select the time period for which you want to override the time category on the Review/Override Time Categories page.

The actual navigation that you'll use to access the Review/Override Time Categories page is determined upon which service time template that was used to create the timesheet. After you have selected the time period that you want to override:

- For non 24-Hour clock timesheets, you must select the time period that you want to override in the Review/Override Time Category field, and then click Go to access the Edit Time Categories page.
- For 24-Hour clock timesheets, scroll to the time period that you want to override and then click the Review/Override Time Category button to access the Edit Time Categories page.

Adjust Timesheet Click this button to accept and save the changes. You will receive a confirmation message after the changes have been successfully saved.

The Timesheet Status changes to *Adjusted.*

Reviewing and Overriding Time Categories

When the Time Category Status is *Approver Override,* a warning will be displayed if an approver makes a subsequent adjustment to the hours. Clicking the Adjust Timesheet button will trigger the warning in this case. You will have an opportunity to cancel the adjustment before the TRC values are recalculated.

Important! If there are multiple approvers for the timesheet, a warning message will display to indicate that subsequent changes will affect previous overridden time. For example, if one approver changes the time categories so that overtime will not be charged against his or her work order, another approver may need to make an associated change to 'pick up' the overtime on his or her work order.

Adjusting Timesheet After TRCs Have Been Overridden

The system displays this confirmation message time categories have been successfully overridden:

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Message indicating that TRCs have been overridden

OK Click this button to accept the changes. The system returns the approver to the Adjust Timesheet page.

Cancel Click this button to indicate that the hours should not be changed, and the system returns the approver to the Adjust Timesheet page.

Approving Timesheets

This section discusses how to:

- Approve or deny timesheets.
- Establish proxy time entry.

Note. Before you can approve timesheets, you must have a role action of SP_TIME_APPROVER.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Setting Up Roles for Role Actions, page 96

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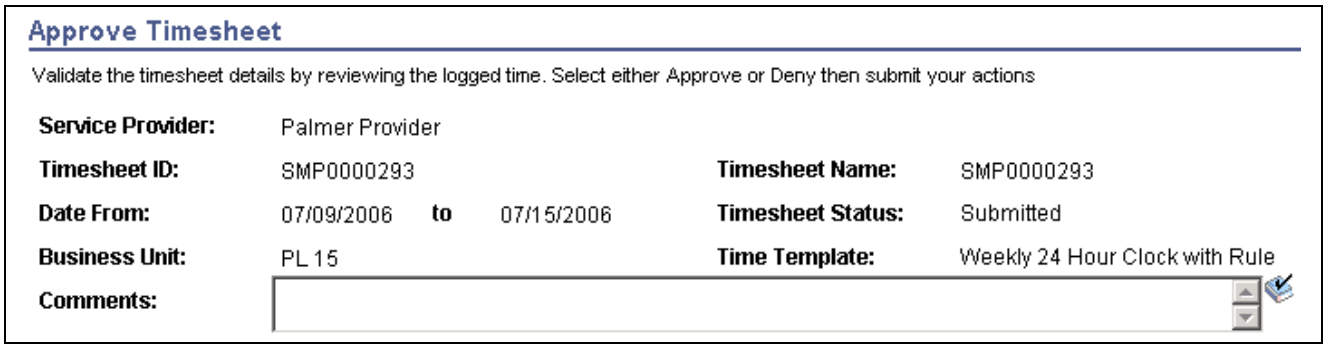
Pages Used to Approve Timesheets

Page Name	Object Name	Navigation	Usage
Worklist	WORKLIST	Worklist, Worklist, Filter By 'Submitted Timesheets'.	View timesheets that require your approval.
Approve Timesheet	SPA_TIME_APPROVE	Select timesheets that require your approval from the Worklist page.	Approve timesheets.
Enter Time	SPA_TIME_ENTRY	Click the View/Adjust Timesheet button on the Approve Timesheet page.	View a list of adjustments entered for the timesheet.
Edit Time Categories	SPA_TM_EDIT_TRC	Click the View/Adjust Timesheet button on the Approve Timesheet page. Select the time period for which you want to override the time category and click the Go button.	Edit time categories for a specific time period.
Timesheet Details	SPA_TIME_DETAILS	Click the Timesheet Details button on the Enter Time page.	View the details for the timesheet.
Review Timesheet	SPA_TIME_SUBMIT	• Click the View Summary button on the Enter Time page. • Click the View Summary button on the Review/Adjust Time page.	View summary information for adjusted timesheets.

Approving and Denying Timesheets

Access the Approve Timesheet page.



Approve Timesheet page (1 of 3)

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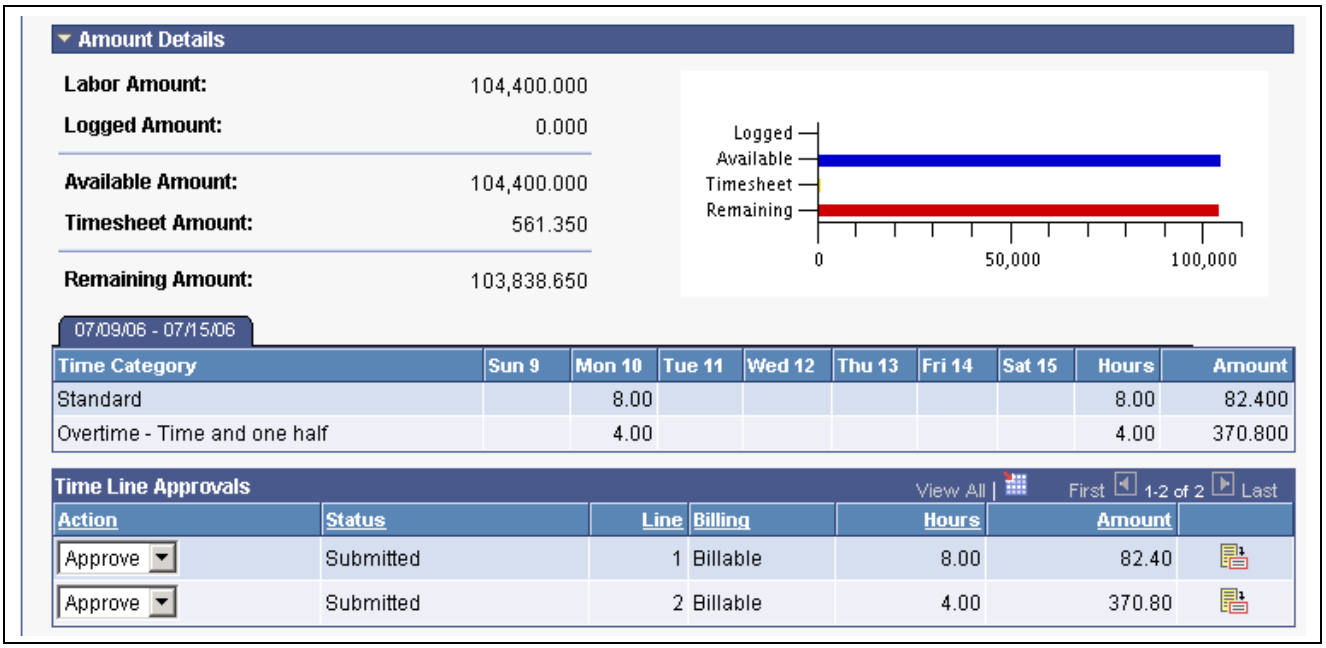
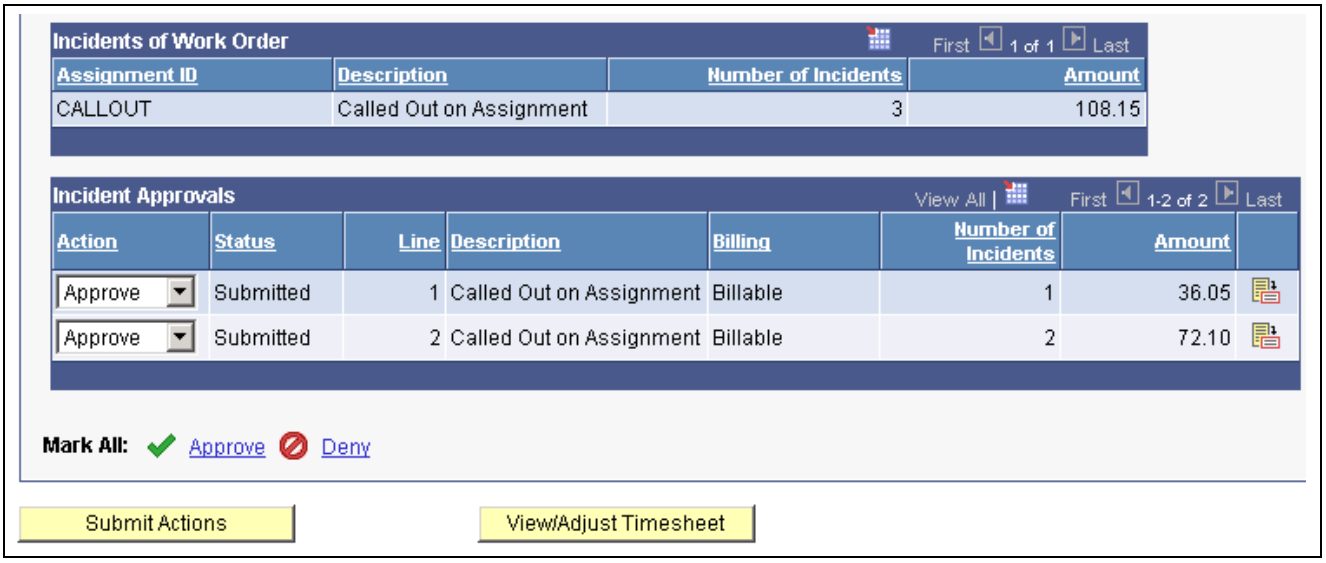


Approve Timesheet page (2 of 3)



Approve Timesheet page (3 of 3)

Time Category Status This display-only field indicates whether the system assigned time categories have been manually overridden for this timesheet. This field displays only if the Enable Time Category Override option is selected on the Services Procurement Bus definition page.

Amount Details

Use this section to view a graphical presentation of timesheet amounts, including logged, available, timesheet, and remaining amounts.

Time Line Approvals

Use this section to approve or deny timesheet lines. The columns that appear differ depending upon whether assignments are associated to projects for the reported time period.

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Note. If there are any incidents associated with the time line, the group box will be named Incidents for Work Order.

Status Displays the status of the time line approval.

Type Column displays the basis for which assignment is based. Values are *Time* or *Incident.*This column appears if there are assignments associated with the time reporting period.

Note. The sort order for this column is by time and then by incident. Rows are sorted within each time line type based on line number.

Quantity This column displays the number of incidents for each time line. This column appears if there are assignments (based on incidents) associated with the time reporting period.

Action Select an option to approve or deny the timesheet. Values include:

Approve: Changes status to *Approved.* The timesheet is now available for invoicing.

Deny: Changes status to *Denied by Approver.* If you deny the timeline, enter a comment to indicate a reason. The timeline returns to the service provider for modifications and re-submission.

Click to access the Timesheets Details page, where you can view the details of the timesheet and select the rating for the work that the service provider performed for this time line.

Mark All Select to mass approve or deny timesheets.

View/Adjust Timesheet Click to access the Enter Time page, where you can make adjustments to the timesheet. Use this page to override time categories if the Enable Time Reporting Override check box is selected on the Services Procurement Bus Defn page.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 26.

Incidents for Work Order

This group box appears if there is any time being reported that is based on incidents which works with assignments. If there are no incidents reported for the work order for the timesheet, the group box will not appear.

Incidents This column summarizes and displays the number of incidents per assignment for the *entire* timesheet.

Amount This column summarizes and displays the total amount of incidents for each assignment for the *entire* timesheet.

Incident Approvals

This group box appears if there are any assignments associated to the time being reported. If there are no incidents reported for the work order for the timesheet, the group box will not appear.

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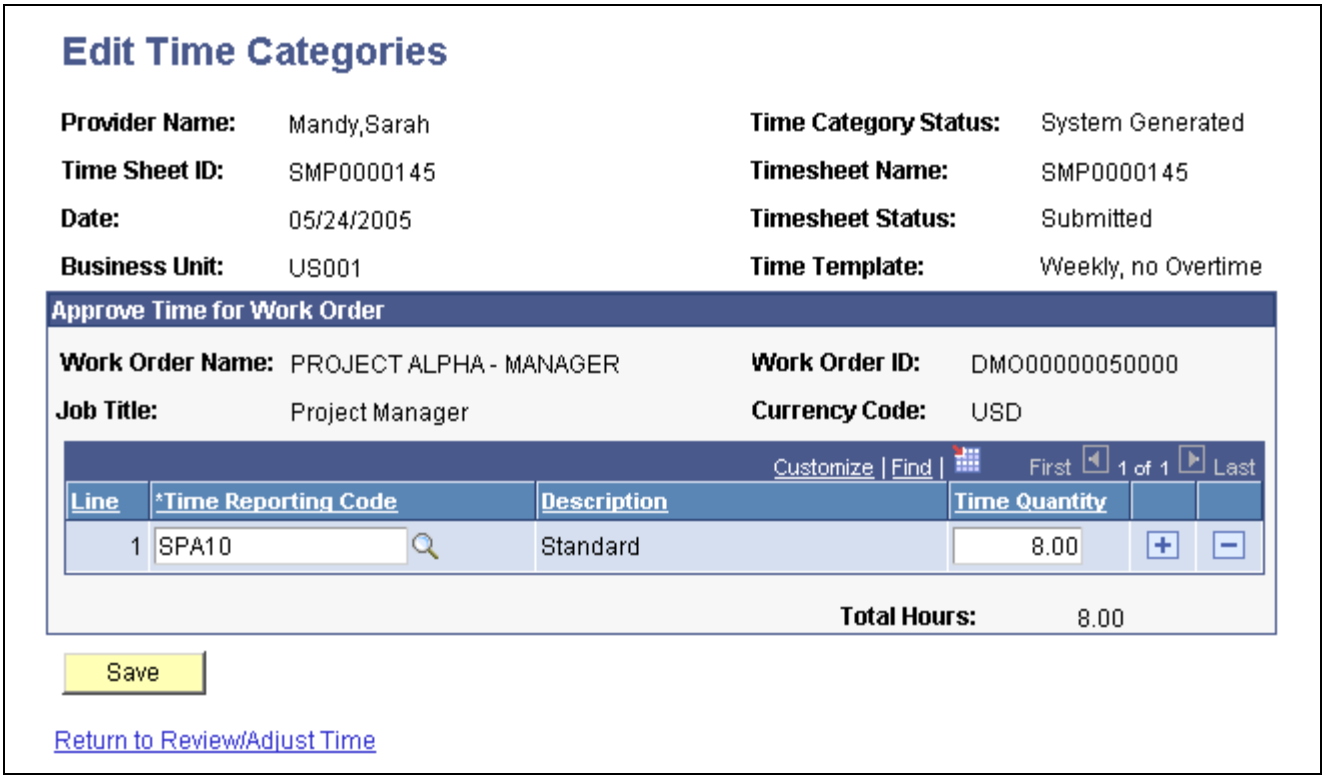
Action Select an option to approve or deny the incident. Values include:

Approve: Changes status to *Approved*. The incident is now available for invoicing.

Deny: Changes status to *Denied by Approver*. If you deny the timeline, enter a comment to indicate a reason. The timeline returns to the service provider for modifications and re-submission.

Editing Time Categories on Timesheets

Access the Edit Time Categories page.



Edit Time Categories page

Note. This page is available only if the Enable Time Reporting Override option has been selected on the Services Procurement Bus Unit definition page, and if the user has the appropriate role action that enables time category overrides.

Time Quantity Enter the new quantity for the time category.

You can add additional time quantities for each time reporting code.

Save Click this button to save your changes.

Establishing Proxy Time Entry

Service Provider Contacts can create timesheets for service providers within the supplier office location.

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If an approver denies a timesheet, the service provider and provider contacts in the supplier office location receive a worklist notification indicating that the timesheet is denied. If the timesheet is approved, the service provider and the provider contacts in the supplier office location receive an email notification indicating that the timesheet is approved.

When a service provider contact resubmits the timesheet, the denied worklist entry is removed from all other provider contacts within the same supplier office location.

Manage Timesheet Worklists

This section discusses how to trigger worklist and email notifications.

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

- The service provider receives a worklist entry and an email notification if the timesheet status changes to *Deny.*

  The service provider receives an email notification if the timesheet's status changes to Approved.
- The approver receives a worklist entry and an email notification when a timesheet is submitted.
- The user can either access the timesheet using the email link shown below or by navigating using the worklist.

The email notification contains values from the Enter Time page and a URL that the recipient should use to access the timesheet.

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CHAPTER 20

Managing Expenses in PeopleSoft Services Procurement

This chapter lists prerequisites and discusses how to:

- Create expense reports.
- Manage expenses.
- Approve and deny expense reports.
- Manage expense report worklists.

Understanding Expense in PeopleSoft Services Procurement

The expense feature enables you to capture travel and expense information relating to a project. A service provider can enter expenses incurred on a project and submit them to the project manager on a expense report for immediate approval.

Note. Expenses can only be entered if there is an expense amount specified on the work order.

See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxxiv

Creating Expense Reports

This section discusses how to:

- Enter general expense information.
- Add expense lines.
- Enter expense line information.

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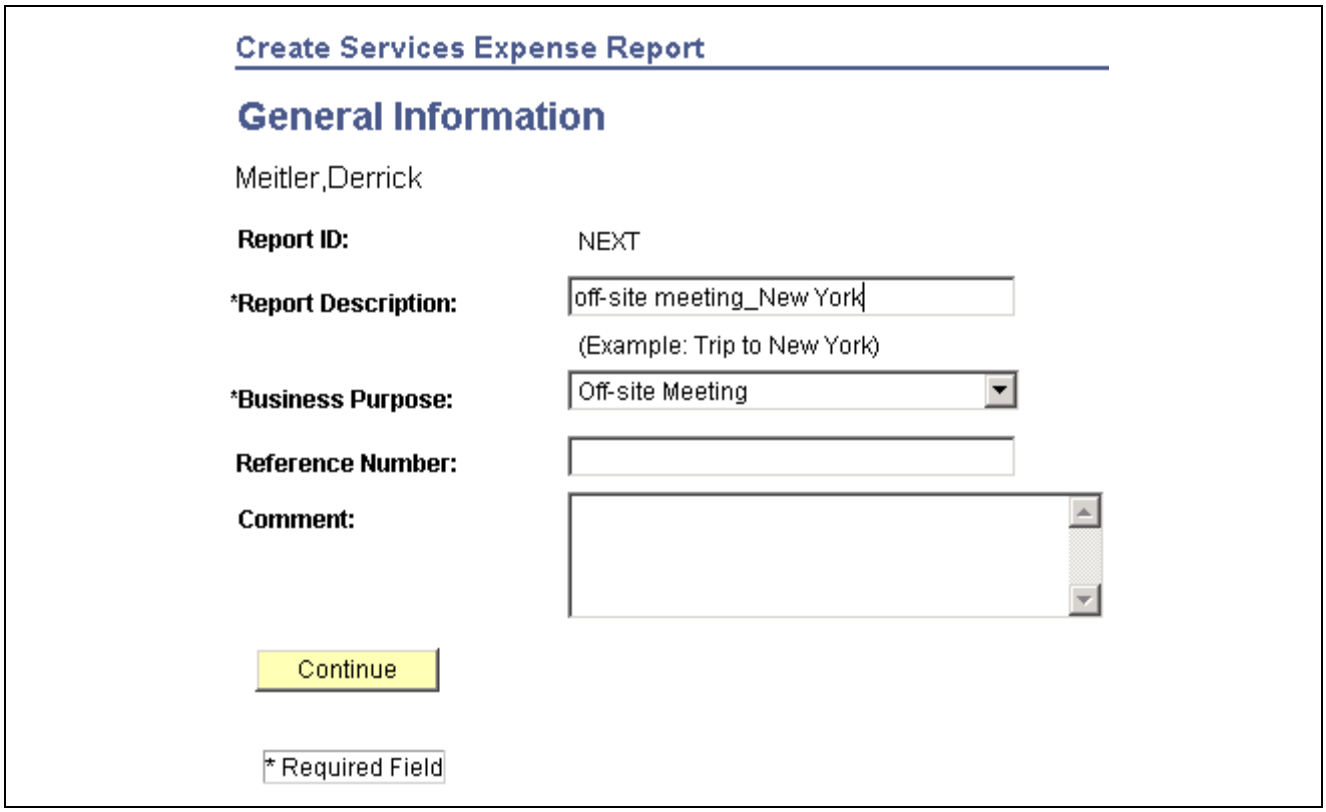
Pages Used to Create Expense Reports

Page Name	Object Name	Navigation	Usage
Manage Expenses	SPA_EXP_ROSTER	Services Procurement, Manage Expenses	Create new expenses, manage the expenses, and view the expense history.
General Information	SPA_SHEET_MAIN2	Click the Add Expense button on the Manage Expenses page.	Enter report description, business purpose, and other comments.
Services Expense Report Details	SPA_SHEET_LINES2	Click Continue on the General Information page.	Select the expense type for each expense line.
Add Expense	SPA_SHEET_EXPENSE2	Click Add on the Services Expense Report Details page.	Enter detailed expense lines and prepare the expense sheet for approval.
Exchange Rate Detail	EXCH_RT_DTL	Click the Rate Detail link on the Add Expense page.	View exchange rate information.

Entering General Expense Information

Access the General Information page.



General Information page

Report Description Enter a description of this report (30-character limit).

Business Purpose Select the business purpose of this trip or activity.

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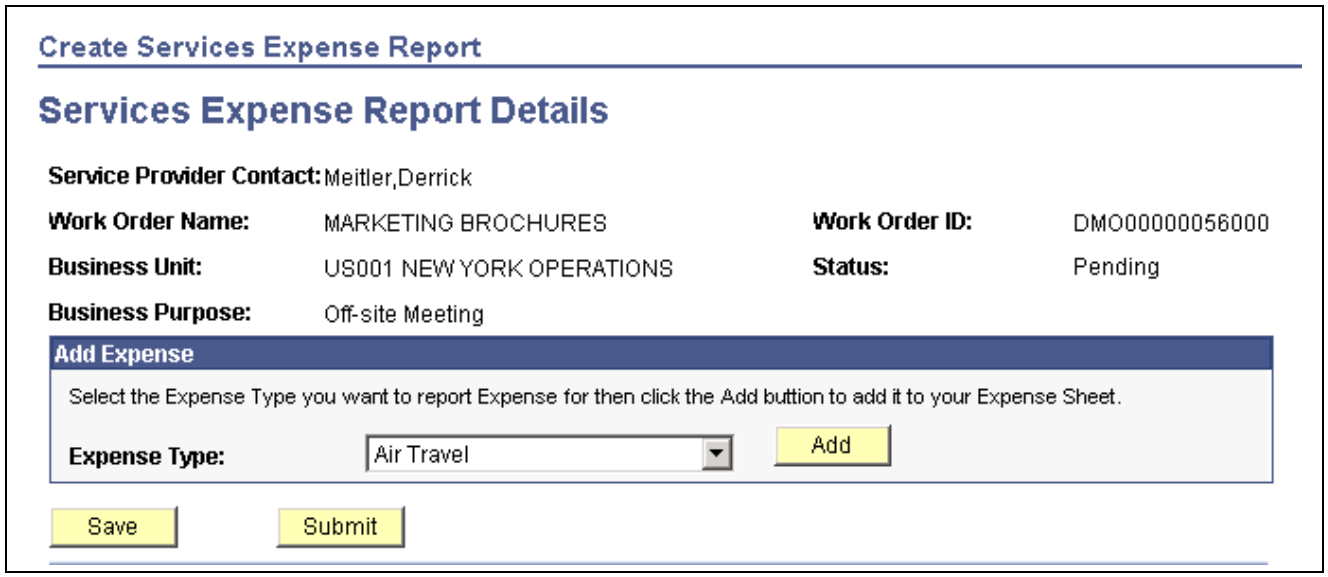
Reference	Enter text (10-character limit.)
Comment	Enter general comments regarding the expense sheet.
Continue	Click to access the Services Expense Report Details page and add expense lines.

Adding Expense Lines

Access the Services Expense Report Details page.



Services Expense Report Details page

Select an expense type and click Add to access the Add Expense page.

Entering Expense Line Information

Access the Add Expense page.

Depending on how the organization defines the expense type, you access the Add Expense page to enter more details such as merchant, mileage, or number of nights pertaining to the line item. When you complete the necessary information, the expense appears as a line item on the Services Expense Report Details page.

Here is one example of an Add Expense page that appears based on the air travel expense type.

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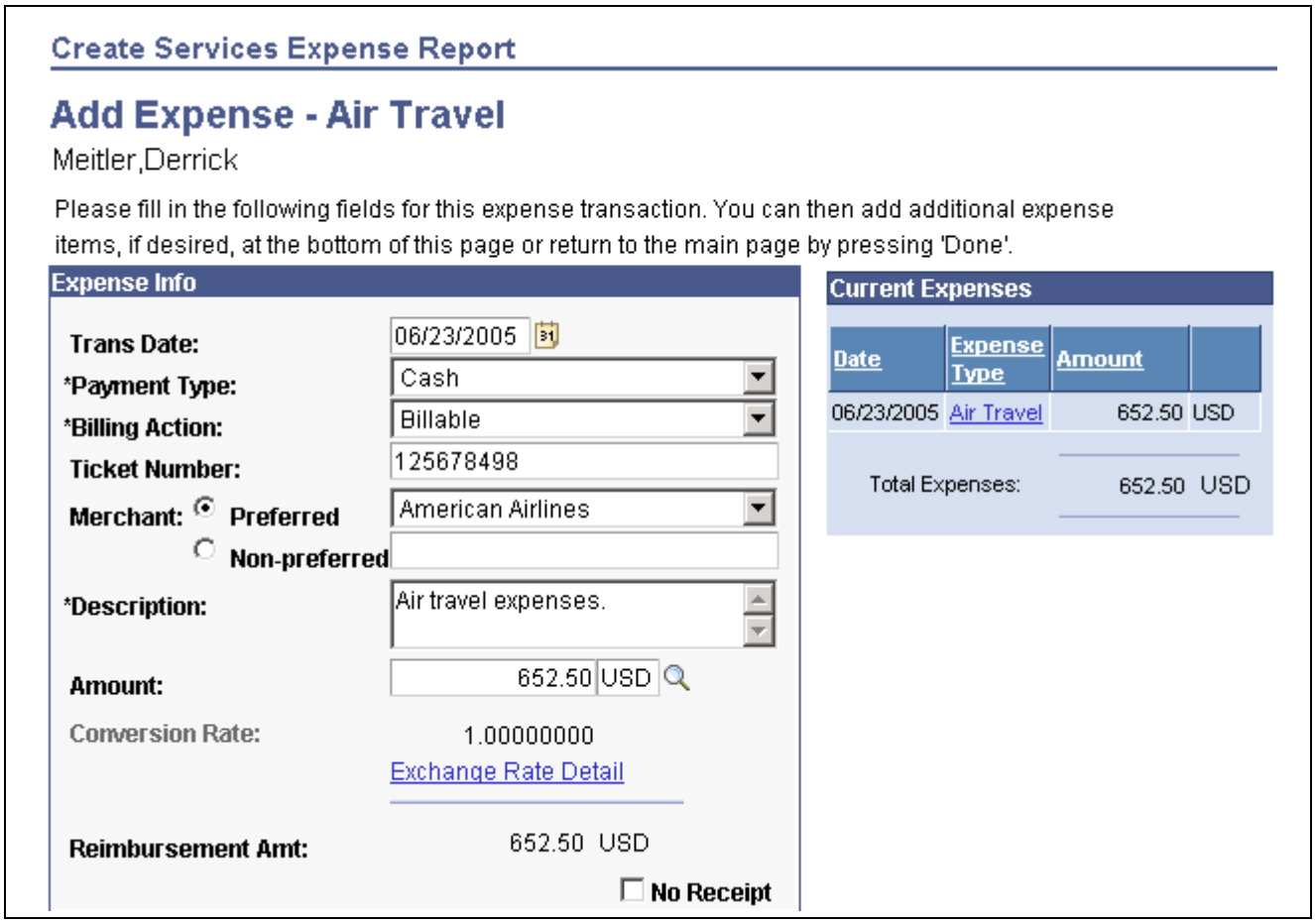

Add Expenses page (1 of 2)

Add Expenses page (2 of 2)

Generic Fields Included on Several Add Expense Pages

Trans Date (transaction date)	Enter the transaction date for this expense.
Payment Type	Select the payment type for this expense.
Billing Code	Select Billable or Nonbillable.
Merchant: Preferred or Non-preferred	Depending on how the expense type is defined during setup, this field may be required.
Location	Enter where the transaction occurs.
Description	Depending on how expense type is defined during setup, this field may be required.

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Amount	Enter the expense amount and the currency in which it was purchased. The currency code is only available for edit if the PeopleSoft Purchasing business unit allows multicurrency purchase orders.
Conversion Rate	Appears automatically and cannot be modified.
Reimbursement Amount	Appears in vendor location currency. The vendor location currency appears by default in the Work Order Vendor Location field. You can change this value by choosing a different currency in the Amount field if the PeopleSoft Purchasing business unit allows multicurrency purchase orders.
Rate Detail	Click to view or rate calculation information.
No Receipt	Select this check box if there is no receipt to substantiate an expense item that normally requires a receipt. If a receipt is required, you may need to provide an explanation for this expense.
Done	Click when you have completed the line item details. This returns you to the Services Expense Report Details page.

Specific Fields Included on Some Add Expense Pages

Ticket Number	Enter a reference number for the airline ticket.
Miles	Enter number of miles used to calculate automobile mileage reimbursement.
Add Additional Attendees	For meals, click to add a guest or business associate name, company, and title.
Number of Nights	Enter the number of nights included in the hotel stay.
Start Time and **End Time**	Enter the start and end of the business day.
Retrieve Per Diem Amounts	Click for the system to populate the amount field with the allowed per diem reimbursement.
Per Diem Information	Click this link to navigate to the Per Diem Information page to select meals that were provided by another party such as a lodging establishment. Depending on how the system is set up, the appropriate amount may be deducted from the per diem for that day.

Managing Expenses

This section discusses how to:

- Manage expenses.
- Submit expenses for approval.

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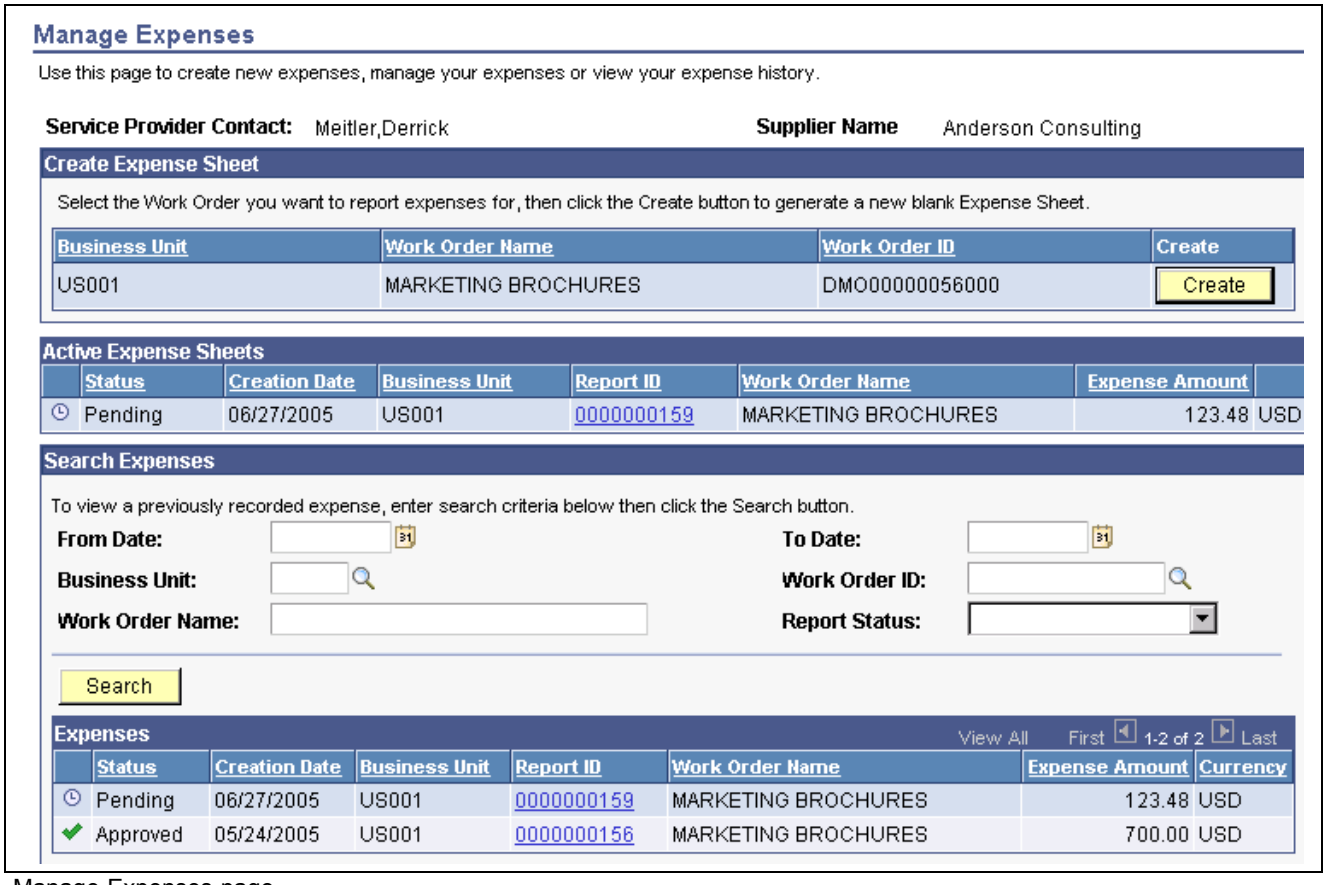
Pages Used to Manage Expenses

Page Name	Object Name	Navigation	Usage
Manage Expenses	SPA_EXP_ROSTER	Services Procurement, Manage Expenses	Create new expenses, manage the expenses, and view the expense history.
Manage Expenses (as proxy)	SPA_EXP_SUP_ROST	Services Procurement, Manage Expenses as Proxy	Manage expenses on behalf of another user.
General Information	SPA_SHEET_MAIN2	Click the Add Expense button on the Manage Expenses page.	Enter report description, business purpose, and other comments.
Services Expense Report Details	SPA_SHEET_LINES2	Click Continue on the General Information page.	Select the expense type for each expense line.

Managing Expenses

Access the Manage Expenses page.



Manage Expenses page

Create Expense Sheets

Use this section to add expenses to an existing work order.

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Active Expense Sheets

Use this section to view active expenses for the user. This includes both pending and denied expenses.

Search Expenses

Enter the search criteria and click Search. The search results appear at the bottom of the page.

Expenses

Report ID Click the link to access Service Expense Report Details page, where you can view the details of previously created expense reports.

Submitting Expense Reports for Approval

To submit expenses for approval:

1. Access the Services Expense Report Details page.
2. Click Submit for Approval.
3. Click OK on the Submit Confirmation page.

> ***Warning!*** After you submit the expense report for approval, you cannot go back and add time or expenses for the same time period, project, and activity combination using the same work order.

Approving or Denying Expense Reports

This section discusses how to:

- Approve or deny expense reports.
- Mass approve expense reports.

Pages Used to Approve or Deny Expense Reports

Page Name	Object Name	Navigation	Usage
Manage Expense Approvals	SPA_EXP_APR_ROSTER	Services Procurement, Manage Expense Approvals	View and approve expense reports.
Expense Report Line Adjustment	SPA_SHT_LN_ADJ	Click the Add Expense button on the Time Report Detail Adjustment page.	View adjusted expense lines.
Expense Report Line Entry Adjustment	SPA_SHT_EXP_ADJ	Click the Expense Type link on the Expense Report Line Adjustment page.	View adjusted expense line detail information.

Approving or Denying Expense Reports

To approve expense reports:

1. Access the Services Expense Report Details page.
2. Click one of the following buttons to designate the approval status of this time and expense line:

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Button	Approval Status
Approve	Changes status to *Approved.* The expense report is now available for invoicing.
Deny	Changes status to *Denied by Approver.* If you deny the expense report, enter a comment to indicate a reason. The expense report returns to the service provider or service provider contact for modifications and resubmission.

When all lines are approved, the expense report status changes to *Approved.*

Mass Approving Expense Reports

To approve multiple expense reports:

1. Access the Manage Expense Approvals page.
2. Select the expense report to be approved.

   Note. This option appears for users with a role action of *SP_EXP_APPROVER* only.

3. Click the Submit button.

   The system changes the status of the selected expense report to *Approved.*

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 26

Manage Expense Report Worklists

This section discusses how to trigger worklist and email notifications.

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

- The service provider receives a worklist entry and an email notification if the expense status changes to *Approve* or *Deny.*
- The approver receives a worklist entry and an email notification when an expense report is submitted.

The email notification contains values from the Manage Expenses page and a URL that the recipient should use to access the expense report.

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CHAPTER 21

Managing Progress Logs

This chapter provides an overview of services progress and discusses how to:

- Create progress logs.
- Manage progress logs.

Understanding Progress Logs

The progress log is similar to the timesheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverable work orders to the project manager for immediate, online approval. You can also track and report issues using the progress log. The project manager or progress log approver can provide feedback to the service provider, including performance-rating information through the approval process.

Use the Manage Progress Logs page as the focal point for all deliverables-based activity in PeopleSoft Services Procurement. Use this page to:

- Create, edit, view, or approve progress logs.
- Filter reports by selecting the criteria in the service provider contact, vendor, or status fields.
- Access pages used to modify progress log details.

See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxxiv

Prerequisites

These attributes must be set up before entering progress log information:

- Services project business units.
- Services time/progress templates.
- Activities defined as milestone activities.
- Activities defined for rate-based services.

A deliverable - based work order must also be released before progress log transactions can be entered against it.

See Also

Chapter 18, "Managing Work Orders," page 281

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Creating Progress Logs

This section discusses how to:

- Create a progress log.
- Enter progress completed on a project.
- View progress log details.
- View progress log history.

Pages Used to Create Progress Logs

Page Name	Object Name	Navigation	Usage
Maintain Progress Logs	SPA_MANAGE_PLOGS	• Services Procurement, Maintain Services Progress Logs (internal) • Services Procurement, Maintain Services Progress Log (external)	View and manage progress logs.
Progress Log Summary	SPA_PLOG_LINES	• Click the Progress Log ID link on the Maintain Progress Logs page. • Click the Add button from the Maintain Progress Logs page.	Create or edit a progress log.
Progress Log Details	SPA_PLOG_DTL	Click the Details button from the Progress Log Summary page.	View invoicing status and project comments. Approve or deny submitted progress logs. View status change history.
Currency Information	EXCH_RT_DTL_INQ	Click the Exchange Rate Detail link on the Progress Log Details page.	View currency information.
Progress Logs by Work Order	SPA_PLOG_PRCNT_HST	Click the History button on the Progress Log Summary page.	View previously entered progress logs by work order.

Creating a Progress Log

Access the Progress Log Summary page.

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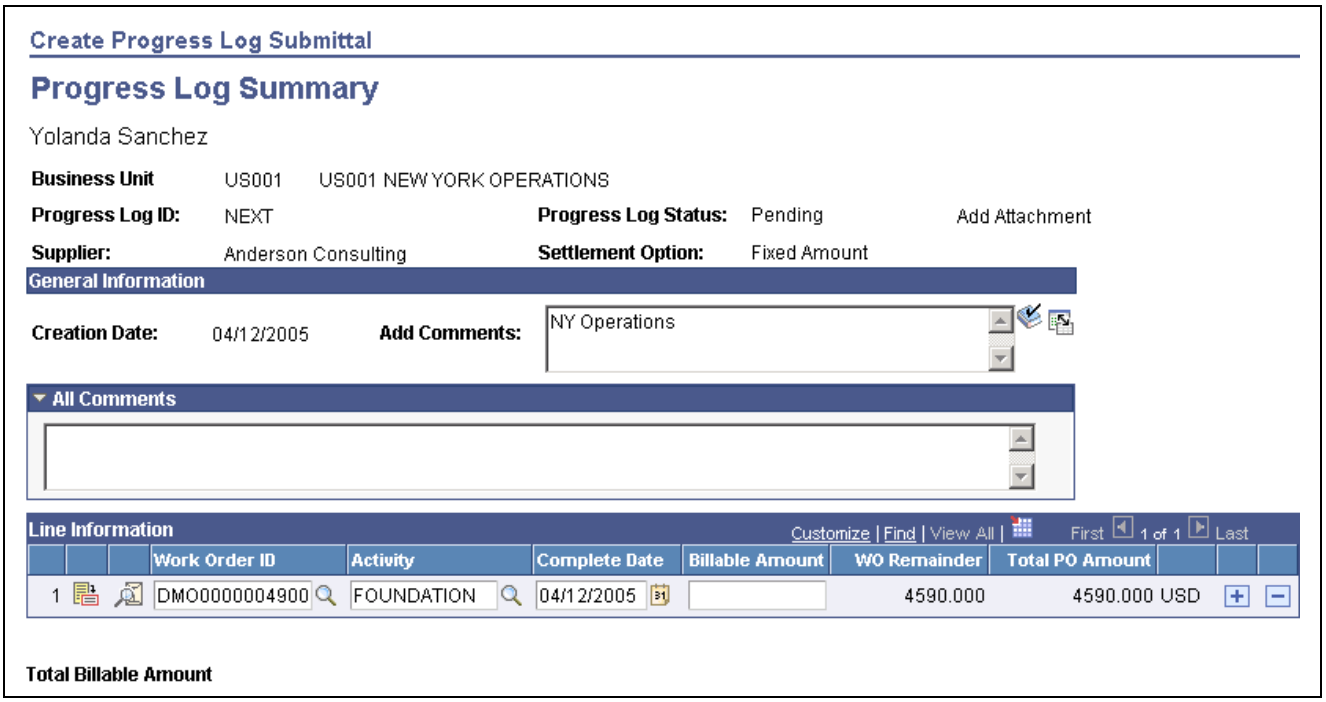

Progress Log Summary page

The fields appearing on this page depend on the settlement option that you defined on the work order.

Add Comments Enter comments or concerns for the work order.

Work Order ID and **Project** Select the work order for which progress is being reported. The project associated with the work order appears as read only.

Billable Amount and **Total PO Amount** (total purchase order amount) The system displays values associated with the work order. The system displays this value in the work order currency, as well as the base unit currency.

Click the Details button to access the Progress Log Details page.

Click the History button to access the Progress Logs by Work Order page.

Total Billable Amount Displays the sum of the billable amounts.

Save Click to save the progress log entry for later submission.

Submit for Approval Click to submit the progress log for approval. the information is automatically submitted to the approver specified for the work order, and you can return to the Maintain Progress Logs page.

Milestone Settlement Method

These fields appear if you are using a service template with *Milestone* specified for the settlement option. The settlement option is defined on the work order.

Milestone Activity and **Complete Date** Select a milestone from the available options, which are determined by the work order defined as using the milestone settlement option.

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Note. Once a milestone activity is submitted, you cannot use it again for another progress log entry.

Complete Date Enter the date the milestone activity was completed.

% of WO (percentage of work order complete) The system displays this information based on the percentage assignments from the work order.

Warning! After you submit the progress log for approval, you can't go back and add progress lines for the work order, project, and milestone activity combination using the same service template.

Fixed Amount Settlement Method

These fields appear if you are using a service template with *Fixed Amount* defined for the settlement option. The fixed amount settlement option is similar to the milestone settlement option in that both record progress against milestone activities. The difference is that fixed amount enables the suppliers to enter the amount they are paid for the activity rather than having the amount defined on the work order. The settlement option is defined on the work order.

Activity Select a milestone activity that is linked to the project defined on the work order.

Note. Progress for fixed amount work orders is reported against milestone activities, however unlike the Milestone Settlement Option, progress can be recorded multiple times against the same milestone activity with the Fixed Amount Settlement Option field.

Complete Date Enter the date that the progress was completed.

Billable Amount Enter the billable amount for the deliverable.

Percentage Settlement Method

These fields appear if you are using a service template with *Percentage* specified for the settlement option as defined on the work order.

% Complete (percentage complete) Enter the percentage value completed.

% Complete TD (percentage complete to date) Displays this information based on data submitted to date.

The system updates the work order with this information when you save the progress log.

Note. To submit this transaction, the submitted total, when added to previously submitted progress logs, cannot exceed the total purchase order amount on the work order, plus the tolerance percentage defined on the work order.

Rate Based Settlement Method

These fields appear if you are using a service template with *Rate Based* defined for the settlement option. The settlement option is defined on the work order.

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Activity Select the activity that you performed. After you select the activity, the rate, unit of measure and billable amount for the activity appear on the page. These fields come from the work order activity definition.

Quantity Enter the quantity completed.

Entering or Viewing Progress Log Details

Access the Progress Log Details page.

Invoice Status, Invoice Date, and **Invoice Number** Display after the progress log is included on an invoice.

Managing Progress Logs

This section discusses how to:

- Manage progress logs.
- Submit progress logs for approval.
- Adjust progress logs.
- Approve or deny progress logs.
- Trigger worklist and email notifications.

Pages Used to Manage Progress Logs

Page Name	Object Name	Navigation	Usage
Maintain Progress Logs	SPA_MANAGE_PLOGS	Services Procurement, Maintain Services Progress Log	Search and view progress logs. Access the progress log that you want to modify.
Progress Log Summary	SPA_PLOG_LINES	Click the Progress Log ID link on the Maintain Progress Logs page.	Modify progress logs.
Progress Log Details	SPA_PLOG_DTL	Click the Details button on the Progress Log Summary page.	Modify progress log details. Approve, deny, or hold submitted progress logs.
Progress Logs by Work Order	SPA_PLOG_PRCNT_HST	Click the History button on the Progress Log Summary page.	View previously entered progress logs by work order.

Maintaining Progress Logs

Access the Maintain Progress Logs page.

Search and Progress Logs

Enter the search criteria and click Search. The search results appear at the bottom of the page.

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Roster

Progress Log ID Click the link to access the Progress Log Summary page.

Submitting Progress Logs for Approval

To submit progress logs for approval:

1. Access the Progress Logs Summary page.
2. Click Submit.
3. Click OK on the Submit Confirmation page.

Adjusting Progress Logs

The progress log approver can adjust a submitted or approved progress log by selecting the Adjust Progress Log button on the Progress Log Summary page. The progress log approver can adjust the amount and modify comments while performing adjustments. If a submitted progress log is adjusted, the status remains *Submitted*. If an approved progress log is adjusted, the status changes to *Adjusted*. If an invoiced progress log is adjusted, the invoice for that progress log is cancelled. If the progress log was adjusted, a link is available to view adjustments.

Approving or Denying Progress Logs

To approve progress logs:

1. Access the Progress Log Details page.
2. Click one of the following buttons to designate the approval status:

Button	Approval Status
Approve	Changes status to *Approved.*
Deny	Changes status to *Denied by Approver.*

3. You can also do mass approvals of progress logs using the Maintain Services Progress Log page by selecting the Select check box and clicking the Approve button.

When all lines are approved, the progress log status changes to *Approved.*

Note. For approvers, the status appears for each line on the Summary page.

Note. When approving or denying progress logs, you can also add comments and ratings.

Note. You can also approve and deny progress logs on the Progress Log Summary page. You can select one or more lines to approve.

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Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

- The service provider contact receives an email notification if status changes to *Approve, Deny,* or *Hold.*
- The service provider contact receives a worklist entry if status changes to *Deny.*
- The approver receives a worklist entry and an email notification when a progress log is submitted.

The email notification contains values from the Progress Log Summary page and a URL for the recipient to access the progress log.

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CHAPTER 22

Managing Settlements

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

- Create invoices manually.
- Generate and print invoices automatically.
- Manage invoices.
- Approve invoices.
- Manage invoice approval for suppliers.

Understanding Settlements in PeopleSoft Services Procurement

Managing settlements with PeopleSoft Services Procurement enables individuals who have appropriate permissions to create consolidated proforma invoices. The proforma invoice process can be optionally configured to include or exclude suppliers in the invoice approval process, based on the supplier's setup. Specific timesheets, expenses, or progress logs lines can be added or removed prior to submitting the invoice for approval. Once approved, the proforma invoice is viewed online and printed, or included in a file for export, or both.

You can grant permissions for each of these functions:

- Automatic invoice generation.
- Manual invoice creation.
- Invoice management.
- Invoice approval.
- Supplier invoice approval.
- Invoice printing and processing.

With Services Settlement, you can:

- Manage the invoicing and settlement process.
- Invoice at varying frequencies.
- Select approved timesheets, expenses, or progress logs for an invoice.
- Manage invoice submittal, approval, and processing.

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See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxxiv

Prerequisites

You must set up these attributes before invoicing a timesheet, expense, or progress log:

- Define invoice authorizations.
- Define whether suppliers are included in the invoice approval process.
- Define addresses.
- Define payment terms.
- Define the accounts payable interface.

Common Elements Used in this Chapter

Batch Invoice Processing Invoices that are created using a batch process that can be scheduled to run offline.

Use Flexible Date One of three options used to specify how the Invoice Date is derived during batch invoice processing. If this option is selected, the user must specify the number of days BEFORE or AFTER the run date that will be used as the invoice date. For example, if the scheduled run date is the 15th day of every month (e.g., May 15) and the user specified 10 days BEFORE the run date, then the invoice date will be set to May 5th.

Use Specific Date One of three options used to specify how the Invoice Date is derived during batch invoice processing. If this option is selected, the user must specify a date that will be used as the Invoice Date. This option is more appropriate for single batch process runs rather than a recurring batch process run.

Use Run Date One of three options used to specify how the Invoice Date is derived during batch invoice processing. If this option is selected, the current date at run time will be used as the Invoice Date. This is the default option. This option is appropriate for both ad hoc and recurring process runs.

Creating Invoices Manually

This section discusses how to:

- Create invoices.
- View available lines for invoicing.

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Pages Used to Create Invoices Manually

Page Name	Object Name	Navigation	Usage
Manage Invoice	SPF_INV_MANAGE	Services Procurement, Manage Invoices	Add invoices, search existing invoices, submit, or cancel invoices. **Note.** The *From Date* and *Date To* fields default to the last 30 days. You may need to change the date fields to see previous invoices.
Create Invoice	SPF_INV_HDR_ADD	Enter the business unit or invoice ID or both, and click the Add button on the Manage Invoices page.	Create invoice header information.
Manage Invoices - Add Lines To Invoice	SPF_INV_TE_DTLS	Save an invoice on the Create Invoice page.	View all non-invoiced timesheets, expenses, and progress logs for the supplier or service provider.
Manage Invoices - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoice page.	Modify the selected invoice.
Invoice Process Detail	SPF_INV_PROCES_DTL	Click the View Entry button on the Manage Invoice page. Click the Process Details link on the Manage Invoices - Line Summary page.	View invoice processing details.
Invoice To Address	SPF_ADDRESS	Click the Vendor Location Address link on the Manage Invoices - Line Summary page.	View the invoice to address.
Remit To Address	SPF_ADDRESS	Click the Remit To Address link on the Manage - Invoices Line Summary page.	View the remit to address.
Currency Information	EXCH_RT_DTL_INQ	Click the Exchange Rate Details link on the Manage Invoices - Line Summary page.	View multicurrency information.
Manage Invoices - Line Detail	SPF_INV_TIME_DTL	For resource-based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View timesheet and expense invoice line details or make adjustments, or both.
Manage Invoices - Line Detail	SPF_INV_PLOG_DTL	For deliverable-based invoices, click the Edit link on the Manage Invoices - Line Summary page.	View progress log and expense invoice line details and make adjustments.

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Page Name	Object Name	Navigation	Usage
Work Order Details	SPF_WORDER_DETAIL	Click View Work Order link on the Manage Invoices - Line Detail page.	View details of the work order related to the invoice.
Purchase Order Inquiry - Purchase Order	PO_LINE_INQ	Click the View Purchase Order button on the Manage Invoices - Line Detail page.	View details of the purchase order related to the invoice.
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked timesheet on the Manage Invoices - Line Detail page.	View time reports.
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoices - Line Detail page.	View expense reports.
Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoices - Line Detail page.	View progress reports.

Creating Invoices

Access the Create Invoice page.

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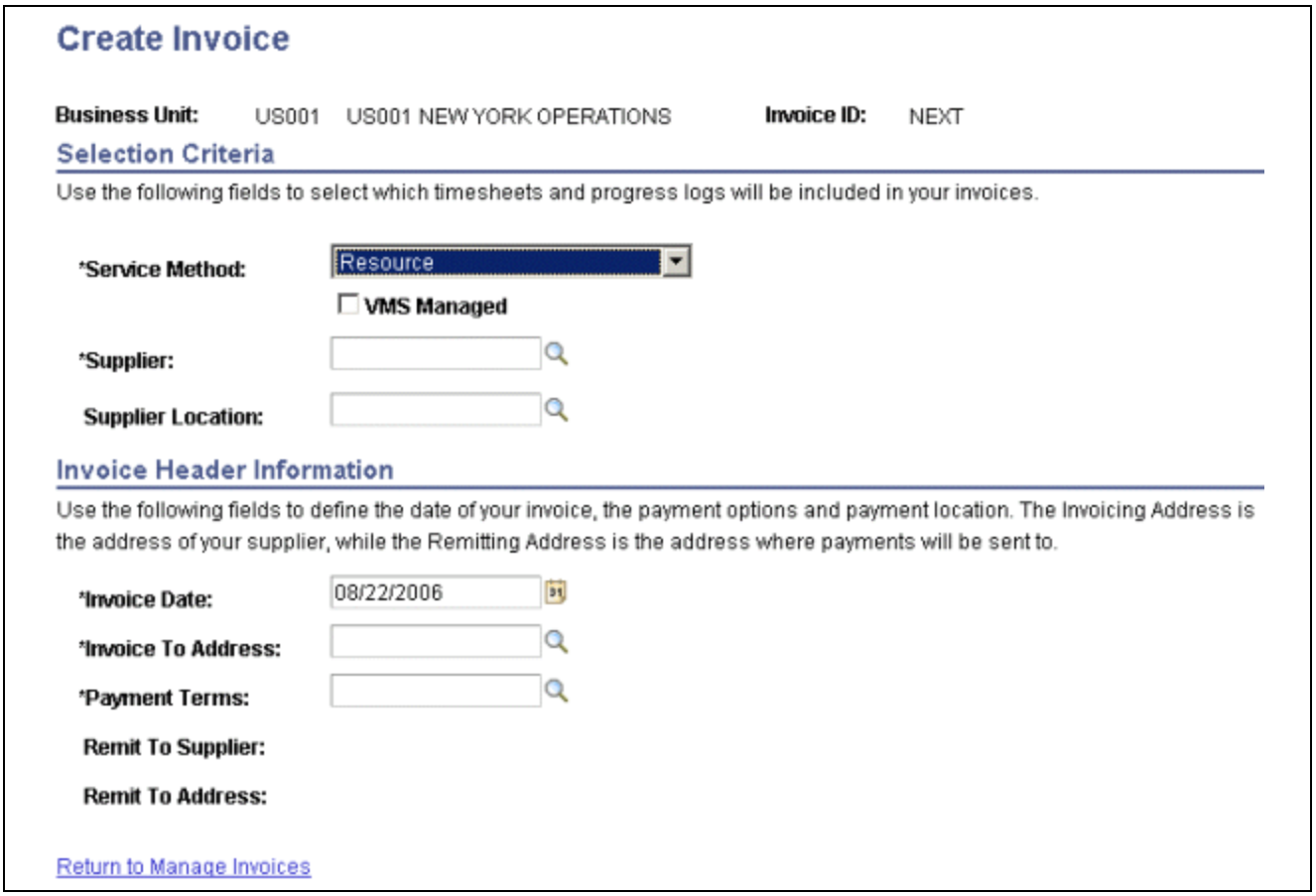

Create Invoice page

Service Method Select a service method. Values are *Deliverable* and *Resource.* The selected service method determines the fields that appear on the invoicing pages.

VMS Managed This option is available when the MSP Installation is not selected on the Services Procurement Installation Option page and the supplier selected on the Create Invoice page is identified as a VMS Supplier for a Business Unit or Service Type. When you select this option, the invoice includes only timesheets, expenses, or progress logs for work orders under VMS management where the selected supplier is the VMS supplier. When this option is not selected, the invoice includes only timesheets or progress logs where the selected supplier is the end supplier actually providing the service.

Internal Supplier This option is available only when the MSP Installation is selected on the Services Procurement Installation Options page. When you select this option, the invoice includes only timesheets, expenses, or progress logs for work orders where the selected supplier is identified as an internal supplier. When this option is not selected, the invoice includes only timesheets or progress logs where the selected supplier is not identified as an internal supplier.

Invoice To Address Enter the address of the supplier.

Payment Terms Select a payment term from the available values defined on the Single Payment Terms page.

Remit To Supplier View the supplier who receives payment.

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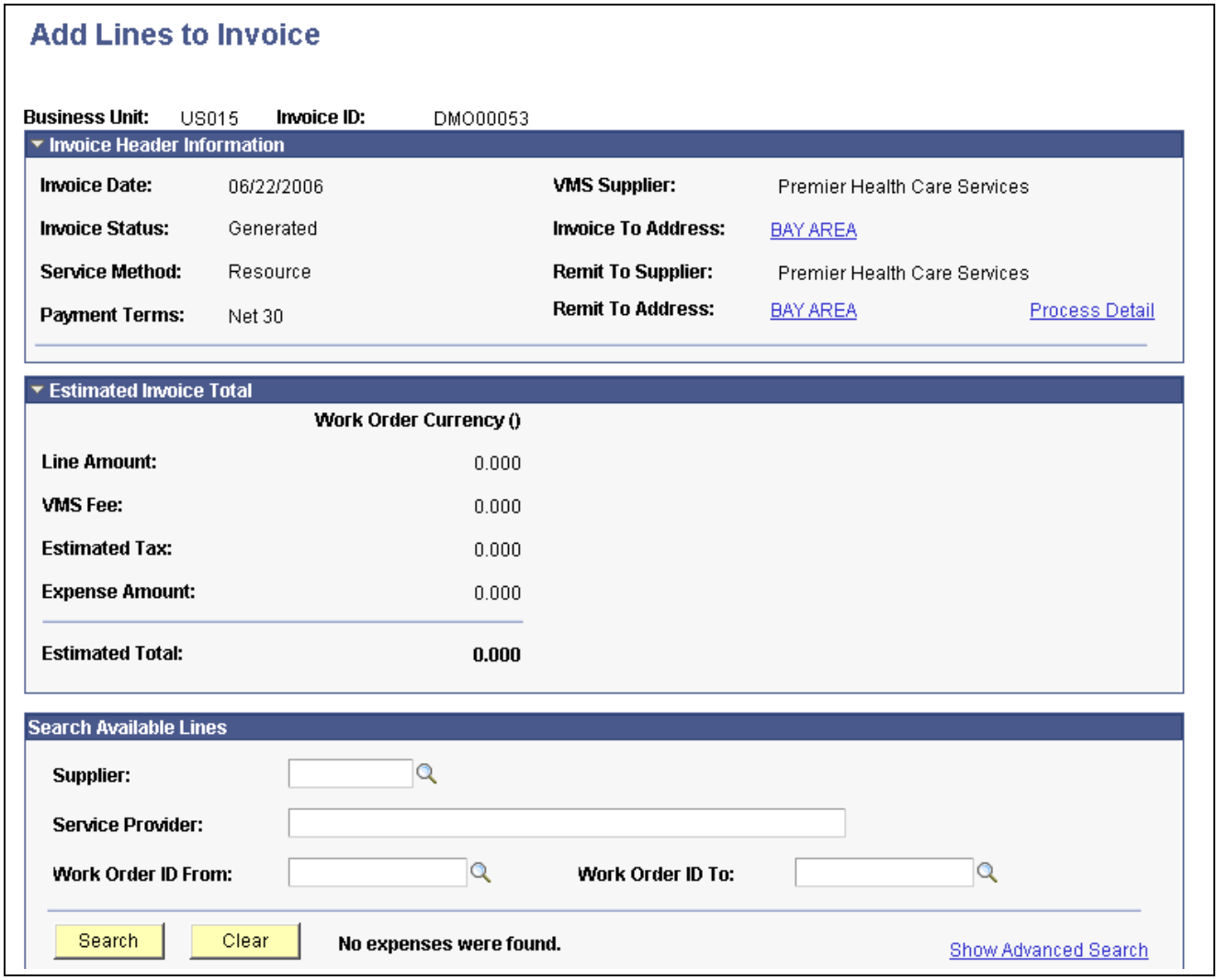
Remit To Address View the address where the payments are sent.

Note. When you select or change a supplier, the *Supplier Location*, *Invoice To Address*, *Remit to Supplier*, and the *Remit to Address* field values automatically default from the vendor base tables.

Note. The *Payment Terms* field value defaults from the Services Supplier Information page. If no value is defined at that level, the system defaults values defined on the vendor base tables

Adding and Viewing Lines to Invoices

Access the Add Lines to Invoice page.



Add Lines to Invoices page (1 of 2)

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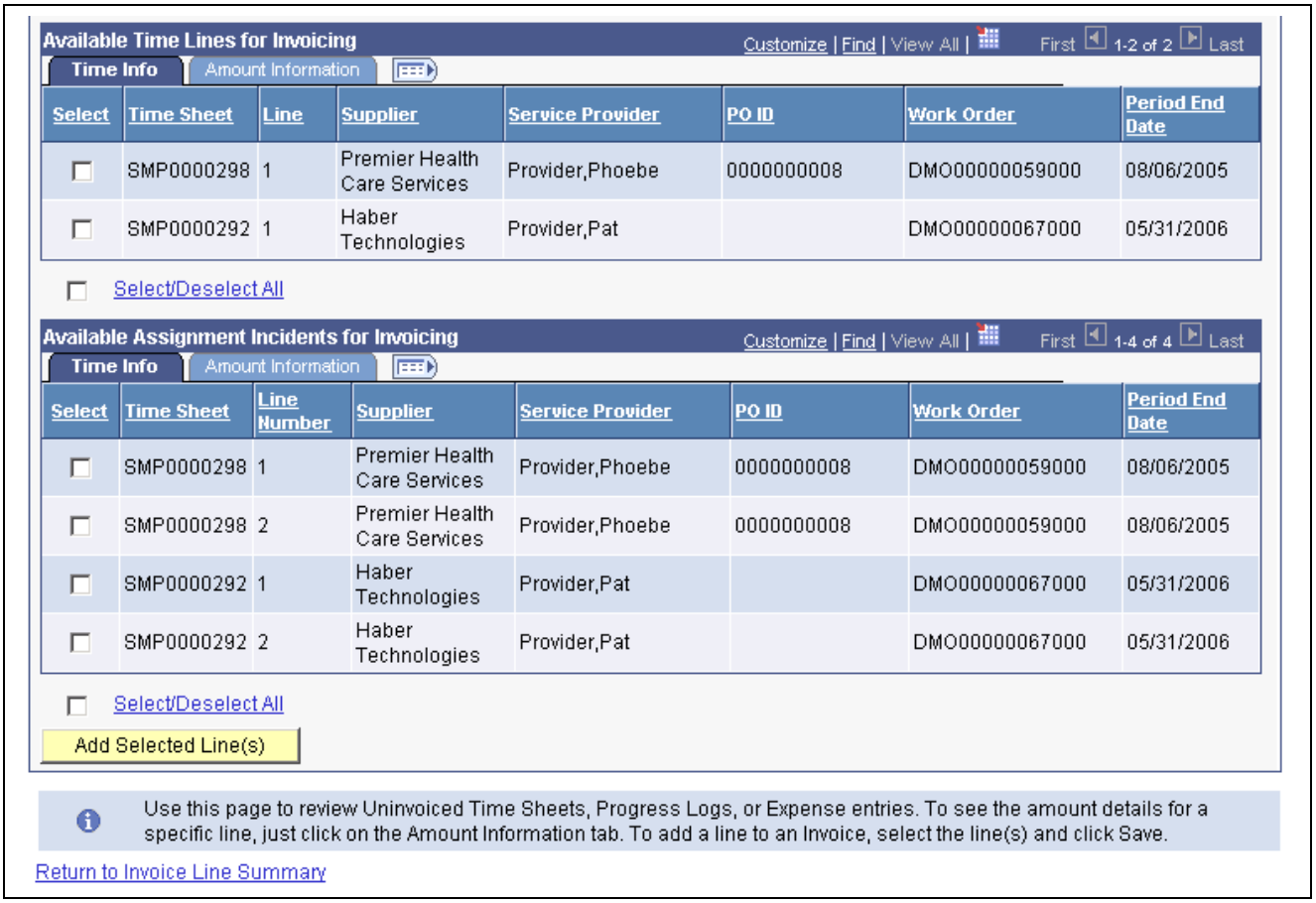

Add Lines to Invoices page (2 or 2)

To add additional lines to an invoice:

1. Select the progress log and expense lines or time report and expense lines to include in the invoice.
2. Click theAdd Selected Line(s) button.

   Use the Select/Deselect All check box if you want to select or clear all the lines at one time.

Note. The available timesheets, progress log, assignment incidents, and expense lines for invoicing are limited to work orders that have a supplier location that matches the location specified on the Create Invoice page.

Generating and Printing Invoices Automatically

This section discusses how to:

- Generate invoices.
- Print invoices.

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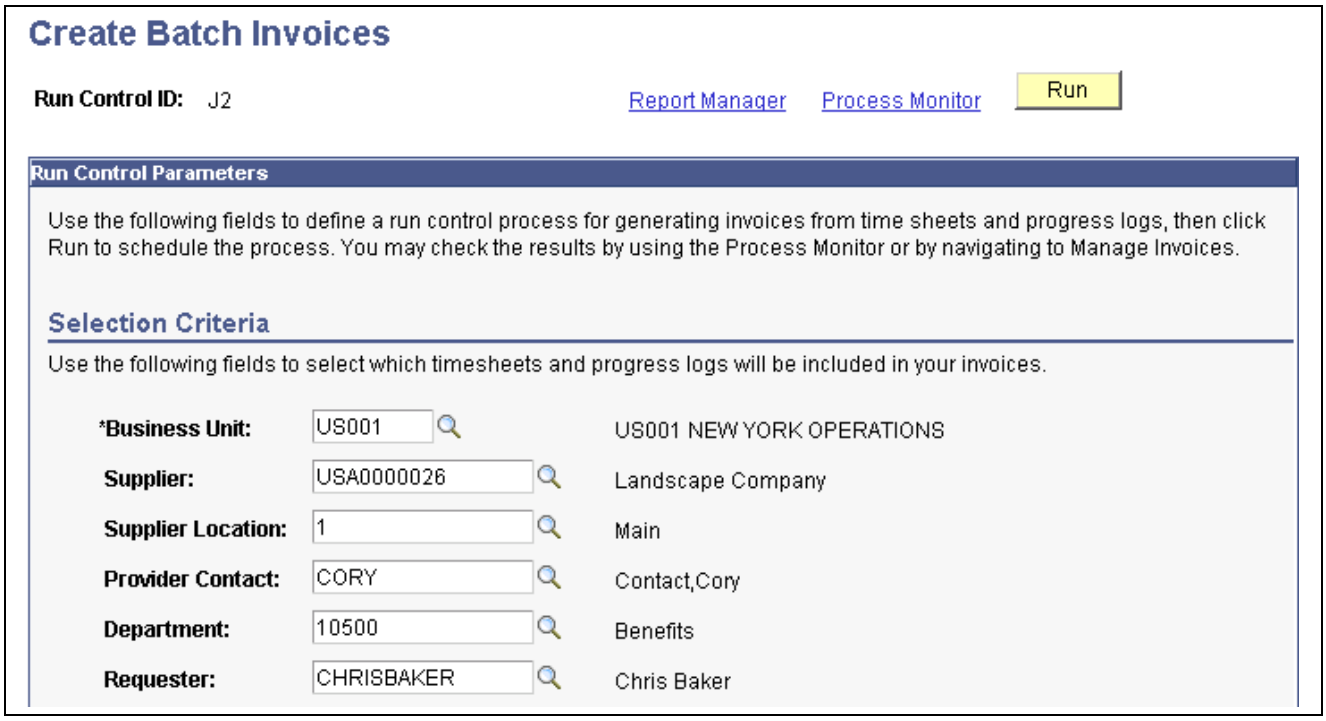
Pages Used to Generate and Print Invoices Automatically

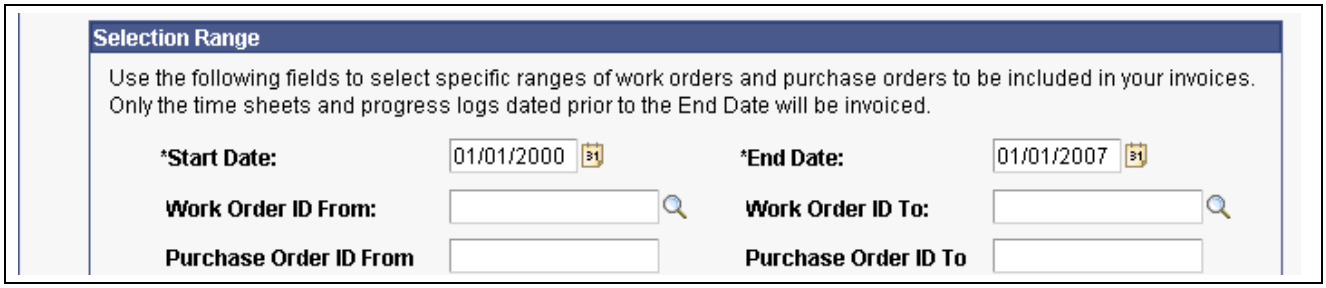
Page Name	Object Name	Navigation	Usage
Generate Invoices	SPF_GEN_CLINV	Service Procurement, Services Settlement, Create Batch Invoices	Generate invoices for approval and printing.
Print Invoices	SPF_GEN_CINP	Service Procurement, Services Settlement, Print Invoices	Print invoices that you've generated and approved.

Generating Invoices

Access the Create Batch Invoices page.



Create Batch Invoices page (1 of 3)



Create Batch Invoices page (2 of 3)

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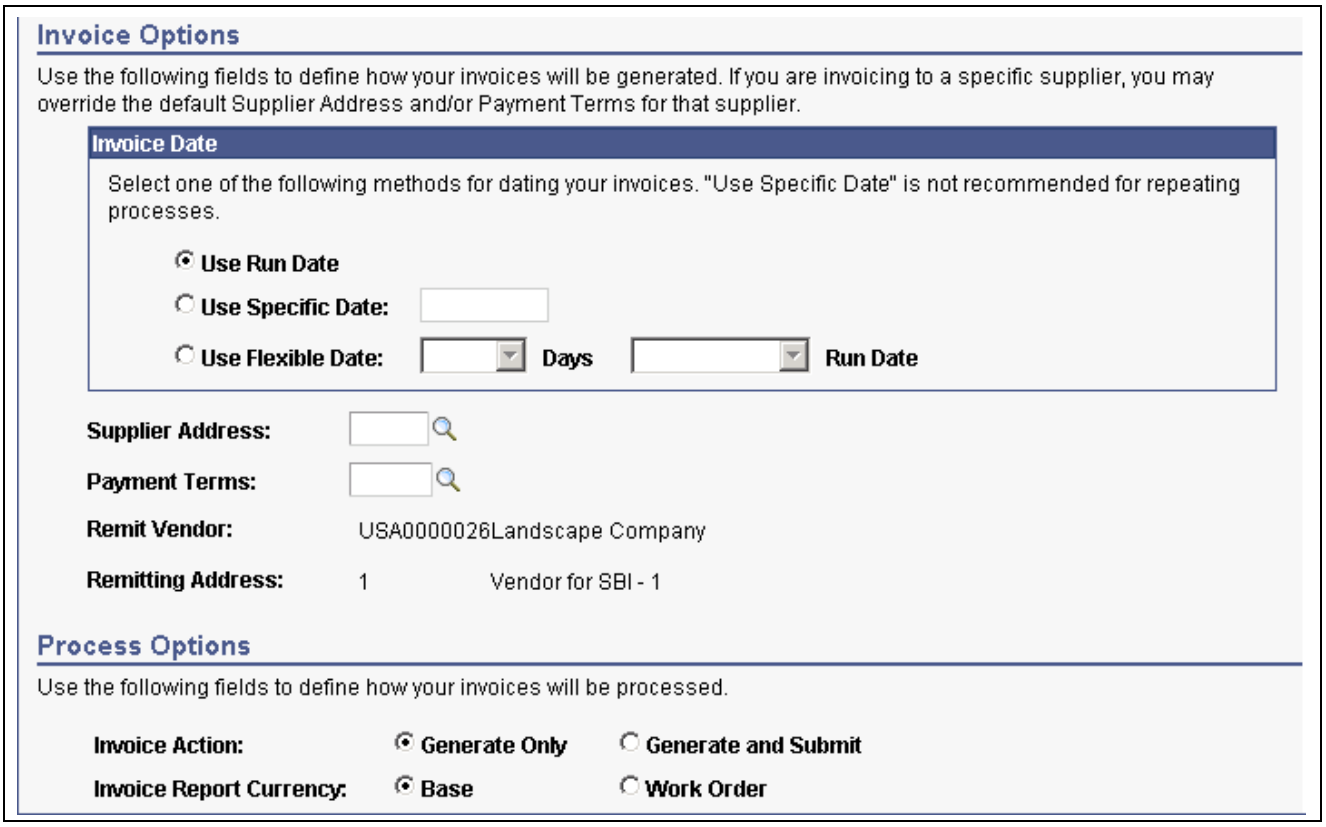

Create Batch Invoices page (3 of 3)

Enter the run control parameters for the invoice process.

Business Unit Select the business unit for which invoices are generated.

Supplier Select a specific supplier to receive an invoice.

Note. If you leave this field blank, the Supplier Location, Supplier Address, and Payment Terms fields are hidden, and the process generates invoices for all suppliers associated to active work orders that meet the selection criteria. When you select a specific supplier, the supplier location, supplier address, payment terms, and the service provider fields are editable.

For VMS managed work orders, select a VMS supplier. All timesheets, progress logs, and expenses associated with the end suppliers are combined on the VMS supplier's invoice.

Supplier Location Select to filter out timesheets and progress logs whose work orders have the same supplier and supplier location.

Note. This field is only available when there is a value in the Supplier field.

Provider Contact Specify the name of the supplier provider contact that receives the invoice.

Note. If you do not specify a value, the provider contact that is associated with the work order receives the invoice.

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Service Provider Select the service provider for whom invoices are generated.

Note. If the supplier is resource-based, the lookup for service providers displays service providers.

If the supplier is deliverable-based, the lookup for service providers displays provider contacts.

If the supplier is both resource- and deliverable-based, the lookup for service providers displays both service providers and provider contacts.

Note. Note

This field is only available when there is a value in the Supplier field.

Department Select the department for which invoices are generated.

Requester Select the requester for whom invoices are generated.

Selection Range

Start Dateand**End Date** Enter the range of dates for timesheets, progress logs, or expenses that are included in the invoices that you generate. The date range is also used to determine active work orders and their associated timesheets, expenses, and progress logs.

Note. The end date is used to compare different date values depending on invoicing time, expense date, or progress log completion date. For timesheets, the end date is compared to the period end date. For expenses, the transaction date is used for the comparison. For progress logs, the creation date is used for the comparison when the settlement option is *Percentage* or *Rate Based*, and the completion date is used when the settlement option is *Fixed Cost* or *Milestone*.

Note. To generate invoices for timesheets, expense reports, and progress logs that fall within a specific time-period, you must enter an end date that is equal or greater than the last end date.

For example, if you have a progress logs with a completion date of July 15, 2005, a timesheet with period end date of June 29, 2005, and an expenses report with a transaction date of July 10, 2005, and you enter an end date of July 10, 2005 on the run control page, the progress log invoice will not be generated.

Work Order ID Fromand**Work Order ID To** Enter the beginning and ending work order for which you want to generate invoices.

Purchase Order ID Fromand**Purchase Order ID To** Enter the beginning and ending purchase orders for which you want to generate invoices.

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Invoice Options

Use Run Date Select to indicate that when the run control is scheduled to run on a recurring basis (when you use the Recurrence Definition), the invoice date is assigned the date of the scheduled run.

Note. This option is selected by default. Refer to Enterprise PeopleTools PeopleBooks for details on how to set up a Recurrence Definition.

Use Specific Date Select to define the specific invoice date. This date is used regardless of the scheduled run date.

When you select this option, the current date defaults in. Do not select this option if you are using a Recurrence Definition and you want to have different invoice dates at different run times. Refer to PeopleTools PeopleBooks for details on how to set up a Recurrence Definition.

Use Flexible Date Select to define invoice dates that are a specific number of days before or after a scheduled run date.

Note. When you select this option, the default is 10 days before the scheduled run date. Refer to Enterprise PeopleTools PeopleBooks for details on how to set up a Recurrence Definition.

Supplier Address Select a supplier address for the invoice.

Note. When you select a specific supplier, the supplier's address may be edited. If you do not select a supplier, the field is hidden and the value is blank. However, the invoice process picks up the default supplier address for each supplier at run time.

Payment Terms Select payment terms for the invoice.

Note. When you select a specific supplier, the payment terms and may be edited. If you do not select a supplier, the field is hidden and the value is blank. However, the invoice process will pick up the default payment terms for each supplier at run time.

Process Options

Invoice Report Currency Select if the invoice should be created in the base currency or the work order currency. The field is disabled if the Purchasing Business unit does not allow multicurrency purchase orders.

Process Results

When you create an invoice for a work order that allows overtime entry, the system performs the overtime calculation during the Generate Invoices Application Engine process (SPF_INVGEN_C). The system validates that the time template associated with the work order is enabled for Use Overtime and also references the overtime calculation rules that you defined on the Overtime Rules page. The resulting invoice amount includes the overtime calculation based on the selected time reporting code for a time/expense line.

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Note. You can also run the Generate Invoice Report process (SPINV002) to generate a report about the invoices that you are processing.

Printing Invoices

Access the Print Invoices page.

Print Invoices page

Enter the run control parameters for the invoice printing process.

Supplier Select the supplier for whom invoices are to be printed.

Note. For VMS managed work orders, the VMS supplier should be selected. All timesheets, progress logs, and expenses associated with the end suppliers are combined on the VMS supplier's invoice.

Invoice Report Currency Select to print in either the base or work order currency. The field is disabled if the Purchasing business unit does not allow multicurrency purchase orders.

From and To and**Invoice ID** Select the range of invoices that you want to print.

Assignment Pay Based on Number of Incidents

If there is any assignment pay based on the number of incidents, there will be a separate section included on the printed invoice.

Process Results

The Process Invoice Application Engine process (SPF_PRNTINV) processes invoices that have been generated and approved. It prints the proforma invoice to be sent to the suppliers. This process also adds any manually created invoices to the invoice report table so that invoices can be printed.

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Managing Invoices

Use the Manage Invoice page to create new invoices manually, review existing invoices, edit invoices, view statuses of invoices, cancel invoices, or submit selected invoices for approval. The Manage Invoice page is the central location and starting point for maintaining invoices. Use the search and sort features to streamline the search results. Once entered, proceed to the roster area where you can view invoice details, edit the invoice, submit or cancel invoices.

Note. This page displays invoices created by the login user. Invoices generated by other users do not appear in this roster.

This section discusses how to:

- Search and view invoices.
- View manage invoice line summaries.
- View invoice line detail.

See Also

Chapter 22, "Managing Settlements," Creating Invoices Manually, page 360

Pages Used to Manage Invoices

Page Name	Object Name	Navigation	Usage
Manage Invoices	SPF_INV_MANAGE	Services Procurement, Manage Invoices	Add invoices, search existing invoices, submit, or cancel invoices. **Note.** The *From Date* and *Date To* fields default to the last 30 days. You may need to change the date fields to see previous invoices.
Create Invoice	SPF_INV_HDR_ADD	Enter the business unit or invoice ID or both, and click the Add button on the Manage Invoices page.	Create invoice header information.
Manage Invoices - Add Lines To Invoice	SPF_INV_TE_DTLS	Save an invoice on the Create Invoice page.	View all non-invoiced timesheets, progress logs, and expenses for the supplier or service provider.
Manage Invoices - Line Summary	SPF_INV_LN_DTLS	Click the Edit button for an invoice on the Manage Invoice page.	Modify the selected invoice.
Invoice Process Detail	SPF_INV_PROCES_DTL	Click the View Entry button on the Manage Invoice page. Click the Process Details link on the Manage Invoices - Line Summary page.	View invoice details.

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Page Name	Object Name	Navigation	Usage
Invoice To Address	SPF_ADDRESS	Click the Vendor Location address link on the Manage Invoices - Line Summary page.	View the invoice to address.
Remit To Address	SPF_ADDRESS	Click the Remit To Address link on the Manage Invoices - Line Summary page.	View the remit to address.
Currency Information	EXCH_RT_DTL_INQ	Click the Exchange Rate Details link on the Manage Invoices - Line Summary page.	View multicurrency information.
Work Order Details	SPF_WORDER_DETAIL	Click View Work Order button on the Manage Invoices - Line Detail page.	View details of the work order related to the invoice.
Manage Invoices - Line Detail	SPF_INV_TIME_DTL	For resource-based invoices, click the Edit button on the Manage Invoices - Line Summary page.	View invoice line details or make adjustments, or both.
Manage Invoices - Line Detail	SPF_INV_PLOG_DTL	For deliverable-based invoices, click the Edit link on the Manage Invoices - Line Summary page.	View invoice line details or make adjustments, or both.
Purchase Order Inquiry - Purchase Order	PO_LINE_INQ	Click the View Purchase Order button on the Manage Invoices - Line Detail page.	View details of the purchase order related to the invoice.
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked timesheet on the Manage Invoices - Line Detail page.	View time reports.
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoices - Line Detail page.	View expense reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoices - Line Detail page.	View progress log reports.

Searching and Viewing Invoices

Access the Manage Invoices page.

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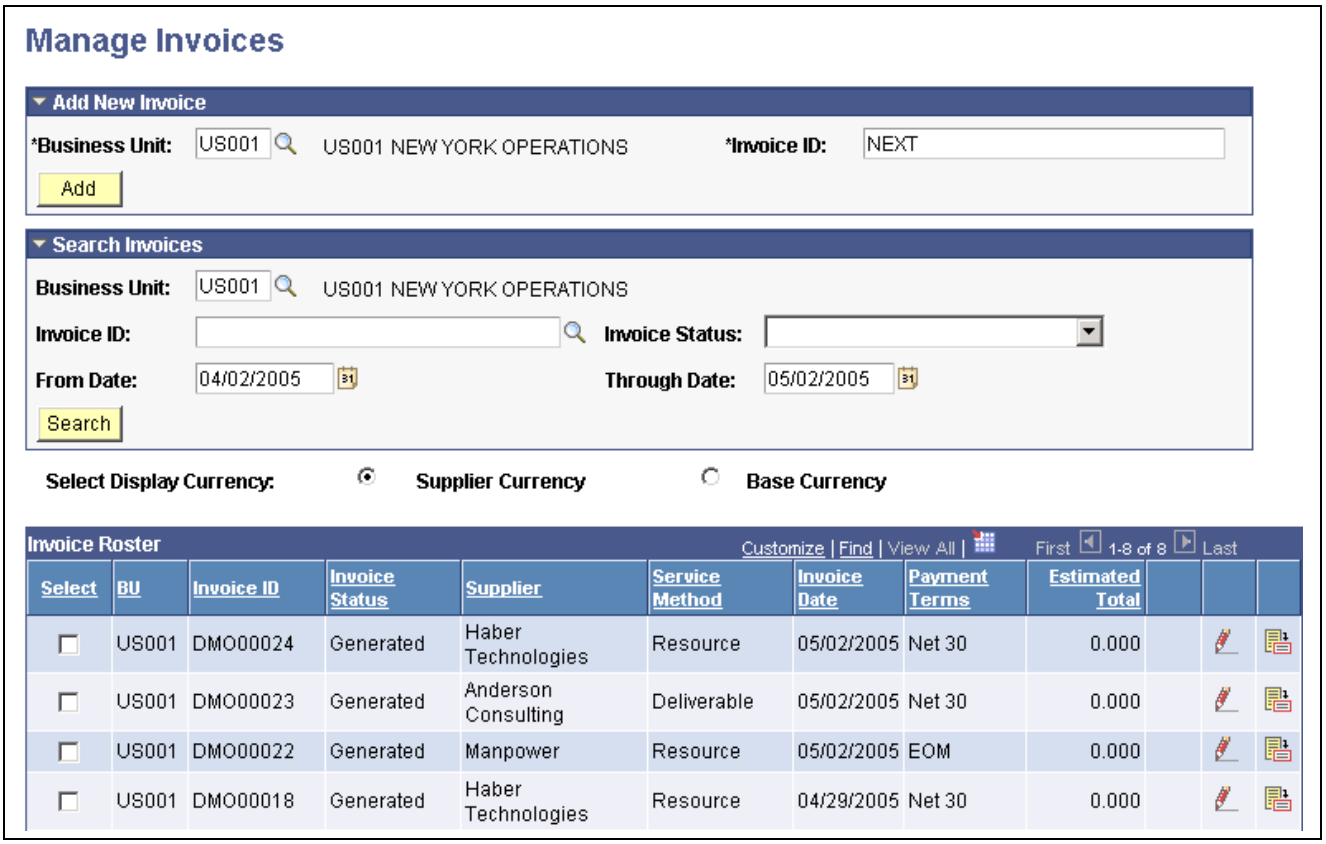

Manage Invoices page

You can access this page when you log in as the PeopleSoft Services Procurement invoice manager.

Search Invoices

Enter search criteria used to retrieve, edit, and view invoices.

Select Currency

Displays amounts in either base or work order currency. The Select Currency field is only available if Allow Multicurrency is selected on the Services Procurement business unit page.

See Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 26.

Note. Invoices are generated in both base and work order currency.

Invoice Roster

Estimated Total Displays the estimated total including expenses and estimated prorated tax.

Note. The sales and use tax (SUT) included in the estimated total includes only the sales tax. The use tax is displayed as a separate line item on the Invoice Detail page.

Click the Edit button to access the Manage Invoice Line Summary page, where you can review and edit invoice lines.

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	Click the View Entry button to access the Invoice Process Detail page, where you can review invoice processing information.
Submit	Click to submit selected invoices for approval.
Cancel	Click to cancel selected invoices. Canceling invoices releases the timesheet, progress log, or expense associated with that invoice so that it can be invoiced again.

Note. Invoices can be adjusted by adjusting the associated timesheets, progress logs, or expenses. If the adjusted timesheet, progress log, or expense is included in an invoice, the status of the invoice line associated to the adjustment is changed to *Canceled* and the invoice header status is changed to *Adjusted*. Invoices can also be adjusted after the invoice has been generated by adjusting the amounts on the Manage Invoice Line Detail page. Adjusting invoices in this manner does not change existing timesheets, progress logs, or expenses. Adjustments can be made prior to invoices being approved by either the supplier invoice approver or the enterprise invoice approver.

Viewing Manage Invoice Line Summaries

Access the Manage Invoices - Line Summary page.

Manage Invoice Approval - Line Summary page (1 of 2)

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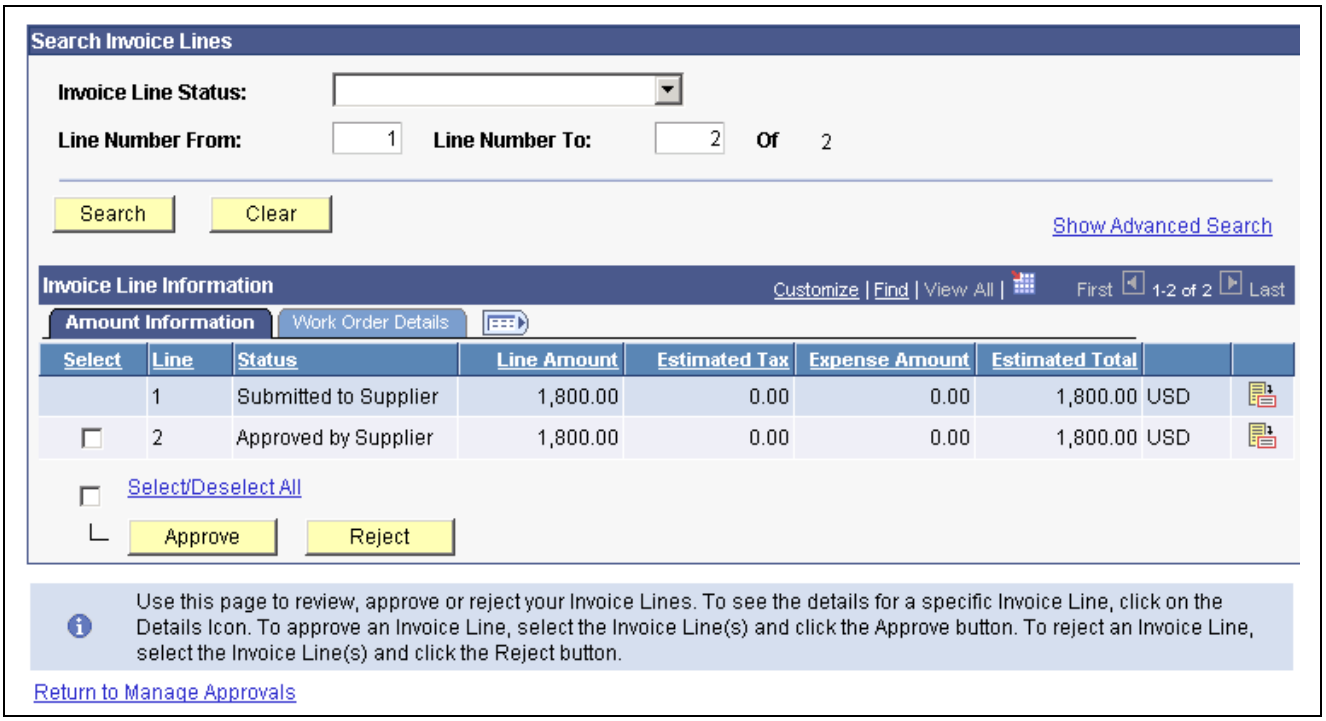

Manage Invoice Approval - Line Summary page (2 of 2)

The data appearing in the Invoice Header Information and Estimated Invoice Totalsections depend on whether or not the invoice is for VMS services.

Business Unit Displays the business unit associated with the invoice.

Invoice ID Displays the number automatically or manually assigned to the invoice when it is created.

Invoice Header Information

Invoice Date Displays the creation date of the invoice.

Invoice Status Displays the current status of the invoice. Values are:

- *Generated*: Line has been created but not yet submitted for approval.
- *Submitted to Enterprise*: Invoice has been submitted for approval, but the line has not yet been approved or rejected.
- *Submitted to Supplier*: Invoice has been submitted for approval to the supplier, but the line has not yet been approved or rejected.
- *Rejected by Enterprise*: The approver has rejected the line.
- *Rejected by Supplier*: The supplier invoice approver has rejected the line.
- *Approved by Supplier*: The supplier invoice approver has approved all lines, and the invoice has not been processed.
- *Approved by Enterprise*: The invoice approver has approved all lines, and the invoice has not been processed.
- *Processed*: All lines have been approved and the invoice has been processed.

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- *Canceled*: The invoice has been canceled and the related timesheets, progress logs or expenses have been released to be re-invoiced.

Payment Terms Displays the payment terms assigned to the invoice.

Supplier Displays the end supplier who performed the service. This option only appears in the Invoice Header Information section when invoices are not VMS managed. The supplier appears at the line level when invoices are VMS managed.

VMS Suppler Displays the VMS supplier that managing the work orders for time and progress invoices. This option only appears in the Invoice Header Information section for VMS invoices.

Estimated Invoice Total

Line Amount Displays the total invoice amount in base or work order currency.

Any assignment pay based on time is included with the base pay in the line amount.

Any assignment pay based on number of incidents is displayed in the Time/Expense Details group box, and is not included in the line amount.

Estimated Tax Displays the total estimated tax for the invoice.

Expense Amount Displays the total expense amount in base or work order currency.

Estimated Total Displays the estimated total for the invoice.

VMS Fee Displays the amount paid to the VMS suppler for managing the service.

The data appearing in the Invoice Line Information grid depends on the selected service method and whether the invoice is for VMS services. Select the Base Currency or Work Order Currency option to display amounts.

View the estimated tax and estimated total amount for the invoice.

Note. This option only appears and is included in the Estimated Invoice Total for VMS invoices.

MSP Fee Displays the amount paid to the MSP supplier for managing the service.

Note. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier.

External suppliers can view MSP fees, however, the fee is not included in the estimated total.

Invoice Line Information — Amount Information tab

Click the Line Details button to access the line details.

Invoice Line Information — Work Order Details tab

Work Order Links to the related work order for viewing more details.

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Supplier	Displays the end supplier who performed the service. This option only appears for VMS invoices.
Provider Contact	Displays the provider contact for the work order.
Time Sheet ID	Displays the timesheet for the invoice line and only has a value for timesheet lines.
Expense Sheet ID	Displays the expense sheet for the invoice line and only has a value for expense lines.
Progress Log ID	Displays the progress log for the invoice line. Appears only for deliverable invoices and only has a value for progress lines.
Activity	Displays the activity for the invoice line. This option only appears for deliverable invoices.
	Note. For deliverable-based requisitions, the rate-based activity is displayed in the Invoice Line Information region.
Submit	Click to submit the selected invoice lines for approval.
	Note. Until all lines have been submitted for approval, the invoice header status remains *Generated*.
Delete	Click to remove the selected line from the invoice. Deleting the invoice line releases the timesheet, progress log, or expense associated with that invoice so that it can be invoiced again.

See Also

Chapter 4, “Setting Up PeopleSoft Services Procurement,” Setting Up Business Unit Definitions, page 26

Chapter 10, “Establishing and Managing VMS,” page 187

Viewing Invoice Line Details

Access the Manage Invoices - Line Detail page.

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Manage Invoices - Line Detail page (1 of 2)

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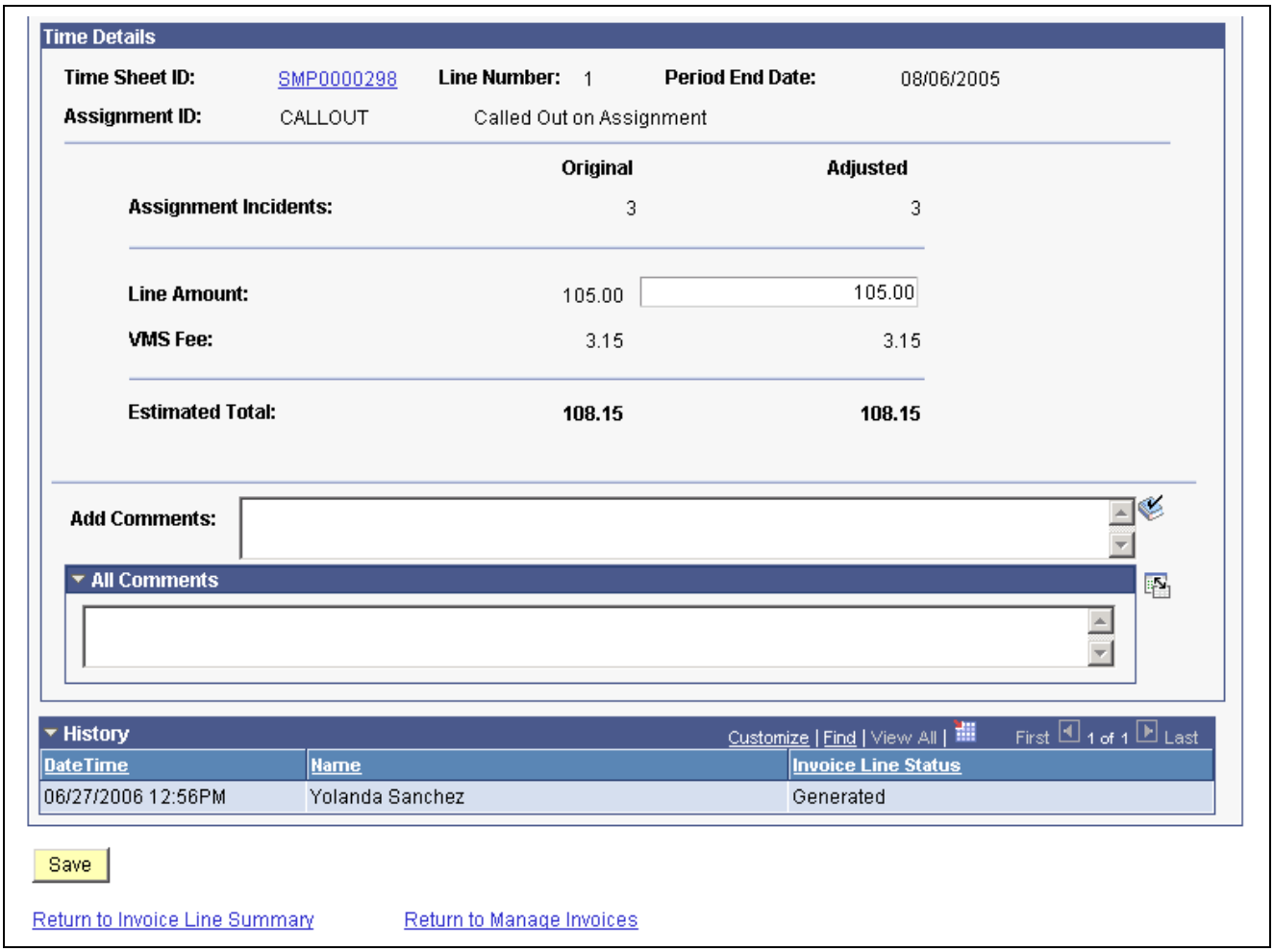

Manage Invoices - Line Detail page (2 of 2)

The information appearing on this page depends on the selected service method.

Invoice Line Information

Invoice Line Number Displays the number automatically assigned to the invoice line when it is created. Allows adjustments to the progress log line amount.

Line Status Displays the current status of the invoice line. Values are:

- *Generated*: Line has been created but not yet submitted for approval.
- *Submitted*: Invoice has been submitted for approval, but the line has not yet been approved or rejected.
- *Submitted to Supplier*: Invoice has been submitted for approval to the supplier, but the line has not yet been approved or rejected.
- *Rejected*: The approver has rejected the line.
- *Approved by Supplier*: The supplier has approved all lines.
- *Approved*: The invoice approver has approved all lines.

Purchase Order Click to view the purchase order assigned to the work order associated with the services included on the invoice line.

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Note. The button is only available if the PO Work Order Integration (purchase order work order integration) check box is selected on the Services Procurement Installation Options page.

Supplier Invoice ID Enter the supplier's invoice ID for each invoice line. This field is for reference only in the event that the supplier uses a different invoice ID.

Work Order ID Click to view the work order associated with the services included on the invoice line.

Provider Contact Displays the provider contact assigned to the work order associated with the services included on the invoice line.

Requester Displays the requester assigned to the work order associated with the services included on the invoice line.

WO Amount Remaining Displays the amount still available for the work order. This amount is updated when invoices are approved.

Service Provider Displays the name of the individual service provider associated with the services included on the invoice line.

Note. This value displays for resource-based engagements only.

Time Approver Displays the time approver assigned to the work order associated with the services included on the invoice line.

Note. This value only appears for resource invoices.

Expense Approver Displays the expense approver assigned to the work order associated with the services included on the invoice line.

Note. This value only if resource or deliverable invoices include expenses.

Progress Log Approver Displays the progress log approver assigned to the work order that is associated with the services included on the invoice line.

Note. This value only appears for deliverable invoices.

Invoice Approver Displays the invoice approver assigned to the work order associated with the services included on the invoice line.

Supplier Invoice Approver Displays the supplier invoice approver assigned to the work order that is associated with the services included on the invoice line. This option only appears for suppliers that are included in the invoice approval process.

Time/Expense Details - Resource-Based Invoices

Adjustments can be made after the invoice has been generated and not yet approved. Once approved, invoices cannot be adjusted.

Timesheet ID or **Expense Sheet ID** Displays the timesheet or expense associated with the invoice line. Click to view the timesheet or expense details.

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Period End Date Displays the period end date of the timesheet associated with the invoice line.

VAT Applicability (value-added tax applicability) Indicates if value-added tax (VAT) applies to this invoice. If VAT Applicability is *Taxable*, the system displays the VAT percentage and VAT amount information.

SUT Applicability Indicates if sales tax or use tax (SUT) applies to this invoice. If SUT Applicability is *Sales Tax* or *Direct Pay/Sales Tax*, then the Sale Tax % and Sales Tax Amount fields appear.

If the value is *Use Tax*, then the system displays the use tax percentage and the use tax amounts.

Note. Use tax is not included in the invoice total and is displayed for informational purposes only. Suppliers can only view the sales tax, not the use tax.

Original/Adjusted Time Quantity Displays the original and adjusted time quantity for resource-based invoices. No manual adjustments are allowed for this field.

Original/Adjusted Line Amount Displays the amounts based on the original and adjusted time quantity. You can adjust the line amount in the work order currency and the system automatically converts to base currency if multi-currency option applies.

Original/Adjusted MSP Fee Displays the MSP fee. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers will have the MSP fee shown, but is not included in the estimated invoice total. No manual adjustments are allowed for this field, but any adjustments made to the line amount will recalculate the adjusted MSP fee.

Original/Adjusted VMS Fee Displays the VMS fee. This option only appears for VMS invoices. No manual adjustments are allowed for this field, but any adjustments made to the line amount recalculates the adjusted VMS fee.

Original/Adjusted Expenses Displays the original and adjusted expenses from the expense sheet associated with the invoice line. You can enter adjustments prior to approval, but the adjustment must be made in the work order currency. The system automatically converts to base currency.

Original/Adjusted Total Displays the total of the original and adjusted line amount, the original and adjusted expenses, and any associated fees and taxes.

VAT Percent Displays the actual VAT percentage. Enables you to adjust the original VAT percentage for resource-based invoices.

Note. The field is hidden if VAT is not applicable.

Estimated VAT (estimated value-added tax) Displays the estimated VAT amount. Adjusting the line amount or VAT percentage recalculates the estimated VAT amount.

Note. The field is hidden if VAT is not applicable.

Sales Tax Percent/Use Tax Percent Displays estimated sales tax percentage if the tax applicability is sales tax or direct pay. If tax applicability is use tax, then the system displays the estimated use tax percent. Enables you to adjust the tax percentage, which recalculates the estimated SUT amounts.

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Note. The field is hidden if SUT Applicability is not*Sales Tax* or *Direct Pay/Sales Tax*.

Includes VAT Indicates if the estimated VAT amount should be added to the line amount before SUT is calculated. If yes, the VAT amount is added to the line amount before SUT is calculated. Otherwise, the line amount is used for VAT calculations.

Note. The field is hidden if VAT and SUT is not applicable.

Estimated Sales Tax Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage will also recalculate the estimated sales tax amount.

Note. The field is hidden if SUT Applicability is not*Sales Tax* or *Direct Pay/Sales Tax*.

Original/Adjusted Assignment Incidents Displays the number of assignments based on incidents associated with the invoice.

Line Amount Displays the sum of all items associated with the invoice line.

Estimated Total Displays the sum of the line amount, expense amount, VMS or MSP fees, and VAT or sales tax.

Estimated Use Tax Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage will also recalculate the estimated sales tax amount.

Note. The field is hidden if SUT Applicability is not*Use Tax*.

Progress Log Details - Deliverables Based Invoices

Progress Log ID or **Expense Sheet ID** Displays the progress log or expense associated with the invoice line. Click to view the progress log or expense details.

Activity Displays the activity associated with the invoice line.

Note. This field is not visible if the settlement option on the work order associated with the invoice line is set to *Percentage*.

% Complete(percent complete) Displays the total percent completed entered.

Note. This field is only visible if the settlement option on the work order associated with the invoice line is set to *Percentage*.

Rate Displays the rate from the work order associated with the invoice line.

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Note. This field is only visible if the settlement option on the work order associated with the invoice line is set to *Rate Based*.

UOM (unit of measurement) The unit of measurement defined for the rate.

Note. This field is only visible if the settlement option on the work order associated with the invoice line is set to *Rate Based*.

Quantity Displays the number of units being billed on the invoice line.

Note. This field is only visible if the settlement option on the work order associated with the invoice line is set to *Rate Based*.

VAT Applicability Indicates if VAT applies to this invoice. If VAT Applicability is *Taxable*, the system displays the VAT percentage and VAT amount information.

SUT Applicability Indicates if SUT applies to this invoice. If SUT Applicability is *Sales Tax* or *Direct Pay/Sales Tax*, then the Sale Tax % and Sales Tax Amount fields appear.

If the value is *Use Tax*, then the system displays the use tax percentage and the use tax amounts.

Note. Use tax is not included in the invoice total and is displayed for informational purposes only. Suppliers can only view the sales tax, not the use tax.

Original/Adjusted Line Amount Displays the amounts based on the original and adjusted progress log for this invoice line. You can adjust the line amount in the work order currency and the system automatically converts to base currency if multi-currency option applies.

Original/Adjusted MSP Fee Displays the MSP fee. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers can view MSP fees, however, the fee is not included in the estimated invoice total. No manual adjustments are allowed for this field. Any adjustments made to the line amount will recalculate the adjusted MSP fee.

Original/Adjusted VMS Fee Displays the VMS fee. This option only appears for VMS invoices. No manual adjustments are allowed for this field. Any adjustments made to the line amount will recalculate the adjusted VMS fee.

Original/Adjusted Expenses Displays the original and adjusted expenses from the expense sheet associated with the invoice line. You can enter adjustments prior to approval, but the adjustment must be made in the work order currency. The system automatically converts to base currency.

Original/Adjusted Total Displays the total of the original and adjusted line amount, the original and adjusted expenses, and any associated fees and taxes.

VAT Percent Displays the actual VAT percentage. Enables you to adjust the actual VAT percentage for resource-based invoices.

Note. The field is hidden if VAT is not applicable.

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Estimated VAT Displays the estimated VAT amount. Adjusting the line amount or VAT percentage recalculates the estimated VAT amount

Note. The field is hidden if VAT is not applicable.

Sales Tax Percent/Use Tax Percent Displays estimated sales tax percentage if tax applicability is sales tax or direct pay. If tax applicability is use tax, then the system displays the estimated use tax percent. Enables you to adjust the tax percentage, which recalculates the estimated SUT amounts.

Note. The field is hidden if SUT Applicability is not*Sales Tax* or *Direct Pay/Sales Tax*.

Includes VAT Indicates if the estimated VAT amount should be added to the line amount before SUT is calculated. If yes, the VAT amount is added to the line amount before SUT is calculated. Otherwise, the line amount is used for VAT calculations.

Note. The field is hidden if VAT and SUT is not applicable.

Estimated Sales Tax Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage will also recalculate the estimated sales tax amount.

Estimated Total Displays the sum of the line amount, expense amount, VMS or MSP fees, and VAT or sales tax.

Estimated Use Tax Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the Includes VAT option is yes, then adjusting the VAT percentage will also recalculate the estimated sales tax amount.

Note. The field is hidden if SUT Applicability is not*Use Tax*.

Approving Invoices

The Manage Invoice Approval page is the central location for reviewing and approving invoices.

Note. Similar approval pages are provided for the supplier role.

This section discusses how to:

- Manage invoice approvals.
- View invoice approval line summaries.
- View invoice approval line detail.

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Pages Used to Approve Invoices

Page Name	Object Name	Navigation	Usage
Manage Invoice Approval	SPF_INV_APR_MANAGE	Services Procurement, Services Settlement, Approve Invoices	Review, accept, or reject invoice approvals.
Manage Invoice Approval - Line Summary	SPF_INV_APR_LNDTL	Click the Invoice Approval Line Summary button on the Manage Invoice Approval page.	View invoice lines that you are authorized to approve.
Manage Invoice Approval - Line Detail (resource-based)	SPF_INV_APR_TIME_D	Click the Line Details button for a resource-based invoice on the Manage Invoice Approval - Line Summary page.	View invoice line details, make adjustments to line amounts, expenses, tax percentages, and enter comments before approving or rejecting the invoice line.
Invoice Approval Line Detail (deliverables-based)	SPF_INV_APR_PLOG_D	Click the Line Details button for a deliverables-based invoice on the Manage Invoice Approval - Line Summary page.	View invoice line details, make adjustments to line amounts, expenses, tax percentages, and enter comments before approving or rejecting the invoice line.
Invoice To Address	SPF_ADDRESS	Click the Vendor Location Address link on the Manage Invoice Approval - Line Summary page.	View the supplier's invoice to address.
Remit To Address	SPF_ADDRESS	Click the Remit To Addresslink on the Manage Invoice Approval - Line Summary page.	View the supplier's remit to address.
Currency Information	EXCH_RT_DTL_INQ	Click the linked currency abbreviation on the Manage Invoice Approval - Line Summary page.	View multicurrency information.
Work Order Details	SPF_WO_REQ_VEN_DT	Click a linked work order on the Manage Invoices - Line Summary page or Manage Invoice Approval - Line Detail page.	View details of the work order related to the invoice.
Purchase Order Inquiry - Purchase Order	PO_LINE_INQ	Click the View Purchase Order button on the Manage Invoice Approval - Line Detail page.	View details of the purchase order related to the invoice.
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked timesheet on the Manage Invoice Approval - Line Detail page.	View time reports.

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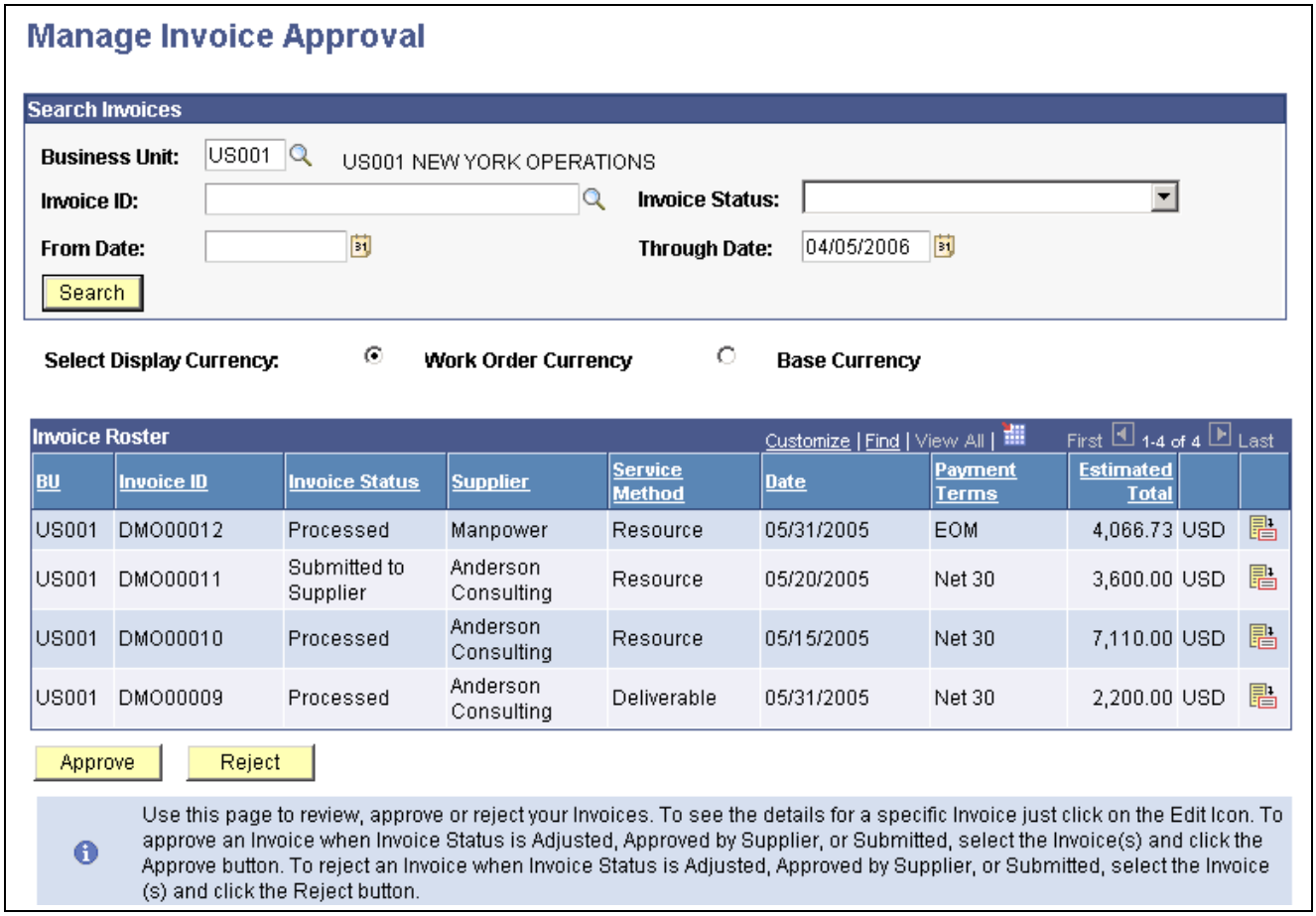
Page Name	Object Name	Navigation	Usage
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoice Approval - Line Detail page.	View expense reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoice Approval - Line Detail page.	View progress log reports.

Managing Invoice Approvals

Access the Manage Invoice Approval page.



Manage Invoice Approval page

You can access this page when you log in as a Services Procurement invoice approver.

Search and Sort Invoices

Enter criteria used to retrieve submitted invoices.

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Note. This page only displays invoice and invoice lines that the login user is authorized to approve. Authorization is defined on the Work Order page when the work order is created. If the supplier is to be included in the invoice approval process, the option must be selected on the Services Supplier Information page. The specific supplier invoice approver will be identified on the work order when the supplier is set up to be included in the approval process.

Invoice Roster

Click the Line Summary button to access the Invoice Line Summary page to view details associated with the line.

Approve and Reject Click to approve or reject the selected invoices.

When a line is rejected, the invoice header status is set to Rejected. The invoice manager that creates that invoice can then review the rejected invoice, make any necessary adjustments, and resubmit the invoice for approval.

Note. The enterprise invoice approver can only approve or reject invoices that have the status of *Submitted To Enterprise* or *Approved by Supplier*. Otherwise the approve and reject buttons are hidden.

Note. You receive an error message if the sum of the invoiced amount (listed on the work order) and the amount of the invoice is greater than the purchase order amount.

Estimated Total Displays the estimated total in either work order or base currency.

Viewing Invoice Approval Line Summaries

Access the Manage Invoice Approval - Line Summary page.

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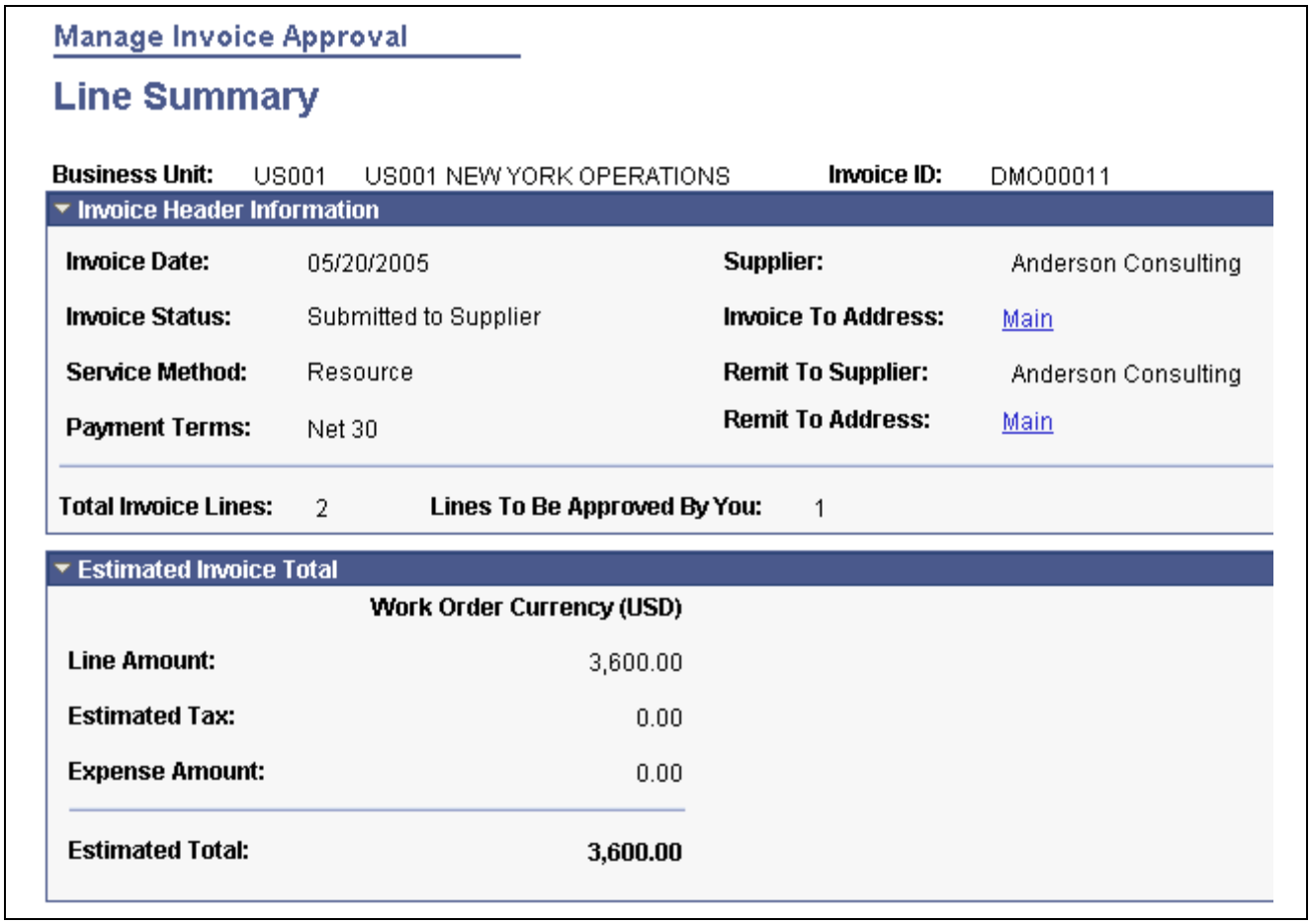
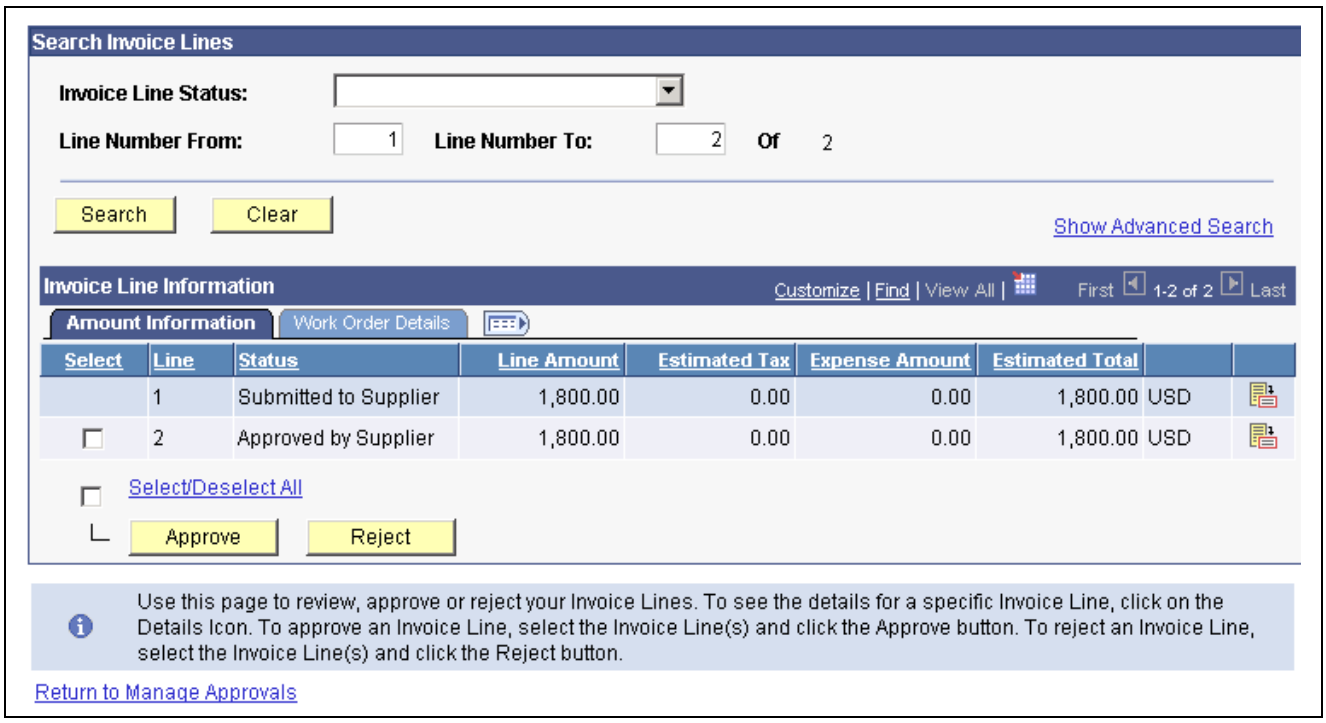


Manage Invoice Approval - Line Summary page (1 of 2)



Manage Invoice Approval - Line Summary page (2 of 2)

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You can access this page when you log in as a PeopleSoft Services Procurement approver and clicking the Edit button from the Invoice Roster.

Line Amount Displays the total amount for the invoice line, excluding expenses and taxes.

MSP Fee Displays the amount paid to the MSP supplier for managing the service. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers will have the MSP Fee shown, but is not included in the estimated invoice total.

VMS Fee Displays the amount paid to the VMS suppler for managing the service. This option only appears and is included in the estimated invoice total for VMS invoices.

Expense Amount Displays the total expense amount in base or work order currency.

Estimated Tax Includes VAT and sales tax, but not use tax.

Estimated Total Displays the sum of the line amount, expense amount, MSP or VMS fee, and the estimated tax.

Work Order Details The Work Order Details tab in the Invoice Line Information grid shows the information related to the work order.

View Work Order Click the link work order to view additional work order details.

Supplier Displays the end supplier for invoices that are under VMS managed. This field is only shown when VMS applies on the Work Order.

Service Provider Displays the service provider associated with the Work Order. This is only displayed for resource-based invoices.

Timesheet ID Displays the timesheet associated with the invoice line. This is only displayed for resource-based invoices

Period End Date Displays the period end date for the timesheet associated with the invoice line. This is only displayed for resource-based invoices.

Expense Sheet ID Displays the expense sheet associated with the invoice line if one exists.

Amount Information The Amount Information tab in the Invoice Line Information grid shows the amounts for the invoice line.

Deliverables Based Invoice Approval

Progress Log ID Displays the progress log ID associated with the invoice line.

Activity This field appears for deliverables-based requisitions for rate-based and milestone-based activities.

Percent Complete This field does not appear for milestone, fixed-amount, and rate-based progress logs.

See Also

Chapter 9, “Establishing and Managing the MSP Environment,” page 177

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Viewing Invoice Approval Line Detail

Access the Manage Invoice Approval - Line Detail page.

The information appearing on this page depends on the selected service method and is similar to the information appearing on the Invoice Line Detail page.

View invoice lines that you are authorized to approve, and enter comments before approving or rejecting invoice lines.

Timesheet ID , **Expense Sheet ID**and **Progress Log ID**	Displays the timesheet, expense, or progress log associated with the invoice line. Click to view the timesheet, expense or progress log details.
Period End Date	Displays the period end date of the timesheet associated with the invoice line.

See Also

Chapter 22, “Managing Settlements,” Viewing Invoice Line Details, page 377

Managing Invoice Approval for Suppliers

This section discusses how to:

- Approve supplier invoices.
- View invoice detail.
- Trigger worklist and email notifications.

Note. Many of the field definitions mentioned in the Approving Invoices section can also be used for this section.

See Chapter 22, “Managing Settlements,” Approving Invoices, page 384.

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Pages Used to Manage Invoice Approval for Suppliers

Page Name	Object Name	Navigation	Usage
Manage Invoice Approval	SPA_MG_SUP_INV_APR	Service Procurement, Approve Service Invoices (external)	Review, accept, or reject invoice approvals as a supplier invoice approver.
Manage Invoice Approval - Line Summary	SPA_SUP_INV_APR_LN	Click the Invoice Approval Line Summary button on the Manage Invoice Approval page.	View invoice lines that you are authorized to approve as a supplier invoice approver.
Work Order Details	SPF_WORDER_DETAIL	• Click the Work Order details tab on the Invoice Line Information grid of the Manage Invoice Approval - Line Summary page, and then select a linked work order. • Click a linked work order on the Manage Invoice Approval - Invoice Approval Line Detail page.	View details of the work order related to the invoice.
Invoice Approval Line Detail	SPA_SUP_INVAP_TIME	Click the Line Details button on the Manage Invoice Approval - Line Summary page.	View approvals for invoice line summaries, and enter comments before approving or rejecting the invoice line as a service provider.
Invoice Approval Line Detail	SPA_SUP_INVAP_PLOG	Click the Line Details button on the Manage Invoice Approval - Line Summary page.	View approvals for invoice line summaries, and enter comments before approving or rejecting the invoice line as a service provider.
Approve Timesheet	SPA_TIME_APPROVE	For resource-based invoices, click the linked timesheet on the Manage Invoice Approval- Line Detail page.	View time reports.
Services Expense Report - Services Expense Report Details	SPA_SHEET_LINES2	For either resource-based or deliverables-based invoices, click the linked expense on the Manage Invoice Approval - Line Detail page.	View expense reports.
Create Progress Log Submittal - Progress Log Summary	SPA_PLOG_LINES	For deliverables-based invoices, click the linked progress log on the Manage Invoice Approval - Line Detail page.	View time reports.

Approving Supplier Invoices

Access the external Manage Invoice Approval page.

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Select the invoice to approve.

Viewing Invoice Detail

Access the Invoice Approval - Line Summary page.

Select the invoice line to approve.

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

Note. To receive an email, an email definition must be set up for the approval activity.

- The invoice manager receives a worklist entry and an email notification if the invoice status changes to *Rejected by Supplier or Rejected by Enterprise*.
- The invoice approver indicated on the work order receives a worklist entry and an email notification when the invoice status changes to *Submitted to Enterprise* or *Approved by Supplier*.
- The supplier invoice approver for each service provider receives a worklist entry and an email notification when an invoice is submitted to a supplier.

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CHAPTER 23

Using Surveys in PeopleSoft Services Procurement

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

- Set up surveys.
- Edit and submit work order surveys.
- View surveys.
- Respond to surveys.
- Review survey summary.

Understanding Surveys in PeopleSoft Services Procurement

PeopleSoft Services Procurement enables enterprise users to create performance surveys that are sent to recipients once their work orders are complete, canceled, or terminated. Enterprise users can create, edit, and send surveys to individual recipients, or distribute surveys to a list of recipients. Surveys are sent both automatically and manually, depending on the configuration of the work order environment. Once the survey is received and completed by the recipient, enterprise users can view survey responses.

Setting Up Surveys

To set up surveys, use the Setup Surveys (SP_SUR_DEFN) component. To define format and answer choices for work order survey questions, use the Response Type (SP_SUR_RESTYP) component. To set up surveys by service type, use the Survey by Service Type (SP_SURVEY_BY_SVTYP) component.

This section discusses how to:

- Define survey business unit option.
- Define service type attributes.
- Define role distribution lists.
- Define response types.
- Set up surveys.
- Set up survey - service types.
- Set up surveys by service type.

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Pages Used to Define Surveys

Page Name	Object Name	Navigation	Usage
Services Procurement Bus Unit (services procurement business unit)	BUS_UNIT_TBL_SP	• Set Up Financials/Supply Chain, Business Unit Related, Services Procurement, Services Procurement Definition • Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement options	Define PeopleSoft Services Procurement business units.
Work Order Settings	BUS_UNIT_TBL_SP_WO	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement options Click the Work Order Settings tab.	Define work order alerts and settings.
Service Types	SPB_ROLE_TYPE	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Service Types/Roles, Service Types • Services Procurement, Define Services Procurement, Service Setup, Service Type Setup, Service Types	Define service types options for surveys.
Role Distribution List	SP_DSTRLST	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Role Distribution Lists • Services Procurement, Define Services Procurement, Service Setup, Role Distribution Lists	Set up role distribution lists to use with performance surveys.
Response Type	SP_SUR_RESTYP	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Response Type • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Response Types	Define formats and answer choices for work order survey questions.

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Page Name	Object Name	Navigation	Usage
Setup Survey	SP_SUR_DEFN	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Survey Setup • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Survey Setup	Define titles, question sequence, and response types for work order surveys.
Survey Setup - Service Type	SP_SUR_DEFN_SVTYP	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Setup Survey Select the Service Type tab. • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Survey Setup Select the Service Type tab.	View the service types related to the survey.
Survey by Service Type	SP_SURVEY_BY_SVTYP	• Set Up Financials/Supply Chain, Product Related, Services Procurement, Surveys, Surveys by Service Type • Services Procurement, Define Services Procurement, Services Setup, Survey Setup, Surveys by Service Type	Associate service type with one or more surveys.

Defining Survey Business Unit Option

Access the Work Order Settings page.

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

See Also

Chapter 4, “Setting Up PeopleSoft Services Procurement,” Defining PeopleSoft Services Procurement Business Units, page 30

Defining Service Type Attributes

Access the Service Types page.

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

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

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

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

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Service Types, page 66

Defining Role Distribution Lists

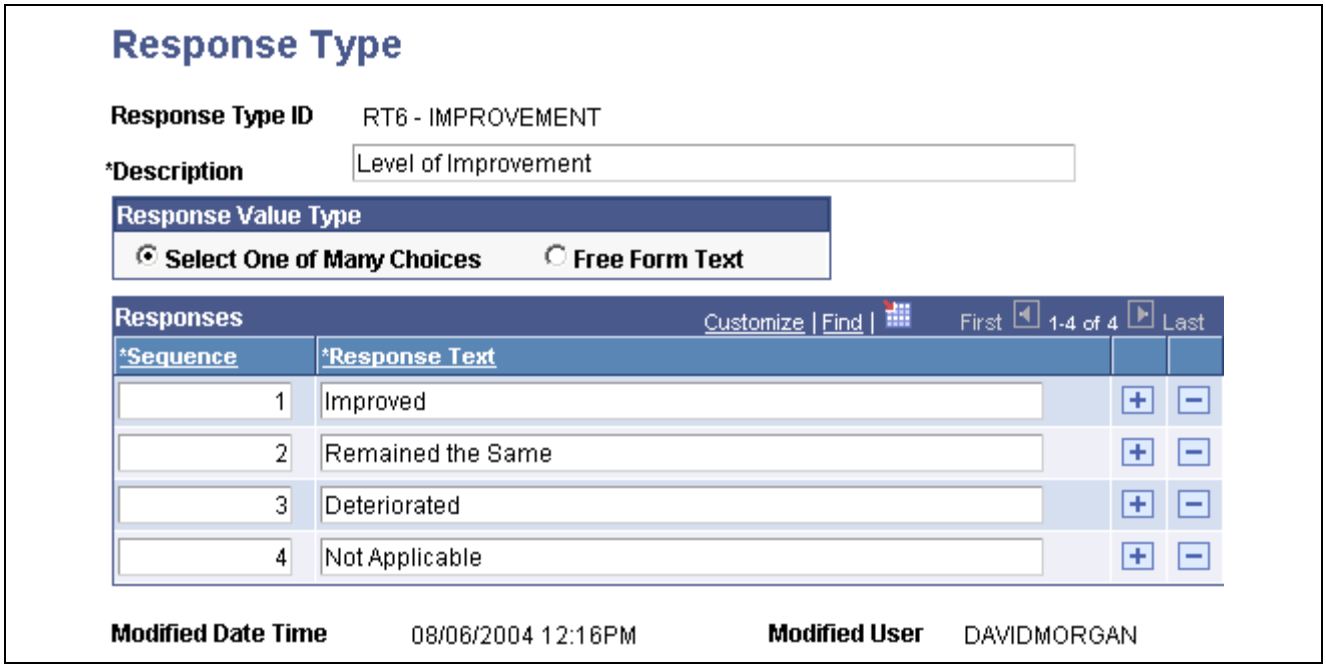
Access Role Distribution List page.

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

Role Action Description Add role actions to the survey distribution list.

Defining Response Types

Access the Response Type page.



Response Type page

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Response Type ID Name of the response type. Response types are used to define a set of appropriate responses that can be associated to multiple questions within or across surveys.

Select One of Many Choices Select to indicate that a question is limited to only one response.

Free Form Text Select to indicate that a recipient can respond to a question as freeform text.

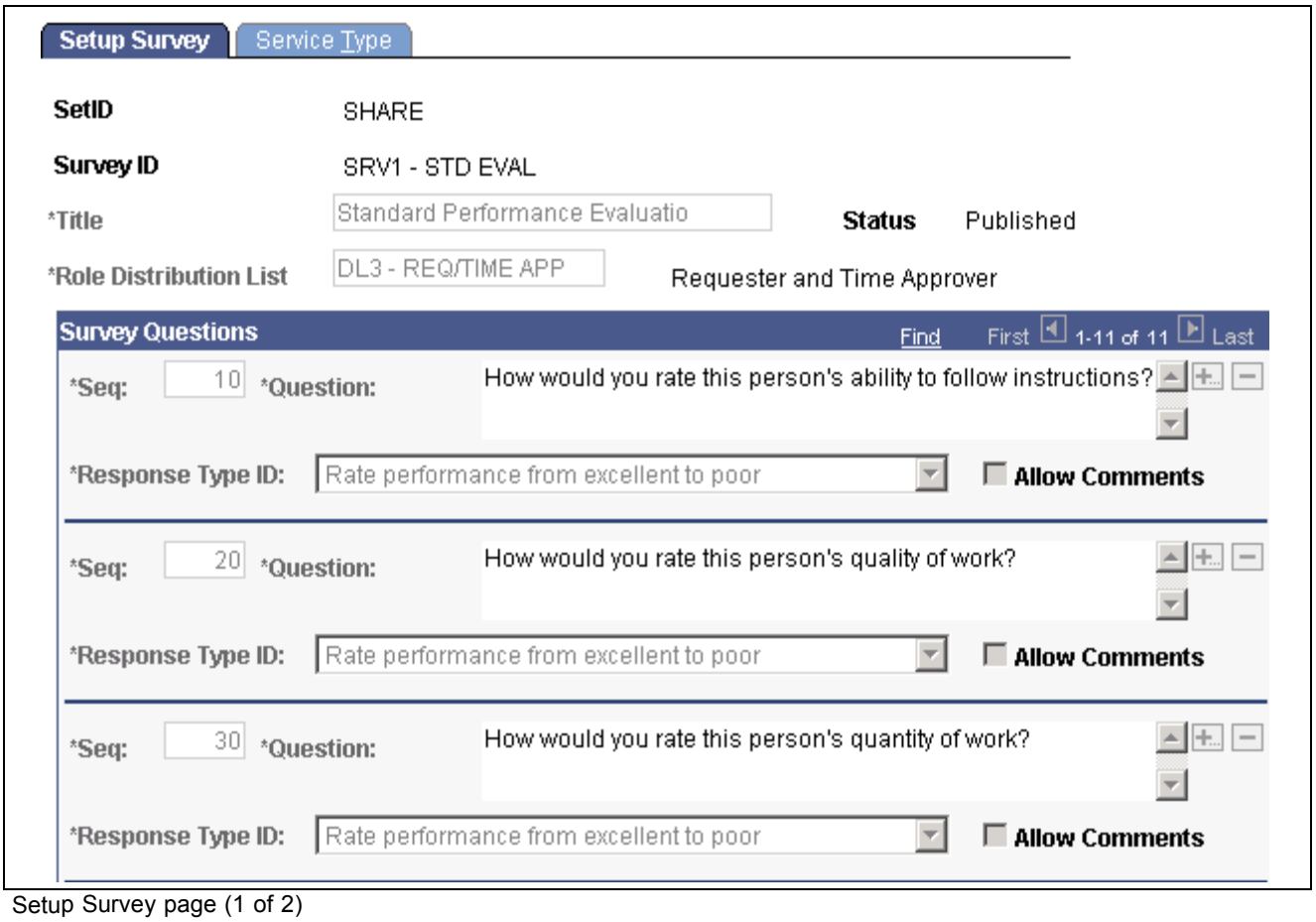
Sequence Enter the order that responses appear to recipients.

Note. This option is for single choice selections only.

Response Text Enter the text for the response. The response texts for a response type are shown to survey recipients as the list of available answers to a survey question.

Setting Up Surveys

Access the Setup Survey page.



Setup Survey page (1 of 2)

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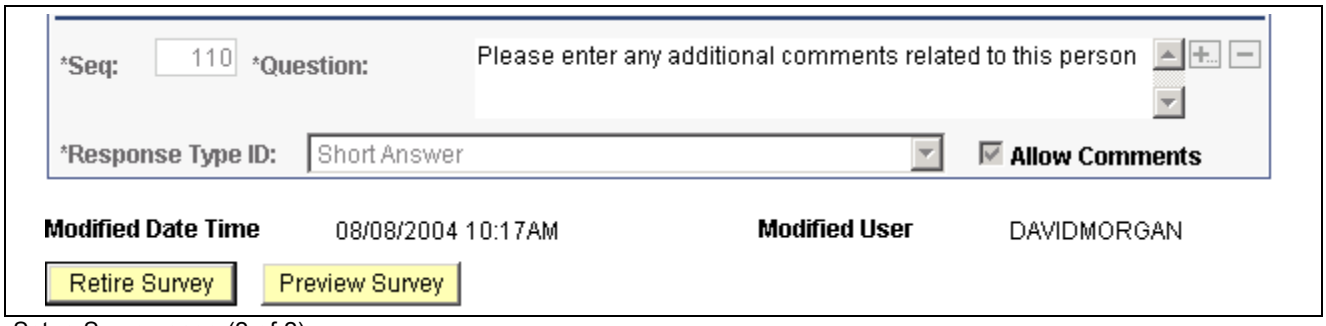

Setup Survey page (2 of 2)

Survey ID Displays the name of the survey.

Note. This field is keyed by SetID upon entering the page.

Title Enter the title of the survey.

Copy Click to copy an existing survey to a new survey. When you click this button, the system enables you to copy from a prior survey SetID and survey ID.

Note. This button only appears if you are creating a new survey.

Status View the predefined statues of a survey. Statuses include *Draft, Publish,* and *Retired.*

Draft: This is the initial status of a survey that is assigned when the survey is created and saved.

Published: The system changes the status from Draft to Publish once you select the Publish Survey button.

Note. Once you click the Publish Survey button, the Save Draft button is no longer available. You can only select published surveys as a work order survey.

Retired: This status indicates that the survey is retired, and the survey does not show up on the work order selection. The survey, however, is viewable in the survey results. It is possible to republish a retired survey.

Note. You cannot retire a survey that is the default for a service type unless you change the default first.

Sequence Determines the order in which the questions will be displayed to the survey recipients.

Role Distribution List Select a survey distribution list to associate with the survey.

Question Enter a survey question.

Response Type ID Select a response type to associate with the question on the survey.

Allow Comments Select to provide a comments text box to recipients for the survey question.

Retire Survey Click to retire a survey.

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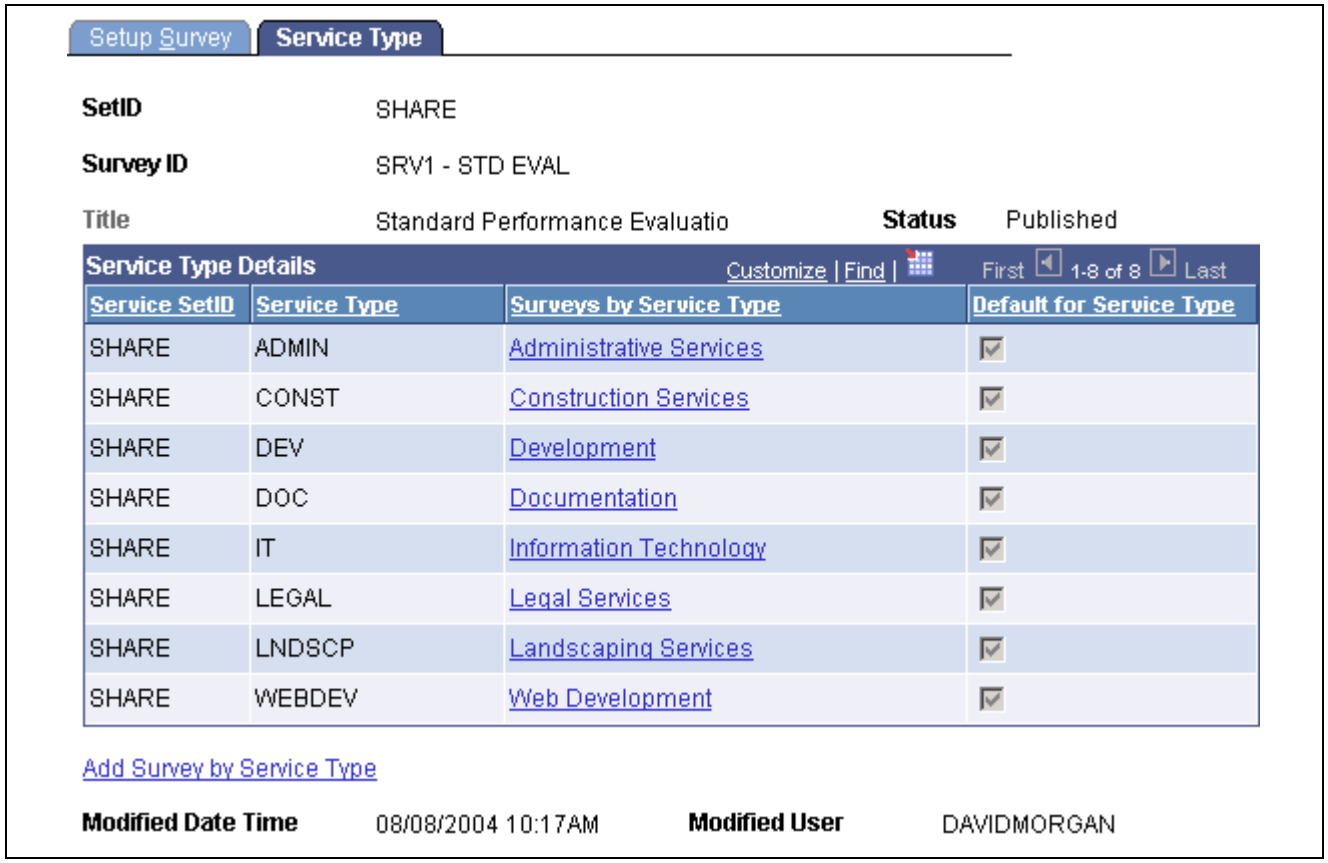
Note. When you retire the survey, the survey is removed from the work order selection.

It is possible to republish a retired survey.

Preview Survey Click to view a survey before it is published.

Setting Up Survey - Service Type

Access Survey Setup - Service Type page.



Survey Setup - Service Type page

Service SetID View the service SetID that is associated with the survey.

Service Type View the service types that are related to the survey.

Surveys by Service Type Click to access the Survey by Service Type page for the specific Service Type. You can add and delete surveys for the service type, as well as select the default survey.

Default for Service Type Indicates that the survey is the default survey for the specified service type when a work order is created and requires a performance survey.

Add Survey by Service Type Click to access the Survey by Service Type page, where you can add and delete surveys for Service Types, as well as select the default survey for the service types. The system will prompt you for the Service Type.

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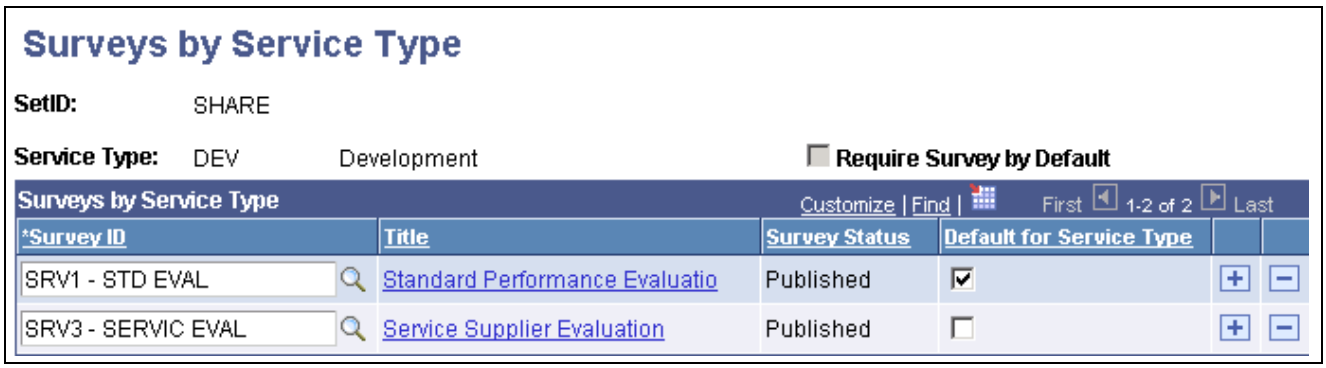
Setting Up Surveys by Service Type

Access the Surveys by Service Type page.



Surveys by Service Type page

Survey ID Add and delete survey IDs that are associated to a service type.

Title Click to access the Setup Survey - Service Type page for the survey title that is visible. You can view all service types associated to the survey.

Survey Status View the status of the survey that is associated to a service type.

Default for Service Type Indicates whether a particular survey is the default survey for service type when the service type is entered on a work order and the business unit uses surveys. The default survey is used to initially populate the work order survey field.

Editing and Submitting Work Order Surveys

This section discusses how to edit and submit work order surveys.

Page Used to Edit and Submit Work Order Surveys

Page Name	Object Name	Navigation	Usage
Manage Work Orders - Surveys	SPF_WO_SUR_USR	Services Procurement, Manage Services Work Order Select the Survey tab.	Include survey details and send surveys to the appropriate recipients.

Editing and Submitting Work Order Surveys

Access the Manage Work Orders - Surveys page.

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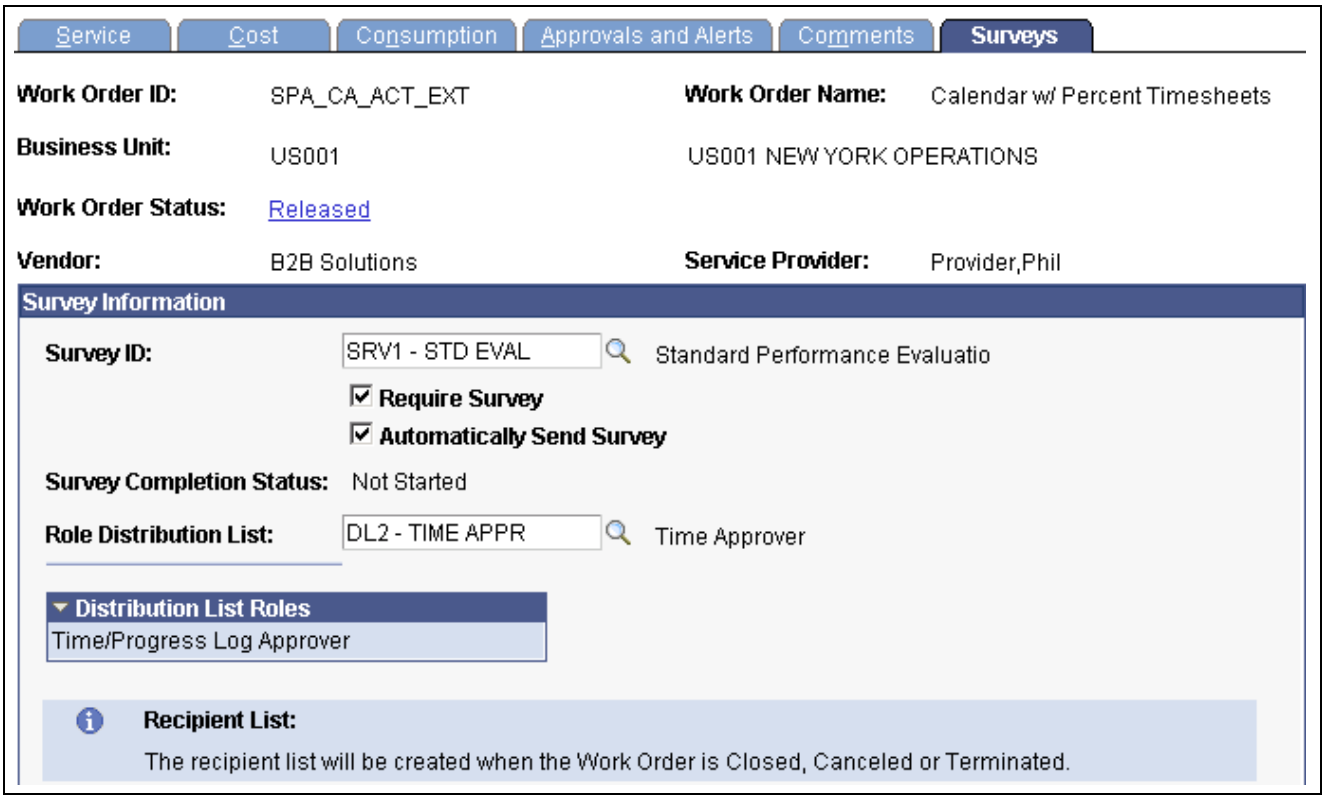

Manage Work Order - Surveys page

Require Survey Indicates that a survey is mandatory for the work order that is associated with the specified service type.

Note. This value defaults from the service type associated with the survey. You can modify this value before sending the survey.

Automatically Send Survey Indicates that a survey will be automatically sent to a recipient at the time the work order is terminated, closed, or canceled. All recipients listed on the survey distribution list will receive notification.

Note. This value defaults from the service type associated with the survey. You can modify this value before sending the survey.

Distribution List Roles Work order-related role actions that are included in the distribution list that you select for the work order survey.

Note. After sending a survey, users may only cancel a survey. Use the + and - buttons to add a new survey recipient or remove a recipient if the survey has not yet been sent.

If a survey is mandatory, all recipients must complete and submit the survey before the work order can be finalized. The survey status changes to complete once the survey is submitted.

See Also

Chapter 18, “Managing Work Orders,” page 281

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Viewing Surveys

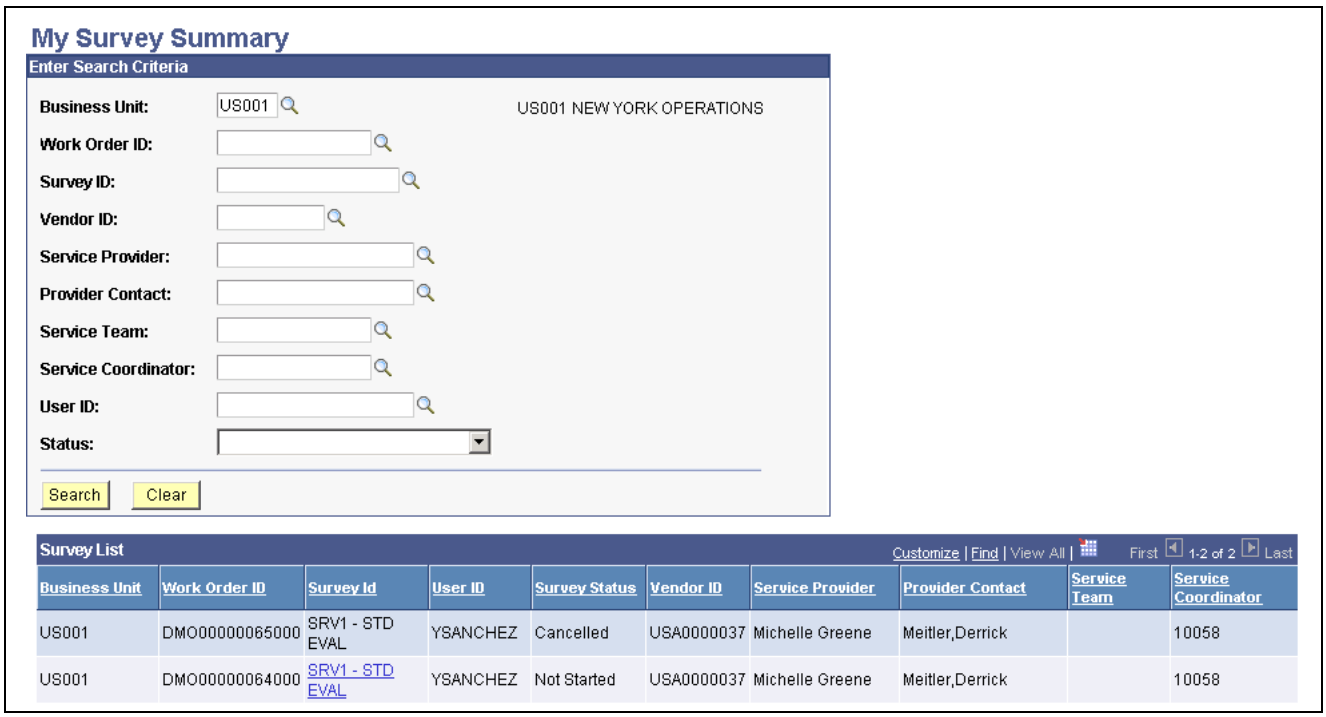
This section discusses how to view my survey summary.

Page Used to View Surveys

Page Name	Object Name	Navigation	Usage
My Survey Summary	SP_SUR_FILL_ROSTER	Services Procurement, Respond/View Survey, My Survey Summary	Search for your work order performance surveys.

Viewing My Survey Summary

Access the My Survey Summary page.



My Survey Summary page

Enter a specific business unit, work order ID, survey ID, vendor ID, service provider, service contact, user ID (survey recipient), or status to restrict the surveys to only those that match. Or leave those fields blank to pick up all values. Click the Search button to return valid surveys that a user can complete for himself or on behalf of another user.

The Status field displays work order surveys that are not started, in progress, or canceled. Initially only those particular surveys that a user must complete as the survey recipient appear in the Survey List.

Survey ID Click to access the Respond to Survey page, where you can respond to and view the work order surveys.

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Responding to Surveys

This section discusses how to respond to surveys.

Page Used to Respond to Surveys

Page Name	Object Name	Navigation	Usage
Respond To Survey	SP_SUR_FILL	• Services Procurement, Respond/View Survey, My Survey Summary Click the Search button to locate your surveys. • Worklist, Filter on Survey Routing Click Survey.	Respond to and review your work order surveys.

Responding to Surveys

Access the Respond To Survey page.

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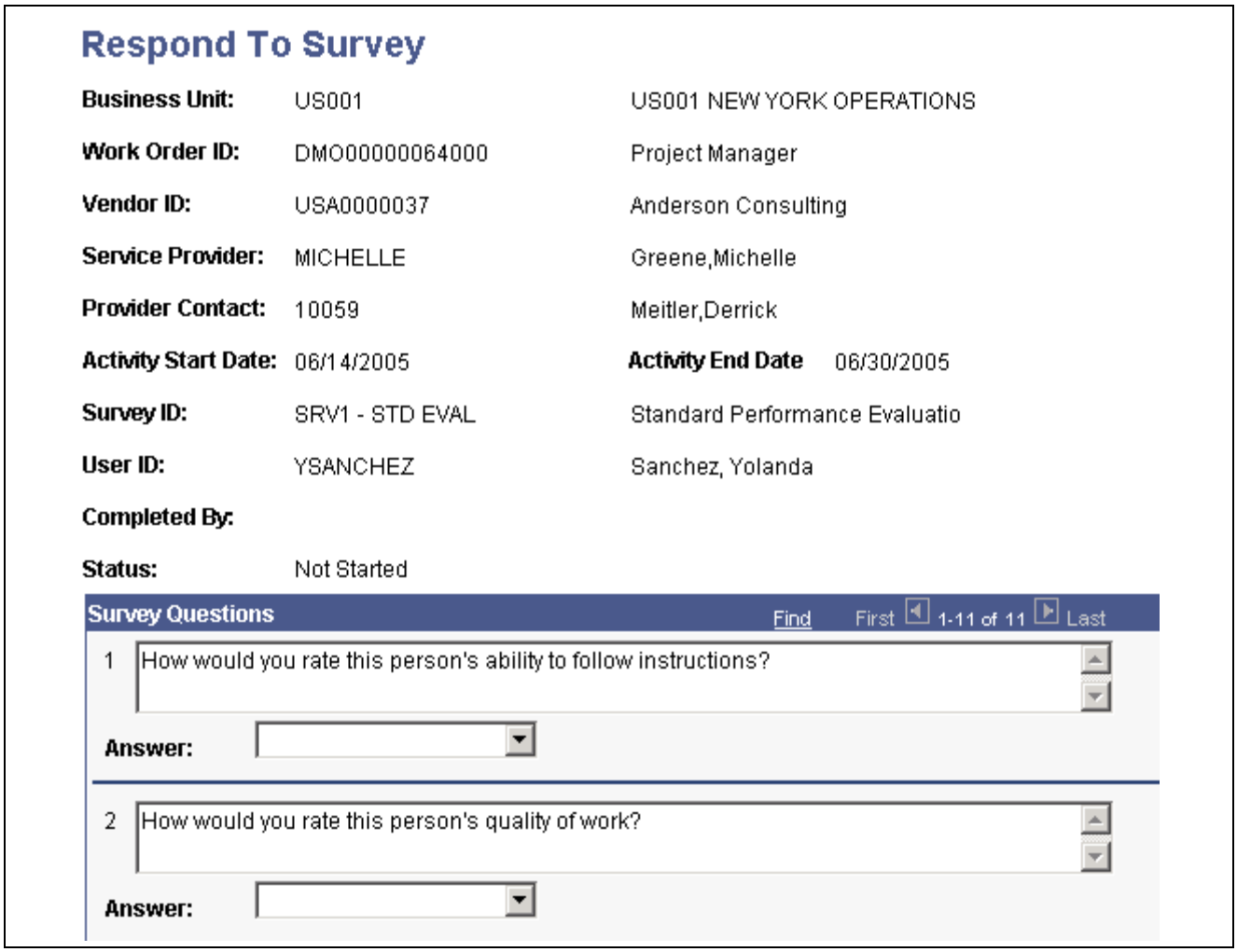
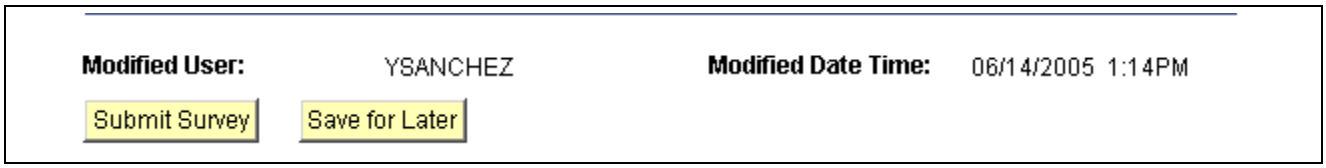


Respond to Survey page (1 of 2)



Respond to Survey page (2 of 2)

User ID Review the survey recipient user name.

Completed By Review name of the person that filled out the survey. This may differ from the recipient user name. The service coordinator, requester, and other service team members have the ability to respond to the survey on behalf of recipients. This field is blank if the survey is not complete.

Survey Question View the questions for the survey.

Answer Provide answers to the survey questions.

Submit Survey Click to submit the survey to the survey reviewer.

Note. This action disallows further changes to the survey, marks the survey as complete for the user, and removes the worklist entry.

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Save for Later Click to save the survey. Once you save the survey, you can access and complete it at a later time.

Reviewing the Survey

This section discusses how to:

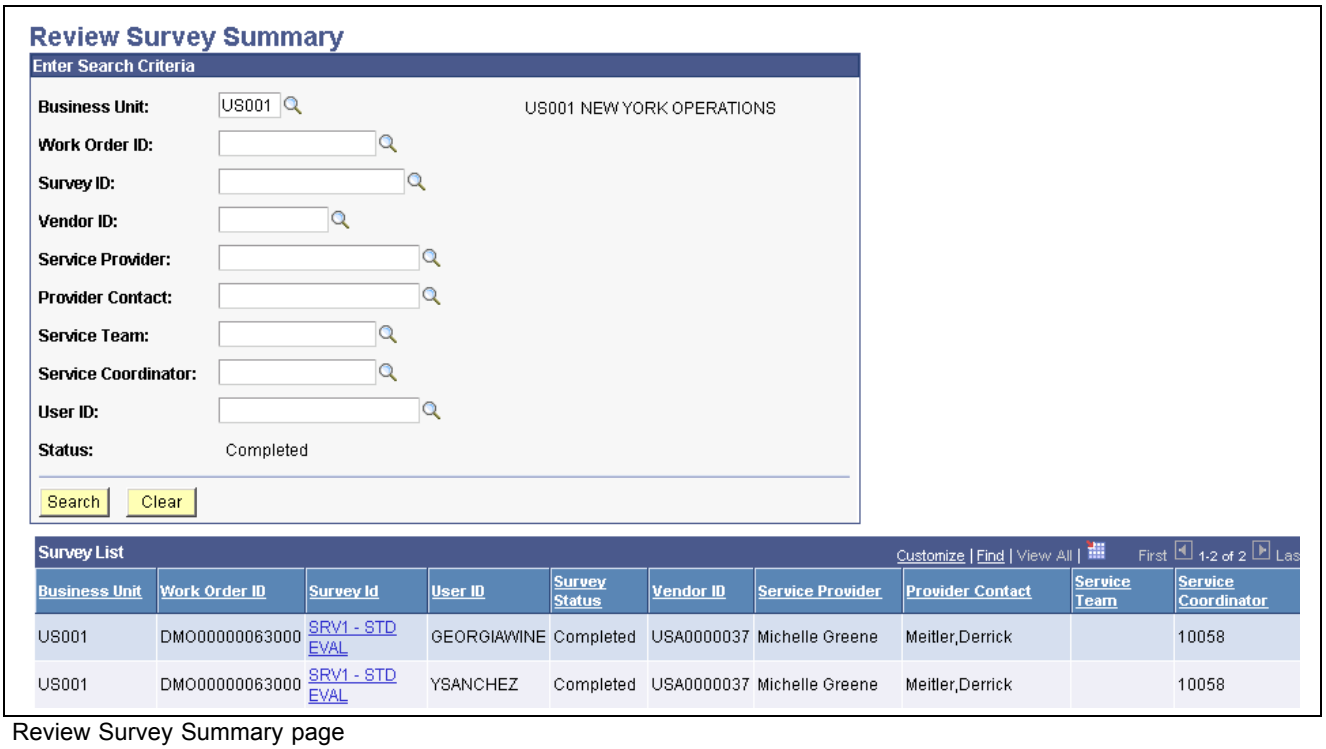
- Review the survey summary.
- Review the survey user response.

Pages Used to Review the Survey

Page Name	Object Name	Navigation	Usage
Review Survey Summary	SP_SUR_REV_ROSTER	Services Procurement, Respond/View Survey, Review Survey Summary	Search for completed surveys to review.
Review Survey User Responses	SP_SUR_USR_RES	Services Procurement, Respond/View Survey, Review Survey Summary Click the Search button to locate survey responses.	Review work order evaluation summaries.

Reviewing the Survey Summary

Access the Review Survey Summary page.



Review Survey Summary page

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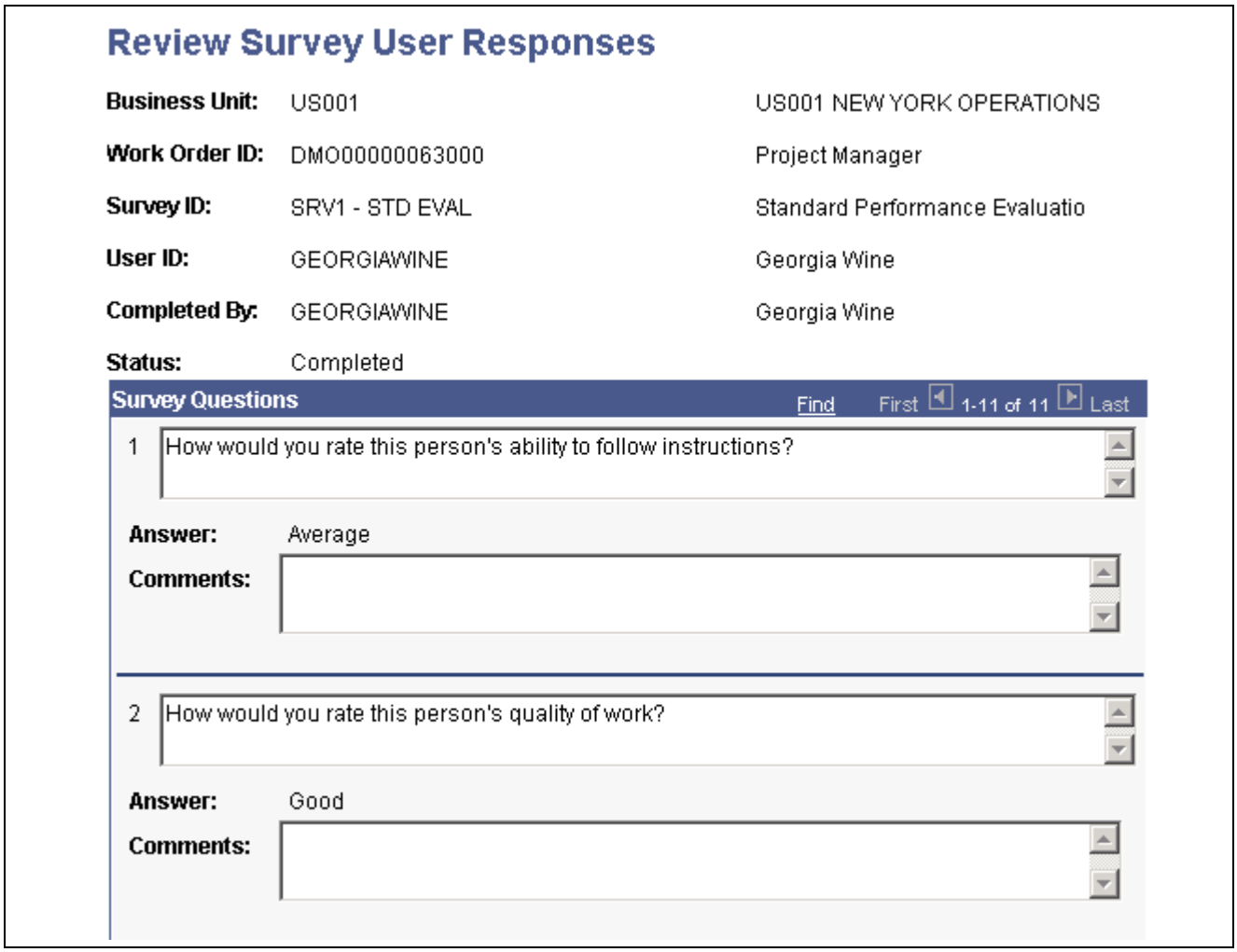
Enter a specific business unit, work order ID, survey ID, vendor ID, service provider, service contact, user ID (survey recipient), or status to restrict the surveys to only those that match. Or leave those fields blank to pick up all values. Click the Search button to return surveys that a user can complete for himself or on behalf of another user

The Status field displays work order surveys that are completed. Initially only those particular surveys that a user must complete as the survey recipient appear in the Survey List.

Survey ID Click to access the Review Survey User Responses page, where you can review completed work order evaluation summaries.

Reviewing the Survey User Response

Access the Review Survey User Responses page.



Review Survey User Responses page

User ID Review the name of the survey recipient.

Completed By Review name of the recipient that filled out the survey. This may differ from the user name.

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Status	View completed surveys. Use the My Survey Summary page to view surveys that are not started, in progress, or canceled.

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CHAPTER 24

Interactive Reports in PeopleSoft Services Procurement

This chapter provides an overview of interactive reports and discusses how to:

- Populate the data mart.
- Analyze service provider rosters.
- Analyze service provider performance.
- Analyze service provider length of stay.
- Analyze expense life cycles.
- Analyze expense variance.
- Analyze supplier performance.
- Compare supplier rates.
- Analyze minority-owned suppliers.

Understanding Interactive Reports

PeopleSoft Services Procurement provides metrics on service providers, expenses, and suppliers to help you manage, measure, and analyze process and cost information across all aspects of the services procurement life cycle. The PeopleSoft system delivers standard analysis pages that cover the most common user requirements.

See Also

"PeopleSoft Services Procurement Preface," Common Elements Used In This PeopleBook, page xxxiv

Service Provider Metrics

Service provider metrics provide information on service providers broken out by department, manager, project, purchase order, and supplier:

- The service provider roster includes service provider project assignment information.
- The service provider performance includes service provider rating information.

Note. Service provider performance metrics are not broken out by purchase order.

- Service provider length of stay includes service provider continuous assignment information.

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Expense Metrics

Expense metrics provide information on amounts committed, expended, and forecast on requisitions, work orders, and invoices:

- Expense life cycle includes expenses that are incurred throughout the various stages of the expense cycle, including entry, submission, approval, invoiced but not approved, invoiced and approved by supplier, and invoiced and approved.

  You can access expense life cycle data broken out by account, department, manager, project, supplier, and work order. For each dimension, you can also view the data by expense status.

- Expense variance includes forecast versus actual expense information.

  You can access expense variance data broken out by department, manager, project, purchase order, and supplier.

Supplier Metrics

Supplier metrics provide information on performance and rate comparisons by supplier and role:

- Supplier performance includes requisitions sourced, candidates submitted, requisitions filled, and positions filled.
- Supplier rate comparison includes rates that various suppliers charge for the same job role.
- Minority-owned suppliers include the number of bids that a minority-owned supplier receives and the number of work orders that are awarded to each of these suppliers.

  Minority-owned supplier metrics are analyzed by role.

Populating the Data Mart

You must populate the data mart before accessing the interactive report pages.

Note. If the data mart contains no data, a search page appears when you try to access an interactive reports page, but you can't progress from there.

This section discusses how to populate the data mart.

Page Used to Populate the Data Mart

Page Name	Object Name	Navigation	Usage
Analysis Datamart	RUN_SPR_DM	Services Procurement, Interactive Reports, Analysis Datamart Engine	Enter parameters that are used to run the PeopleSoft Application Engine that populates the data mart for analysis purposes.

Populating the Data Mart

Access the Analysis Datamart page.

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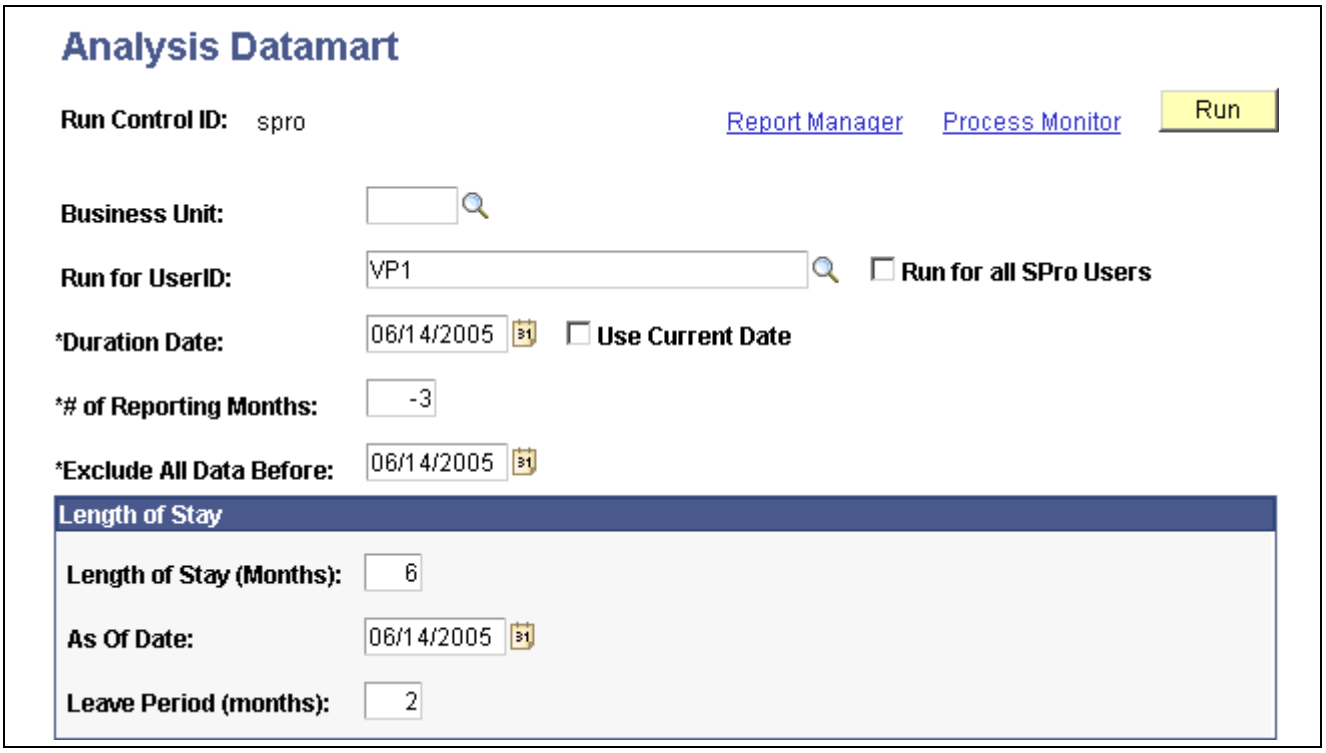

Analysis Datamart page

Business Unit Define the business unit for which you want to retrieve interactive report data.

Run for UserID and **Run for all Spro Users** The system retrieves data and populates the data mart with data that is specific to the selected user. Select the Run for all Spro Users check box to retrieve data for all users. The current user appears as the default value in the Run for UserID field.

Duration Date and **# of Reporting Months** The system uses the duration date in conjunction with the number of reporting months to determine the time period that is used to retrieve the interactive report data. Enter the number of reporting months to define the number of months before or after the duration date for which you want to retrieve data.

Enter a positive value for number of reporting months to indicate the number of months starting from the duration date that are to be included in the process. Use a negative number to indicate the number of months prior to the duration date that are to be included in the process.

Note. The system does not retrieve dates prior to the entered start date regardless of the entered duration date and number of reporting months.

Use Current Date Select to define duration date as the current system date. If this check box is selected, the system uses the number of reporting months that are relative to the current system date for each process instance.

Length of Stay

You enter data in the Length of Stay group box to define the parameters that are used to retrieve data for the length-of-stay interactive report pages.

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Length of Stay (Months) Enter the duration that a service provider can stay on assignment in accordance with the laws that govern the organization's labor practices. The system default is six months.

The system uses this value for analysis calculations, including determining the excess duration on the length-of-stay interactive report pages.

As Of Date Select the date for which the service provider is considered active.

Leave Period (months) Enter the maximum allowable period between the end of a project and the start of the next project. This is used to determine the service provider's start date.

Process Results

The Process Analysis Datamart Application Engine process (SPR_DATAMART) retrieves data from transaction tables and copies it to a fact table that is used during analysis.

Note. You can define a regular processing schedule by using the Process Scheduler page.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

Analyzing Service Provider Rosters

You use the service provider roster to analyze total service provider count by department, manager, project, purchase order, or supplier.

This section discusses how to:

- View service provider roster summary information.
- View service provider roster details.

Note. This section uses the service provider roster department summary and details as an example. Similar functionality applies to the other dimensions (manager, project, purchase order, and supplier) and respective detail pages.

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Pages Used to Analyze Service Provider Rosters

Page Name	Object Name	Navigation	Usage
Service Provider Roster (summary)	SPR_CONROS_DASH_PG	Services Procurement, Interactive Reports, Provider Roster	View service provider roster summary graphs and data. Access detail pages.
Service Provider - Department Roster	SPR_CONSROSDR_PG	Click the Department Detail link on the Service Provider Roster page.	View the department details.
Service Provider Roster - Department Details	SPR_CONROS_DASH_PG	Click the Department link on the Service Provider Roster (summary) page for department.	View detailed service provider roster information for a selected department.
Service Provider Roster - Manager Details	SPR_CONROS_DASH_PG	Click the Manager link on the Service Provider Roster (summary) page for Manager.	View detail service provider roster information for a selected manager.
Service Provider Roster - Purchase Order Details	SPR_CONROS_DASH_PG	Click the PO link on the Service Provider Roster (summary) page for Purchase Order.	View detailed service provider roster information for a selected purchase order.
Service Provider Roster - Supplier Details	SPR_CONROS_DASH_PG	Click the Supplier link on the Service Provider Roster (summary) page for Supplier.	View detail service provider roster information for a selected supplier.

Viewing Service Provider Roster Summary Information

Access the Service Provider Roster (summary) page.

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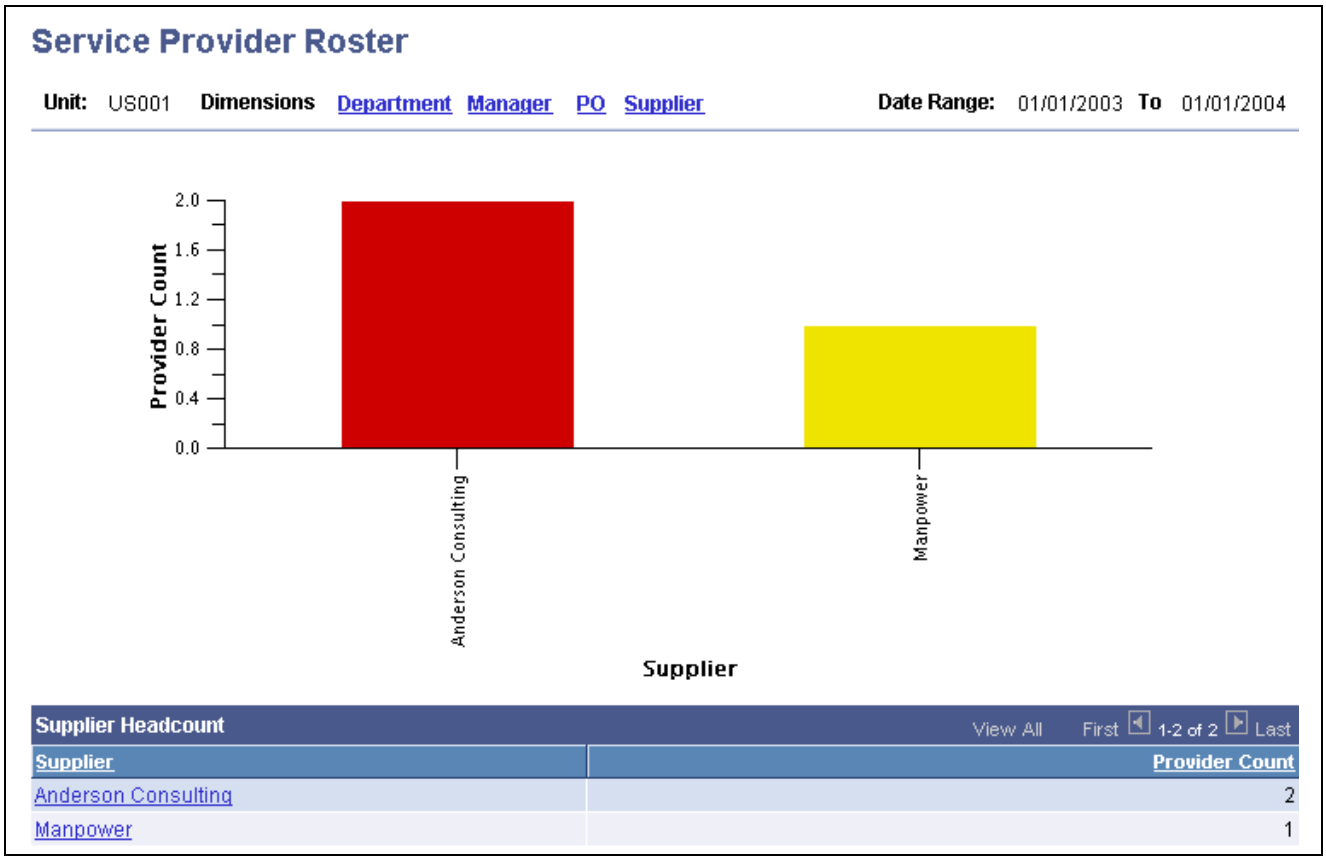

Service Provider Roster (summary) page

Department, Manager, Project, Purchase Order, and **Supplier** — Click the link at the top of the page to have the system display the service provider roster graph and data by department, manager, project, purchase order, or supplier.

Provider Count — Displays for each department the total number of service providers.

Viewing Service Provider Roster Details

Access the Service Provider Roster - Department Details page.

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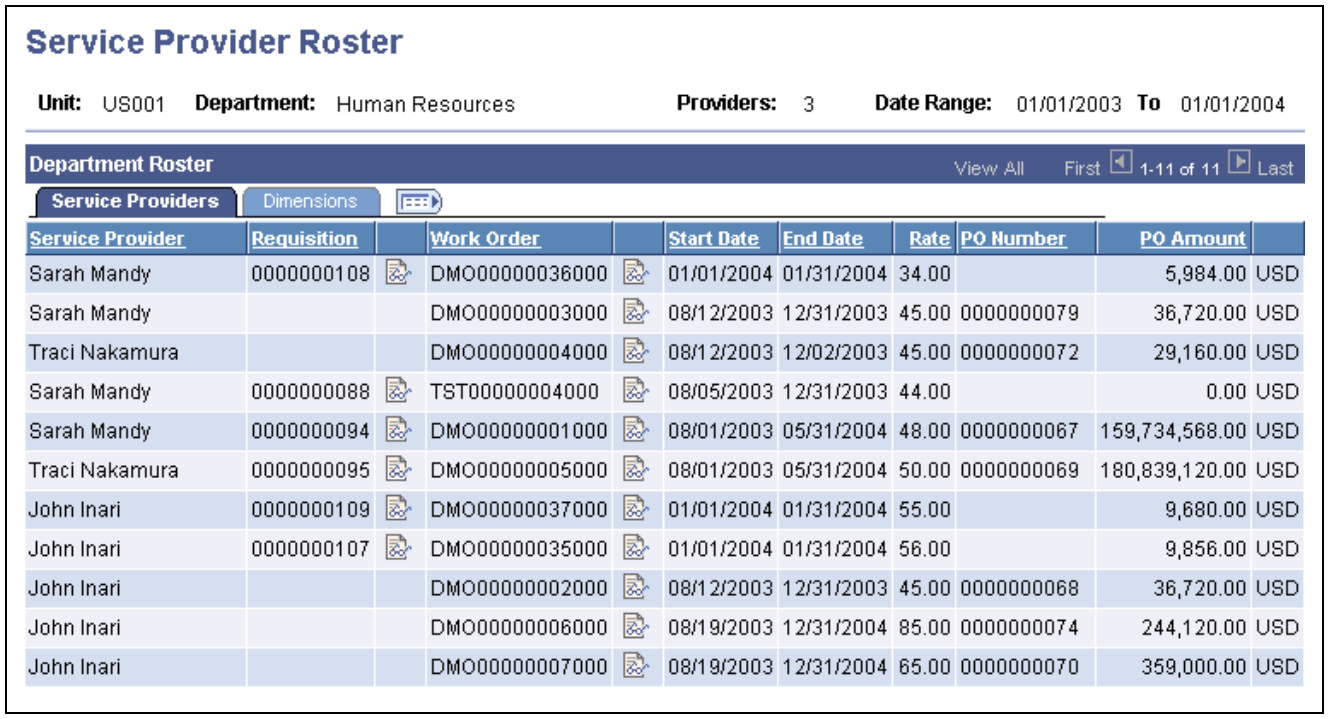


Service Provider Roster

Unit: US001 **Department:** Human Resources **Providers:** 3 **Date Range:** 01/01/2003 **To** 01/01/2004

Department Roster — View All — First 1-11 of 11 Last

Service Providers | Dimensions

Service Provider	Requisition		Work Order		Start Date	End Date	Rate	PO Number	PO Amount	
Sarah Mandy	0000000108		DMO00000036000		01/01/2004	01/31/2004	34.00		5,984.00	USD
Sarah Mandy			DMO00000003000		08/12/2003	12/31/2003	45.00	0000000079	36,720.00	USD
Traci Nakamura			DMO00000004000		08/12/2003	12/02/2003	45.00	0000000072	29,160.00	USD
Sarah Mandy	0000000088		TST00000004000		08/05/2003	12/31/2003	44.00		0.00	USD
Sarah Mandy	0000000094		DMO00000001000		08/01/2003	05/31/2004	48.00	0000000067	159,734,568.00	USD
Traci Nakamura	0000000095		DMO00000005000		08/01/2003	05/31/2004	50.00	0000000069	180,839,120.00	USD
John Inari	0000000109		DMO00000037000		01/01/2004	01/31/2004	55.00		9,680.00	USD
John Inari	0000000107		DMO00000035000		01/01/2004	01/31/2004	56.00		9,856.00	USD
John Inari			DMO00000002000		08/12/2003	12/31/2003	45.00	0000000068	36,720.00	USD
John Inari			DMO00000006000		08/19/2003	12/31/2004	85.00	0000000074	244,120.00	USD
John Inari			DMO00000007000		08/19/2003	12/31/2004	65.00	0000000070	359,000.00	USD

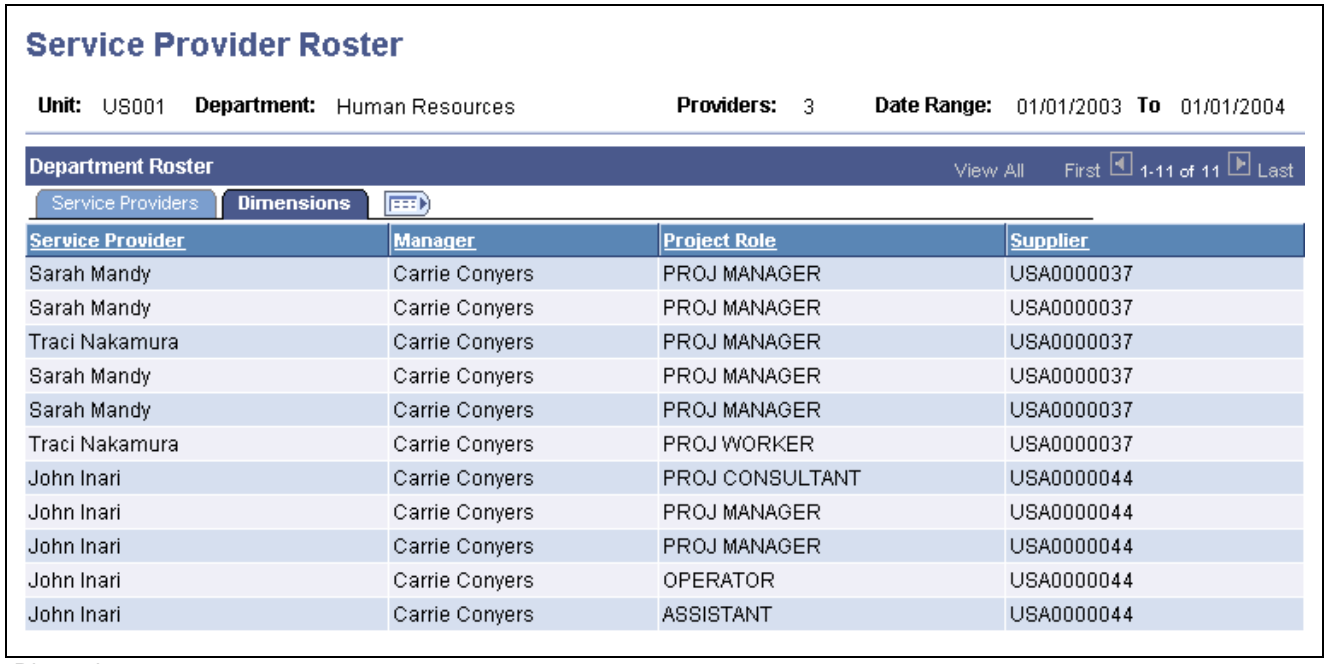
Service Provider Roster - Department Details page

The system displays detailed information about the service providers for the selected department.

Click to view the requisition or work order.

Dimensions

Select the Dimensions tab.



Service Provider Roster

Unit: US001 **Department:** Human Resources **Providers:** 3 **Date Range:** 01/01/2003 **To** 01/01/2004

Department Roster — View All — First 1-11 of 11 Last

Service Providers | Dimensions

Service Provider	Manager	Project Role	Supplier
Sarah Mandy	Carrie Conyers	PROJ MANAGER	USA0000037
Sarah Mandy	Carrie Conyers	PROJ MANAGER	USA0000037
Traci Nakamura	Carrie Conyers	PROJ MANAGER	USA0000037
Sarah Mandy	Carrie Conyers	PROJ MANAGER	USA0000037
Sarah Mandy	Carrie Conyers	PROJ MANAGER	USA0000037
Traci Nakamura	Carrie Conyers	PROJ WORKER	USA0000037
John Inari	Carrie Conyers	PROJ CONSULTANT	USA0000044
John Inari	Carrie Conyers	PROJ MANAGER	USA0000044
John Inari	Carrie Conyers	PROJ MANAGER	USA0000044
John Inari	Carrie Conyers	OPERATOR	USA0000044
John Inari	Carrie Conyers	ASSISTANT	USA0000044

Dimension page

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The system displays the procurement details for the department.

Analyzing Service Provider Performance

You use the service provider performance pages to analyze service provider performance by department, manager, project, or supplier.

Note. You use the service provider performance pages similar to the way that you use the service provider roster pages.

This section discusses how to view service provider performance summary information.

See Also

Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Service Provider Rosters, page 412

Pages Used to Analyze Service Provider Performance

Page Name	Object Name	Navigation	Usage
Service Provider Performance (summary)	SPR_CONPER_DASH_PG	Services Procurement, Interactive Reports, Provider Performance	View service provider performance summary graphs and data. Access detail pages.
Service Provider Performance - Department Details	SPR_CONSPERDR_PG	Click the Department link on the Service Provider Performance (summary) page for department.	View detailed service provider performance information for a selected department.
Service Provider Performance - Manager Details	SPR_CONSPERMR_PG	Click the Manager link on the Service Provider Performance (summary) page for manager.	View detailed service provider performance information for a selected manager.
Service Provider Performance - Project Details	SPR_CONSPERPR_PG	Click the Project link on the Service Provider Performance (summary) page for project.	View detailed service provider performance information for a selected project.
Service Provider Performance - Supplier Details	SPR_CONSPERVR_PG	Click the Supplier link on the Service Provider Performance (summary) page for supplier.	View detailed service provider performance information for a selected supplier.

Viewing Service Provider Performance Summary Information

Access the Service Provider Performance (summary) page.

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Rating (Avg) Displays the average approver rating for the total number of service providers for the business unit for each department, manager, project, or supplier, depending on the dimension that you view.

Analyzing Service Provider Length of Stay

You use the service provider length-of-stay pages to analyze how long service providers have been on assignment by department, manager, project, purchase order, or supplier.

This section discusses how to:

- View service provider length-of-stay summary information.
- View service provider length-of-stay details.

Note. This section uses the service provider length-of-stay manager summary and details as an example. Similar functionality applies to the other dimensions (department, project, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Service Provider Length of Stay

Page Name	Object Name	Navigation	Usage
Service Provider Length of Stay (summary)	SPR_CONLOS_DASH_PG	Services Procurement, Interactive Reports, Provider Length of Stay	View service provider length-of-stay summary graphs and data. Access detail pages.
Service Provider Length of Stay - Department Details	SPR_CONSLOSDR_PG	Click the Department link on the Service Provider Length of Stay (summary) page for department.	View detailed service provider length-of-stay information for a selected department.
Service Provider Length of Stay - Manager Details	SPR_CONSLOSMR_PG	Click the Manager link on the Service Provider Length of Stay (summary) page for manager.	View detailed service provider length-of-stay information for a selected manager.
Service Provider Length of Stay - Project Details	SPR_CONSLOSPR_PG	Click the Project link on the Service Provider Length of Stay (summary) page for project.	View detailed service provider length-of-stay information for a selected project.
Service Provider Length of Stay - Purchase Order Details	SPR_CONSLOSOR_PG	Click the Purchase Order link on the Service Provider Length of Stay (summary) page for purchase order.	View detail service provider length-of-stay information for a selected purchase order.
Service Provider Length of Stay - Supplier Details	SPR_CONSLOSVR_PG	Click the Supplier link on the Service Provider Length of Stay (summary) page for supplier.	View detailed service provider length-of-stay information for a selected supplier.

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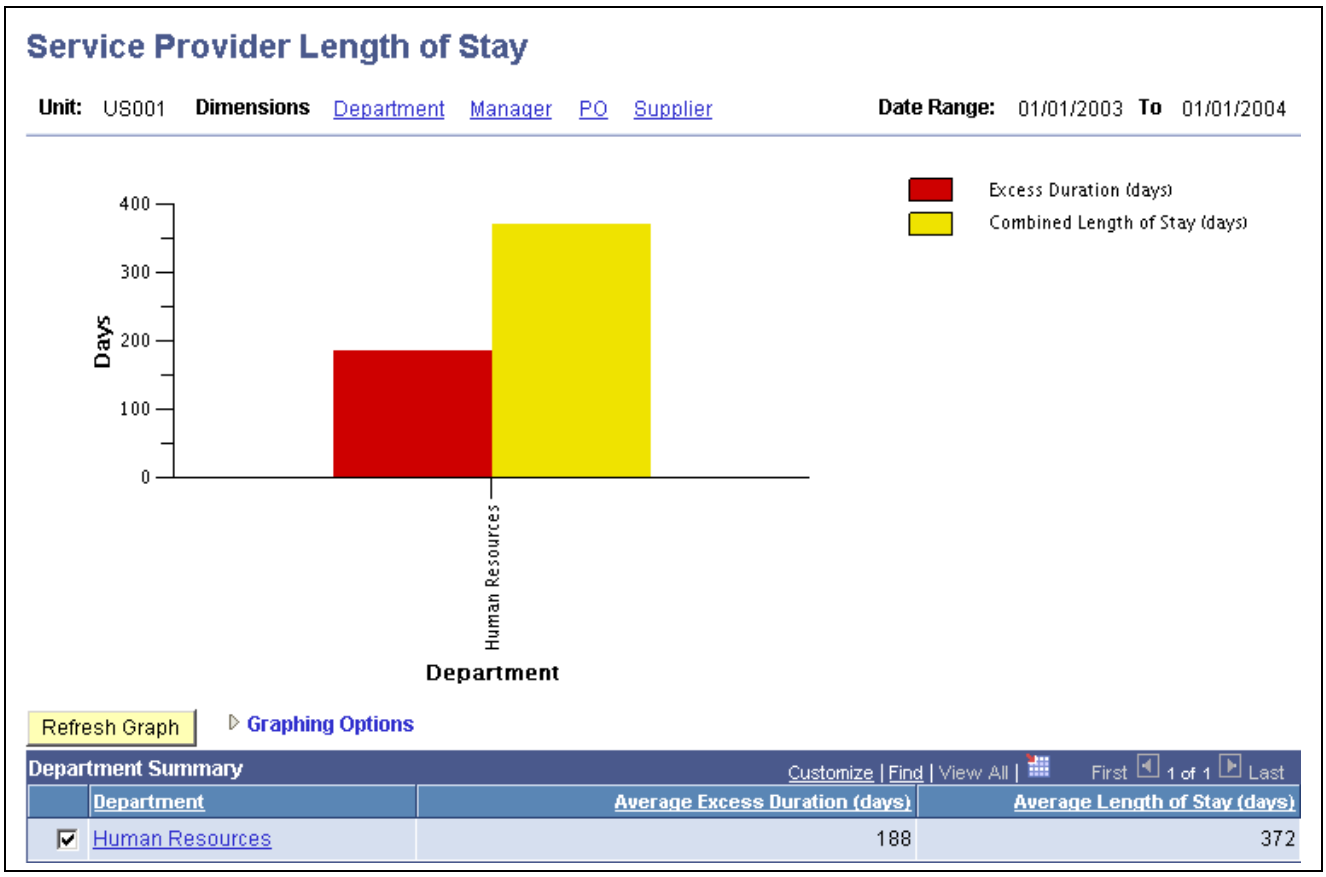
Viewing Service Provider Length-of-Stay Summary Information

Access the Service Provider Length of Stay (summary) page.



Service Provider Length of Stay (summary) page

Department, Manager, Project, Purchase Order, and **Supplier**

Click the link at the top of the page to have the system display the service provider length-of-stay graph and data by department, manager, project, purchase order, or supplier.

Graphing Options

Select the options in the collapsible Graphing Options group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on time and another based on count.

The system displays an error message if you select parameters of different measurement types.

Refresh Graph

Click to display the graph by using the selected graphing options and data points.

Note. Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph.

By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

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Average Excess Duration (days) Displays the resulting calculation of the average projected end date less the start date for all service providers for the business unit by manager.

A positive value indicates the number of days in excess of the length of stay (in months) that is entered on the Analysis Datamart page, including Saturdays, Sundays, and holidays.

Note. The conversion from length of stay entered in months to excess duration appearing in days is based on using an average 30.4 days for a month.

Average Length of Stay (days) Displays the resulting calculation of the average start date less end date for all service providers for the business unit by manager.

Viewing Service Provider Length-of-Stay Details

Access the Service Provider Length of Stay - Manager Details page.

The system displays detailed information about service providers for the manager.

Start Date Displays the service provider's earliest start date, taking into account the leave period that is defined on the Analysis Datamart page.

A service provider's start date may not be his or her earliest start date with the organization. If the service provider has left the organization and returned after a period of time that exceeds the leave period that you define on the Analysis Datamart page, then the service provider's start date is the date of his or her return to the organization.

Projected End Date Displays the start date plus the length of stay that is defined on the Analysis Datamart page.

End Date Displays the end date that is associated with the work order ID.

Excess Duration (days) Displays the resulting calculation of projected end date less the start date for the service provider and work order.

A positive value indicates the number of days in excess of the length of stay that is entered on the Analysis Datamart page, including Saturdays, Sundays, and holidays.

Note. The conversion from length of stay entered in months to excess duration in days is based on an average 30.4 days for a month.

Combined Length of Stay (days) Displays the resulting calculation of start date less end date for all service providers for the service provider and work order.

Analyzing Expense Life Cycles

You use the expense life cycle pages to analyze expenses at each stage of the expense cycle and by account, department, manager, project, supplier, or work order.

This section provides an overview of expense life cycle statuses and discusses how to:

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- View expense life cycle summary information.
- View expense life cycle-by-status summary information.
- View expense life cycle details by dimension and status.

Note. This section uses the expense life cycle work order summary and details as an example. Similar functionality applies to the other dimensions (account, department, manager, project, supplier, and work order) and respective detail pages.

Understanding Expense Life Cycle Statuses

The PeopleSoft system delivers expenses organized in these status categories:

Status	Description
Entered.	Timesheets and progress logs that are entered but not approved. These include timesheets and progress logs that are pending or denied status.
Submitted.	Timesheets and progress logs that are submitted by a service provider, but are not approved.
Approved.	Timesheets and progress logs that are approved but not invoiced.
Invoiced - Not Approved.	Timesheets and progress logs that are invoiced but pending approval. These include invoices that are generated, submitted to manager for approval, submitted to supplier for approval, rejected, rejected by supplier, and in adjusted status.
Invoiced - Supplier Approved.	Timesheets and progress logs that are invoiced and approved by the supplier.
Invoice Approved - Not Processed.	Timesheets and progress logs that are invoiced and approved, but not processed for billing.
Invoice Processed.	Invoices that are approved and processed.

The expense life cycle calculations include expenses from timesheets, progress logs, and invoices. For purposes of analysis, the PeopleSoft system delivers mapping for each expense life cycle status category as defined in these tables.

Timesheets

Timesheet mappings include:

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Transaction Translate Value	Transaction Translate Value Description	Expense Life Cycle Status
ADJ	Adjusted	Approved
DEN	Denied	Entered
HLD	Hold	Submitted
PND	Pending	Entered
RAP	Approved	Approved
SUB	Submitted	Submitted

Note. Timesheet entries are mapped for analysis purposes at the detailed level.

Progress Logs

Progress log mappings include:

Transaction Translate Value	Transaction Translate Value Description	Expense Life Cycle Status
APR	Approved	Approved
DEN	Denied	Entered
HLD	Hold	Submitted
PND	Pending	Entered
SUB	Submitted	Submitted

Note. Progress log entries are mapped for analysis purposes at the detailed level.

Invoices

Invoice mappings include:

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Invoice Status	Expense Life Cycle Status
Generated.	Invoiced - Not Approved.
Approved.	Invoice Approved - Not Processed.
Processed.	Invoice Processed.
Submitted.	Invoiced - Not Approved.
Rejected.	Invoiced - Not Approved.
Submitted to Supplier.	Invoiced - Not Approved.
Approved by Supplier.	Invoiced - Supplier Approved.
Rejected by Supplier.	Invoiced - Not Approved.
Canceled.	Not applicable.
Adjusted.	Invoiced - Not Approved.

Note. Invoice entries are mapped for analysis purposes at the header level.

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Pages Used to Analyze Expense Life Cycles

Page Name	Object Name	Navigation	Usage
Expense Life Cycle (summary)	SPR_EXPCYC_DASH_PG	Services Procurement, Interactive Reports, Expense Life Cycle	View expense life cycle summary graphs and data. Access detail pages.
Expense Life Cycle - Account by Status	SPR_EXPCYCAM_PG	Click the Account link on the Expense Life Cycle (summary) page for account.	View expenses that are incurred by account and status.
Expense Life Cycle - Account Details	SPR_EXPCYCAR_PG	Click the Status link on the Expense Life Cycle - Account by Status page.	View account details of expenses that are incurred by selected status.
Expense Life Cycle - Department by Status	SPR_EXPCYCDM_PG	Click the Department link on the Expense Life Cycle (summary) page for department.	View expenses that are incurred by department and status.
Expense Life Cycle - Department Details	SPR_EXPCYCDR_PG	Click the Status link on the Expense Life Cycle - Department by Status page.	View department details of expenses that are incurred by selected status.
Expense Life Cycle - Manager by Status	SPR_EXPCYCMM_PG	Click the Manager link on the Expense Life Cycle (summary) page for manager.	View expenses that are incurred by manager and status.
Expense Life Cycle - Manager Details	SPR_EXPCYCMR_PG	Click the Status link on the Expense Life Cycle - Manager by Status page.	View manager details of expenses that are incurred by selected status.
Expense Life Cycle - Project by Status	SPR_EXPCYCPM_PG	Click the Project link on the Expense Life Cycle (summary) page for project.	View expenses that are incurred by project and status.
Expense Life Cycle - Project Details	SPR_EXPCYCPR_PG	Click the Status link on the Expense Life Cycle - Project by Status page.	View project details of expenses that are incurred by selected status.
Expense Life Cycle - Supplier by Status	SPR_EXPCYCVM_PG	Click the Supplier link on the Expense Life Cycle (summary) page for supplier.	View expenses that are incurred by supplier and status.
Expense Life Cycle - Supplier Details	SPR_EXPCYCVR_PG	Click the Status link on the Expense Life Cycle - Supplier by Status page.	View supplier details of expenses that are incurred by selected status.
Expense Life Cycle - Work Order by Status	SPR_EXPCYCWM_PG	Click the Work Order link on the Expense Life Cycle (summary) page for work order.	View expenses that are incurred by work order and status.
Expense Life Cycle - Work Order Details	SPR_EXPCYCWR_PG	Click the Status link on the Expense Life Cycle - Work Order by Status page.	View work order details of expenses that are incurred by selected status.

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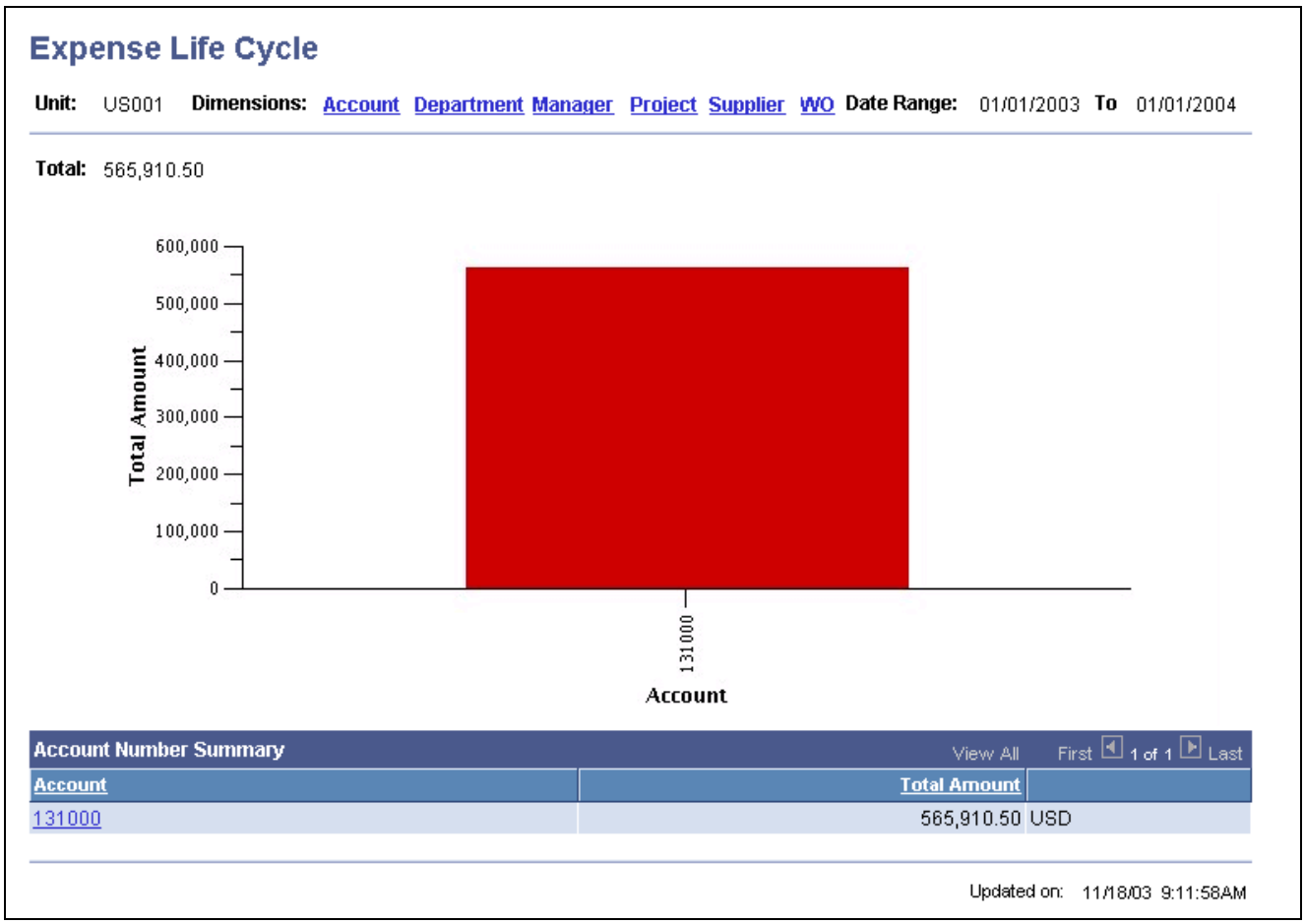
Viewing Expense Life Cycle Summary Information

Access the Expense Life Cycle (summary) page.



Expense Life Cycle (summary) page

Total Amount Displays total costs from time, expenses, and progress logs, including those in the various processing stages, by work order.

Viewing Expense Life Cycle-by-Status Summary Information

Access the Expense Life Cycle - Work Order by Status page. You can also access this page for account, department, manager, project, supplier, and work order.

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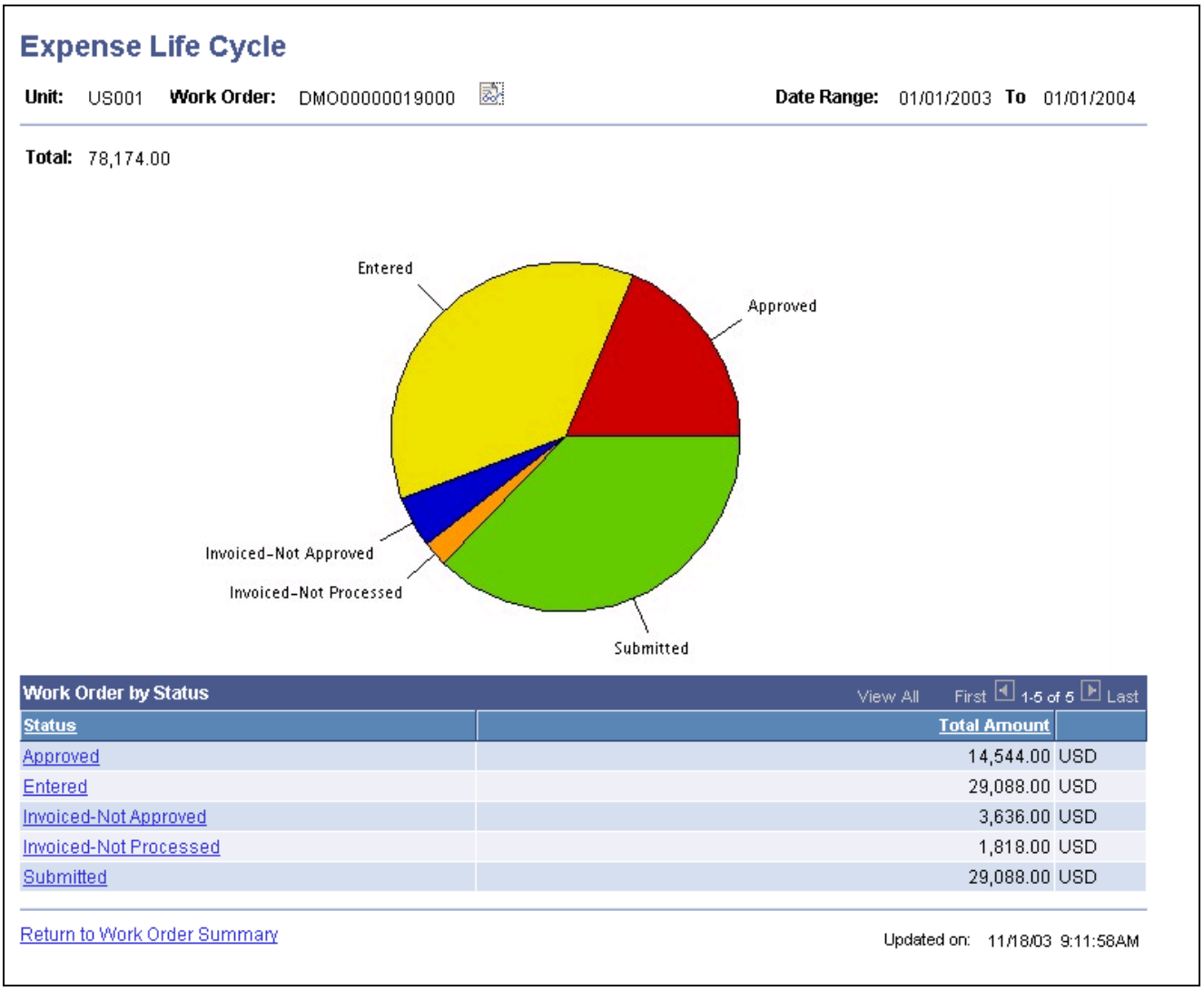

Expense Life Cycle - Work Order by Status page

Total Amount Displays the total costs from time, expenses, and progress logs for all work orders by status.

Viewing Expense Life Cycle Details by Dimension and Status

Access the Expense Life Cycle (details) page for a dimension and status.

The system displays detailed information about the work order for the selected status.

Analyzing Expense Variance

You use the expense variance pages to analyze expense variance by department, manager, project, purchase order, or supplier.

This section discusses how to:

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- View expense variance summary information.
- View expense variance details.

Note. This section uses the expense variance project summary and details as an example. Similar functionality applies to the other dimensions (department, manager, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Expense Variance

Page Name	Object Name	Navigation	Usage
Expense Variance (summary)	SPR_EXPVAR_DASH_PG	Services Procurement, Interactive Reports, Expense Variance	View expense variance summary graphs and data. Modify parameters that are used to create the graphs. Access detail pages.
Expense Variance - Department Details	SPR_EXPVARDR_PG	Click the Department link on the Expense Variance (summary) page for department.	View detailed expense variance information for a selected department.
Expense Variance - Manager Details	SPR_EXPVARMR_PG	Click the Manager link on the Expense Variance (summary) page for manager.	View detailed expense variance information for a selected manager.
Expense Variance - Project Details	SPR_EXPVARPR_PG	Click the Project link on the Expense Variance (summary) page for project.	View detailed expense variance information for a selected project.
Expense Variance - Purchase Order Details	SPR_EXPVAROR_PG	Click the Purchase Order link on the Expense Variance (summary) page for purchase order.	View detailed expense variance information for a selected purchase order.
Expense Variance - Supplier Details	SPR_EXPVARSR_PG	Click the Supplier link on the Expense Variance (summary) page for supplier.	View detailed expense variance information for a selected supplier.

Viewing Expense Variance Summary Information

Access the Expense Variance (summary) page.

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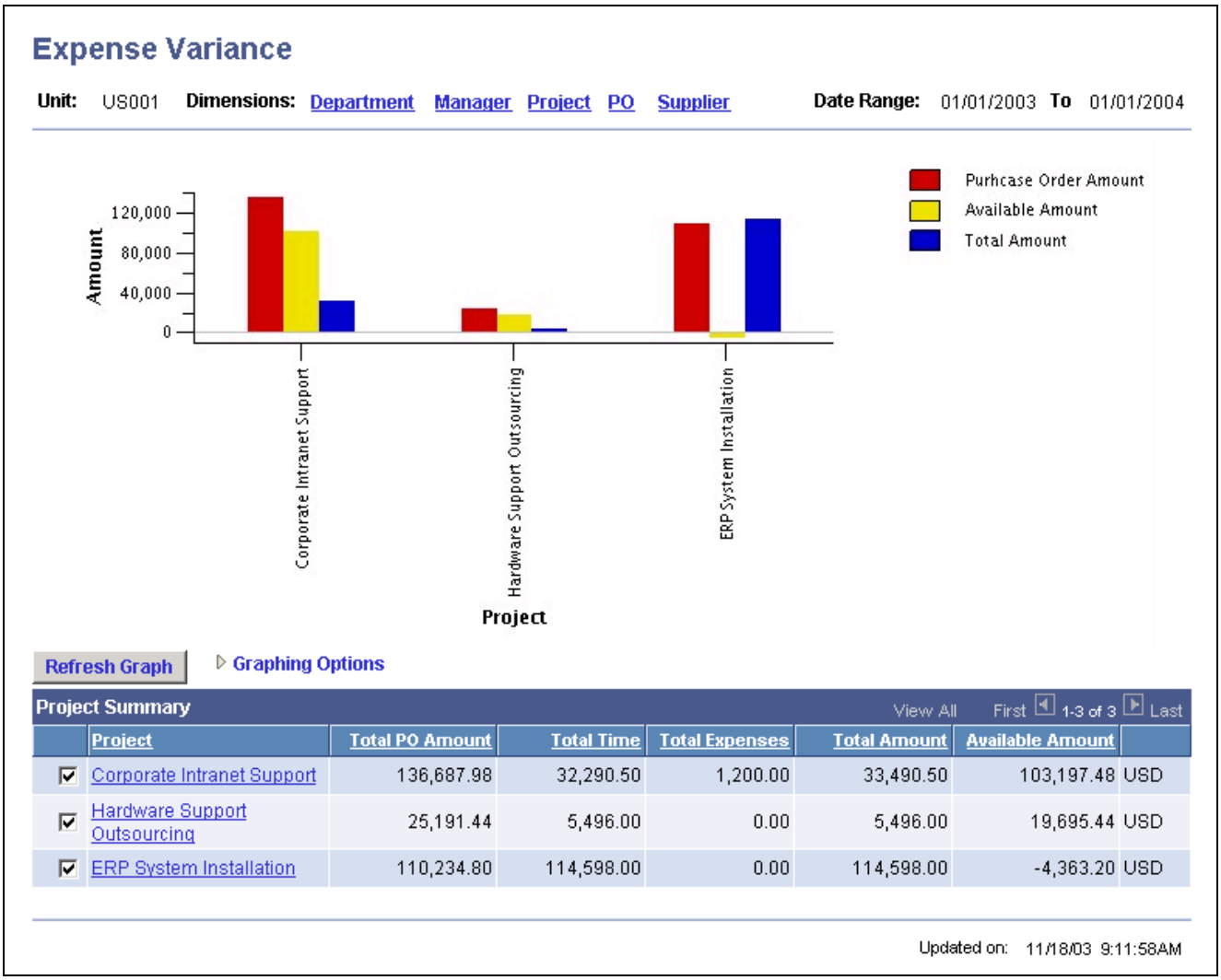

Expense Variance (summary) page

Graphing Options

Select the options in the collapsible Graphing Options group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on time and another based on count.

The system displays an error message if you select parameters that are of different measurement types.

Refresh Graph

Click to display the graph by using the selected graphing options and data points.

Note. Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph.

By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Variance Amount

Displays the difference between the total purchase order amount and forecast total.

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Viewing Expense Variance Details

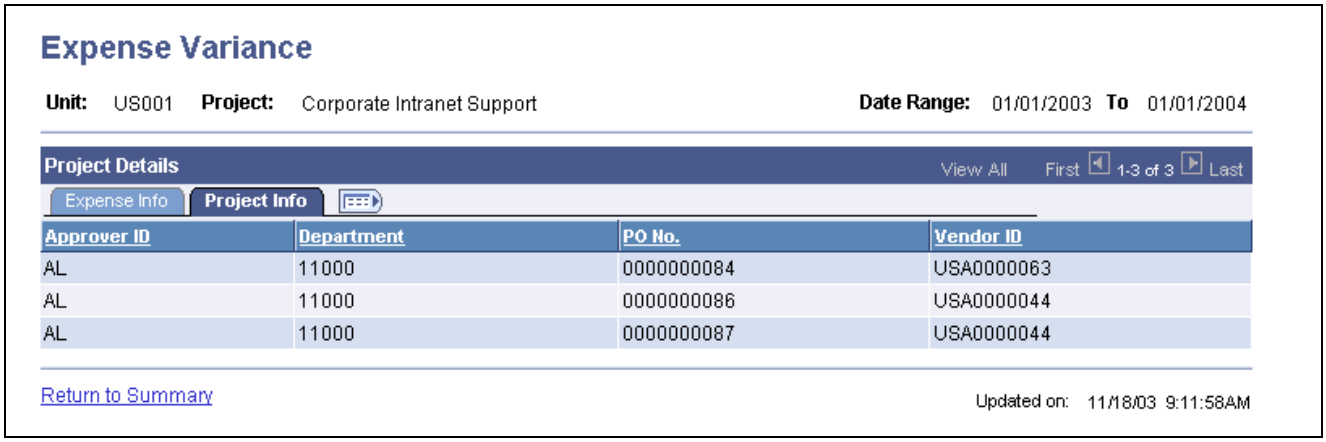
Access the Expense Variance (details) page.

The system displays detailed expense information about the service providers for the selected project.

Click the Show All Columns button to view data from both the Expense Info (expense information) tab and the Project Info (project information) tab.

Project Info

Select the Project Info tab.



Expense Variance - Project Details page: Project Info tab

The system displays detailed expense information about the service providers for the selected project.

Click the Show All Columns button to view data from both the Expense Info tab and the Project Info tab.

Analyzing Supplier Performance

You use the supplier performance pages to analyze supplier performance by supplier or role.

This section discusses how to:

- View supplier performance summary information.
- View supplier performance details.

Note. This section uses the supplier performance supplier summary and details as an example. Similar functionality applies to the role summary and detail pages.

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Pages Used to Analyze Supplier Performance

Page Name	Object Name	Navigation	Usage
Service Supplier Performance (summary)	SPR_SUP_S_PG	Services Procurement, Interactive Reports, Supplier Performance	View supplier performance summary graphs and data. Modify parameters that are used to create the graphs. Access detail pages.
Service Supplier Performance - Supplier Details	SPR_SUP_SR_PG	Click the Supplier link on the Service Supplier Performance summary page for project.	View requisition and candidate statistics by supplier.
Service Supplier Performance - Role Details	SPR_SUP_RR_PG	Click the Role link on the Service Supplier Performance summary page for role.	View requisition and candidate statistics for this role.

Viewing Supplier Performance Summary Information

Access the Service Supplier Performance (summary) page.

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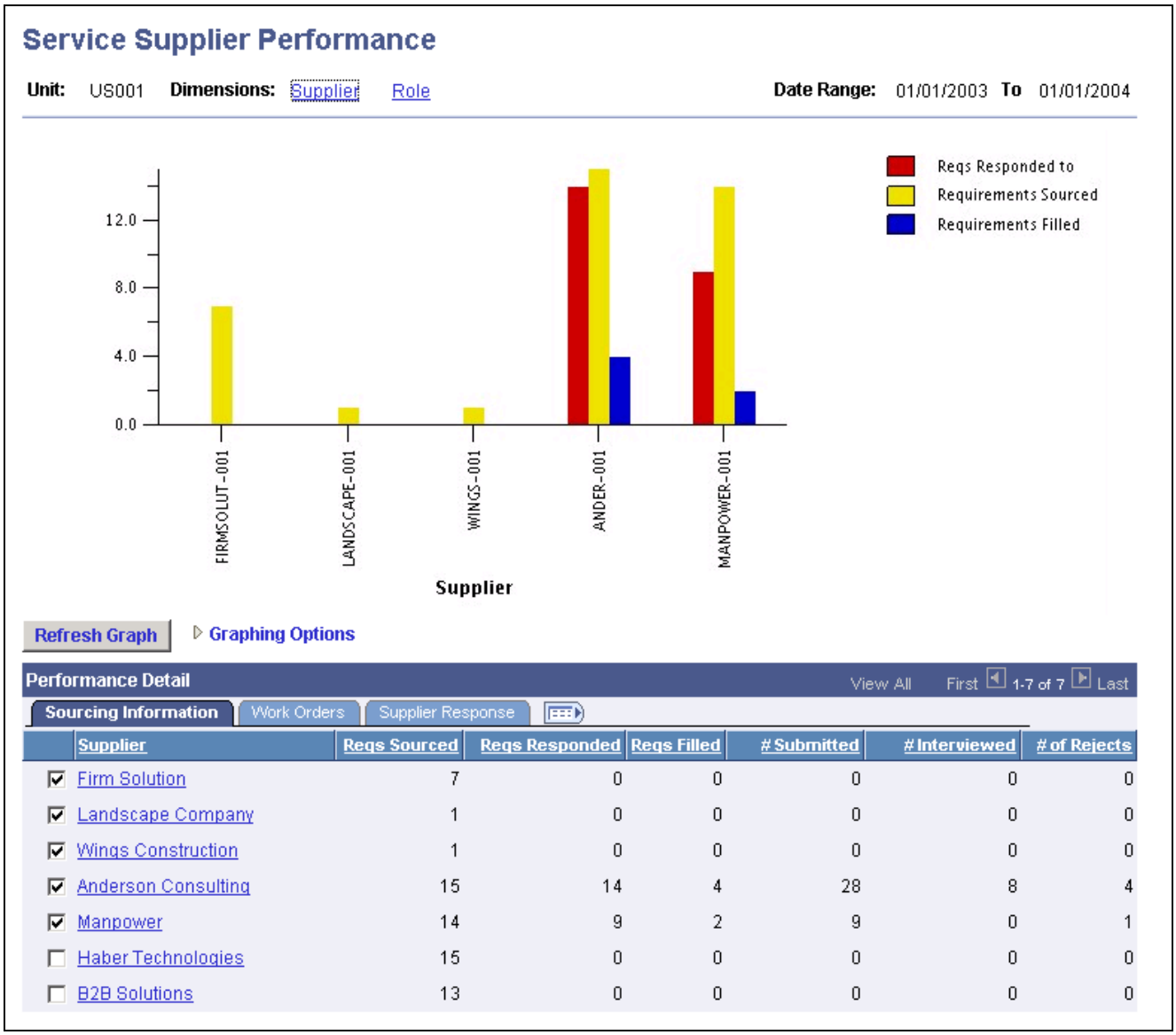

Service Supplier Performance (summary) page

Graphing Options

Select the options in the collapsible Graphing Options group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on amount, such as purchase order amount, and another based on count, such as work orders filled.

The system displays an error message if you select parameters of different measurement types.

Refresh Graph

Click to display the graph by using the selected graphing options and data points.

Note. Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph.

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By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Work Orders

Select the Work Orders tab.

View work order summary information for each supplier for the business unit.

Supplier Response

Select the Supplier Response tab.

View supplier response time summary information by supplier for the business unit.

Viewing Supplier Performance Details

Access the Service Supplier Performance - Supplier Details page.

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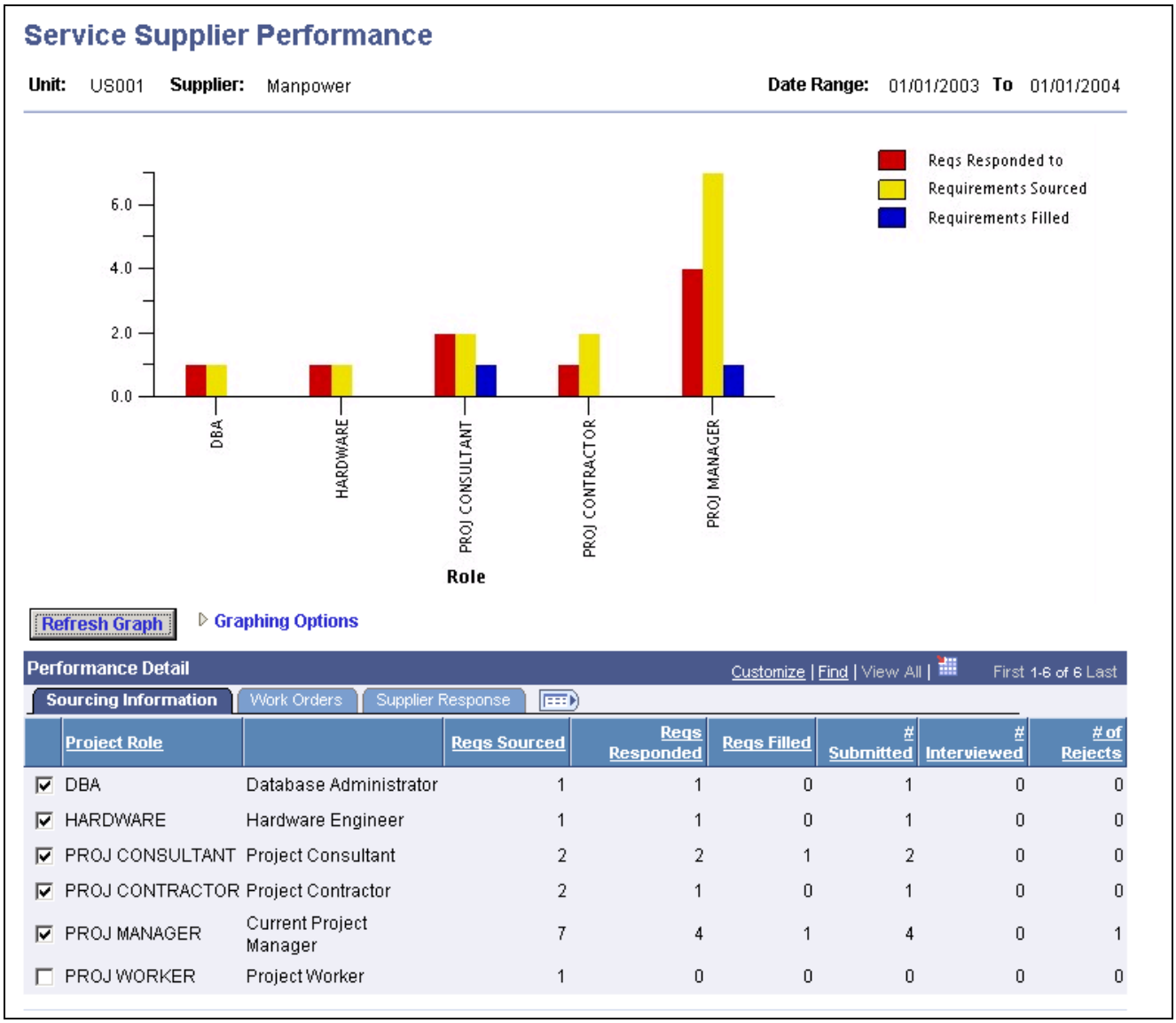

Service Supplier Performance - Supplier Details page

Sourcing Information

View requisition details by project role for a selected supplier.

Work Orders

Select the Work Orders tab.

View work order details by project role for a selected supplier.

Supplier Response

Select the Supplier Response tab.

View supplier response time details by project role for a selected supplier.

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Comparing Supplier Rates

You use the supplier rate comparison pages to analyze average rates of suppliers by supplier or role.

Note. You use the supplier rate comparison pages similar to how you use the expense life cycle pages.

This section lists the pages used to compare supplier rates.

See Also

Chapter 24, "Interactive Reports in PeopleSoft Services Procurement," Analyzing Expense Life Cycles, page 419

Pages Used to Compare Supplier Rates

Page Name	Object Name	Navigation	Usage
Supplier Rate Comparison (summary)	SPR_SRTCMP_DASH_PG	Services Procurement, Interactive Reports, Supplier Rate Comparison	View supplier rate comparison summary graphs and data. Access detail pages.
Supplier Rate Comparison - Supplier Details	SPR_SRTCMPSM_PG	Click the Supplier link on the Supplier Comparison summary page for suppliers.	View average rates by role for this supplier.
Supplier Rate Comparison - Role Details	SPR_SRTCMPRM_PG	Click the Role link on the Supplier Comparison summary page for roles.	View average rates by supplier for this role.
Supplier Rate Comparison - Service Providers for Supplier and Role	SPR_SRTCMPSD_PG	Click the Current Project Manager link on the Supplier Rate Comparison - Role Details page.	View service providers by supplier for a selected role.
Supplier Rate Comparison - Service Providers for Role and Supplier	SPR_SRTCMPRD_PG	Click the Supplier link on the Supplier Rate Comparison - Supplier Details page.	View service providers by role for a selected supplier.

Analyzing Minority-Owned Suppliers

The Minority Owned Suppliers page shows a summary of the number of bids that minority-owned suppliers receive and the number of work orders that are awarded to each category for the business unit.

This section discusses how to view minority-owned supplier summary information.

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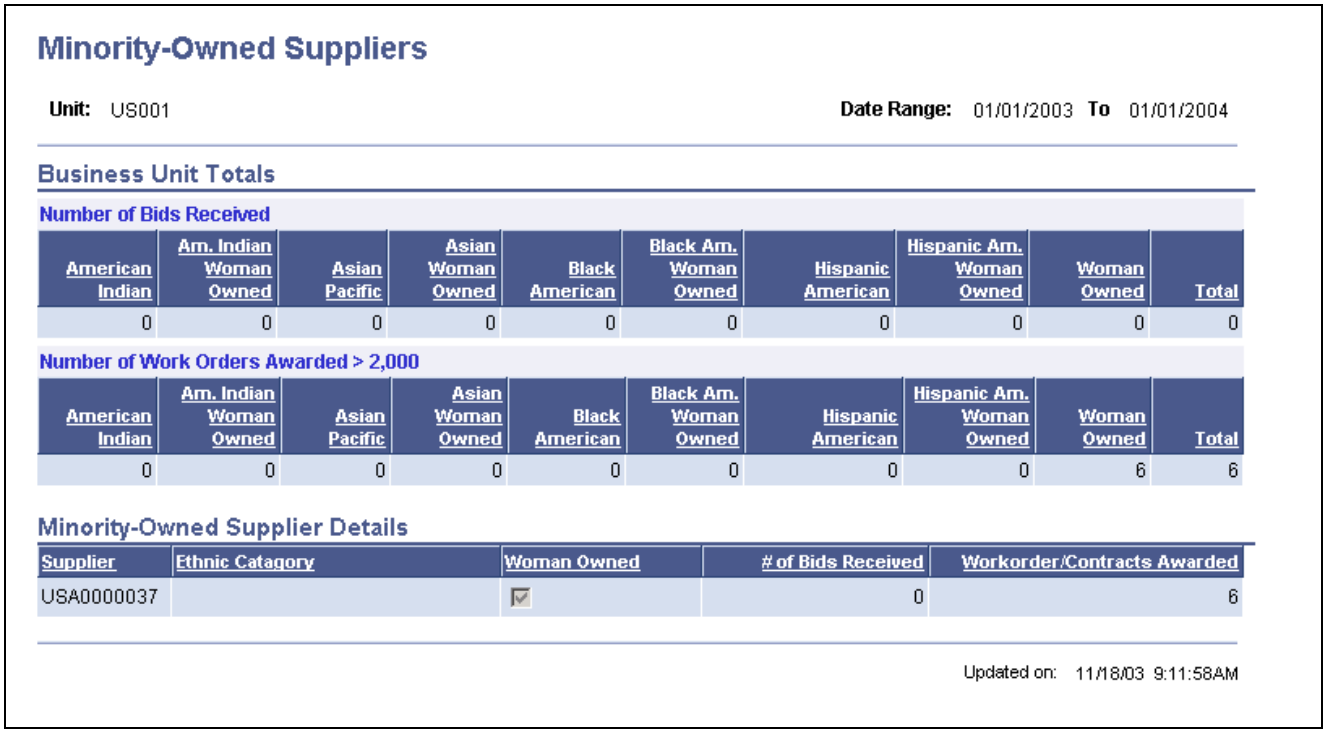
Page Used to Analyze Minority-Owned Suppliers

Page Name	Object Name	Navigation	Usage
Minority-Owned Suppliers	SPR_MOS_PG	Services Procurement, Interactive Reports, Minority-Owned Suppliers	View the number of bids that are received and the number of work orders that are awarded for each minority-owned supplier.

Viewing Minority-Owned Supplier Summary Information

Access the Minority-Owned Suppliers page.



Minority-Owned Suppliers

Unit: US001 **Date Range:** 01/01/2003 **To** 01/01/2004

Business Unit Totals

Number of Bids Received

American Indian	Am. Indian Woman Owned	Asian Pacific	Asian Woman Owned	Black American	Black Am. Woman Owned	Hispanic American	Hispanic Am. Woman Owned	Woman Owned	Total
0	0	0	0	0	0	0	0	0	0

Number of Work Orders Awarded > 2,000

American Indian	Am. Indian Woman Owned	Asian Pacific	Asian Woman Owned	Black American	Black Am. Woman Owned	Hispanic American	Hispanic Am. Woman Owned	Woman Owned	Total
0	0	0	0	0	0	0	0	6	6

Minority-Owned Supplier Details

Supplier	Ethnic Catagory	Woman Owned	# of Bids Received	Workorder/Contracts Awarded
USA0000037		☑	0	6

Updated on: 11/18/03 9:11:58AM

Minority-Owned Suppliers page

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CHAPTER 25

Supplier Scoring for PeopleSoft Services Procurement

This chapter provides an overview of supplier scoring for PeopleSoft Services Procurement and discusses how to:

- Set up performance level codes.
- Set up supplier scoring rules.
- Set up supplier scoring parameters.
- View PeopleSoft Services Procurement pages that use supplier scoring.

Understanding Supplier Scoring for PeopleSoft Services Procurement

Supplier scoring for PeopleSoft Services Procurement provides you with supplier metrics to help score, analyze, and compare suppliers across the requisition life cycle. Use supplier scoring to determine the best suppliers that meet the requisition requirements. We provide standard scoring setup pages to assist you in creating the own enterprise metrics for scoring suppliers.

Use supplier scoring to:

- Define performance level codes to determine the various levels at which suppliers perform.
- Analyze and compare performance metrics and performance level codes across the requisition life cycle.
- Source requisitions to qualified suppliers that meet the scoring requirements.
- Define supplier scoring parameters, such as rule score, start date, and duration start date.

  Use the Service Procurement Business Unit page to schedule time intervals for retrieving score data from the PeopleSoft Services Procurement database.

The Supplier Scoring Process

This is the basic task flow of the service scoring process:

1. Access the Supplier Performance Level Codes page to set up supplier performance level codes.
2. Use the Supplier Scoring Rules page to set up supplier scoring rules.
3. Access the Services Procurement Business Units page to set up supplier scoring parameters.

   You can also use this page to identify the scoring rule, define a specific period of time for gathering scoring data, and calculate supplier scores.
4. Use supplier scoring logic within the Scoring component.

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Common Elements Used in This Chapter

Performance Level Codes Determines various levels at which suppliers perform. Use the Performance Level Codes page to create specific performance codes to help evaluate suppliers' performance. Each performance code has four levels that are used to determine a range for evaluation. For example, you might create the performance level code RESPONSE_TIME to determine the average response time of suppliers. Or, you might create performance level CAND_SUB_PER_REQ to determine the average number of candidates that suppliers submit per requisition. The performance range for the CAND_SUB_PER_REQ level code might include the following levels: Level One = 2, Level Two = 4, Level Three = 6, and Level Four = 8, to represent the number of candidates that are submitted per requisition.

Note. Reverse performance levels as needed.

The combined level amount can equal more than 100 percent.

Supplier Scoring Rules User-defined rule that calculates supplier performance metrics, level codes, weight, and performance-level ranges.

Supplier Performance Element Essential performance factors (such as total candidates submitted, total positions filled, or total work orders rejected).

Supplier Performance Metrics Measurement of supplier performance based on specific predefined elements.

Services Supplier Score Overall supplier score.

Note. This score is the supplier total weight (or score) divided by the total weight of the supplier rule.

Setting Up Performance Level Codes

To set up performance level codes, use the Performance Level Codes (SPB_LVL_CD) component.

This section discusses how to set up performance level codes.

Page Used to Set Up Performance Level Codes

Page Name	Object Name	Navigation	Usage
Performance Level Code	SPB_LVL_CD	Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Performance Level Codes	Determine various levels at which suppliers perform.

Setting Up Performance Level Codes

Access the Performance Level Code page.

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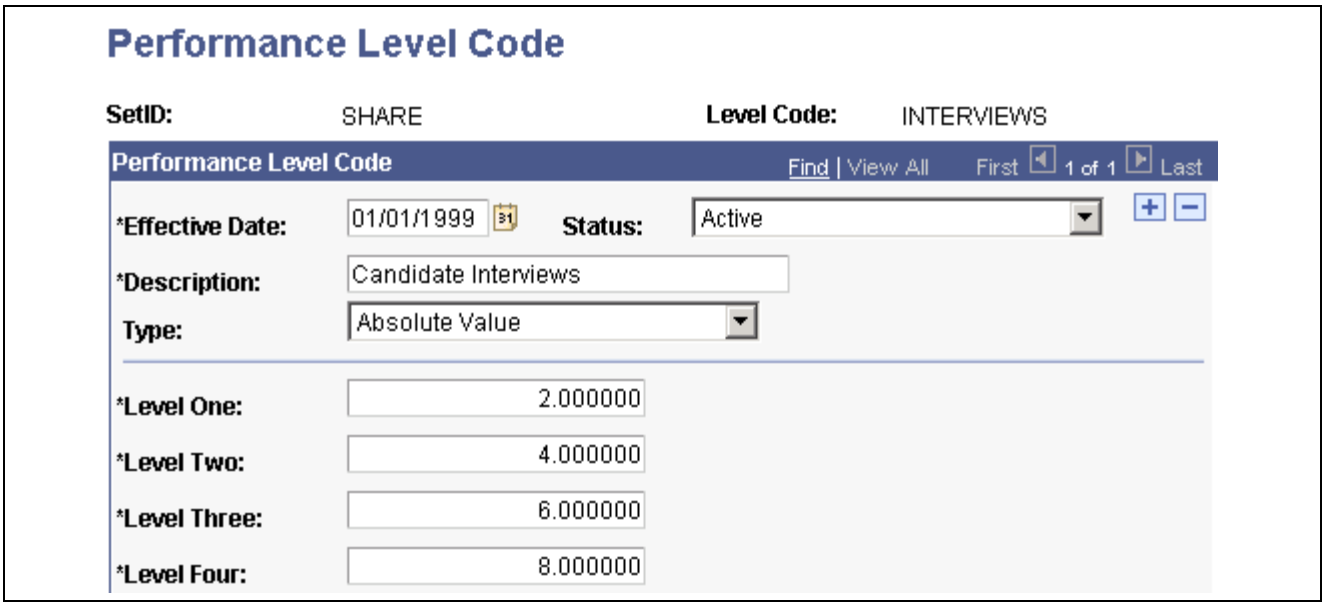

Performance Level Code page

Type Select *Absolute Value.*

Level One, Level Two, Level Three, and **Level Four** Enter four maximum range values for the performance level that you create. Use these values to determine the range for evaluating supplier performance levels. For example, you might create performance level code INTERVIEW to determine the number of candidate interviews that a supplier is scheduled for per requisition. The performance levels for the INTERVIEW performance code might include the following levels: Level One = 2, Level Two = 4, Level Three = 6, and Level Four = 8. In this example, level four represents the best possible score and level one represents the worst possible score.

Note. Reverse levels as needed.

Setting Up Supplier Scoring Rules

To set up supplier scoring rules, use the Supplier Scoring Rules (SPB_SUP_SCORE_RULE) component.

This section discusses how to set up supplier scoring rules.

Pages Used to Set Up Supplier Scoring Rules

Page Name	Object Name	Navigation	Usage
Supplier Scoring Rule	SPB_SUP_SCORE_RULE	Services Procurement, Define Services Procurement, Sourcing Setup, Supplier Scoring Setup, Scoring Rules	Define a supplier scoring rule that calculates supplier scoring metrics, level codes, weight, and performance-level ranges.

Setting Up Supplier Scoring Rules

Access the Supplier Scoring Rule page.

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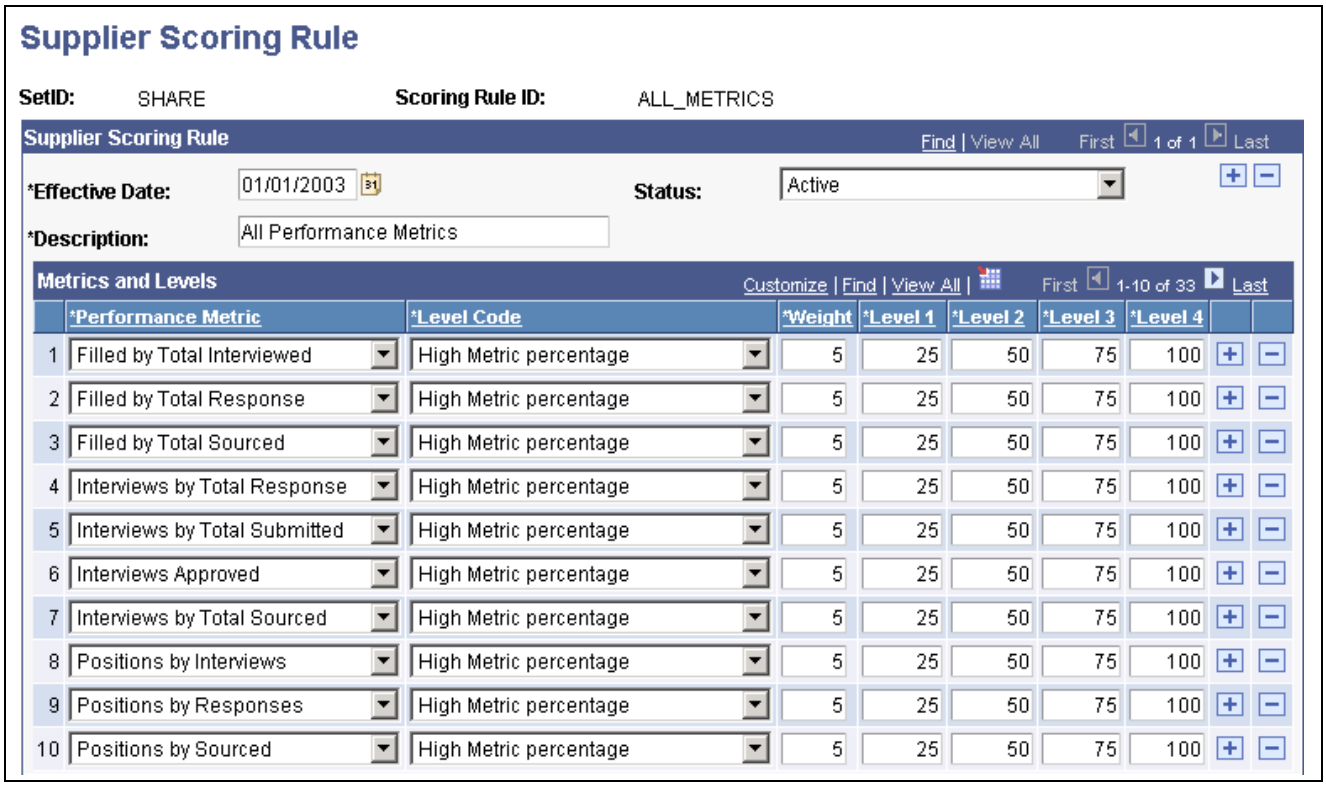

Supplier Scoring Rules page

Performance Metrics Select one or more performance elements to calculate the supplier score.

Weight Enter the best possible weight that you want suppliers to receive.

Note. Enter desired weighting amount. The weight value need not equal 100 percent.

Setting Up Supplier Scoring Parameters

This section discusses how to set up supplier scoring parameters.

Page Used to Set Up Supplier Scoring Parameters

Page Name	Object Name	Navigation	Usage
Services Procurement Business Unit Options	BUS_UNIT_TBL_SP	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn (Services Procurement Definition)	Define consolidation structures for accounting and reporting purposes.

Setting Up Supplier Scoring Parameters

Access the Services Procurement Business Units Options page.

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Supplier Scoring

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

Note. It is also possible to define a minimum supplier score at the service type level. If a minimum score is defined, it takes precedence over the minimum score setting of the BU.

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

Use Current Date Select to define duration date as the current system date. If selected, the system uses the number of reporting months relative to the current system date for each process instance.

Duration Date Enter the date that is used to determine the ending date for the analysis data. Score processing includes the duration defined by the specified number of months going backward or forward from this date.

Note. This field is only available when the Use Current Date is not selected.

Exclude All Data Before Enter the date that is used to determine the absolute begin date of the analysis data. The system retrieves data from this date forward. The default is the current system date.

Note. If the values that you enter for duration date and number of reporting months define a date before the entered start date, the system does not retrieve data prior to the entered start date. For example, if the start date is January 1, 2006, the duration date is June 30, 2006, and number of reporting months is 12, indicating that you want 12 months of data prior to June 30, 2006, then the system retrieves data only for the period between January 1, 2006 and June 30, 2006. Data prior to January 1, 2006, or in this example between July 1, 2005 and December 31, 2005, is not retrieved.

# of Reporting Months (number of reporting months) The system uses the duration date in conjunction with the number of reporting months to determine the time period that is used to retrieve the analysis data. Enter the number of reporting months to define the number of months before or after the duration date for which you want to retrieve data.

Enter a positive value for number of reporting months to indicate the number of months starting from the duration date to be included in the process. Use a negative number to indicate the number of months prior to the duration date to include in the process.

Note. The system does not retrieve data prior to the entered start date regardless of the entered duration date and number of reporting months.

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

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See Also

Chapter 4, “Setting Up PeopleSoft Services Procurement,” Setting Up Business Unit Definitions, page 26

Chapter 5, “Setting Up Application Specific Options for PeopleSoft Services Procurement,” page 57

Viewing PeopleSoft Services Procurement Pages That Use Supplier Scoring

This section provides you with a table of PeopleSoft Services Procurement pages that use supplier scoring.

Table of Pages That Use Supplier Scoring

There are three Supplier Scoring pages:

Page Name	Navigation	Usage
Sourcing Selection	Services Procurement, Review and Source Requisitions Click the sourcing selection icon that corresponds with the requisition ID and line that you want to source. Home, Worklist Click the link that corresponds with the requisition ID and line that you want to source.	Enter sourcing requirements.
Supplier Scoring Results	Click the Score Analysis button on the Sourcing Selections page.	View the vendor score.
Services Procurement Business Unit Option	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Defn (Services Procurement Definition)	Set up sourcing parameters.

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APPENDIX A

Additional Implementation Process Flow Information

This chapter discusses important implementation process flow information relating to:

- Shifts.
- Assignments.
- Time category overrides.
- Service provider/coordinator role.

Shifts Process Flow

The following diagrams illustrate the process flow for shifts in PeopleSoft Services Procurement:

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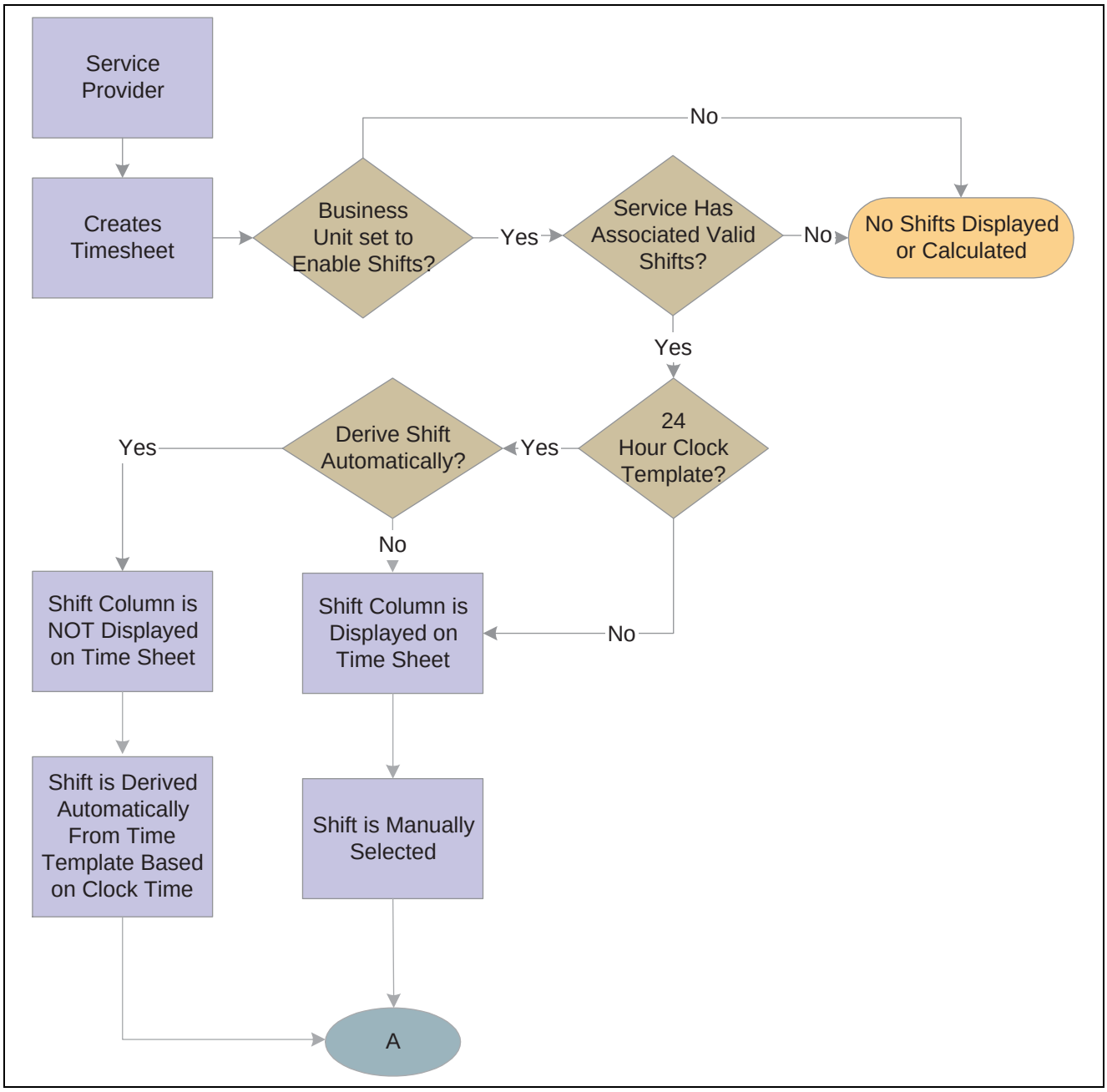

Shifts Process Flow (1 of 2)

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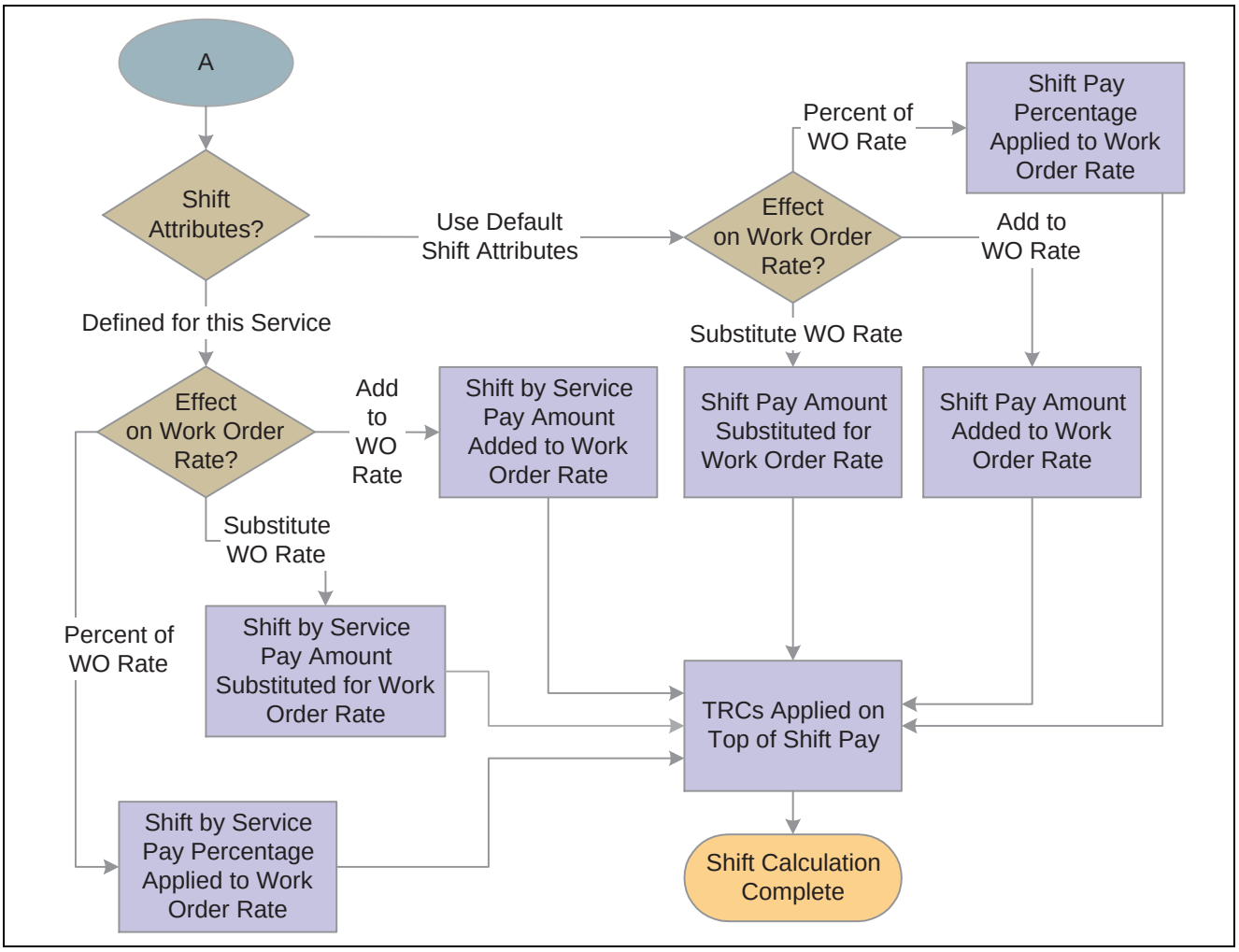

Shifts Process Flow (2 of 2)

Assignments Process Flow

The following diagrams illustrate the process flow for assignments in PeopleSoft Services Procurement:

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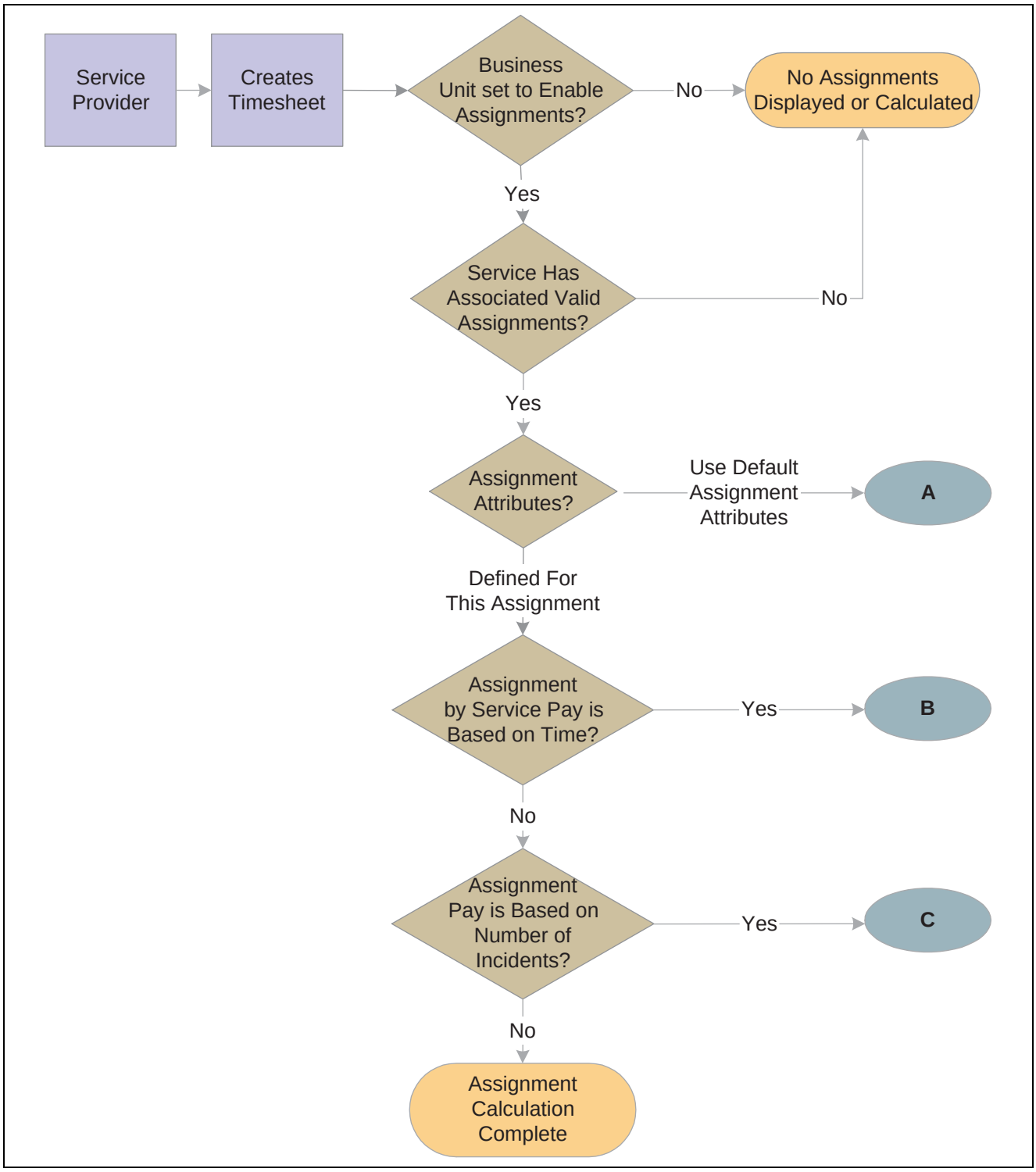

Assignments Process Flow (1 of 4)

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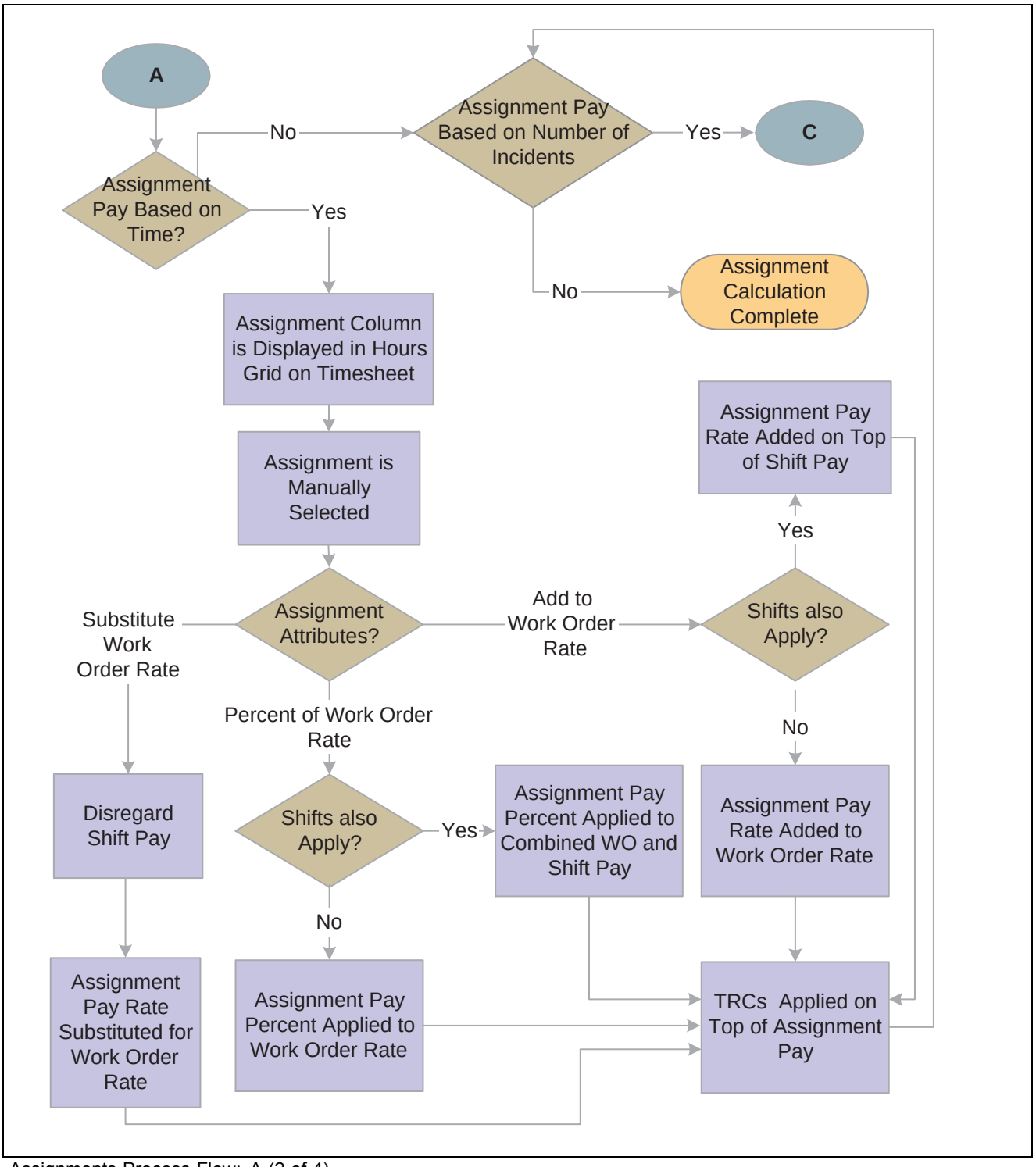

Assignments Process Flow: A (2 of 4)

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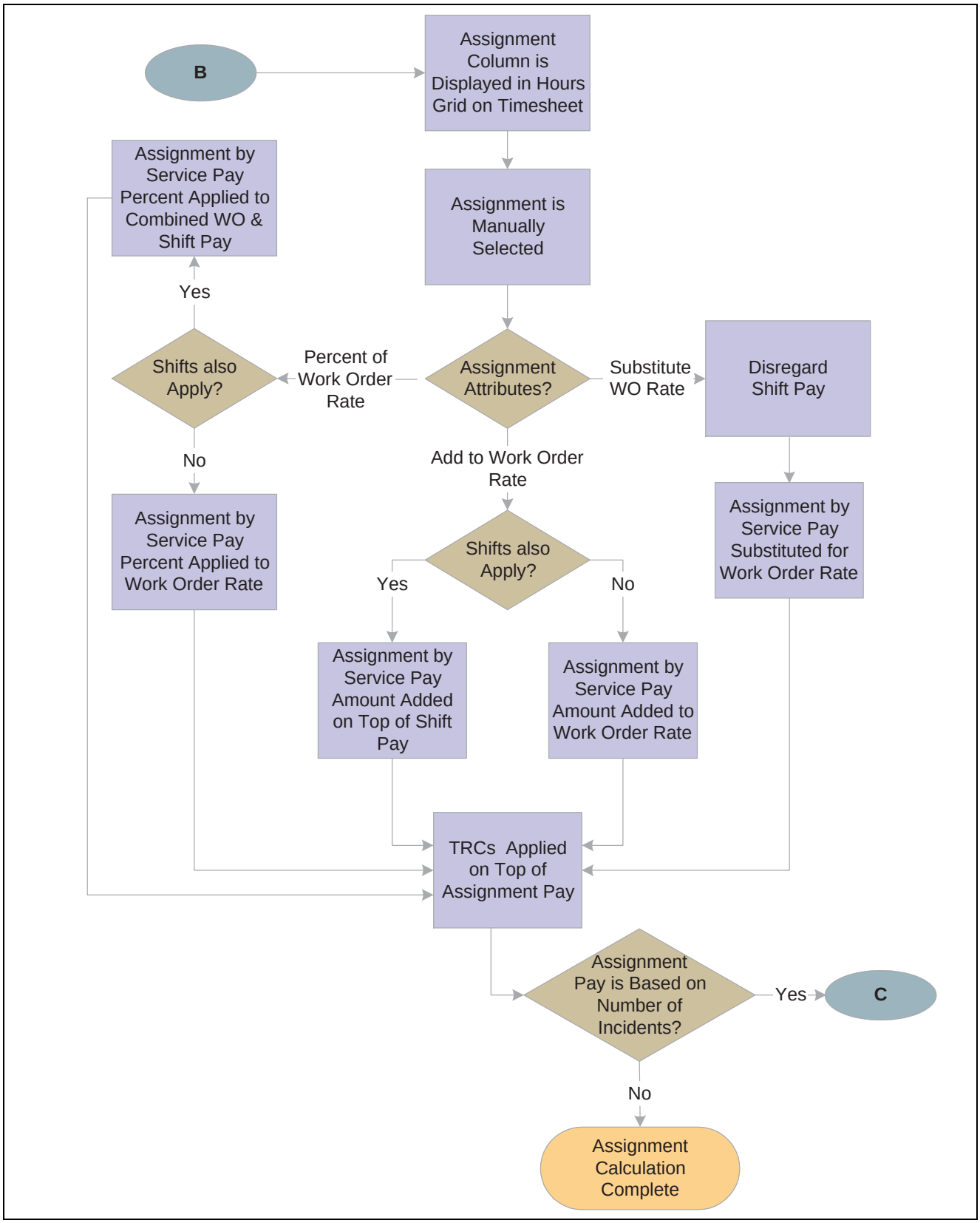

Assignments Process Flow: B (3 of 4)

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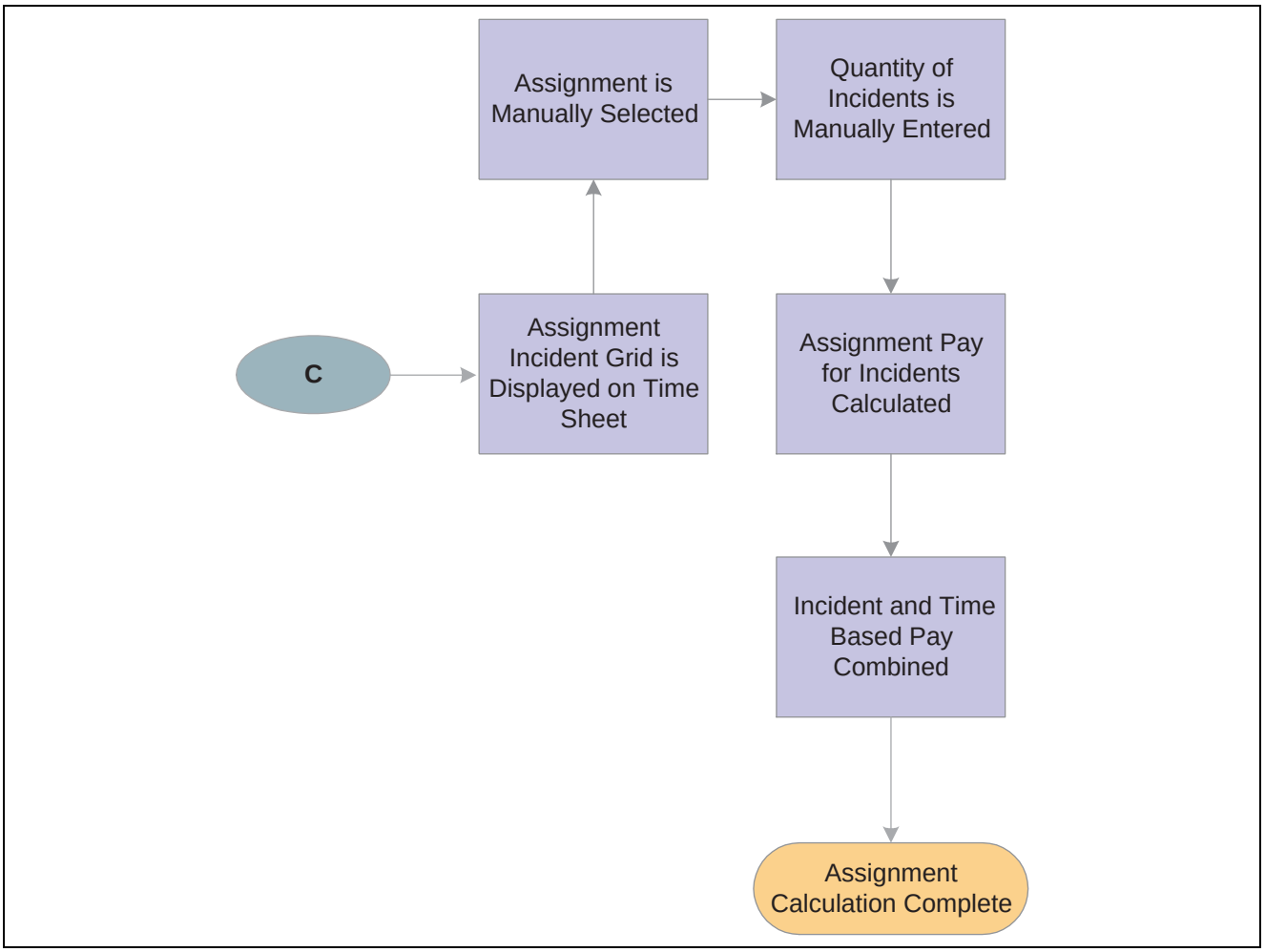

Assignments Process Flow: C (4 of 4)

Time Category Override Process Flow

The following diagram illustrates the process flow for time category overrides in PeopleSoft Services Procurement:

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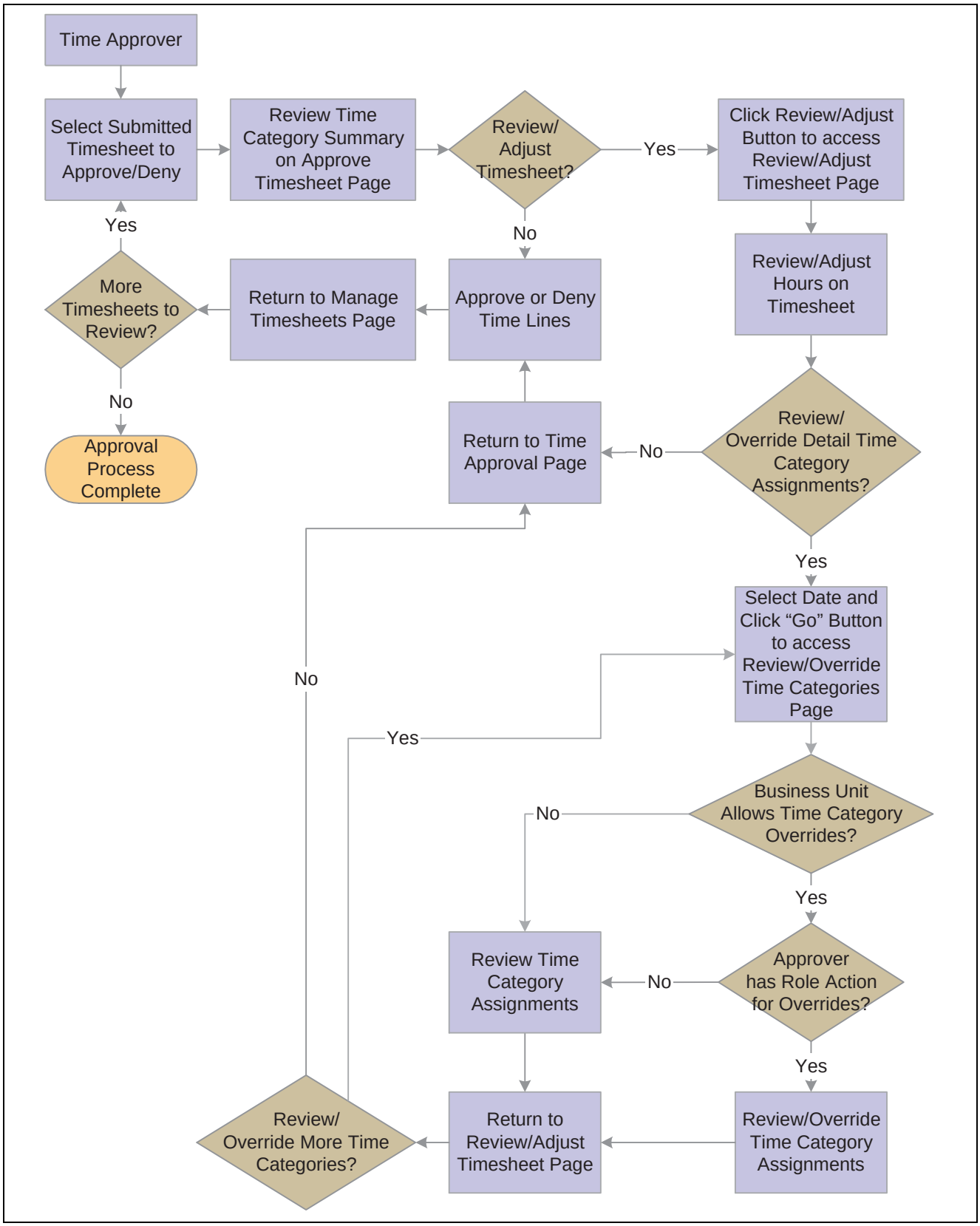

Time Category Override Process Flow

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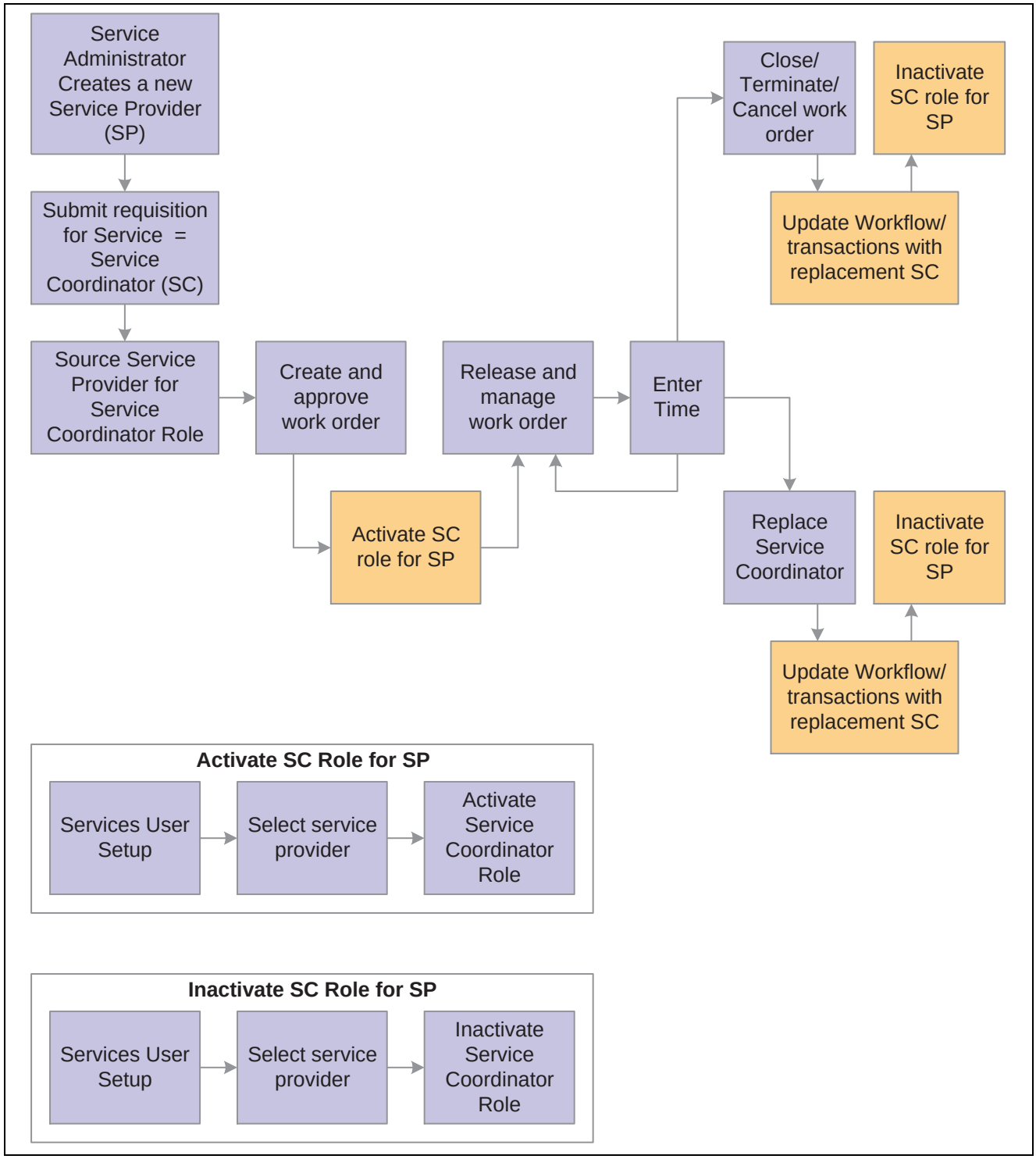
Service Provider/Coordinator Role Process Flow

The following diagram illustrates the process flow for service provider/coordinator role used in PeopleSoft Services Procurement:



Service Provider/Coordinator Combined Role process flow

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Service Provider/Coordinator Role — Worklist Information

This section lists the worklist information that is moved or created when you replace a service coordinator on requisitions and work orders.

Requisitions

The following table lists the worklist information that is moved or created when you replace a service coordinator on requisitions:

Step	Requisition Status	Worklist Description	Reassign Worklists - Assign To the Team Members*
1	Open	Define Rate worklist entries (depending on the business unit setup information)	All team members
2	Pending/Denied	Preapproval Sourcing Worklist (based on the allow Sourcing Prior to approval option on the business unit setup)	All team members
3	Approved	Sourcing Worklist	All team members
4	Sourced	Approved Worklist Sourcing Worklist Last Bid Worklist (one for each supplier; worklists needs to be triggered in case of a team)	Default team member
5	Filled	Approved Worklist Sourcing Worklist Work Order Creation Worklist	Default team member
6	Canceled	None	None
7	Closed	None	None

*When no team is involved, the Worklist items will be assigned to the specific replacement service coordinator.

Work Orders

The following table lists the worklist information that is moved or created when you replace a service coordinator on work orders:

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Step	Requisition Status	Worklist Description	Reassign Worklists - Assign To the Team Members*
1	Open/Denied	Define Rate worklist entries (depending on the business unit setup information) Alert Worklist Entries	All team members
2	Submitted	Alert Worklist Entries	Default team member
3	Approved	Approved Worklist, Alert Worklist Entries	Default team member
4	Released	Alert Worklist Entries Survey Worklist Entries	Default team member
5	Canceled/Closed/Terminate	Alert Worklist Entries Survey Worklist Entries	Default team member
6	Extended/Reassign	None	None

*When no team is involved, the Worklist items will be assigned to the specific replacement service coordinator.

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APPENDIX B

Shifts and Assignments — Examples and Use Case Scenarios

This chapter provides examples of:

- Shifts used in PeopleSoft Services Procurement.
- Shifts and assignments — use case scenarios.

Shifts Used in PeopleSoft Services Procurement

This section discusses how shifts can be used in PeopleSoft Services Procurement.

Shift Example

Work Order 1000 is created and released for a service of IT Worker with a rate of $35 per hour with duration of 07/01/99 to 06/30/2006. The service provider will be spending some time on the swing shift, which may qualify for special pay. The following shift definitions are applicable over the course of the work order:

Swing Shift Definition

Effective Date	Start/Stop Time	Shift Percent	Shift Rate (MHR)	Rate Type
01/01/1900	3:00PM/11:00PM	10	NA	NA
01/01/2000	3:00PM/11:00PM	NA	$5.00	Add to WO Rate
01/01/2005	2:00PM/10:00PM	NA	$5.00	Add to WO Rate

Swing Shift by Service Definition for IT Worker

Effective Date	Shift Attribute Value	Start/Stop Time	Shift Percent	Shift Rate (MHR)	Rate Type
01/01/1999	Use Default Shift Attributes	NA	NA	NA	NA
01/01/2002	Define for this Service	3:00PM/11:00PM	NA	$45.00	Substitute WO Rate

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Effective Date	Shift Attribute Value	Start/Stop Time	Shift Percent	Shift Rate (MHR)	Rate Type
01/01/2004	Use Default Shift Attributes	NA	NA	NA	NA
01/01/2006	Disable Shift for This Service	NA	NA	NA	NA

Swing Shift by Service Definition for IT Worker based on Time Template

Effective Date	Automatically Derive Shifts	Associated Shifts	Start/Stop Time	Hours Worked
01/01/1990	No	NA	NA	NA
01/01/2006	Yes	Swing	1:00PM to 9:00 PM	Hours worked are compared to the shift start and stop times defined on time template.
01/01/2006	Yes	Grave	9:00PM to 5:00AM	Hours worked are compared to the shift start and stop times defined on time template.

Selected Timesheet Information for Work Order 1000

This table outlines specific timesheet information that was entered for Work Order 1000:

Date Worked	Hours Worked	Shift Attributes	Rate
06/30/1999	10:00 AM to 3:00PM	No related shift	First 5 hours at $35.00 — Work Order Rate
06/30/1999	3:00PM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 3 hours at $38.50 — Shift rate ($35.00 + 10%)
06/30/2002	10:00 AM to 3:00PM	No related shift	First 5 hours at $35.00 — Work Order Rate
06/30/2002	3:00PM to 6:00PM	Swing shift — Defined for this Service	Last 3 hours at $45.00 — Shift by Service rate)($45.00 substitute)
06/30/2004	10:00 AM to 3:00PM	No related shift	First 5 hours at $35.00 — Work Order Rate
06/30/2004	3:00 AM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 3 hours at $40.00 — Shift rate ($35.00 + $5.00)
06/30/2005	10:00 AM to 2:00PM	No related shift	First 4 hours at $35.00 — Work Order Rate)

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Date Worked	Hours Worked	Shift Attributes	Rate
06/30/2005	2:00PM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 4 hours at $40.00 — Shift rate ($35.00 + $5.00)
01/01/2006	10:00AM to 1:00PM	No related shift	First 3 hrs at $35.00 — Work Order Rate
01/01/2006	1:00PM to 6:00PM	Swing	Last 5 hours at $40.00 (based on time template)
06/30/2006	10:00 AM to 6:00PM	No related shift	8 hours at $35.00 — Work Order Rate

Criteria for Shift Display and Selection on Timesheet

This section discusses how the shift value affects the information that is displayed on the timesheet.

1. Is the time template defined to automatically derive shift?
   - If answer is *Yes,* System derives the appropriate shift based on the start and end times from the template.

     Is there an effective dated record defined for the shifts by service for the date worked? If Yes, what is the Shift Attributes setting for the shift on this date?

     - Use Default Shift Definition: Skip steps 2 and 3; Shift column is not displayed on timesheet, but shift pay is applied based on rate from the Shift definition for the date worked.

     - Define for this Service: Skip steps 2 and 3; Shift column is not displayed on timesheet, but shift pay is applied based on Shift by Service definition for the date worked.

     - Disable Shift for This Service: Skip steps 2 and 3. Shift column is not displayed on timesheet and no shift pay is applied.

     If answer is *No*: Skip steps 2 and 3; Shift Column is not displayed on timesheet and no shift pay is applied.
   - If answer is *No,* go to step 2.
2. Is there an effective dated record defined for shifts by service for any dates within the timesheet date range?

   If answer is:
   - *Yes*: What is the Shift Attributes settings for the shifts during the timesheet date range?

     - All are set to Use Default Shift Definition or Define For this Service: Shift column is displayed on timesheet, and all shifts are available for selection. Go to step 3

     - Some are set to No Longer Valid: Shift column is displayed on timesheet, and all shifts with a Shift Attributes setting except Disable Shift for This Service effective somewhere within the date range are available for selection. Go to step 3.

     - All are set to Disable Shift for This Service: Shift column is not displayed on timesheet. Skip step 3.
   - *No*: Shift column is not displayed on timesheet. Skip step 3.
3. Has a shift been selected for the time line?

   If the answer is:

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- *Yes:* Is there an effective dated record defined for shifts by service for the specific date associated to the hours column?

  If Yes, then what is the Shift Attributes setting for that effective date?

  - Use Default Shift Definition: Hours field is accessible for that date. System uses rate information from Swing Shift Definition for the date that hours were worked, and replaces or augments work order rate accordingly.

  - Define for this Service: Hours field is accessible for that date. System uses rate information from Swing Shift and IT Worker Service Definition for the date that hours were worked, and replaces or augments work order rate accordingly

  - Disable Shift for This Service: Hours field is not accessible for that date. No hours can be associated to the shift for that date.

  If No, Hours field is not accessible, no hours can be associated to the shift for that date.
- *No:* Hours field is not accessible for that date, and no hours can be associated to the shifts for that specific date.

Shifts and Assignments — Use Case Scenarios

The following are use cases using shifts and assignments.

1. Shift Pay: Certain time of day is paid at a fixed amount over the standard rate.
   - Base Pay: $10.00 per hour
   - Pay for time of day: $.25 per hour
   - Markup: 3%

   Bill Rate for Base Pay hours: $10.30 per hour ($10.00 + 3%)

   Bill Rate for Shift Pay hours: $10.56 per hour ($10.25 + 3%)
2. Shift Pay: Certain time of day is paid a percentage over the standard rate.

   Note. Service Provider's work hours for a single day may cross multiple shifts, and a shift may cross multiple days.

   - Base Pay: $10.00 per hour
   - Shift 2: Base rate plus 10%
   - Shift 3: Base rate plus 15%
   - Markup: 3%

   Bill Rate for base pay hours: $10.30 per hour ($10.00 + 3%)

   Bill Rate for shift 2 hours: $11.33 (($10.00 + 10% = $11.00) + 3%)

   Bill Rate for shift 3 hours: $11.85 (($10.00 + 15% = $11.50) + 3%)
3. Shift Pay Plus Overtime: Certain time of day is paid an additional shift rate on top of the standard rate, and overtime is paid a percentage over the shift pay rate.

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Note. Overtime may be defined as more than a specified number of hours in a day or more than a specified number of hours in a week.

- Base Pay: $10.00 per hour
- Shift 2: Base rate plus 10%
- Shift 3: Base rate plus 15%
- Overtime: Rate in effect plus 50%
- Markup: 3%

Bill Rate for base pay hours: $10.30 per hour ($10.00 + 3%)

Bill Rate for overtime using Base Pay hours: $15.45 per hour (10.30 + 50%)

Bill Rate for shift 2 hours: $11.33 per hour(($10.00 + 10% = $11) + 3%)

Bill Rate for overtime using shift 2 hours: $17.00 per hour ($11.33 + 50%)

Bill Rate for shift 3 hours: $11.85 per hour (($10.00 + 15% = $11.50) + 3%)

Bill Rate for overtime using shift 3 hours: $17.78 per hour (11.85 + 50%)

4. Assignment Pay: Special rate paid when on call or called out.
   - On call amount paid per hour:
     - On call rate: $5.00 per on call hour
     - Call out fee: $100 per call out incident
     - Call out rate: $20 per call out hour
     - Markup: 5%

     Bill Rate for hours on call: $5.25 ($5.00 + 5%)

     Bill Rate for hours called out: $21.00 ($20.00 + 5%)

     Additional Billed Amount - Fixed fee per call out incidence: $105.00 ($100.00 + 5%)
   - On call amount paid at a fixed fee, hours are not recorded:
     - On call rate: $50.00 per on call period
     - Call out fee: $100.00 per call out incidence
     - Call out rate: $20.00 per call out hour
     - Markup: 5%

     Billed amount per on call shift: $52.50 ($50.00 + 5%)

     Bill Rate for hours called out: $21.00 ($20.00 + 5%)

     Additional Billed Amount - Fixed fee per call out incidence = $105.00 ($100,00 + 5%)

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- On call amount paid at a fixed fee, but hours are still recorded:

  - On call rate: $50.00 per on call period plus $5.00 per on call hour

  - Call out fee: $100.00 per call out incidence

  - Call out rate: $20.00 per call out hour

  - Markup: 5%

  Bill Rate for hours on call: $5.25 ($5.00 + 5%)

  Additional Billed Amount - Fixed fee per on call shift: $52.50 ($50.00 + 5%)

  Bill Rate for hours called out: $21.00 ($20.00 + 5%)

  Additional Billed Amount - Fixed fee per call out incidence: $105.00 ($100.00 + 5%)

The following additional use case covers the scenario where both shifts and assignments are applicable to the same work order:

Combined Shift and Assignment Pay: Certain time of day is paid at a fixed amount over the standard rate, certain type of work is paid at a percentage over the standard or shift rate.

- Base Pay: $10.00 per hour
- Pay for time of day: $.25 per hour
- Pay for type of work: 20%
- Markup: 3%

Bill Rate for Base Pay hours: $10.30 per hour ($10.00 + 3%)

Bill Rate for Shift Pay hours: $10.56 per hour ($10.25 + 3%)

Bill Rate for Assignment Pay hours: $12.36 per hour (($10.00 + 20% = $12.00) + 3%)

Bill Rate for Combined Shift and Assignment Pay hours: $12.67 per hour (($10.25 + 20% = $12.30) + 3%)

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APPENDIX C

HCM Integrations

This chapter discusses how to:

- Set up PeopleSoft Human Capital Management (HCM) and PeopleSoft Services Procurement person integration.
- Set up and use the HCM terminology integration.
- Set up the PeopleSoft Recruiting Solutions and PeopleSoft Services Procurement integration.

Understanding the PeopleSoft Services Procurement and Human Capital Management Integration

Many PeopleSoft applications offer seamless integration with other selected products. PeopleSoft Services Procurement customers can now integrate with PeopleSoft HCM. When you install both Supply Chain Management (SCM) and HCM database structures, you can configure the system to use the HCM database as the system of record and initiate consistent terminology between the PeopleSoft Services Procurement and PeopleSoft HCM applications.

Note. You must register services procurement administrators, approvers, requesters, and service coordinators in the HCM database first. Once you register these users in the HCM database, you can then register them in the SCM database.

Note. You cannot enable the HCM integration if you've already selected the MSP Installation option on the Services Procurement Installation Options page.

See Also

PeopleSoft Enterprise HRMS Application Fundamentals 9.0 PeopleBook

Prerequisites

In order to use the HCM and Services Procurement integration, you must first install both the HCM and SCM databases.

Common Elements Used in This Chapter

Login Profile Operator profile or user profile.

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HCM Person	A person within the HCM system that has a unique employee ID. This person could be an employee or a contingent worker.
Services Procurement Person	A user who is registered in Services Procurement. A Services Procurement person entry is created for Service Coordinators, Service Provider Contacts and Service Providers type of users.
HCM User	An administrator that has access to the HCM database.
SCM User	An administrator or other user who has access to the SCM database.
Job Family	Grouping of jobs to make it easier to assign a competency or competency cluster to similar jobs.
Job Function	Used to create function categories that can then be assigned to job codes.
Job Code	In HCM, jobs are identified by job codes. Job Codes are used to maintain information about jobs independent of the person of group performing that job. For example, salary grades and standard hours are assigned to a job regardless of who holds that job.
Job Profile	Identifies a set of competencies, subcompetencies, and responsibilities that apply to employees in the same job or job family.
Establishment	A country specific option for USA or France.
	Note. This option is only visible when the regulatory region is USA or France.
Labor Agreement	This is a country-specific required field for Spain.
	Note. This option is only visible when the regulatory region is Spain.
Job Posting	Job requirement defined within the HCM Recruiting Solutions product and sent to Services Procurement for fulfillment.

Setting Up the PeopleSoft HCM and Services Procurement Person Integration

This section discusses how to:

- Set up installation options.
- Set up business unit definitions.
- Set up service operations - incremental synchronization.
- Set up service operations - full-table synchronization.
- Activate full-table publish rules.
- Register enterprise service administrators, approvers, requesters, and service coordinators.
- Register service provider contacts.
- Register service providers.

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- Use the Service Operations Monitor.

Understanding the PeopleSoft HCM and Services Procurement Person Integration

When you implement both PeopleSoft Services Procurement and HCM applications, you can configure HCM as the system of record to maintain user details. When the HCM Person Integration installation option is selected on the Services Procurement Installation Options page, the enterprise administrators can register a Services Procurement user as an HCM person with a unique employee ID and create unique operator login profiles within the HCM database.

The following six users are either registered in the HCM database with a unique Person ID, or they are created in the SCM database without a Person ID. Each user has a specific role that enables them to perform specific tasks within the application:

- *Service Procurement Administrator:* This user can register all other users in the Services Procurement system, as well as perform basic application setup.

  This user is created in the HCM database as an HCM person with a unique employee ID.

- *Approver:* This enterprise user may be designated as requisition, work order, or time and progress log approver.

  This user is created in the HCM database as an HCM person with a unique employee ID.

- *Requester:* This enterprise user determines specific requirements for a resource and creates a requisition listing those requirements.

  The requester might designate a service coordinator to source the requisition and handle the fulfillment process. This user is created in the HCM database as an HCM person with a unique employee ID.

- *Service Coordinator:* This user may work for the enterprise or the supplier.

  He or she handles the sourcing of requisitions to different suppliers and also handles supplier bids to ensure that the request is filled with the most qualified resource. This user is created in the HCM database as an HCM person with a unique employee ID.

- *Service Provider Contact:* This is a non-enterprise user who manages a team of service providers and handles bidding with the service coordinator.

  This user is registered in SCM database and does not have a corresponding HCM person ID and a unique employee ID.

- *Service Provider:* This supplier resource is submitted as a potential candidate for a sourced requisition.

  The service provider is registered in the SCM database and has a unique services procurement person ID. Once this user is registered in the SCM database, personal data is sent back to the HCM database, where a new person entry and operator login profile is created for the service provider.

See *PeopleSoft Enterprise HRMS Application Fundamentals 9.0 PeopleBook*

Pages Used to Set Up the PeopleSoft HCM and Services Procurement Person Integration

Page Name	Object Name	Navigation	Usage
Services Procurement Installation Options	INSTALLATION_SP	Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement	Define PeopleSoft Services Procurement installation options.

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Page Name	Object Name	Navigation	Usage
Services Procurement Business Unit Definition	BUS_UNIT_TBL_SP	Services Procurement, Define Services Procurement, General Setup, Business Unit Definitions, Services Procurement Definitions	Define PeopleSoft Services Procurement business units. Define your own consolidation structures for accounting and reporting purposes.
Services User Setup	SPB_USER_SETUP_PG1	Services Procurement, Maintain Users, Services User Setup	Maintain user setup for requesters, service coordinators, service providers, and service provider contacts.
Services User Setup	SPB_USER_SETUP_PG2	Click the Create a New Services User button, and then click the requester user button.	Determine whether the new user has an existing user profile or needs a new profile, add new users as requesters, and establish security and user preferences for the new user.
User Profile Information	SPB_USR_PROFILE_PG	Click the User Profile link on the Services Procurement Setup page.	Enter user ID and password information for the new requester.
Requester Setup	REQUESTOR_TBL	Click Go on the Services User Setup page to add the new user as a requester on the Requester Setup page.	Define requisition and catalog defaults for the requester.
Business Unit Security by User ID	SEC_BU_OPR	Click the Unit by User ID link on the Services User Setup page.	Set up business unit access by user ID.
TableSet Security by User ID	SEC_SETID_OPR	Click the TableSet by User ID link on the Services User Setup page.	Set up TableSet access by user ID.
User Preferences	PV_OPR_LINKS	Click the User Preference link on the Services User Setup page.	Define overall and procurement preferences for the requester.
Maintain Service Coordinator	SPB_PERSON_PAGE	Click the Person ID link on the Services User Setup page.	Define personal information for the service coordinator.
Service Coordinator Information	SPB_COORDINATOR_PG	Click the Service Coordinator Information link on the Maintain Service Coordinator page.	Define employee and user ID information.
Maintain Service Coordinator - Phone and Email Details	SPB_USR_PH_EM_PAGE	Click the Phone and Email Details link on the Maintain Service Coordinator page.	Enter telephone and email details for the service coordinator.

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Page Name	Object Name	Navigation	Usage
User Login Information - User Profile Information	SPB_PERSLGN_SEC_PG	Click the Create User Profile button on the Service Coordinator Information page.	Define login information for the service coordinator.
Maintain Provider Contact	SPB_SP_PERS_PAGE	Click the Add button on the Services User Setup page.	Define personal information for the provider contact.
Provider Contact Information	SPB_PROV_CNTCT_PG	Click the Provider Contact Information link on the Maintain Provider Contact page.	Define supplier, location code, and create user profile.
Maintain Provider Contact - Phone and Email Details	SPB_USR_PH_EM_PG2	Click the Phone and Email Details link on the Maintain Provider Contact page.	Enter telephone and email details for the provider contact.
Maintain Service Provider	SPB_PERS_PROV_PAGE	Click the Add button to add a new Person ID on the Services User Setup page.	Define personal information for the service provider.
Service Provider Information	PB_INDP_PROV_PG	Click the Service Provider Information link on the Maintain Service Provider page.	Define work status, project role, supplier, years of experience, and other parameters to define the service provider.
Maintain Service Provider - Phone and Email Details	SPB_USR_PH_EM_PG3	Click the Phone and Email Details link on the Service Provider Information page.	Enter telephone and email details for the service provider.
Service Provider Skills	SPB_PROV_SKILL_PG	Click the Provider Skills link on the Service Provider Information page.	Select appropriate competencies for the service provider.
Services	IB_SERVICEDEFN	PeopleTools, Integration Broker, Integration Setup, Services	Define services.
Service Operations	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Services Operations	Define service operations and associate them to services.
Routing Definitions	IB_ROUTINGDEFN	PeopleTools, Integration Broker, Integration Setup, Routings	Define routings associated with service operations.
Queue Definitions	IB_QUEUEDEFN	PeopleTools, Integration Broker, Integration Setup, Queues	Define queues to be used with the HCM integration.
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services	Use this page to ensure that all service operations are set up and active.

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See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Setting Up the Installation Options

Access the Services Procurement Installation Options page.

HCM Person Integration Enabled Select to enable the integration with HCM for person information. When you select this option, basic person and job data is synchronized between the HCM and Services Procurement systems.

Setting Up Business Unit Definitions

Access the Services Procurement Business Unit Definition page.

HCM Integration group box on the Services Procurement Business Unit Definition page

If you select the HCM Person Integration Enabled option on the Services Procurement Installation Options page, the HCM Integration group box and relative HCM field values are available on this page.

Regulatory Region Select a regulatory region.

Company Select the company.

Business Unit HR (business unit human resources) Enter the human resource business unit.

HCM Administrator Select the name of the human resource administrator responsible for entering user information in the HCM database.

Note. Many of the HCM default values from the Services Procurement Business Unit Definition come from the requisition and work order components.

See Also

Chapter 4, "Setting Up PeopleSoft Services Procurement," Setting Up Business Unit Definitions, page 26

Setting Up Service Operations - Incremental Synchronization

PeopleSoft Services Procurement utilizes PeopleSoft Integration Broker to integrate PeopleSoft Services Procurement tables with PeopleSoft HCM. The service operations are delivered with a default status of *Inactive.* You must activate each service operation before attempting to publish service operation or subscribe to service operations between databases. You must activate these service operations in the HCM and SCM databases.

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To begin using PeopleSoft Integration Broker, you must enable the publishing of service operations in PeopleSoft HCM and SCM and the subscribing to those service operations in PeopleSoft HCM and SCM. The publish and subscribe rules may also be incremental or full table synchronization for each service operation.

The following table contains the Incremental Synchronization Service Operations that update the PeopleSoft Services Procurement applications every time a user changes data in HCM that is relevant to the integration. These service operations are published from HCM.

Note. You must activate these service operations and queues in the PeopleSoft Services Procurement and HCM databases.

Service Operation	Queue
DEPT_SYNC	ENTERPRISE_SETUP
DEPT_SYNC_EFF	ENTERPRISE_SETUP
COMPANY_SYNC	PERSON_ISE_SETUP
LOCATION_SYNC_EFF	ENTERPRISESETUP
LOCATION_SYNC	ENTERPR _SETUP
BUS_UNIT_HR_SYNC	HR_SETUP
JOBCODE_SYNC	PERSON_SETUP
REGULATORY_REGION_SYNC	PERSON_SETUP
ESTAB_TBL_SYNC	PERSON_SETUP
ESTAB_ LOC_US_SYNC	PERSON_SETUP
HR_LABOR_AGRMNT_S	PERSON_SETUP
PERSON_BASIC_SYNC	PERSON_DATA
WORKFORCE_SYNC	PERSON_DATA
USER_PROFILE	USER_PROFILE

After you activate these service operations, every subsequent change to data in any of the records associated with these service operations triggers the publication and subscription of the new or deleted data. As a result, PeopleSoft Services Procurement reflects the change within a few seconds.

These SYNC service operations are published from HCM. You must activate the subscriptions to these service operations in the SCM system in order to update the data in SCM.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

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Setting Up Service Operations - Full-Table Synchronization

Full-table synchronization is more data-destructive than incremental synchronization. Incremental synchronization service operations modify, delete, or add the data that a user has affected in performing an individual transaction. Full-table synchronization service operations delete all data in the target record first and then loads a copy of the source record.

Full-table synchronization is generally used at the beginning of an implementation to get the data synchronized between databases. After that point, it should be used sparingly.

The following table lists full-table synchronization service operations. You should carefully consider the effect of activating any of these service operations.

Warning! Do not activate any service operations that are identified as FULL_SYNC or FULLSYNC unless you are absolutely certain that you want to overwrite all of the data in the records that are associated with the service operation in the database. Understanding how Full Synchronization Service Operations work is especially important if you have a different list of departments or locations in the Services Procurement database than you have in the HCM database. For example, synchronizing the departments using a FULLSYNC service operation would overwrite all of the Services Procurement departments with the HCM departments.

Note. When using Full Synchronization service operations, the primary concern is that you do not inadvertently overwrite valid data. To prevent this problem, you should generally avoid activating Full Synchronization service operations for any record that receives input from more than one database.

Service Operation	Queue
DEPT_FULLSYNC	ENTERPRISE_SETUP
COMPANY_FULLSYNC	PERSON_ISE_SETUP
LOCATION_FULLSYNC_EFF	ENTERPRISESETUP
LOCATION_FULLSYNC	ENTERPR _SETUP
BUS_UNIT_HR_FULLSYNC	HR_SETUP
JOBCODE_FULLSYNC	PERSON_SETUP
REGULATORY_REGION_FULLSYNC	PERSON_SETUP
ESTAB_TBL_FULLSYNC	PERSON_SETUP
ESTAB_ LOC_US_FULLSYNC	PERSON_SETUP
HR_LABOR_AGRMNT_FULLSYNC	PERSON_SETUP

You should activate the following two service operation and service operation subscription to synchronize the SetIDs and tableset information from the HCM database to the SCM database.

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Service Operation	Queue
SETID_INITIALIZE	TBLSET_CONTROL
TBLSET_CONTROL_INITIALIZE	TBLSET_CONTROL

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Activating Full-Table Publish Rules

Full-table service operations in PeopleSoft Integration Broker are delivered with a status of *Inactive*. The publishing rules must be activated. When the appropriate service operations are activated, information that is shared by the SCM, and PeopleSoft HCM databases is updated properly.

For example, PeopleSoft publishes (Full Table Publish) data from HCM. Table BUS_UNIT_TBL_HR is populated with new data from PeopleSoft HCM, and all old data is deleted. The data from this table is published in the service operation BUS_UNIT_HR_FULLSYNC.

Use the following service operations to send the service provider information from the SCM database to the HCM database. You should activate the service operation and routings in both the HCM and SCM databases to enable the integration.

Service Operation	Queue
HCR_ADD_PERSON This service operation is published from SCM to HCM when a work order is released. The service operation contains the service providers personal information that is required by HCM for creating an HCM person. The service operation also contains job information for creating a job assignment in HCM.	PERSON_DATA
HCR_ADD_PERSON_ACK This service operation is published from HCM after processing the HCR_ADD_PERSON service operation. This acknowledgement service operation contains information of whether the HCM person, job and user profile have been created in HCM.	PERSON_DATA
HCR_ADD_JOB This service operation is published from SCM when a service provider who is currently associated to a work order is also associated to another work order. This service operation contains job information for creating a job assignment in HCM.	PERSON_DATA

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Service Operation	Queue
HCR_ADD_JOB_ACK This service operation is sent from HCM after processing the HCR_ADD_JOB message. This service operation contains info of whether the job assignment was created in HCM.	PERSON_DATA
HCR_CAN_JOB This service operation is published from SCM when a work order is canceled, closed or terminated. This service operation contains the job information for terminating the job assignment in HCM.	PERSON_DATA

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Registering Enterprise Administrators, Approvers, Requesters, and Service Coordinators

The following list details the required steps for registering administrators, approvers, requesters, and service coordinators.

1. The enterprise administrator registers the user in the HCM database.

   The HCM system creates a new HCM person of type *Employee*.

2. The enterprise administrator creates an operator login profile for the user.

   Note. The new user employee ID is associated with the operator login profile.

3. The PERSON_BASIC_SYNC service operation publishes the person and job assignment information from the HCM database to the SCM database.

   The USER_PROFILE service operation publishes the user profile information from the HCM database to the SCM database.

4. The enterprise administrator registers the new user in the PeopleSoft Services Procurement application.
5. For service coordinators, the service procurement person ID is associated to the user profile. In SCM, the required roles are associated to the users when they are added as administrators, approvers, requestors or service coordinators

Registering Service Provider Contacts

The service provider contact is a supplier person of interest user that does not require registration in the HCM database.

Registering Service Providers

The following list details the required steps for registering a service provider.

Note. The HCM Integration option must be enabled to complete this process effectively.

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1. The enterprise or supplier administrator registers the service provider in the PeopleSoft Services Procurement application.

   Once the service provider is successfully registered, the system creates a unique Services Procurement Person ID.

2. Once the service provider is registered with his own unique Person ID, the service provider contact sources the candidate, the candidate qualifies and accepts the position, and then the work order is created and approved.

3. After a work order is released, the SCM system sends the service provider information to HCM to create an HCM person of type *Contingent Worker*.

   This information is sent to HCM in the form of an asynchronous service operation.

4. Once in HCM, a new HCM person entry and login profile is created for the service provider.

5. The Services Procurement application receives a response back from HCM.

   This information includes, but is not limited to the HCM employee ID, Work Order Business Unit, Work Order ID, and the Services Procurement person ID.

6. Services Procurement stores the HCM employee ID as a cross-reference in the SCM database.

7. The PERSON_BASIC_SYNC service operation synchronizes the person and job assignment information from the HCM database to the SCM database.

   The USER_PROFILE service operation synchronizes the user profile information from the HCM database to the SCM database. When creating the user profile, the HCM system uses the employee ID as the user ID and password. The user has the option of changing the password when they log in into Services Procurement.

The following service provider data is sent to the HCM database from the SCM database using asynchronous service operations:

- Services Procurement Person ID
- First Name
- Middle Name
- Last Name
- Person Organization
- Email ID
- Primary Phone Number

The following job data information is also sent to the HCM database from the SCM database:

- Work Order Business Unit
- Work Order ID
- Sequence Number
- Effective Date
- Employee ID
- Regulatory Region
- Company
- Business Unit

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- Department
- Location
- Job Code
- Establishment
- Labor Agreement

Once the data is received and processed in the HCM database, the following information is sent back to SCM from the HCM database using the PERSON_BASIC_SYNC and USER_PROFILE service operations:

- Services Procurement Person ID
- Work Order Business Unit
- Work Order ID
- HCM Employee ID
- Employee Record Number
- Sequence Number

Note. Once an administrator registers a service provider in PeopleSoft Services Procurement, all updates to personal data must be performed in the HCM database.

See Also

Chapter 5, "Setting Up Application Specific Options for PeopleSoft Services Procurement," Maintaining Users and Team Setup, page 87

Using the Service Operations Monitor

Use the Services Operations Monitor menu to ensure that all service operations are set up and active. You can also use this menu to monitor asynchronous and synchronous service operations.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker

Setting Up the HCM Terminology Integration

This section discusses how to set up installation options.

Understanding the HCM Terminology Integration

When the HCM Terminology installation option is selected on the Services Procurement Installation Options page, the current service and service type labels are replaced with job code and job family labels throughout the PeopleSoft Services Procurement system. Since the job family and job function terms are widely used throughout the HCM application, you can now configure the system to use HCM terminology consistently across both the SCM and HCM databases.

The following table lists the new terminology for PeopleSoft Services Procurement when the HCM integration is selected.

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Note. When you enable the HCM Terminology integration, all service and service type labels change into job family and job code labels respectively.

Page Name in Services Procurement	Page Name When HCM Terminology is selected	Search Pages
Service Type	Job Family	Service Type changes to Job Family
Service	Job Code	Services changes to Job Code
Project Role	Job Code	Services changes to Job Code

Pages Used to Set Up the HCM Terminology Integration

Page Name	Object Name	Navigation	Usage
Services Procurement Installation Options	INSTALLATION_SP	Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement	Define PeopleSoft Services Procurement installation options.
Existing Service Type/Service	SP_SERVICETYPE_WK	This page automatically populates if you do not have the correct job code/job family relationship.	Fix the job code and job family relationship before you enable the Use HCM Terminology option on the Services Procurement Installation Options page. **Note.** You can only have job family associated to a job code.

Setting Up Installation Options

Access the Services Procurement Installation Options page.

Use HCM Terminology Select to modify HCM terminology throughout Services Procurement. When you select this option, all current Service and Service Type labels change to Job Code and Job Family labels.

If selected, the MSP Installation option is disabled.

Note. When you enable this option, the system validates the relationship between the existing the job family and job codes. HCM allows only one Job Family per Job Code, while Services Procurement allows multiple service types per service. Due to this restriction from HCM, you cannot enable this option if there are services present with more than one related service type. If this situation occurs, you will receive a secondary page that informs you of the service and service type relationships that do not meet the criteria. In order to continue with the conversion to HCM terminology, you must remove the additional relationships.

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Setting Up the PeopleSoft Recruiting Solutions and Services Procurement Integration

This section discusses how to:

- Set up installation options.
- View the PeopleSoft Recruiting Solutions and Services Procurement Integration process flow.
- View service operations.

Understanding the PeopleSoft Recruiting Solutions and Services Procurement Integration

When you implement both PeopleSoft Services Procurement and Recruiting Solutions (eRecruit) applications, you can create a requisition in the Recruiting Solutions application and then use service operations to pass that requirement data to Services Procurement for fulfillment.

When the Recruiting Solutions Integration Enabled installation option is selected on the Services Procurement Installation Options page, users can create a job posting in Recruiting Solutions, send that data back to Services Procurement with pre-populated data, approve, source, and fulfill the requisition, create a work order, and send that data back to the Recruiting Solutions application for further processing.

With this integration, you can send service operations back and forth between applications by using the PeopleTools Integration Broker to support the following activities:

- Create a Recruiting Solutions job requirement and route it to Services Procurement with the appropriate data mapping.
- Route updates or cancellations from the Recruiting Solutions requirements to Services Procurement with the appropriate data mapping.
- Send candidate information from services procurement to Recruiting Solutions after work order approval.
- Send candidate confirmation from Recruiting Solutions to Services Procurement after on boarding process is complete.

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Pages Used to Set Up the PeopleSoft Recruiting Solutions and Services Procurement Integration

Page Name	Object Name	Navigation	Usage
Services Procurement Installation Options	INSTALLATION_SP	Set Up Financials/Supply Chain, Install, Installation Options, Services Procurement	Define PeopleSoft Services Procurement installation options.
Create Requisition	SPF_REQ_INFO_PG	Services Procurement, Create Requisition	Enter basic service requisition information.
Services	IB_SERVICEDEFN	PeopleTools, Integration Broker, Integration Setup, Services	Define services.
Service Operations	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Services Operations	Define service operations and associate them to services.
Routing Definitions	IB_ROUTINGDEFN	PeopleTools, Integration Broker, Integration Setup, Routings	Define routings associated with service operations.
Queue Definitions	IB_QUEUEDEFN	PeopleTools, Integration Broker, Integration Setup, Queues	Define queues to be used with the PeopleSoft Recruiting Solutions integration.
Monitor Overview	IB_MONITOR_OVRVIEW	PeopleTools, integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services	Use this page to ensure that all service operations are set up and active.

Setting Up Installation Options

Access the Services Procurement Installation Options page.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Services Procurement Installation Options.

Recruiting Solutions Integration Enabled Select to enable the integration with Recruiting Solutions. When you select this option, all requisitions created in the Recruiting Solutions product are passed to Services Procurement for fulfillment.

Recruiting Solutions/HCM Nodename Enter the HCM node location where the work order service operation is sent.

Viewing the PeopleSoft Recruiting Solutions and Services Procurement Integration Process Flow

The following sections describe the process flow for the Recruiting Solutions and Services Procurement integration.

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Job Posting Process

The following steps outline the job posting process.

1. User creates a job posting in Recruiting Solutions and sends that data to the Services Procurement application.

   A service operation is created in the HCM and sent to SCM in the format of the PositionOpening HR-XML service operation.

2. The SCM Integration Broker receives the PositionOpening, and transforms it into the PeopleSoft service operation JOB_POSTING.

3. The Services Procurement code will examine the service operation for the authentication data originally sent in the HR-XML envelope.

   If authenticated, a unique identifier *HOLDING_ID* is generated and data from the JOB_POSTING service operation is inserted into the Job Posting table.

4. A URL that points to the Services Procurement requisition is generated, which includes the HOLDING_ID identifier.

   The URL is added to the JOB_POSTING response service operation.

5. The SCM Integration Broker receives the JOB_POSTING service operation and converts it into the HR-XML envelope format, which is all that is needed for the response to the PositionOpening.

6. HCM receives the response XML, extracts the Services Procurement URL, and creates a new browser window that points to the URL.

7. Services Procurement requisition examines the unique identifier and then loads matching data from the holding table into the appropriate fields on the requisition.

8. The user completes the requisition, submits it for approval, and continues on with the fulfillment process within Service Procurement.

Note. You can also sent updates from Recruiting Solutions to Services Procurement to modify or cancel job posting that were sent previously.

Work Order Process

Once the requisition is filled and the related work order is generated, the following steps outline the work order process:

1. The Work Order is approved, and the Work Order process initiates.

   This process is kicked-off by the service coordinator manually.

2. Service operation SP_WORK_ORDER is created with current work order data.

   This service operation is sent asynchronously to the HCM database. The service coordinator sees that the posting is in progress, and continues with work as usual. The Work Order is then marked as *Published* in HCM.

3. The SCM Integration Broker receives the SP_WORK_ORDER service operation and converts it into the HR-XML *Candidate* format.

4. The HCM application receives the *Candidate* XML service operation and begins the onboarding process.

   After the onboarding process is complete in HCM side, an asynchronous service operation is sent to SCM to respond to the *Candidate* XML.

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5. The SCM Integration Broker receives the XML *Candidate* format service operation and converts it into the PeopleSoft SP_WORK_ORDER format.
6. Services Procurement code updates the work order to specify that it is acknowledged and processed by HCM.

Viewing Service Operations

When the user is transferred to the Services Procurement requisition, they see the requisition fields filled with the data from Recruiting Solutions.

The following table lists the mappings of the Position Opening XML from Resource Management to Services Procurement.

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Recruiting Solutions Position Opening Element Name	Services Procurement Field Label
PositionProfile.ProfileId.IdValue	Job Code
PositionProfile.PositionDetail.Competency.NumericValue	Experience
PositionProfile.PositionDetail.Competency.CompetencyEvidence. EvidenceId.id	Educational Level
PositionProfile.PositionDetail.Competency.name	Competencies
PositionProfile.PositionDetail.RemunerationPackage.BasePay.currencyCode	Currency
PositionProfile.PositionDateInfo.ExpectedEndDate	End Date
PositionProfile.PositionDetail.PositionTitle	Job Title
PositionProfile.PositionDetail.PhysicalLocation.Name	Location
PositionProfile.PositionDetail.RemunerationPackage.BasePay.BasePayAmountMax	Rate
PositionProfile.PositionDetail.FormattedPositionDescription.Value	Scope of Work
PositionProfile.PositionDetail.PositionTitle	Service
PositionProfile.PositionDetail.JobCategory.CategoryCode	Service Type
PositionProfile.PositionDateInfo.StartDate	Start Date
PositionProfile.PositionDetail.RemunerationPackage.BasePay.baseInterval	Unit of Measure

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The following table lists the mappings from the Service Procurement tables (work order, service provider, and related tables) to the ‘Candidate’ XML service operation for Recruiting Solutions.

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Services Procurement Record	Services Procurement Field Label	Recruiting Solutions Candidate Element Name
NA	JobOpeningID	RelatedPositionPostings.PositionPosting.Id.IdValue.name
PV_EXT_ XREF_HDR	KEY1FLDVAL	RelatedPositionPostings.PositionPosting.Id.IdValue
SPF_ WORDERREC	JOB_TITLE	RelatedPositionPostings.PositionPosting.Id.Title
SPB_PERSON_ TBL	FIRST_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName.GivenName
SPB_PERSON_ TBL	MIDDLE_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName.MiddleName
SPB_PERSON_ TBL	LAST_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName. FamilyName
SPB_PERSON_ TBL	TITLE	Resume.StructuredXMLResume.ContactInfo.PersonName.Affix
NA	familyNamePrefix	Resume.StructuredXMLResume.ContactInfo.PersonName.Affix.type
SPB_PERS_ PHONE	COUNTRY_ CODE (where PHONE_TYPE= Home)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.Telephone.InternationalCountryCode
SPB_PERS_ PHONE	PHONE (where PHONE_TYPE= Home)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.Telephone.SubscriberNumber
SPB_PERS_ PHONE	COUNTRY_ CODE (where PHONE_TYPE= Cellular)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.Mobile.InternationalCountryCode
SPB_PERS_ PHONE	PHONE(where PHONE_TYPE= Cellular)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.Mobile.SubscriberNumber

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Services Procurement Record	Services Procurement Field Label	Recruiting Solutions Candidate Element Name
SPB_PERS_ PHONE	COUNTRY_ CODE(where PHONE_TYPE= FAX)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.FAX.InternationalCountryCode
SPB_PERS_ PHONE	PHONE(where PHONE_TYPE= FAX)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.FAX.SubscriberNumber
SPB_PERS_ EMAIL	EMAIL_ADDR	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.InternetEmailAddress

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APPENDIX D

Delivered Workflows for PeopleSoft Services Procurement

This appendix discusses delivered workflows for PeopleSoft Services Procurement.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Workflow

Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications

Delivered Workflows for PeopleSoft Services Procurement

This section discusses PeopleSoft Services Procurement workflows. The workflows are listed alphabetically by workflow name.

Bid Forwarded to Requester

The section discusses the Bid Forwarded to Requester workflow.

Description

Event Description	The service coordinator sends a bid response to the requester.
Action Description	The service coordinator sends the requester a candidate to consider.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_CBID_RSP_COMP
Role	Requester
Email Template	SCTOREQBID

Bid Response from Requester

The section discusses the Bid Response from Requester workflow.

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Description

Event Description	The requester sends a bid response to an external service coordinator.
Action Description	Notifies external service coordinator that the requester has reviewed the bid.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_RBID_RSP_COMP
Role	Service coordinator (external)
Email Template	FREQTSC

See Also

Chapter 17, "Reviewing and Awarding Bids," page 269

Bid Reviewed

The section discusses the Bid Reviewed workflow.

Description

Event Description	The requester sends a bid response to an internal service coordinator.
Action Description	Notifies internal service coordinator that the requester has reviewed the bid.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_RBID_RSP_COMP
Role	Service coordinator (internal employee)
Email Template	FRQTSC_E

Bid Submitted

The section discusses the Bid Submitted workflow.

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Description

Event Description	The service provider or service provider contact submits a bid on a requisition.
Action Description	Notifies the service coordinator that a bid has been submitted for a requisition line. Notifies an external service coordinator that a service provider has entered a bid on a requisition, a response for a bid on a requisition, or a bid without a requisition. Notifies an internal service coordinator that a service provider has entered a response for a bid on a requisition, or a bid without a requisition.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_BID SPF_BIDRESPONSE SPF_SUBMITTAL
Role	Service coordinator (internal employee)
Email Template	S_RESPN_E S_RESPONSE CONBID CONBID_E

Communication Ended

The section discusses the Communication Ended workflow.

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Description

Event Description	The requester sends a bid response to the service coordinator with the bid action of *End Communication*. The service coordinator sends a bid response to the requester with the bid action of *End Communication*. The service coordinator sends a bid response to the service provider contact with the bid action of *End Communication*. The service provider contact sends a bid response to the service coordinator with the bid action of *End Communication*.
Action Description	Notifies the service coordinator that communication has ended for this bid. Notifies the requester that communication has ended for this bid. Notifies the service provider contact that communication has ended for this bid. Notifies the service coordinator that communication has ended for this bid.
Notification Method	Email.

Workflow Objects

Component	SPF_CBID_RSP_COMP
Role	Service coordinator Requester Service provider contact Service coordinator
Email Template	ECREQTOSC ECSCTOREQ ECSCTOSPC ECSPCTOSC

Expense Report Adjustments

This section discusses the Expense Report Adjustment workflow.

Description

Event Description	An expense report is adjusted.
Action Description	Notifies the provider or provider contact that the expense is adjusted.
Notification Method	Email

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Workflow Objects

Component	SPA_EXPENSE2
Role	Provider or provider contact.
Email Template	SP_EX_ADJ

Expense Report Approved

This section discusses the Expense Report Approved workflow.

Description

Event Description	An expense report is approved.
Action Description	Notifies the provider or provider contact that the expense is approved.
Notification Method	Email

Workflow Objects

Component	SPA_EXPENSE2 SPA_EXP_APR_ROSTER
Role	Provider or provider contact
Email Template	SP_EX_APR SP_EXRAPR

Expense Report Denied

This section discusses the Expense Report Denied workflow.

Description

Event Description	An expense report is denied.
Action Description	Notifies the provider or provider contact that the expense is denied.
Notification Method	Worklist, Email

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Workflow Objects

Component	SPA_EXPENSE2 SPA_EXP_APR_ROSTER
Role	Provider or provider contact.
Email Template	SP_EX_DEN SP_EXRDEN

Expense Report Submitted

This section discusses the Expense Report Denied workflow.

Description

Event Description	An expense report is submitted for approval.
Action Description	Notifies the expense approver that the expense is submitted for approval.
Notification Method	Worklist, Email

Workflow Objects

Component	SPA_EXPENSE2
Role	Expense approver.
Email Template	SP_EX_SUB

Final Approval

The section discusses the Final Approval workflow.

Description

Event Description	The task is approved or denied.
Action Description	The requester is informed of the action taken.
Notification Method	Worklist, email.

Workflow Objects

Component	SAC_AW_ROUTE
Role	Requester
Email Template	WO_On_Final_Approval

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Interview Canceled

The section discusses the Interview Canceled workflow.

Description

Event Description	A scheduled interview is canceled.
Action Description	Notifies interviewer that the interview has been canceled.
Notification Method	Email. **Note.** The Send Email check box must be selected for the interviewer to be notified.

Workflow Objects

Component	SPF_INTERVIEW_SCHD
Role	Interviewer
Email Template	INTRVREMVD

Interview Rescheduled

The section discusses the Interview Rescheduled workflow.

Description

Event Description	A scheduled interview is rescheduled and the send email check box is selected.
Action Description	Notifies interviewer that the interview has been rescheduled.
Notification Method	Email (only when the send email check box is selected).

Workflow Objects

Component	SPF_INTERVIEW_SCHD
Role	Interviewer
Email Template	INTRVRESCH

Interview Scheduled

The section discusses the Interview Scheduled workflow.

Description

Event Description	An interview is scheduled for a bid.
Action Description	Notifies interviewer that he or she is scheduled to interview a candidate.
Notification Method	Worklist, email (only when the send email check box is selected).

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Workflow Objects

Component	SPF_INTERVIEW_SCHD
Role	Service provider (email only), interviewer (worklist and email).
Email Template	INTERVIEW

Invoice Approved by Internal Approver

The section discusses the Invoice Approved by Internal Approver workflow.

Description

Event Description	Invoice is approved by the internal invoice approver.
Action Description	Notifies the invoice manager that the invoice has been approved by the internal invoice approver.
Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVAPR

See Also

Chapter 22, "Managing Settlements," page 359

Invoice Approved by Supplier

The section discusses the Invoice Approved by Supplier workflow.

Description

Event Description	Invoice is approved by the internal invoice approver.
Action Description	Notifies the internal invoice approver that the supplier has approved the invoice.
Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Internal invoice approver
Email Template	SP_IVABS

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Invoice Rejected by Internal Approver

The section discusses the Invoice Rejected by Internal Approver workflow.

Description

Event Description	Invoice is rejected by the internal invoice approver.
Action Description	Notifies the invoice manager that the invoice has been rejected by the internal invoice approver.
Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVREJ

Invoice Rejected by Supplier

The section discusses the Invoice Rejected by Supplier workflow.

Description

Event Description	Invoice is rejected by the internal invoice approver.
Action Description	Notifies the invoice manager that the supplier has rejected the invoice.
Notification Method	Email.

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVRBS

Invoice Submitted for Approval

The section discusses the Invoice Submitted for Approval workflow.

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Description

Event Description	Invoice is submitted for approval.
Action Description	Notifies invoice manager that an invoice has been submitted for approval. Notifies internal invoice approver that an invoice has been submitted for approval.
Notification Method	Email (invoice manager). Worklist, email (internal invoice approver).

Workflow Objects

Component	SPF_INV_APPROVE
Role	Invoice manager Internal invoice approver
Email Template	SP_IVS2E (invoice manager) SP_IVSUB (internal invoice approver)

Progress Log Adjusted

The section discusses the Progress Log Adjusted workflow.

Description

Event Description	The progress log approver adjusts a progress log.
Action Description	Notifies the invoice manager (progress log creator) that the progress log was adjusted. Notifies the provider contact (progress log creator) that the progress log was adjusted.
Notification Method	Email.

Workflow Objects

Component	SPA_PLOG
Role	Invoice manager Provider contact
Email Template	SP_PLADJ (invoice manager) SP_PLADJ2 (provider contact)

See Also

Chapter 21, “Managing Progress Logs,” page 351

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Progress Log Approved

The section discusses the Progress Log Approved workflow.

Description

Event Description	The progress log approver approves a progress log.
Action Description	Notifies the invoice manager (progress log creator) that the progress log was approved. Notifies the provider contact (progress log creator) that the progress log was approved.
Notification Method	Email.

Workflow Objects

Component	SPA_MANAGE_PLOGS SPA_PLOG
Role	Invoice manager Provider contact
Email Template	SP_PL_MAS1 (invoice manager using the SPA_MANAGE_PLOGS component) SP_PL_MAS2 (provider contact using the SPA_MANAGE_PLOGS component) SP_PLAPR (invoice manager using the SPA_PLOG component) SP_PLAPR2 (provider contact using the SPA_PLOG component)

Progress Log Denied

The section discusses the Progress Log Denied workflow.

Description

Event Description	The progress log approver denies a progress log.
Action Description	Notifies the invoice manager (progress log creator) that the progress log was denied. Notifies the provider contact (progress log creator) that the progress log was denied.
Notification Method	Worklist, Email.

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Workflow Objects

Component	SPA_PLOG
Role	Invoice manager Provider contact
Email Template	SP_PLDEN (invoice manager) SP_PLDEN2 (provider contact)

Progress Log On Hold

The section discusses the Progress Log On Hold workflow.

Description

Event Description	The progress log approver puts a progress log on hold.
Action Description	Notifies the invoice manager (progress log creator) that the progress log was put on hold. Notifies the provider contact (progress log creator) that the progress log was put on hold.
Notification Method	Email.

Workflow Objects

Component	SPA_PLOG
Role	Invoice manager Provider contact
Email Template	SP_PLHLD (invoice manager) SP_PLHLD2 (provider contact)

Progress Log Submitted

The section discusses the Progress Log Submitted workflow.

Description

Event Description	The progress log creator submits a progress log for approval.
Action Description	Notifies the progress log approver that a progress log was submitted for approval.
Notification Method	Worklist, email.

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Workflow Objects

Component	SPA_PLOG
Role	Progress log approver
Email Template	SP_PLSUB

Requisition Approved

The section discusses the Requisition Approved workflow.

Description

Event Description	A requisition is approved.
Action Description	Notifies an external service coordinator that a requisition has been approved and is ready to be sourced. Notifies an internal service coordinator that a requisition has been approved and is ready to be sourced. Notifies a service coordinator that a requisition is approved and ready for bid submittal.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_REQ_LN_STTS (service coordinator—external, service coordinator—internal employee) SPF_SOURCE_CMP (service coordinator)
Role	Service coordinator (external) Service coordinator (internal employee)
Email Template	REQAPPROVE REQAPR_E SOURCING

See Also

Chapter 14, “Creating and Managing Requisitions,” page 211

Requisition Canceled

The section discusses the Requisition Canceled workflow.

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Description

Event Description	A requisition is canceled.
Action Description	Notifies service provider contacts that the requisition has been canceled.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_REQ_LN_STTS
Role	Service provider contact
Email Template	CANCEL

Requisition Filled

The section discusses the Requisition Filled workflow.

Description

Event Description	The service coordinator fills the requisition.
Action Description	Notifies the requester and the service coordinator (if the service coordinator can create work orders) that the position on the requisition was filled. Click to generate a work order so that the service provider can record time and expenses.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_CBID_RSP_COMP
Role	Requester, service coordinator Service provider contact
Email Template	REQFILLED (requester, service coordinator) FILLED (service provider contact)

Requisition Reassigned

The section discusses the Requisition Reassigned workflow.

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Description

Event Description	A requisition is reassigned.
Action Description	Notifies an external service coordinator that a requisition has been reassigned to him or her and is ready for sourcing. Notifies an internal service coordinator that a requisition has been reassigned to him or her and is ready for sourcing.
Notification Method	Email.

Workflow Objects

Component	SPF_SOURCE_CMP
Role	Service coordinator (external) Service coordinator (internal employee)
Email Template	REASSIGN (service coordinator—external) REASSIGN_E (service coordinator—internal employee)

Respond to Supplier Bid

The section discusses the Respond to Supplier Bid workflow.

Description

Event Description	The service coordinator sends a bid response to the service provider contact.
Action Description	Notifies the service provider contact that the service coordinator has responded to a bid.
Notification Method	Worklist, email.

Workflow Objects

Component	SPF_CLIBID_COMP
Role	Service provider contact
Email Template	C_RESPONSE

Service Provider Registered

The section discusses the Service Provider Registered workflow.

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Description

Event Description	The service provider is registered.
Action Description	Notifies the administrator that a service provider needs a user profile.
Notification Method	Email.

Workflow Objects

Component	SPF_MANAG_REQ_LINE
Role	Administrator
Email Template	REGSRVCPRO

Suggest Vendor Notification

The section discusses the Suggest Vendor Notification workflow.

Description

Event Description	The requester creates a requisition with suggested vendors.
Action Description	Notifies the administrator of suggested vendors that need to be added to the system.
Notification Method	Email.

Workflow Objects

Component	SPF_REQ_LINE
Role	Administrator
Email Template	SUG_VENDOR

Timesheet Submittal

The section discusses the timesheet Submittal workflow.

Description

Event Description	A service provider submits a timesheet.
Action Description	Notifies a timesheet approver that a timesheet has been submitted for approval.
Notification Method	Worklist, email.

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Workflow Objects

Business Process	SPA_TIME_BP
Activity	SPA_SUB_TIME_SHEET SPA_SUB_TIME_SHEET_WL
Component	SPA_TIME
Role	Timesheet approver
Email Template	SP_TM_SUB

See Also

Chapter 19, "Managing Time in PeopleSoft Services Procurement," page 323

Time Report Adjusted

The section discusses the Time Report Adjusted workflow.

Description

Event Description	The time report approver adjusts a time report.
Action Description	Notifies a service provider that the time report was adjusted.
Notification Method	Email.

Workflow Objects

Business Process	SPA_TIME_BP
Activity	SPA_ADJ_TIME_SHEET
Component	SPA_TIME
Role	Service provider
Email Template	SP_TM_ADJ

Time Report Approved

The section discusses the Time Report Approved workflow.

Description

Event Description	The time report approver approves a time report.
Action Description	Notifies a service provider that the time report was approved.
Notification Method	Email.

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Workflow Objects

Business Process	SPA_TIME_BP
Activity	SPA_APPR_TIME_SHEET
Component	SPA_TIME_APPROVAL
Role	Service provider
Email Template	SP_TE_MASS SP_TM_APR

Time Report Approved by Proxy

The section discusses the Time Report Approved by Proxy workflow.

Description

Event Description	The time report approver approves a time report submitted by service provider contact on behalf of a service provider (by proxy).
Action Description	Notifies all service provider contacts for a vendor location that a time report is approved.
Notification Method	Email.

Workflow Objects

Business Process	SPA_TIME_BP
Activity	SPA_PROXY_TIME_APPR
Component	SPA_TIME_APPROVAL
Role	All Service Provider Contacts for the work order vendor's location.
Email Template	SP_TM_APR

Time Report Denied

The section discusses the Time Report Denied workflow.

Description

Event Description	The time report approver denies a time report.
Action Description	Notifies a service provider that the time report was denied.
Notification Method	Email.

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Workflow Objects

Business Process	SPA_TIME_BP
Activity	SPA_DEN_TIME_SHEET SPA_DEN_TIME_SHEET_WL
Component	SPA_TIME_APPROVAL
Role	Service provider
Email Template	SP_TM_DEN

Time Report Denied by Proxy

The section discusses the Time Report Denied by Proxy workflow.

Description

Event Description	The time report approver denies a time report submitted by service provider contact on behalf of a service provider (by proxy).
Action Description	Notifies all service provider contacts for a vendor location that a time report is denied.
Notification Method	Worklist, Email

Workflow Objects

Business Process	SPA_TIME_BP
Activity	SPA_PROXY_TIME_DENY SPA_DEN_TIME_SHEET_WL
Component	SPA_TIME_APPROVAL
Role	All service provider contacts for the work orders vendor location.
Email Template	SP_TM_DEN

Work Order Auto Task Notify

The section discusses the Work Order Auto Task Notify workflow.

Description

Event Description	A work order is created.
Action Description	Notifies users that work order tasks have been assigned to them.
Notification Method	Email.

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Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Configurable
Email Template	WO_A_TASK

See Also

Chapter 18, "Managing Work Orders," page 281

Work Order Canceled

The section discusses the Work Order Canceled workflow.

Description

Event Description	A work order is canceled.
Action Description	Notifies the service provider contact that a work order has been canceled.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service provider contact
Email Template	WO_CAN_3 (work orders with requisitions) WO_CAN_2 (work orders without requisitions)

Work Order Created

The section discusses the Work Order Created workflow.

Description

Event Description	A work order is created.
Action Description	Notifies the service coordinator that a work order has been created.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service coordinator
Email Template	WO_CREATE

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Work Order Extension

The section discusses the Work Order Extension workflow.

Description

Event Description	The service coordinator or requestor extends a work order.
Action Description	Notifies the service provider that the work order has been extended.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service provider
Email Template	WO_EXTEND

Work Order Reassign

The section discusses the Work Order Reassign workflow.

Description

Event Description	The service coordinator reassigns a work order.
Action Description	Notifies the originally assigned user that the work order has been reassigned. Notifies the newly assigned user that the work order has been reassigned.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Assigned users
Email Template	WO_REASSIG (previously assigned user) WO_REASSIGN (newly assigned user)

Work Order Release

The section discusses the Work Order Release workflow.

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Description

Event Description	The service coordinator or requester releases a work order.
Action Description	Notifies the service provider or service provider contact that the work order has been released and time or progress can be recorded against the work order.
Notification Method	Email.

Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Service provider, service provider contact
Email Template	WO_RELEASE

Work Order Task Assigned

The section discusses the Work Order Task Assigned workflow.

Description

Event Description	A work order is closed.
Action Description	Notifies users that off boarding tasks have been assigned to them.
Notification Method	Email.

Workflow Objects

Component	SPF_WO_APPR_CMP SPF_WO_TASK_CHKLST
Role	Assigned user
Email Template	TASK_EM WO_TASK

Work Order Approved

The section discusses the Work Order Approved workflow.

Description

Event Description	A work order is approved.
Action Description	Notifies the work order requester that the work order was approved.
Notification Method	Email.

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Workflow Objects

Component	SPF_WORK_ORDER_CMP
Role	Requester
Email Template	WO_APPROVE

Work Order Survey

The section discusses the Work Order Survey workflow.

Description

Event Description	A survey is sent to recipient.
Action Description	Notifies survey recipient that a work order survey is submitted and requires completion.
Notification Method	Worklist, Email.

Workflow Objects

Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_SEND_SURVEY
Component	SP_SUR_FILL
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	WO_SNDSURR WO_SNDSURD

Work Order Survey Canceled

The section discusses the Work Order Survey Canceled workflow.

Description

Event Description	A survey is canceled.
Action Description	Notifies survey recipient that a work order survey is canceled.
Notification Method	Email

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Workflow Objects

Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_CANC_SUR_EM
Component	SPF_WORK_ORDER_CMP
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	WO_CNLSUR

Work Order Threshold Alerts

The section discusses the Work Order Threshold Alerts workflow.

Description

Event Description	A work order reaches a specific pre-defined consumption or target date threshold.
Action Description	Notifies all work order threshold distribution list users that the work order consumption percentage has reached the target percentage. Also sends a notification to users a number of days before and after a specific event occurs.
Notification Method	Worklist, email.

Workflow Objects

Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_ALERT_BY_DT, SPF_WO_ALERT_BY PER
Component	SPF_WORK_ORDER_CMP
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	Uses message catalog text, no template used.

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APPENDIX E

PeopleSoft Services Procurement Reports

This appendix provides a summary table with a general description of the PeopleSoft Services Procurement standard reports.

Note. For samples of these reports, see the PDF files published on CD-ROM with the documentation (for online users) or *PeopleSoft Enterprise Services Procurement Reports* (for hardcopy users).

In addition to the standard reports, we also provide reporting tools that you can use to create new reports.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Services Procurement Reports: General Description

This table lists the PeopleSoft Services Procurement reports.

Report ID and Report Name	Description	Navigation	Run Control Page
POPO008 Close Purchase Order Report	Close all qualified purchase orders and generate the Purchase Order Reconciliation report.	Services Procurement, Reconciliations, Close Purchase Orders	RUN_PORECON
PORQ009 Close Requisition	Close all qualified requisitions using the Run Close Requisitions process, and generate the Requisition Reconciliation report.	Services Procurement, Reconciliations, Close Requisitions	RUN_REQRECON
SPINV001 Proforma Invoice	Lists detailed Proforma invoice information.	Services Procurement, Services Settlement, Print Invoices	SPF_GEN_CINP
SPINV002 sPro Invoice Report	View the generated voice information in a report form.	Reporting Tools, Query, Query Manager Select the *SPB_SRVC_BY_SHFT* Query Name to run the Shift by Service report.	QRY_QUERY

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Report ID and Report Name	Description	Navigation	Run Control Page
Shift by Service Shift by Service	Generate a PSQUERY report that lists shifts by service at a setID level.	Reporting Tools, Query, Query Manager Select the *SPB_ASSGNMT_BY_SERVICE* Query Name to run the Assignment by Service report.	QRY_QUERY
Assignment by Service Assignment by Service	Generate a PSQUERY report that lists assignments by service at a setID level.	Reporting Tools, Query, Query Manager Select the *SPB_SRVC_BY_ASSIGNMENT* Query Name to run the Service by Assignment report.	QRY_QUERY
Service by Assignment Service by Assignment	Generate a PSQUERY report that lists services by assignment at a setID level.	Reporting Tools, Query, Query Manager Select the *SPB_SRVC_BY_SHFT* Query Name to run the Service by Shift report.	QRY_QUERY
Service by Shift Service by Shift	Generate a PSQUERY report that lists services by shifts at a setID level.	Reporting Tools, Query, Query Manager	QRY_QUERY

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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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