
PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs

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PeopleSoft FSCM 9.2: Financials, ESA, ALM, and SCM Portal Packs
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i>Typographical Convention</i>	<i>Description</i>
Bold	Highlights 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.
<i>Italics</i>	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: Enter the letter <i>O</i> .
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	Highlights a PeopleCode program or other code example.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

<i>Typographical Convention</i>	<i>Description</i>
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
=>	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

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

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleSoft FSCM Related Links

Financial and Supply Chain Management information for Secure Enterprise Search (SES) can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components (*PeopleSoft FSCM 9.2: Application Fundamentals*)" topic.

[My Oracle Support](#)

[PeopleSoft Information Portal on Oracle.com](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with PeopleSoft Financials, ESA, ALM, and SCM Portal Packs

Getting Started with PeopleSoft Financials, ESA, ALM, and SCM Portal Packs

This topic discusses:

- PeopleSoft Financials, ESA, ALM, and SCM Portal Packs overview.
- PeopleSoft Financials, ESA, ALM, and SCM Portal Packs implementation.

PeopleSoft Financials, ESA, ALM, and SCM Portal Packs Overview

The PeopleSoft Financials, ESA, ALM, and SCM portal packs each provide a collection of pagelets that you can individually select to appear on a corporate intranet or extranet homepage. The individual pagelets provide information from various PeopleSoft Financials, Enterprise Service Automation (ESA), Asset Lifecycle Management (ALM), and Supply Chain Management (SCM) applications.

These four portal packs can be delivered to users through the application portal in the Financials database. The portal packs contain pagelets that provide at-a-glance access to key financial and operational data. They supplement the PeopleSoft Financials, ESA, ALM, and SCM applications and other portal applications with content-rich pagelets.

The PeopleSoft Financials, ESA, ALM, and SCM Portal Packs are targeted for multiple roles in an organization. Since these are functional roles, they may or may not be delivered in the PeopleSoft Security sample data.

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

You can associate these roles with employees in your organization.

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

You can associate these roles with employees and projects in your organization.

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

You set up multiple roles for this portal pack such as CIOs, property or IT accountants, IT asset managers, lease administrators, portfolio managers, technicians, and schedulers.

- The PeopleSoft SCM Portal Pack is intended for employee (internal) and customer (external) roles.

You can associate buyer, customer service manager, customer service representative, purchasing manager and more with an employee (internal) role, and associate customer, broker, and other roles relevant to your organization with a customer (external) role.

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

PeopleSoft Financials, ESA, ALM, and SCM Portal Packs Implementation

All four portal packs deliver pagelets that provide summary views of data that currently exist in the system. Each pagelet is associated with a PeopleSoft Financials, ESA, ALM, or SCM product (such as PeopleSoft General Ledger, Project Costing, Maintenance Management, or Billing) and the appropriate portal registry structures. The enabling application provides the data that appears in the pagelet. If you have not licensed the enabling application, the pagelet does not work.

Chapter 2

Setting Up PeopleSoft Financials Portal Pack

Setting Up PeopleSoft Financials Portal Pack

This topic discusses:

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

Prerequisites for the PeopleSoft Financials Portal Pack

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

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

To find a pagelet's enabling application, refer to the table in the Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack section.

See [Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack](#).

3. Specify pagelet security for each user ID on the ChartField Pagelet Security page to access information on the PeopleSoft General Ledger Actual vs Budgeted pagelet.

See [Viewing Actual Versus Budgeted \(Standard Budget\) Information](#).

Note: ChartField pagelet security applies only to the General Ledger Actual vs Budgeted pagelet. For each user ID that can view pagelet information, specify values for the DEPTID (department ID) and OPERATING_UNIT ChartFields.

4. Ensure that required prerequisite job processes appear on the portal menu navigation.

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

For the Receivables Update Pagelet Statistics Application Engine process (AR_CFOLOAD), navigate to PeopleTools, Portal, Structure and Content. In the Folders grid, select Accounts Receivable and Receivables Update. In the Content References grid, select the Edit link for Update Pagelet Statistics

to access the Content Reference Administration component. On the Content Ref Administration page, deselect the Hide from portal navigation option.

5. Grant security access to run a prerequisite process by navigating to PeopleTools, Security, Permission & Roles, Permission Lists.

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

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

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

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

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

See also *PeopleTools: PeopleTools Portal Technology*.

See also *PeopleTools: Using PeopleSoft Applications*.

Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack

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

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

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

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

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

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

Chapter 3

Setting Up PeopleSoft Enterprise Service Automation (ESA) Portal Pack

Setting Up PeopleSoft Enterprise Service Automation (ESA) Portal Pack

This topic discusses:

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

Prerequisites for the PeopleSoft ESA Portal Pack

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

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

To find a pagelet's enabling application, refer to the table in the section titled [Using Roles and Permission Lists for the PeopleSoft Enterprise Service Automation Portal Pack](#).

See [Using Roles and Permission Lists for the PeopleSoft ESA Portal Pack](#).

3. Use PeopleTools security to assign pagelet permission lists to the roles that need access to each PeopleSoft ESA Portal Pack pagelet.

The section titled [Using Roles and Permission Lists for the PeopleSoft ESA Portal Pack](#) identifies the permission lists that are authorized to use each PeopleSoft ESA Portal Pack pagelet.

4. Specify the PeopleSoft ESA Portal Pack pagelet default values at the administrator level so that users can access most of the PeopleSoft ESA Portal Pack pagelets without the need to personalize each one.

The system applies these values to retrieve transactional information that appears on the pagelet. To establish system default values at the administrator level, navigate to Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults. Users can override the default values at an individual level.

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

To open a personalization page, click the Customize (pencil) icon in the upper right corner of the pagelet.

6. (Optional) If you use PeopleSoft Expenses, schedule the Expenses Pagelet Processing Application Engine process (EX_PAGELET).

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

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

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

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

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

See "Updating Resource Utilization Data (*PeopleSoft FSCM 9.2: Program Management*)".

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

See "Specifying Staffing Workbench and Resource Utilization Options (*PeopleSoft FSCM 9.2: Resource Management*)".

There are no PeopleSoft ESA Portal Pack system defaults available for this pagelet. Therefore, each user must perform *one* of these activities:

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

10. (Optional) If you use PeopleSoft Project Costing, schedule the Transaction In Progress Summary Application Engine process (PC_PETIP_SUM).

This process stores information for the Payables In Progress, Purchasing In Progress, Inventory In Progress, Expenses Time In Progress, and Expenses In Progress pagelets to staging tables so that the data renders more rapidly. To schedule this process, navigate to Project Costing, Utilities,

Transaction In Progress Summary and select a frequency that is appropriate for your users to have refreshed information.

Using Roles and Permission Lists for the PeopleSoft ESA Portal Pack

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

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

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

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

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

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

Chapter 4

Setting Up PeopleSoft Asset Lifecycle Management (ALM) Portal Pack

Setting Up PeopleSoft Asset Lifecycle Management (ALM) Portal Pack

This topic discusses:

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

Prerequisites for the PeopleSoft ALM Portal Pack

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

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

To find a pagelet's enabling application, refer to the table in the section titled Using Roles and Permission Lists for the PeopleSoft ALM Portal Pack.

3. If you use PeopleSoft Maintenance Management, run the Update Work Order Portal Data (WM_PE) and Update Most Costly Asset Data (WM_PE_ASSET) Application Engine processes as required to create data that is used by Maintenance Management portal pagelets.
4. If you use PeopleSoft Real Estate Management, run the Real Estate Portal Data Collector Application Engine process (RE_PGLT_DATA) as required to create data that is used by PeopleSoft Real Estate Management portal pagelets.
5. Specify PeopleSoft Real Estate Management Portal Pack pagelet default values at the administrator level so that users can access most of the PeopleSoft Real Estate Management pagelets without the need to personalize each one.

The system applies these values to retrieve transactional information that appears on the pagelet. Users can override the default values by personalizing their settings. To establish system default values at the administrator level, navigate to Setup Financials/Supply Chain, Pagelets, ALM, Real Estate Management, Portal Pack Defaults, Portal Pack Default Administration - Real Estate Management.

6. If you use PeopleSoft IT Asset Management, display data in the portal by running the Generate Metrics Application Engine process (IT_METRICS), which summarizes data created by primary

PeopleSoft IT Asset Management processes and third party integration. The primary PeopleSoft IT Asset Management processes are Request Discovery Data (IT_DISCO_RUN) and Compare Asset Repositories (IT_RECON_RUN).

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

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

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

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

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

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

<i>Enabling Asset Lifecycle Management Application</i>	<i>Pagelet</i>	<i>Permission List</i>
PeopleSoft IT Asset Management	Asset Financial Statistics	These sample permission lists are included at installation: EPIT1000 (ITAM all permissions) EPIT2000 (ITAM portal setup permission) EPIT3000 (ITAM run and view reports) EPIT4000 (ITAM portlet view-only) EPIT5000 (Software Devices) The key page in each list is PORTAL_COMPONENTS_EP. Include this page in any list to provide access to PeopleSoft IT Asset Management pagelets to users of that list.
	Software Inventory Monitor	
	Software Renewal Pagelet	
	Software Pending Requisitions	
	Software Device Monitor	
	Assets Not Reporting	
	Hardware Progress Report	
	Software Progress Report	
	Hardware Inventory	
	Inventory Exceptions	
	Lease End Metric	
	Integration Data Load Errors	
	Related Links	

<i>Enabling Asset Lifecycle Management Application</i>	<i>Pagelet</i>	<i>Permission List</i>
PeopleSoft Maintenance Management	Backlog by Work Order Type Unassigned Work Order Tasks Reviewed Work Order Tasks Scheduled Work Order Tasks Scheduler's Work Orders My Assigned Work Orders Most Costly Assets To Maintain Top 5 Problem Codes My Service Requests	For the My Assigned Work Orders pagelet, use EPWM1008 (Maintenance Technician Pagelets). For the My Service Requests pagelet, use EPWM1012 (Self-Service Service Request). For all other PeopleSoft Maintenance Management pagelets, use EPWM1005 (Planner and Scheduler's Pagelets).
PeopleSoft Real Estate Management	Property Statistics Site Statistics My Tasklist My Lease Portfolio Lease Costs Lease Statistics Lease Revenue Lease Optimization Space Utilization Recently Acquired Sites Recent SAR Exec. Performance	EPRE1000 (Real Estate Configuration) EPRE2000 (Lease Administration) EPRE3000 (Real Estate Portal Administration) EPRE3500 (Real Estate Portal User)

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

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

Chapter 5

Setting Up PeopleSoft Supply Chain Management (SCM) Portal Pack

Setting Up PeopleSoft Supply Chain Management (SCM) Portal Pack

This topic presents an overview and discusses:

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

Understanding PeopleSoft SCM Portal Pack

The PeopleSoft SCM Portal Pack is a collection of portal pagelets set up on the employee registry and accessed through your organization's intranet, or on the customer registry accessed through your organization's extranet homepages. These pagelets enable you to access to key data and transactions within the PeopleSoft Supply Chain Management applications.

You install the PeopleSoft SCM Portal Pack and define roles and permission lists for specific users that enable them to access specific pagelet components in PeopleSoft Security. Users, based on their defined role, can access certain pagelets to personalize their portal homepages. You can identify the pagelets that support personalization if the Customize button appears on the title bar of the pagelet.

You can configure the 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.

Prerequisites for PeopleSoft SCM Portal Pack

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

- Install the PeopleSoft FSCM product database.
- Select Supply Chain Portal Pack on the Products page of the Installation Options. (Set Up Financials/ Supply Chain, Installation Options).
- Install the products on the Installation Options – Products page that supply data to the SCM Portal Pack, which include:

- PeopleSoft Billing.
 - PeopleSoft Order Management.
 - PeopleSoft Promotions Management.
 - PeopleSoft eBill Management.
-
- Set up PeopleSoft PeopleTools Security roles and permission lists to access pagelets.

Using Roles and Permission Lists for the PeopleSoft SCM Portal Pack

The PeopleSoft Supply Chain Portal Pack pagelets are targeted for specific functional roles, which generally fit into two audiences (mirroring the different portal registries):

- Employee.
- Customer.

Pagelet Security

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

Oracle delivers sample data with your products that groups pagelets into the functional roles, Employee and Customer. You must create permission lists appropriate for your organization and associate them with role definitions before users can access the pagelets. You can refer to the roles and permission list definitions that Oracle delivers in the PeopleTools Security sample data for examples of how to set up this data.

The sample roles that Oracle delivers to enable access to PeopleSoft Supply Chain Portal Pack pagelets are:

- Employee (internal)
- Customer (external)

PeopleTools: Using PeopleSoft Applications

Employee (Internal)

Buyer.

Customer service manager.

Customer service representative.

Employee.

Purchasing manager.

Salesperson.

Warehouse manager.

Warehouse personnel.

Customer (External)

Broker.

Customer.

Related Links

[PeopleSoft Supply Chain Management Portal Pack Pagelets Overview](#)

Chapter 6

Using Pagelets Enabled by PeopleSoft General Ledger

Using Pagelets Enabled by PeopleSoft General Ledger

This topic discusses how to:

- View account reconciliation.
- Ledger balance analysis.
- View expense variances.
- View the operating budget variance.
- View gross margin.
- View project revenue variances.
- View budget alerts.
- View unbilled balances to projects expiring.
- View lapsing of appropriation.
- View actual versus budgeted information.

Viewing Expense Variances

This section discusses how to:

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

Pages Used to View Expense Variances

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

Expense Variance Pagelet

Use the Expense Variance pagelet page (GL_PE_02) to view the top five expense variances between amounts budgeted and actual expenses.

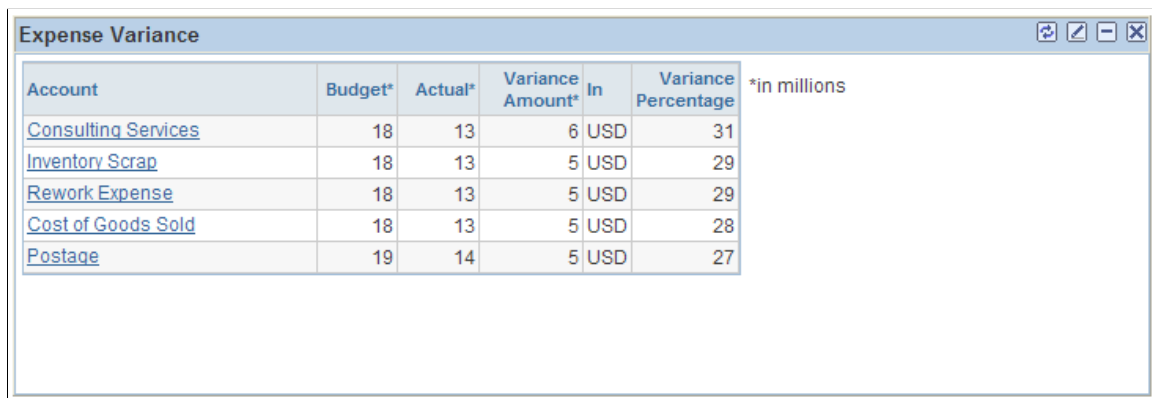
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Expense Variance.

Image: Expense Variance pagelets

This example illustrates the fields and controls on the Expense Variance pagelets. You can find definitions for the fields and controls later on this page.



Account	Budget*	Actual*	Variance Amount*	In	Variance Percentage	*in millions
Consulting Services	18	13	6	USD	31	
Inventory Scrap	18	13	5	USD	29	
Rework Expense	18	13	5	USD	29	
Cost of Goods Sold	18	13	5	USD	28	
Postage	19	14	5	USD	27	

Account

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

Set that you select on the Expense Variance Personalization page.

**Variance Amount Variance
Percentage and**

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

Personalizing Expense Variance

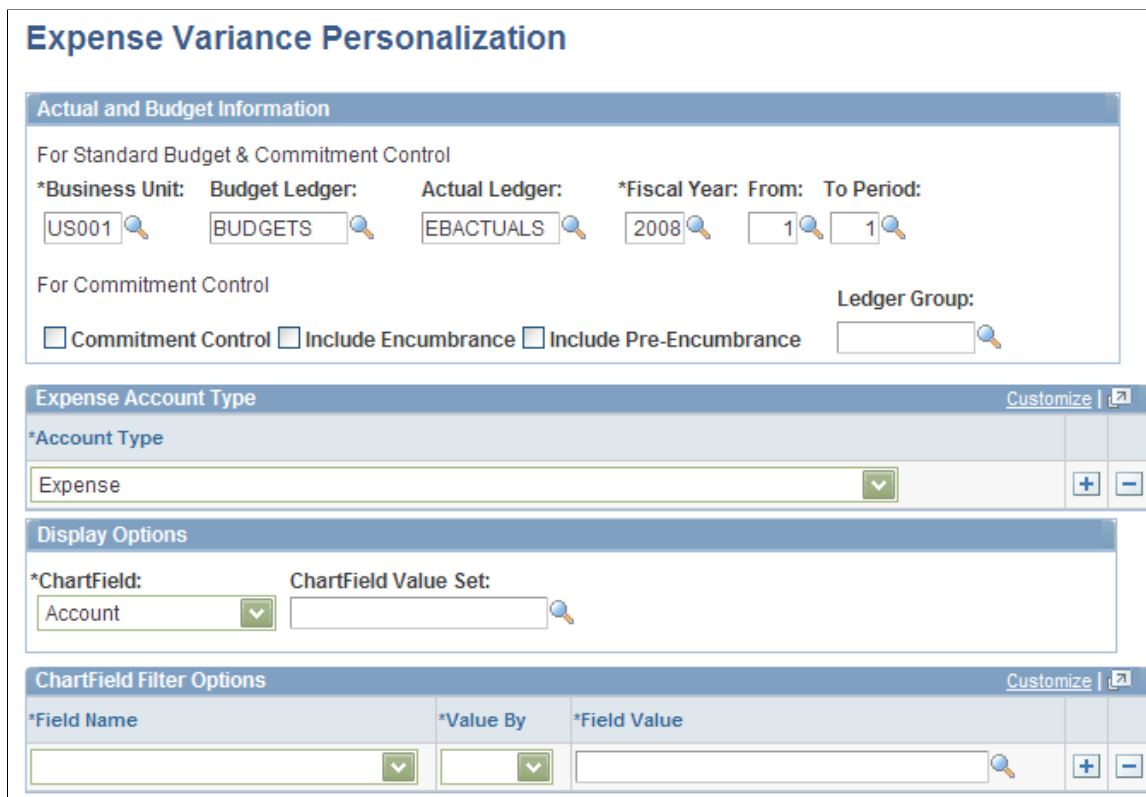
Use the Expense Variance Personalization page (GL_PE_02_PRS) to define default display information for the Expense Variance pagelet.

Navigation

Click the Customize icon on the Expense Variance pagelet.

Image: Expense Variance Personalization page

This example illustrates the fields and controls on the Expense Variance Personalization page. You can find definitions for the fields and controls later on this page.



The screenshot shows the 'Expense Variance Personalization' page with the following sections:

- Actual and Budget Information**
 - For Standard Budget & Commitment Control:
 - *Business Unit: US001
 - Budget Ledger: BUDGETS
 - Actual Ledger: EBACTUALS
 - *Fiscal Year: From: 2008 To Period: 1
 - For Commitment Control:
 - ☐ Commitment Control
 - ☐ Include Encumbrance
 - ☐ Include Pre-Encumbrance
 - Ledger Group: (empty)
- Expense Account Type**
 - *Account Type: Expense
- Display Options**
 - *ChartField: Account
 - ChartField Value Set: (empty)
- ChartField Filter Options**
 - *Field Name: (empty)
 - *Value By: (empty)
 - *Field Value: (empty)

Budget Ledger

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

Actual Ledger

Specify an actual ledger of the business unit.

From and To Period

Select a range of ledger accounting periods for the specified year.

Ledger Group	Select a specific Commitment Control ledger group.
Account Type	Select the account type that identifies expense accounts.
ChartField	Select the ChartField that you want to display on the pagelet.
ChartField Value Set	Select the ChartField Value Set that defines the scope of the ChartField values that you want to include. The ChartField Value Set must define values for only one ChartField.
Field Name	Select the field on which you want to add an additional filter.
Value By	Select how you want to limit the scope of the field values, either by <i>Set</i> (ChartField Value Set), or <i>Value</i> (a single value).
Field Value	Enter the scoping ChartField Value Set or single value to limit the scope of the field.

Compare Across Ledgers Pagelet

Use the Compare Across Ledgers (for standard ledgers) page (INQ_COMPARE_PNL) to specify the ledger data you want to compare by period and view comparison results.

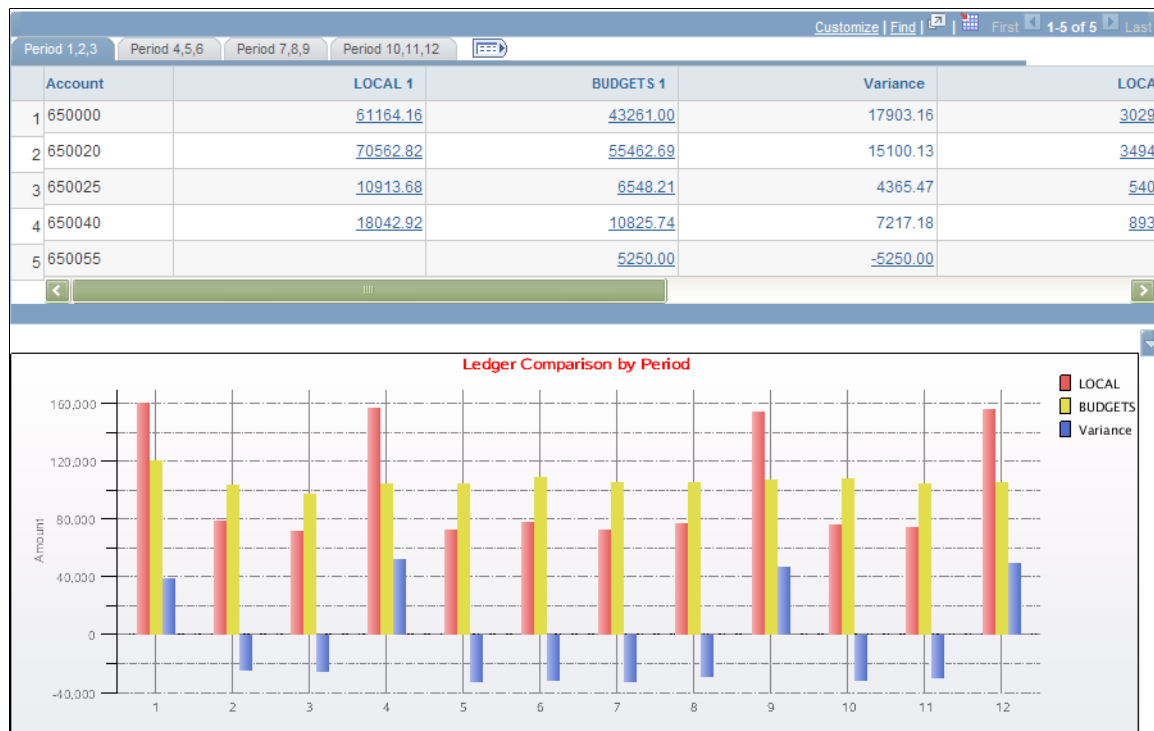
Navigation

Click a ChartField value that is displayed on the Expense Variance pagelet.

You can also navigate through application pages: General Ledger, Review Financial Information, Compare Across Ledger

Image: Compare Across Ledgers page

This example illustrates the fields and controls on the Compare Across Ledgers page. You can find definitions for the fields and controls later on this page.



Related Links

"Comparing Across Ledgers (*PeopleSoft FSCM 9.2: General Ledger*)"

Budget Overview Page

Use the Budget Overview (for Commitment Control ledgers) page (KK_INQ_BD_OVW) to the search page is populated with values from the selected ChartField.

Click the Search icon to view the Budget Overview page.

Navigation

Click a ChartField value that is displayed on the Expense Variance pagelet.

Image: Budget Overview page

This example illustrates the fields and controls on the Budget Overview page. You can find definitions for the fields and controls later on this page.

Budget Inquiry Criteria
Budget Overview

Inquiry: *DEFAULT Description:

[Amount Criteria](#)

Budget Type

*Business Unit: Ledger Group/Set: Ledger Group:
☐ View Stat Code Budgets EG_UNIV group
☐ Display Chart

Time Span

*Type of Calendar:

Budget Criteria [Customize](#) [Find](#) [View All](#) First **1 of 1** Last

Select	Ledger Group	Detail Calendar	From Year	From Period	To Year	To Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	EG_UNIV	01	2009	1	2009	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	<input type="text" value="6015"/>	<input type="text" value="6015"/>		<input type="text"/>	Update/Add
Dept	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add
PC Bus Unit	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add
Project	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add
Activity	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add

Budget Status

- ☒ Open
- ☒ Closed
- ☒ Hold

Related Links

"Creating and Reviewing Budget Overview Inquiries (*PeopleSoft FSCM 9.2: Commitment Control*)"

Viewing Gross Margins

This section discusses how to:

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

Pages Used to View Gross Margins

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

Viewing Gross Margins

Use the Gross Margin pagelet page (GL_PE_04) to view a bar graph that shows the five most profitable or five least profitable gross margins.

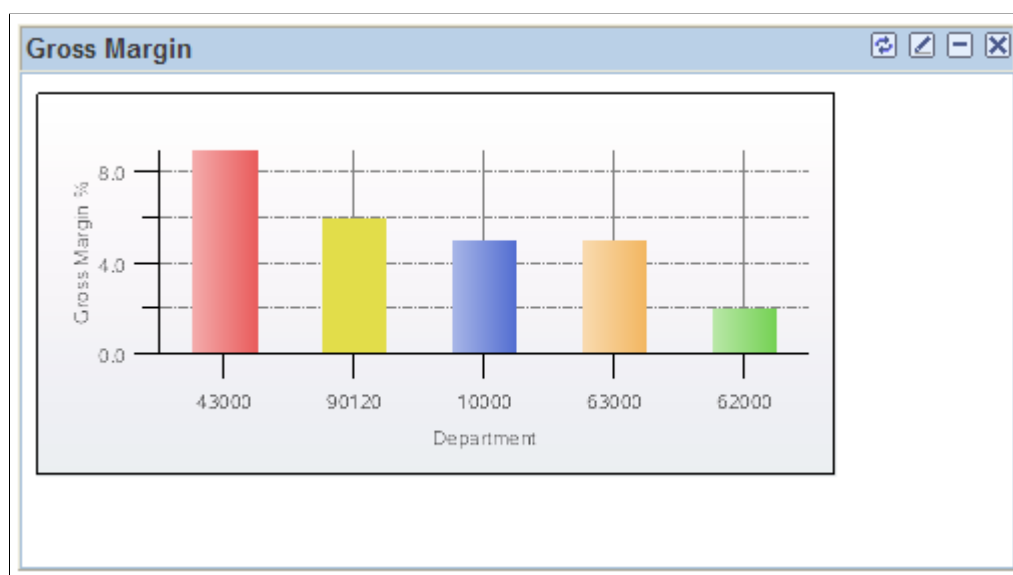
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Gross Margin.

Image: Gross Margin pagelet

This example illustrates the fields and controls on the Gross Margin pagelet. You can find definitions for the fields and controls later on this page.



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

Personalizing Gross Margins

Use the Gross Margin Personalization page (GL_PE_04_PRS) to define default display information for the Gross Margin pagelet.

Navigation

Click the Customize icon on the Gross Margin pagelet.

Image: Gross Margin Personalization page

This example illustrates the fields and controls on the Gross Margin Personalization page. You can find definitions for the fields and controls later on this page.

Gross Margin Personalization

*Show: 5 Most Profitable

Ledger Information

*Business Unit: US001 *Ledger: EBACTUALS *Year: 2008 From: 1 To Period: 1

Revenue Account Type *Account Type: Revenue

Expense Account Type *Account Type: Expense

Display Options

ChartField: Department Tree Name: Node: Level:

ChartField Filter Options

*Field Name	*Value By	*Field Value

☐ User Defined Groups

Groups defined by Tree Nodes

*Group Name	*Revenue Node	*Expense Node

Groups defined by Range of Accounts

*Group Name	*ChartField Value 1	*ChartField Value 2	*ChartField Value 3	*ChartField Value 4

Show

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

From and To Period

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

Revenue Account Type and Expense Account Type

Select the account types that correspond to revenue and expense.

ChartField, Tree Name, Node, or Level

Use these fields as needed to narrow the display to a PeopleSoft internal ChartField, or to a ChartField and its associated Tree Name, Node, or Level or a combination of these. You can leave a field blank or enter a valid value. If you leave the Tree Name, Node, or Level field blank, the system uses all of the values for that ChartField.

Field Name, Value By, or Field Value

Use these fields to narrow the search to all values for a field name, a specific field value, or a ChartField ValueSet.

User Define Groups

Select to create a new user-defined group.

Groups defined by Tree Nodes or Groups defined by Range of Accounts

If you selected the User Define Groups option, use these group boxes to create either a group defined by a tree node or a group defined by a range of accounts.

Viewing Ledger Details

Use the Ledger Inquiry page (INQ_DETAIL_LEDGER) to view ledger details for the department represented in the bar graph.

Navigation

On the pagelet graph, click the bar that represents the department for which you want to view ledger details.

Image: Ledger Inquiry - Ledger Summary page

This example illustrates the fields and controls on the Ledger Inquiry - Ledger Summary page. You can find definitions for the fields and controls later on this page.

Ledger Inquiry

Ledger Summary

Before clicking on Detail hyper link, you can click on "Ledger Detail Drill-Down Chartfield Display" to display the chartfields that are pertinent to your inquiry.

Ledger Criteria

Go To: [Inquiry Criteria](#) [Ledger Detail Drill-Down Chartfield Display](#)

Ledger Summary Find | View All | First 1 of 1 | Last

Period	Activity	Detail	Dept	Period Balance (in Transaction Currency)	Currency	Period Balance (in Base Currency)	Base Currency
1	Activity	Detail	90120	-175,571.82	USD	-175,571.82	USD

Currency Totals

Amount (in Transaction Currency):	-175,571.82	USD	Amount (in Base Currency):	-175,571.82	USD
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Related Links

"Ledger Inquiry - Ledger Details Page (PeopleSoft FSCM 9.2: General Ledger)"

Viewing Lapsing of Appropriation

This section discusses how to:

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

Pages Used to View the Lapsing of Appropriation

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

Lapsing of Appropriation Pagelet

Use the Lapsing of Appropriation pagelet (GL_PE_08) to view a list of projects according to their expiration dates and the total amount unbilled.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Lapsing of Appropriation.

Image: Lapsing of Appropriation pagelet

This example illustrates the fields and controls on the Lapsing of Appropriation pagelet. You can find definitions for the fields and controls later on this page.

Grants expire within	Unbilled Amount*	In
0 to 30 days	602	USD

*in millions

Unbilled Amount

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

Personalizing Lapsing of Appropriation

Use the Lapsing of Appropriation Personalization page (GL_PE_08_PRS) to define default display information for the Lapsing of Appropriation pagelet.

Navigation

Click the Customize icon on the Lapsing of Appropriation pagelet.

Image: Lapsing of Appropriation Personalization page

This example illustrates the fields and controls on the Lapsing of Appropriation Personalization page. You can find definitions for the fields and controls later on this page.

Commitment Control and Ledger Group

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

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

Expense Account Type

Select the account type used for appropriations that you want to view.

Viewing Budget Alerts

This section discusses how to:

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

Pages Used to View Budget Alerts

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

Viewing My Budget Alerts

Use the My Budget Alert pagelet page (GL_PE_03) to view the top five alerts by the actual amount or by the percentage remaining in the budget.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select My Budget Alert.

Image: My Budget Alert pagelet

This example illustrates the fields and controls on the My Budget Alert pagelet. You can find definitions for the fields and controls later on this page.

My Budget Alert			
Project	Total Amount Used	In	Percentage Remaining
The effects of insulin on labo	51	USD	2
The effects of insulin on labo	99	USD	2
The effects of insulin on labo	1,500	USD	3
Research on Sleep and Sleep Di	400,000,000	USD	4
The effects of insulin on huma	16,800	USD	4

Refresh icon

Click to update the data that appears on the page.

Personalizing My Budget Alerts

Use the My Budget Alert Personalization page (GL_PE_03_PRS) to define default display information for the My Budget Alert pagelet.

Navigation

Click the Customize icon on the My Budget Alert pagelet.

Image: My Budget Alert Personalization page

This example illustrates the fields and controls on the My Budget Alert Personalization page. You can find definitions for the fields and controls later on this page.

My Budget Alert Personalization

Budget Information

*Business Unit: EGV05 *Ledger Group: EG_UNIV *Year: 2009 From: 1 To Period: 12

Display Options

*ChartField: Project *Sort Data By: By Amount

ChartField Filter Options [Customize](#)

*Field Name	*Value By	*Field Value

Ledger Group

Select a specific Commitment Control ledger group.

Sort Data By

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

Viewing Budget Details

Use the Commitment Control Budget Details page (KK_INQ_BDT_STATUS) to the search page is populated with values from the selected ChartField.

Click the Search button to display the Commitment Control Budget Details page.

Navigation


Click a ChartField value on the My Budget Alert pagelet.

Image: Commitment Control Budget Details page









This example illustrates the fields and controls on the Commitment Control Budget Details page. You can find definitions for the fields and controls later on this page.

Commitment Control Budget Details





Business Unit	Ledger Group	Account	Dept	Project	PC Bus Unit	Activity	Budget Period
EGV05	EG_UNIV	6004	41000	PI-PRJ10	EGV05	IMPLEMENTATION	2008



Ledger Amounts

Budget:	5,000.00 USD			Attributes	Max Rows: <input type="text" value="100"/>
Expense:	0.00 USD			Parent / Children	
Encumbrance:	51.00 USD			Associated Budgets	
Pre-Encumbrance:	950.00 USD				
Associate Revenue:	0.00 USD				

Available Budget

Without Tolerance:	3,999.00  USD	Percent: (79.98%) 
With Tolerance:	4,349.00  USD	Percent: (86.98%) 

Budget Exceptions

Exception Errors:	0	Exception Warnings:	0	Budget Exceptions
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Related Links

"Viewing Budget Details and Transaction Activity (*PeopleSoft FSCM 9.2: Commitment Control*)"

Viewing Operating Budget Variances

This section discusses how to:

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

Pages Used to View Operating Budget Variances

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

Viewing Operating Budget Variances

Use the Operating Budget Variance pagelet (GL_PE_06) to view the top five variances between budgeted amounts and actual expenses.

This pagelet can display the amount budgeted, actual amount spent, variance amount, and variance percentage.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Operating Budget Variance.

Image: Operating Budget Variance pagelet

This example illustrates the fields and controls on the Operating Budget Variance pagelet. You can find definitions for the fields and controls later on this page.

Operating Budget Variance						
Account	Budget*	Actual*	Variance Amount*	In	Variance Percentage	*in millions
Consulting Services	18	13	6	USD	31	
Inventory Scrap	18	13	5	USD	29	
Rework Expense	18	13	5	USD	29	
Cost of Goods Sold	18	13	5	USD	28	
Postage	19	14	5	USD	27	

Account

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

Variance Percentage

Displays the difference as a percentage.

Personalizing Operating Budget Variance

Use the Operating Budget Variance Personalization page (GL_PE_06_PRS) to define default display information for the Operating Budget Variance pagelet.

Navigation

Click the Customize icon on the Operating Budget Variance pagelet.

Image: Operating Budget Variance Personalization page

This example illustrates the fields and controls on the Operating Budget Variance Personalization page. You can find definitions for the fields and controls later on this page.

Operating Budget Variance Personalization

Actual and Budget Information

For Standard Budget & Commitment Control

*Business Unit: Budget Ledger: Actual Ledger: *Fiscal Year: From: To Period:

For Commitment Control

☐ Commitment Control ☐ Include Encumbrance ☐ Include Pre-Encumbrance Ledger Group:

Expense Account Type [Customize](#)

*Account Type

Display Options

*ChartField: Tree Name: Tree Node: Level:

ChartField Filter Options [Customize](#)

*Field Name	*Value By	*Field Value
<input type="text"/>	<input type="text"/>	<input type="text"/>

From and To Period

Select a range of ledger accounting periods for the specified year.

Ledger Group

Select a commitment control ledger group.

Expense Account Type

Select the account type that is associated with expenses.

Comparing Standard Ledgers

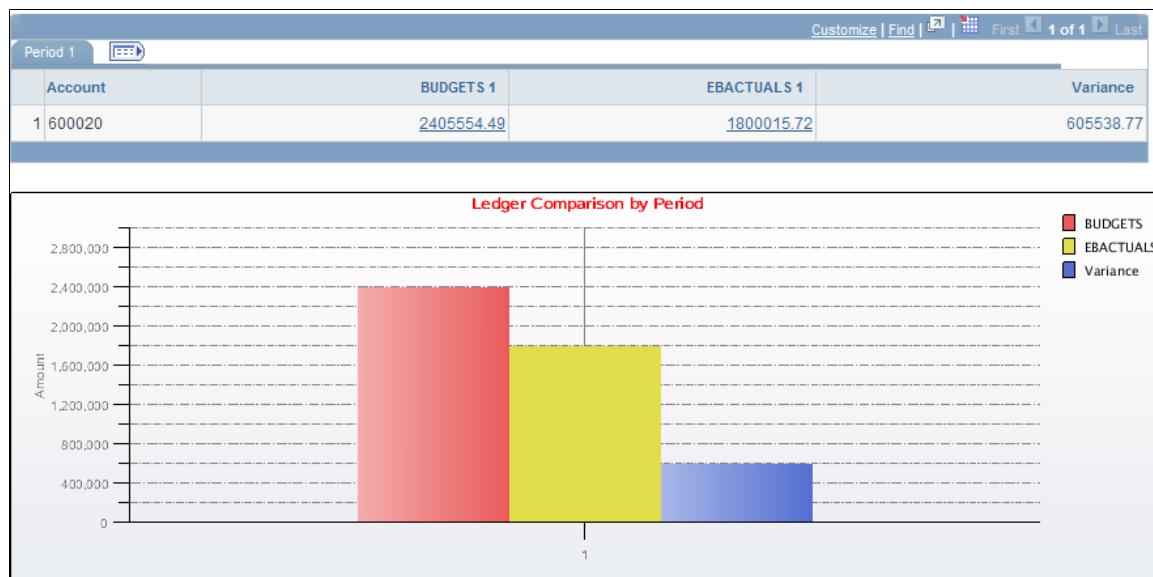
Use the Compare Across Ledgers (for standard ledgers) page (INQ_COMPARE_PNL) to specify the ledger data you want to compare by period and view comparison results.

Navigation

Click a ChartField value on the Operating Budget Variance pagelet.

Image: Compare Across Ledgers page

This example illustrates the fields and controls on the Compare Across Ledgers page. You can find definitions for the fields and controls later on this page.



Related Links

"Comparing Across Ledgers (*PeopleSoft FSCM 9.2: General Ledger*)"

Budget Overview Page

Use the Budget Overview (for Commitment Control ledgers) page (KK_INQ_BD_OVW) to the search page is populated with values from the selected ChartField.

Click the Search button to view the Budget Overview page.

Navigation

Click a ChartField value on the Operating Budget Variance pagelet.

Image: Budget Overview page

This example illustrates the fields and controls on the Budget Overview page. You can find definitions for the fields and controls later on this page.

Budget Inquiry Criteria
Budget Overview

Inquiry: *DEFAULT Description:

[Amount Criteria](#)

Budget Type

*Business Unit: Ledger Group/Set: Ledger Group:
☐ View Stat Code Budgets EG_UNIV group
☐ Display Chart

Time Span

*Type of Calendar:

Budget Criteria [Customize](#) | [Find](#) | [View All](#) | | | [First](#) | [1 of 1](#) | [Last](#)

Select	Ledger Group	Detail Calendar	From Year	From Period	To Year	To Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	EG_UNIV	01	2009	1	2009	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	<input type="text" value="6007"/>	<input type="text" value="6007"/>		<input type="text"/>	Update/Add
Dept	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add
PC Bus Unit	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add
Project	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add
Activity	<input type="text" value="%"/>	<input type="text" value="%"/>		<input type="text"/>	Update/Add

Budget Status

☒ Open
☒ Closed
☒ Hold

Related Links

"Creating and Reviewing Budget Overview Inquiries (*PeopleSoft FSCM 9.2: Commitment Control*)"

Viewing Project Revenue Variances

This section discusses how to:

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

Pages Used to View Project Revenue Variances

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

Project Revenue Variances Pagelet

Use the Project Revenue Variance pagelet (GL_PE_05) to view the top five variances between budgeted amounts for a project and actual expenses.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Project Revenue Variance.

Image: Project Revenue Variance pagelet

This example illustrates the fields and controls on the Project Revenue Variance pagelet. You can find definitions for the fields and controls later on this page.

Project Revenue Variance						*in millions
Project	Budget*	Actual*	Variance Amount*	In	Variance Percentage	
Database Maintenance	-9	6	-15	USD	170	
System Installation	-8	6	-15	USD	179	
HTML Programming	-9	6	-15	USD	167	
Access Database Creation	-9	6	-15	USD	166	
Transportation Upgrades	-9	6	-15	USD	164	

Project

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

Variance Percentage

Displays the difference as a percentage.

Personalizing Project Revenue Variance

Use the Project Revenue Variance Personalization page (GL_PE_05_PRS) to define default display information for the Project Revenue Variance pagelet.

Navigation

Click the Customize icon on the Project Revenue Variance pagelet.

Image: Project Revenue Variance Personalization page

This example illustrates the fields and controls on the Project Revenue Variance Personalization page. You can find definitions for the fields and controls later on this page.

Project Revenue Variance Personalization

Actual and Budget Information

For Standard Budget & Commitment Control

*Business Unit: Budget Ledger: Actual Ledger: *Fiscal Year: From: To Period:

For Commitment Control

☐ Commitment Control ☐ Include Encumbrance ☐ Include Pre-Encumbrance Ledger Group:

Revenue Account Type Customize

*Account Type

+ -

Display Options

*ChartField: ChartField Value Set:

ChartField Filter Options Customize

*Field Name	*Value By	*Field Value
<input type="text"/>	<input type="text"/>	<input type="text"/>

+ -

Ledger Group

Select a specific Commitment Control ledger group.

From and To Period

Select a range of ledger accounting periods for the specified year.

Revenue Account Type

Select the account type that is associated with revenue.

ChartField

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

Comparing Standard Ledgers

Use the Compare Across Ledgers (for standard ledgers) page (INQ_COMPRE_PNL) to specify the ledger data that you want to compare by period and view comparison results.

Navigation

Click a ChartField value on the Project Revenue Variance pagelet.

Image: Compare Across Ledgers page

This example illustrates the fields and controls on the Compare Across Ledgers page. You can find definitions for the fields and controls later on this page.

Compare Across Ledgers

Ledger Criteria

Inquiry *Unit *Ledger *Ledger *Year *From Period *To Period *Currency
 *DEFAULT US001 BUDGETS LOCAL 2009 1 12 USD

*Amount to display POSTED_TOTAL_AMT Percentage/Amount Amount Max Rows 25 *** No Records Found ***

☒ Display Chart [Search](#)

Chartfields	ChartField Value	Info	ChartField Value Set	Update/Add	Sum By	Value Required	Order-By
1 Account		i		Update/Add	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
2 Alternate Account		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
3 Department		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
4 Operating Unit		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
5 Product		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
6 Fund Code		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
7 Class Field		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
8 Program Code		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
9 Budget Reference		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
10 Affiliate		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
11 Fund Affiliate		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
12 Operating Unit Affiliate		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
13 Project	CORP_INTRANE	i		Update/Add	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
14 Book Code		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	
15 Adjustment Type		i		Update/Add	<input type="checkbox"/>	<input type="checkbox"/>	

Related Links

"Comparing Across Ledgers (*PeopleSoft FSCM 9.2: General Ledger*)"

Viewing Commitment Control Budget Overviews

Use the Budget Overview (for Commitment Control ledgers) page (KK_INQ_BD_OVW) to the search page is populated with values from the selected ChartField.

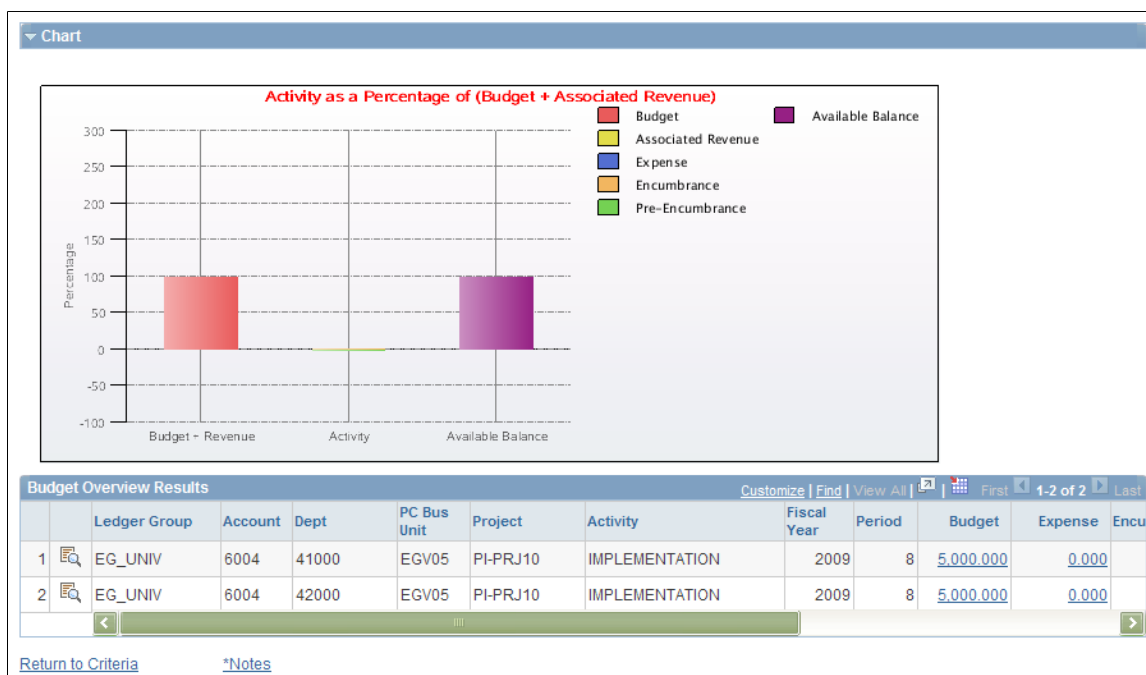
Click the Search button to view the Budget Overview page.

Navigation

Click a ChartField value on the Project Revenue Variance pagelet.

Image: Budget Overview (Results) page

This example illustrates the fields and controls on the Budget Overview (Results) page. You can find definitions for the fields and controls later on this page.



Related Links

"Creating and Reviewing Budget Overview Inquiries (*PeopleSoft FSCM 9.2: Commitment Control*)"

Viewing Unbilled Balances to Projects Expiring

This section discusses how to:

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

Pages Used to View Unbilled Balances

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Expiring Projects pagelet	GL_PE_07	Click the Personalize Content link on the PeopleSoft homepage. Select Expiring Projects.	View a list of the top five projects with unbilled amounts, and project expiration dates. Sort by most unbilled amounts or by earliest expiration date.
Unbilled Balances to Projects Expiring Personalization	GL_PE_07_PRS	Click the Customize icon on the Expiring Projects pagelet.	Define default display information for the Expiring Projects pagelet.

Viewing Expiring Projects

Use the Expiring Projects pagelet (GL_PE_07) to view a list of the top five projects with unbilled amounts, and project expiration dates.

Sort by most unbilled amounts or by earliest expiration date.

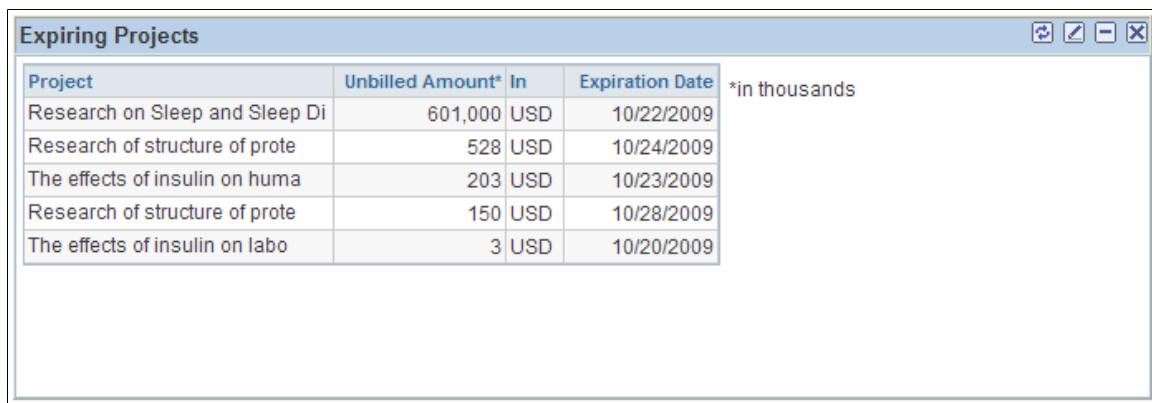
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Expiring Projects.

Image: Expiring Projects pagelet

This example illustrates the fields and controls on the Expiring Projects pagelet. You can find definitions for the fields and controls later on this page.



Project	Unbilled Amount*	In	Expiration Date	*in thousands
Research on Sleep and Sleep Di	601,000	USD	10/22/2009	
Research of structure of prote	528	USD	10/24/2009	
The effects of insulin on huma	203	USD	10/23/2009	
Research of structure of prote	150	USD	10/28/2009	
The effects of insulin on labo	3	USD	10/20/2009	

Unbilled Amount

The amount of the balance that has not been billed.

Expiration Date

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

Personalizing Unbilled Balances to Projects Expiring

Use the Unbilled Balances to Projects Expiring Personalization page (GL_PE_07_PRS) to define default display information for the Expiring Projects pagelet.

Navigation

Click the Customize icon on the Expiring Projects pagelet.

Image: Unbilled Balances to Projects Expiring Personalization page

This example illustrates the fields and controls on the Unbilled Balances to Projects Expiring Personalization page. You can find definitions for the fields and controls later on this page.

Unbilled Balances to Projects Expiring Personalization

Show Projects: with Most Unbilled Amounts

Actual and Budget Information

*Business Unit: EGV05 *Ledger Group: EG_UPRV *Projects Expire in (days): 30

Select to show the top five projects with the most unbilled amounts or those that are expiring the earliest.

Ledger Group

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

Projects Expire in (days)

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

Viewing Actual Versus Budgeted (Standard Budget) Information

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

This section discusses how to:

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

Pages Used to Access and View Actual Versus Budgeted Information

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

ChartField Pagelet Security Page

Use the ChartField Pagelet Security page (GL_PE_CF_SEC_PAGE) to enable additional security for the Actual vs Budgeted pagelet by restricting data access to specified department IDs and operating units.

Navigation

Set Up Financials/Supply Chain, Security, ChartField Pagelet Security, ChartField Pagelet Security

Image: ChartField Pagelet Security page

This example illustrates the fields and controls on the ChartField Pagelet Security page. You can find definitions for the fields and controls later on this page.

Field Name

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

sign in to the portal, information that appears on the pagelets is limited to the specified values.

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

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

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

Pagelet security is separate from application security. Once a user accesses an application page, that user uses the security that is set up for the application and associated ChartField Security.

See [Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack](#).

See "Understanding ChartField Security (*PeopleSoft FSCM 9.2: Application Fundamentals*)".

Actual vs Budgeted Pagelet

Use the Actual vs Budgeted pagelet page (GL_PE_ACTVBUD) to view actual amount compared to budgeted amount for a specified time period, and view the positive or negative variance.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Actual vs Budgeted.

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

Image: Actual vs Budgeted pagelet

This example illustrates the fields and controls on the Actual vs Budgeted pagelet. You can find definitions for the fields and controls later on this page.

Actual vs Budgeted					
Account	Budget*	Actual*	Variance Amount*	In	*in millions
Service Revenue	-18	-12	-6	USD	
Project Revenue	-17	-12	-6	USD	
Freight Revenue	-17	-12	-5	USD	
Contract Revenue	-17	-12	-5	USD	
Interest On Consumer Loans	-17	-12	-5	USD	

Account

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

Actual Versus Budgeted Personalization Page

Use the Actual vs Budgeted Personalization page (GL_PE_ACTVBUD_PRS) to define default display information for the Actual vs Budgeted pagelet.

Navigation

Click the Pagelet Settings icon on the Actual vs Budgeted pagelet and select Personalize.

Image: Actual vs Budgeted Personalization page

This example illustrates the fields and controls on the Actual vs Budgeted Personalization page. You can find definitions for the fields and controls later on this page.

Actual vs Budgeted Personalization						
*Business Unit:	*Actuals Ledger:	*Budget Ledger:	*Fiscal Year:	*From:	*To Period:	*Currency:
US001	EBACTUALS	BUDGETS	2008	1	1	USD

Actuals Ledger and Budget Ledger

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

From and To Period

Select a range of ledger accounting periods for the specified year.

Compare Across Ledgers Page

Use the Compare Across Ledgers page (INQ_COMPARE_PNL) to specify the ledger data you want to compare by period and view comparison results.

Navigation

Click an account on the Actual vs Budgeted pagelet.

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

Related Links

"Comparing Across Ledgers (*PeopleSoft FSCM 9.2: General Ledger*)"

Chapter 7

Using Pagelets Enabled by PeopleSoft Payables

Using Pagelets Enabled by PeopleSoft Payables

This topic discusses how to:

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

Setting Up PeopleSoft Payables for the PeopleSoft Financials Portal Pack

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

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

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

Understanding Setup

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

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

Viewing Average Days in Payables

This section discusses how to:

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

Pages Used to View Average Days in Payables

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

Average Days in Payables Pagelet

Use the Average Days in Payables pagelet page (AP_CFOP_AVG_MAIN) to view a bar graph that displays average days for the periods specified on the Average Days Personalization page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Average Days in Accounts Payable.

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

Click a bar on the graph to view details.

Average Days in AP Personalization Page

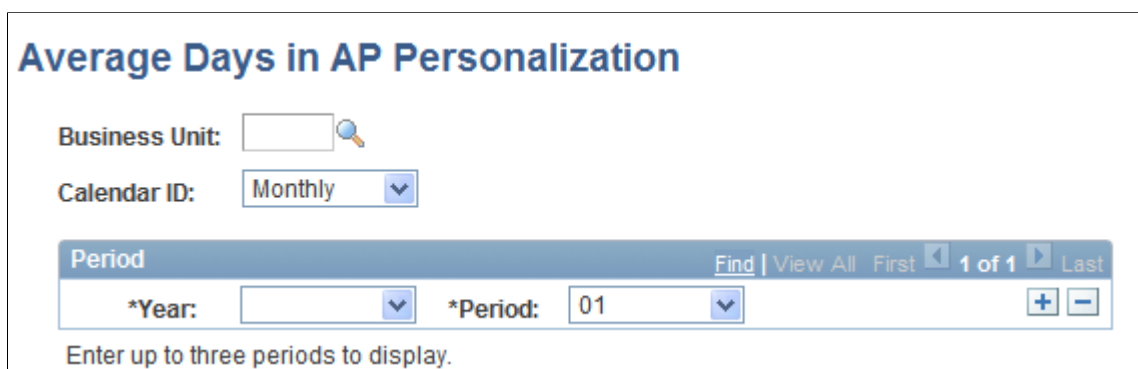
Use the Average Days in AP Personalization page (AP_CFOP_AVG_PERS) to define default display information for the Average Days in Payables pagelet.

Navigation

Click the Customize icon on the Average Days in Payables pagelet.

Image: Average Days in AP Personalization page

This example illustrates the fields and controls on the Average Days in AP Personalization page. You can find definitions for the fields and controls later on this page.



Business Unit

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

Calendar ID

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

Year and Period

Define up to three accounting periods to display on the Average Days in Payables pagelet.

Average Days by Business Unit Page

Use the Average Days by Business Unit page (AP_CFOP_AVG_DTLS) to view details of each period shown on the bar graph, such as the name of the business unit and the average days per business unit.

Navigation

Click a bar on the graph displayed on the Average Days in Payables pagelet.

Image: Average Days by Business Unit page

This example illustrates the fields and controls on the Average Days by Business Unit page. You can find definitions for the fields and controls later on this page.

Average Days by Business Unit

Period: 2009
 Average Days: 4
 As of Date: 10/14/2009

Business Units		
Business Unit	Name	Average Days
EGV05	EDUC & GVT - BU 5	0
US001	US001 NEW YORK OPERATIONS	7

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

Average Days

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

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

Viewing Payables Discounts

This section discusses how to:

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

Pages Used to View Payables Discounts

Page Name	Definition Name	Navigation	Usage
Payables Discounts pagelet	AP_CFOP_DSCNT_MAIN	Click the Personalize Content link on the PeopleSoft homepage. Select Payables Discounts in Accounts Payable.	View a bar graph that displays the discount taken or lost amounts per business unit for the periods specified on the Discounts Personalization page.

Page Name	Definition Name	Navigation	Usage
Discounts Personalization	AP_CFOP_DSCNT_PERS	Click the Customize icon on the Payables Discounts pagelet.	Define default display information for the Payables Discounts pagelet.
Discounts by Business Unit	AP_CFOP_DSCNT_DTLS	Click a bar on the graph displayed on the Payables Discounts pagelet.	View details on discounts and vouchers.

Viewing Payables Discounts

Use the Payables Discounts pagelet (AP_CFOP_DSCNT_MAIN) to view a bar graph that displays the discount taken or lost amounts per business unit for the periods specified on the Discounts Personalization page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Payables Discounts in Accounts Payable.

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

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

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

Personalizing Payables Discounts

Use the Discounts Personalization page (AP_CFOP_DSCNT_PERS) to define default display information for the Payables Discounts pagelet.

Navigation

Click the Customize icon on the Payables Discounts pagelet.

Image: Discounts Personalization page

This example illustrates the fields and controls on the Discounts Personalization page. You can find definitions for the fields and controls later on this page.



Business Unit

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

Display In

Select *Amount* or *Percentage*.

Calendar ID

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

Year and Period

Define up to three accounting periods to display on the Payables Discounts pagelet.

Viewing Discounts by Business Unit

Use the Discounts by Business Unit page (AP_CFOP_DSCNT_DTLS) to view details on discounts and vouchers.

Navigation

Click a bar on the graph displayed on the Payables Discounts pagelet.

Image: Discounts by Business Unit page

This example illustrates the fields and controls on the Discounts by Business Unit page. You can find definitions for the fields and controls later on this page.

Discounts by Business Unit

Period: 2009

Display Currency: USD

As of Date: 10/14/2009

Total Discount Taken: 40.00
 Percentage: 33.33

Total Discount Loss: 100.00
 Percentage: 66.67

Discount Details

[Customize](#) | [Find](#) | | [First](#) | [1 of 1](#) | [Last](#)

Discount Taken / Loss

Percentage

Business Unit	Description	Discount Taken	Discount Loss
US001	US001 NEW YORK OPERATIONS	40.00	100.00

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

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

Viewing Top Payables Suppliers by Expenditure

This section discusses how to:

- View top Payables suppliers by expenditure.
- Personalize top suppliers.
- View top supplier details.

Pages Used to View Top Payables Suppliers by Expenditure

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

Viewing Top Payables Suppliers by Expenditure

Use the Top Suppliers by Expenditure pagelet (AP_CFOP_VNDR_MAIN) to view expenditure amounts for the top five PeopleSoft Payables suppliers over the periods specified on the Top Suppliers Personalization page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Top Suppliers by Expenditure in Accounts Payable.

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

Personalizing Top Suppliers

Use the Top Suppliers Personalization page (AP_CFOP_VNDR_PERS) to define default display information for the Top Suppliers by Expenditure pagelet.

Navigation

Click the Pagelet Settings icon on the Suppliers by Expenditure pagelet and select Personalize.

Image: Top Suppliers Personalization page

This example illustrates the fields and controls on the Top Suppliers Personalization page. You can find definitions for the fields and controls later on this page.

Business Unit

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

Calendar ID

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

From Year and To Year

Select the range for which you want to display the data.

Viewing Top Supplier Details

Use the Top Suppliers Details page (AP_CFOP_VNDR_DTLS) to view vouchers for any supplier.

Navigation

Click the name of the supplier or the Details button on the Top Suppliers by Expenditure pagelet.

Image: Top Suppliers Details page

This example illustrates the fields and controls on the Top Suppliers Details page. You can find definitions for the fields and controls later on this page.

Top Suppliers

Calendar ID

Annually

As of Date

09/28/2012

From Year

2000

To Year

2012

Supplier SetID

SHARE

Supplier ID

NLD0000080

Contractor

Business Units

Personalize | Find | View All |   First 1 of 1 Last

Business Unit	Name	Amount	Currency	Invoice Count
EGV05	EDUC & GVT - BU 5	201,150,000.00	USD	2

Total Amount

201,150,000.00 USD

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

Supplier ID

Enter a different supplier ID to see details on a different supplier. To see details on all suppliers, leave this field blank.

Chapter 8

Using Pagelets Enabled by PeopleSoft Receivables

Using Pagelets Enabled by PeopleSoft Receivables

This topic discusses how to:

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

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

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

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

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

Understanding Setup

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

Viewing Aging Summary Information

This section discusses how to:

- View aging summary information.
- Personalize aging summary.

Pages Used to View Aging Summary Information

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

Aging Summary Pagelet

Use the Aging Summary pagelet page (AR_PE_AGING_PAGE) to view a bar graph that shows the total aging amount in up to five aging categories.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Aging Summary.

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

Aging Summary Personalization Page

Use the Aging Summary Personalization page (AR_PE_AGSUM_PRS) to define default display information for the Aging Summary pagelet.

Navigation

Click the Customize Aging Summary icon on the Aging Summary pagelet.

Image: Aging Summary Personalization page

This example illustrates the fields and controls on the Aging Summary Personalization page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Aging Summary Personalization' page. It features a 'Filter Options' section with the following fields and controls:

Filter Options	
*Aging ID:	STD Standard Aging
Business Unit:	
Customer ID:	
SubCustomer 1:	
SubCustomer 2:	
Credit Analyst:	
Sales Person:	
Collector:	
Currency:	
Entry Type:	

Aging ID

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

Entry Type

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

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Average Time to Resolve Deductions

This section discusses how to:

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

Pages Used to View Average Time to Resolve Deductions

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

Average Time to Resolve Pagelet

Use the Average Time to Resolve pagelet page (AR_PE_DEDAVG_PAGE) to display the average time to resolve a deduction over a user-defined period using a bar graph.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Average Time to Resolve.

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

Average Time to Resolve Personalization Page

Use the Average Time to Resolve Personalization page (AR_PE_DEDAVG_PRS) to define default display information for the Average Time to Resolve Deduction pagelet.

Navigation

Click the Customize Average Time to Resolve icon on the Average Time to Resolve Deduction pagelet.

Image: Average Time to Resolve Personalization page

This example illustrates the fields and controls on the Average Time to Resolve Personalization page. You can find definitions for the fields and controls later on this page.

Number of Days

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

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Days Sales Outstanding

This section discusses how to:

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

Pages Used to View Days Sales Outstanding

Page Name	Definition Name	Navigation	Usage
Days Sales Outstanding pagelet	AR_PE_DSO_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Days Sales Outstanding.	View a bar graph that shows the days sales outstanding for up to five time periods.

Page Name	Definition Name	Navigation	Usage
DSO Personalization	AR_PE_DSO_PRS	Click the Customize Days Sales Outstanding icon on the Days Sales Outstanding pagelet to access the DSO Personalization (days sales outstanding personalization) page.	Define default display information for the Days Sales Outstanding pagelet.

Viewing Days Sales Outstanding

Use the Days Sales Outstanding pagelet page (AR_PE_DSO_PAGE) to view a bar graph that shows the days sales outstanding for up to five time periods.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Days Sales Outstanding.

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

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

Personalizing Days Sales Outstanding

Use the DSO Personalization page (AR_PE_DSO_PRS) to define default display information for the Days Sales Outstanding pagelet.

Navigation

Click the Customize Days Sales Outstanding icon on the Days Sales Outstanding pagelet to access the DSO Personalization (days sales outstanding personalization) page.

Image: DSO Personalization page

This example illustrates the fields and controls on the DSO Personalization page. You can find definitions for the fields and controls later on this page.

DSO Personalization

Display Options

*Number of Days: 30

Filter Options

Business Unit:

Credit Analyst:

Customer ID:

Sales Person:

SubCustomer 1:

Collector:

SubCustomer 2:

Currency:

Number of Days

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

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Deductions by Amount

This section discusses how to:

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

Pages Used to View Deduction by Amount

Page Name	Definition Name	Navigation	Usage
Deduction by Amount pagelet	AR_PE_DEDAMT_PAGE	Click the Personalize Content link on the PeopleSoft homepage. Select Deduction by Amount.	Display the current deduction amount and the previous year deduction amount over a user defined period on a stacked bar graph.

Page Name	Definition Name	Navigation	Usage
Deduction by Amount Personalization	AR_PE_DEDAMT_PRS	Click the Customize Deduction by Amount icon on the Deduction by Amount pagelet.	Define default display information for the Deduction by Amount pagelet.

Viewing the Deductions by Amount

Use the Deduction by Amount pagelet page (AR_PE_DEDAMT_PAGE) to display the current deduction amount and the previous year deduction amount over a user defined period on a stacked bar graph.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Deduction by Amount.

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

Personalizing Deduction by Amount

Use the Deduction by Amount Personalization page (AR_PE_DEDAMT_PRS) to define default display information for the Deduction by Amount pagelet.

Navigation

Click the Customize Deduction by Amount icon on the Deduction by Amount pagelet.

Image: Deduction by Amount Personalization page

This example illustrates the fields and controls on the Deduction by Amount Personalization page. You can find definitions for the fields and controls later on this page.

Deduction by Amount Personalization

Display Options

*Number of Days:

Filter Options

Business Unit:

Credit Analyst:

Customer ID:

Sales Person:

SubCustomer 1:

Collector:

SubCustomer 2:

Currency:

[Return to Homepage](#)

Deduction Reason		Customize Find 1 of 1
Deduction Reason	Description	
1 <input type="text"/>		

Number of Days

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

Deduction Reason

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

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Deductions by Reason

This section discusses how to:

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

Pages Used to View Deductions by Reason

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

Viewing the Deductions by Reason

Use the Deduction by Reason pagelet page (AR_PE_DEDRSN_PAGE) to display deductions by reason in a table format, listing the reason, current amount and currency, count of deductions making up the current amount, and the comparison amount and currency.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Deduction by Reason.

Deduction Reason

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

Current Amount and Count

Displays the total amount and count of deductions in the current period.

Prior Amount and Count

Displays the total amount and count of deductions for the previous year or period.

Personalizing Deduction by Reason

Use the Deduction by Reason Personalization page (AR_PE_DEDRSN_PRS) to define default display information for the Deduction by Reason pagelet.

Navigation

Click the Customize Deduction by Reason icon on the Deduction by Reason pagelet.

Image: Deduction by Reason Personalization page

This example illustrates the fields and controls on the Deduction by Reason Personalization page. You can find definitions for the fields and controls later on this page.

Comparison Period

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

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

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

Number of Days

Enter the number of days for the comparison period.

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Outstanding and Past Due Balances

This section discusses how to:

- View outstanding balances.
- View past due balances.

Pages Used to View Outstanding and Past Due Balance Information

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

Outstanding Balances Pagelet

Customer

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

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

Amount

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

Related Links

"Reviewing Customer Account Information (*PeopleSoft FSCM 9.2: Receivables*)"

Past Due Balances Pagelet

Use the Past Due Balances pagelet page (AR_PE_PASTDU_PAGE) to view customer accounts with collection problems.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Past Due Balances.

Customer

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

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

Amount

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

Related Links

"Reviewing Customer Account Information (*PeopleSoft FSCM 9.2: Receivables*)"

Viewing Sales for New and Existing Customers

This section discusses how to:

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

Pages Used for View Sales to New and Existing Customers

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

Viewing Sales for New and Existing Customers

Use the Sales New/Existing Customers pagelet (AR_PE_SALES_PAGE) to view a bar graph that compares the sales for new and existing customers over a period of time.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Sales New/Existing Customers.

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

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

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

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

Personalizing Sales for New and Existing Customers

Use the New and Existing Customers Personalization page (AR_PE_SALES_PRS) to define default display information for the Sales New/Existing Customers pagelet.

Navigation

Click the Customize Sales New/Existing Customers icon on the Sales New/Existing Customers pagelet.

Image: New and Existing Customers Personalization page

This example illustrates the fields and controls on the New and Existing Customers Personalization page. You can find definitions for the fields and controls later on this page.

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

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

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Top Customer Sales Balances

This section discusses how to:

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

Pages Used to View Top Customer Sales Balances

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

Viewing Top Customer Sales Balances

Use the Top Customer Sales Balances pagelet (AR_PE_TOPCST_PAGE) to view the sales balances and the percentage of total sales for up to five corporate customers.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Top Customer Sales Balances.

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

% (percent)

Displays the percentage of total sales for the sales period contributed by this customer.

Related Links

"Reviewing Customer Account Information (*PeopleSoft FSCM 9.2: Receivables*)"

Personalizing Top Customer Sales Balances

Use the Top Customers Personalization page (AR_PE_TPCST_PRS) to define default display information for the Top Customer Sales Balances pagelet.

Navigation

Click the Customize Top Customer Sales Balances icon on the Top Customer Sales Balances pagelet.

Image: Top Customers Personalization page

This example illustrates the fields and controls on the Top Customers Personalization page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Top Customers Personalization' page. It features a 'Filter Options' section with the following fields and controls:

- Business Unit:** A text input field with a magnifying glass icon.
- Credit Analyst:** A text input field with a magnifying glass icon.
- Sales Person:** A text input field with a magnifying glass icon.
- SubCustomer 1:** A text input field with a magnifying glass icon.
- Collector:** A text input field with a magnifying glass icon.
- SubCustomer 2:** A text input field with a magnifying glass icon.
- Currency:** A text input field with a magnifying glass icon.
- From Date:** A date picker showing '09/30/2008' with a calendar icon.
- *To Date:** A date picker showing '09/30/2009' with a calendar icon.

From Date and To Date

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

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Top Customer Write-offs

This section discusses how to:

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

Pages Used to View Top Customer Write-offs

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

Viewing the Top Customer Write-offs

Use the Bad Debt Write-off by Customer pagelet (AR_PE_DETWO_PAGE) to view the balances that have been written off for up to five top corporate customers.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Bad Debt Write-off by Customer.

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

Related Links

"Reviewing Customer Account Information (*PeopleSoft FSCM 9.2: Receivables*)"

Personalizing Top Customer Write-offs

Use the Customer Write-off Personalization page (AR_PE_DETWO_PRS) to define default display information for the Bad Debt Write-off by Customer pagelet.

Navigation

Click the Customize Bad Debt Write-off by Customer icon on the Bad Debt Write-off by Customer pagelet.

Image: Customer Write-off Personalization page

This example illustrates the fields and controls on the Customer Write-off Personalization page. You can find definitions for the fields and controls later on this page.

Display Reason

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

From Date and To Date

Enter the date range of the write-off items to include in the pagelet. This field is required.

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Viewing Write-off Trends

This section discusses how to:

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

Pages Used to View Write-off Trends

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

Viewing Write-off Trends

Use the Write-off Trends pagelet (AR_PE_WO_PAGE) to display the amount written off over a user-defined period using a bar graph.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Write-off Trends.

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

Personalizing Write-off Trends

Use the Write-off Trends Personalization page (AR_PE_WO_PRS) to define default display information for the Write-off Trends pagelet.

Navigation

Click the Customize Write-off Trends icon on the Write-off Trends pagelet.

Image: Write-off Trends Personalization page

This example illustrates the fields and controls on the Write-off Trends Personalization page. You can find definitions for the fields and controls later on this page.

Write-off Trends Personalization

Display Options

*Number of Days:

Filter Options

Business Unit:

Credit Analyst:

Customer ID:

Sales Person:

SubCustomer 1:

Collector:

SubCustomer 2:

Currency:

[Return to Homepage](#)

Entry Reasons Customize | Find |

	Entry Reason	Description		
1	<input type="text"/>			

Number of Days

Enter the number of days for each period of time.

Entry Reason

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

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

Related Links

[Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack](#)

Chapter 9

Using Pagelets Enabled by PeopleSoft Treasury Management

Using Pagelets Enabled by PeopleSoft Treasury Management

This topic discusses how to:

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

Viewing Bank Contacts

This section discusses how to:

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

Pages Used to View Bank Contacts

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

Related Links

"Defining Financial Contacts (*PeopleSoft FSCM 9.2: Banks Setup and Processing*)"

Viewing Bank Contacts

Use the Bank Contacts pagelet page (TR_PE_BANK_CONTACT) to view information for an individual bank contact as defined on the Bank Contacts Personalization page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Bank Contacts.

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

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

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

Personalizing Bank Contacts

Use the Bank Contacts Personalization page (TR_PE_BNKCPRS) to define default display information for the Bank Contacts pagelet.

Navigation

Click the Customize icon on the Bank Contacts pagelet.

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

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

Reviewing Financial Contact Information

Use the Financial Contacts page (TR_CONTACT_PNL) to View and edit information about bank contacts.

Navigation

Click the name of a bank contact on the Bank Contacts pagelet.

Viewing Bank Statement Reconciliation Aging Information

This section discusses how to:

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

Pages Used to View Bank Statement Reconciliation Aging Information

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

Related Links

"Review Bank Statements Page (*PeopleSoft FSCM 9.2: Banks Setup and Processing*)"

Viewing Bank Statement Reconciliation Aging

Use the Reconciliation Aging pagelet page (TR_PE_RCNAGE) to view unreconciled items grouped by number of days the item has been unreconciled and the total unreconciled amount of each group.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Reconciliation Aging.

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

Group

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

Count

Total number of unreconciled transactions.

Amount

Total dollar amount of unreconciled transactions.

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

Personalizing Bank Statement Reconciliation Aging

Use the Bank Reconciliation Aging Personalization page (TR_PE_RCNPERS) to define default display information for the Reconciliation Aging pagelet.

Navigation

Click the Customize icon on the Reconciliation Aging pagelet.

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

Reviewing Bank Statement Information

Use the Bank Statement Inquiry page (BNK_RCN_STMT_GEN) to view detailed information for unreconciled transactions and generate an Account Register report.

To view the resulting report, navigate to the Process Monitor.

Navigation

Click a Group link on the Bank Reconciliation Aging pagelet.

Understanding Enterprise Service Automation Pagelets

Understanding Enterprise Service Automation Pagelets

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

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

Understanding Enterprise Service Automation Pagelet Types

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

This section lists common elements and discusses:

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

Common Elements Used in This Topic

Calendar ID

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

My Projects

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

Number of Prior Periods

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

Restore Defaults

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

Show Only if Alert

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

Specify

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

Alert Threshold

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

User Preferences

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

Visual Indicators

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

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



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

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



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

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

Operational Summary Pagelets

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

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

- Most Recent Contracts (PeopleSoft Contracts)
- Top Five Contracts (PeopleSoft Contracts)

- Contract Milestone Metric (PeopleSoft Contracts)
- Contract Product Grouping Metric (PeopleSoft Contracts)
- Contract Status Metric (PeopleSoft Contracts)
- Total Predicted Expenses (PeopleSoft Expenses)
- Top Projects (PeopleSoft Project Costing)
- Top 5 Issues (PeopleSoft Program Management)
- Top 5 Risks (PeopleSoft Program Management)
- Change Control Analysis (PeopleSoft Program Management)
- Forecast to Complete (PeopleSoft Program Management)
- Critical Issues by Project (PeopleSoft Program Management)
- My Program (PeopleSoft Program Management)
- Issues by Priority (PeopleSoft Program Management)
- Issues by Priority by Project (PeopleSoft Program Management)
- Proposal Operational Summary (PeopleSoft Proposal Management)
- Proposal Resource Demand (PeopleSoft Proposal Management)
- Proposal Revenue Pipeline (PeopleSoft Proposal Management)
- Resources Needing Assignments (PeopleSoft Resource Management)

Operational Threshold Alerts

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

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

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

- Forecast Utilization (PeopleSoft Program Management)
- Budget to Actual Cost (PeopleSoft Project Costing)
- Budget to Actual Time (PeopleSoft Project Costing)
- Gross Margin (PeopleSoft Project Costing)
- Projects Over Budget (PeopleSoft Project Costing)

Transactions in Progress

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

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

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

Administering System Defaults for PeopleSoft Enterprise Service Automation Portal Pack Pagelets

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

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

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

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

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

Defining Default Values for Enterprise Service Automation Pagelets

Use the ESA Portal Pack Pagelet Default Administration page (PC_ESA_PPACK_ADMIN) to define default personalization settings for PeopleSoft Enterprise Service Automation Portal Pack pagelets.

Navigation

Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Image: ESA Portal Pack Pagelet Default Administration page

This example illustrates the fields and controls on the ESA Portal Pack Pagelet Default Administration page. You can find definitions for the fields and controls later on this page.

ESA Portal Pack Pagelet Default Administration

Set up personalization defaults for ESA Portal Pack pagelets.

Operational Summary

Top Projects	Issue Priority by Project	Total Predicted Expenses
Top 5 Issues	Most Recent Contracts	Proposals
Top 5 Risks	Contract Status Metrics	Proposal Revenue Pipeline
Forecast to Complete Variance	Contract Product Grouping Metrics	Resource Demand
Change Control Analysis	Contract Milestone Metrics	

Operational Threshold Alerts

Forecast Utilization	Total Expense Costs	Budget to Actual Cost Variance
Actual to Forecast Utilization	Gross Margin	Budget to Actual Time Variance
Contract Revenue Forecast	Projects Predicted to be Late	Budget to Forecast Time
Contract Sales	Projects Over Budget	

Transactions In Progress

Expenses Not Yet Transmitted	Time Not Yet Transmitted	Expense Report TIP
Inventory Not Yet Transmitted	Transactions Not Yet Priced	Time Report TIP

Additional Pages

Media Sources	Media Sources Setup
-------------------------------	-------------------------------------

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

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

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

Operational Summary

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

Operational Threshold Alerts

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

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

Transactions in Progress

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

Additional Pages

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

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

Viewing OTAs

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

This section discusses how to:

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

Pages Used to View OTAs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Operational Threshold Alert pagelet	PC_PE_OTA_LIST	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Alert on the Personalize Content page and return to the PeopleSoft homepage.	View up to five OTAs that display real-time monitoring data based on tolerance levels that you define.
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Chart on the Personalize Content page and return to the PeopleSoft homepage.	View an OTA in a chart format that monitors data based on tolerance levels that you define.
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	<ul style="list-style-type: none"> • Click the Customize Operational Threshold Alert icon on the Operational Threshold Alert pagelet. • Click the Customize Operational Threshold Chart icon on the Operational Threshold Chart pagelet. 	Select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.

Setting Up OTAs

The overall tasks to set up OTAs are:

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

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

Related Links

[Defining Default Values for Enterprise Service Automation Pagelets](#)

Operational Threshold Alert Pagelet

Use the Operational Threshold Alert pagelet (PC_PE_OTA_LIST) to view up to five OTAs that display real-time monitoring data based on tolerance levels that you define.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Operational Threshold Alert on the Personalize Content page and return to the PeopleSoft homepage.

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

Threshold Alert

Displays the title of the OTA that you selected on the Personalize Operational Threshold Alerts page. If the title appears as a link, click the link to access a page in the enabling application that contains further details.

Target

The target threshold alert value, expressed as a percentage or as an amount, that is specified in each OTA's personalization settings. When a measurement goes beyond the alert threshold, a red alert visual indicator appears on the Operational Threshold Alert pagelet, which indicates that the measurement is not within an acceptable range. When a measurement has not reached, or is equal to, the alert threshold, a green visual indicator appears on the Operational Threshold Alert pagelet, which indicates that the measurement is within an acceptable range.

Actual

Displays a calculated value for the OTA based on the OTA's personalization settings.

Curr (currency)

Displays the currency code of the actual amount.

% Variance or Variance Percentage

Displays a calculated value based on the formula $((\text{Target} - \text{Actual}) \div \text{Target}) \times 100$.

Visual Indicators

Displays a red Alert Status icon or green Within Range icon based on the OTA's variance percentage.

As of Date

Displays the date that data was last summarized. The date appears for OTAs that are calculated based on summary data from a batch process.



Click the Customize Operational Threshold Alert icon to access the Personalize Operational Threshold Alerts page to select up to five OTAs to appear on the pagelet.

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

Operational Threshold Chart Pagelet

Use the Operational Threshold Chart pagelet (PC_PE_OTA_CHART) to view an OTA in a chart format that monitors data based on tolerance levels that you define.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Operational Threshold Chart on the Personalize Content page and return to the PeopleSoft homepage.

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

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

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

Personalizing OTAs

Use the Personalize Operational Threshold Alerts page (PC_PE_OTA_PRS) to select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets.

Access the page to personalize individual OTA tolerance levels.

Navigation

- Click the Customize Operational Threshold Alert icon on the Operational Threshold Alert pagelet.
- Click the Customize Operational Threshold Chart icon on the Operational Threshold Chart pagelet.










Image: Personalize Operational Threshold Alerts page

This example illustrates the fields and controls on the Personalize Operational Threshold Alerts page. You can find definitions for the fields and controls later on this page.

Personalize Operational Threshold Alerts

User ID: VP1 Name: Kenneth Schumacher

Select up to five Operational Threshold Alerts. Optionally, select one Threshold Chart.

Operational Threshold Alerts			
Select	Chart	Threshold Alert	Personalize
<input type="checkbox"/>	<input type="checkbox"/>	Budget to Actual Cost	
<input type="checkbox"/>	<input type="checkbox"/>	Budget to Actual Time	
<input type="checkbox"/>	<input type="checkbox"/>	Contract Revenue Forecast	
<input type="checkbox"/>	<input type="checkbox"/>	Contract Sales	
<input type="checkbox"/>	<input type="checkbox"/>	Gross Margin	
<input type="checkbox"/>	<input type="checkbox"/>	Projects Over Budget	
<input type="checkbox"/>	<input type="checkbox"/>	Actual to Forecast Utilization	
<input type="checkbox"/>	<input type="checkbox"/>	Forecast Utilization	
<input type="checkbox"/>	<input type="checkbox"/>	Total Expense Costs	

Select

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

Chart

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



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

Viewing the Media Sources Pagelet

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

This section discusses how to:

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

Pages Used to View the Media Sources Pagelet

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Media Sources Setup	GM_PE_3RD_ADMIN	<p>Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration</p> <p>Click the Media Sources Setup link on the ESA Portal Pack Pagelet Default Administration page.</p>	Set up a content link so that it can be available to appear on the Media Sources pagelet.
Personalize Media Sources	GM_PE_3RD_MEDIAPRS	<ul style="list-style-type: none"> • Click the Media Sources link on the ESA Portal Pack Pagelet Default Administration page to access this page as an administrator. • Click the Customize Media Sources icon on the Media Sources pagelet to access this page as a user. 	Select up to five online publications to appear by default on the Media Sources pagelet.
Media Sources	GM_PE_3RD_MEDIA	<p>Click the Personalize Content link on the PeopleSoft homepage.</p> <p>Select Media Sources on the Personalize Content page and return to the PeopleSoft homepage.</p>	View the Media Sources pagelet that contains up to five links to publications or other content.

Setting Up Media Sources

Use the Media Sources Setup page (GM_PE_3RD_ADMIN) to set up a content link so that it can be available to appear on the Media Sources pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click the Media Sources Setup link on the ESA Portal Pack Pagelet Default Administration page.

Image: Media Sources Setup page

This example illustrates the fields and controls on the Media Sources Setup page. You can find definitions for the fields and controls later on this page.

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

Publication Title

Enter the title to appear as a link on the Media Sources pagelet.

URL Identifier

Select a URL for this media source from the available URLs that are created by using the PeopleTools URL Maintenance page.

Note: You must create a link by using the URL Maintenance page before you can select it in the URL Identifier field. To access the URL Maintenance page, go to PeopleTools, Utilities, Administration, URLs.

Active

Select this option if you want this media source to be available for users to select on the Personalize Media Sources page.

Deselect this option to inactivate this media source, in which case it does not appear for selection on the Personalize Media Sources page.

Long Description

Enter text to describe the media source content. This text appears on the Personalize Media Sources page to help users determine if the media source is of interest.

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

See *PeopleTools: System and Server Administration*.

Personalizing Media Sources

Use the Personalize Media Sources page (GM_PE_3RD_MEDIAPRS) to select up to five online publications to appear by default on the Media Sources pagelet.

Navigation

- Click the Media Sources link on the ESA Portal Pack Pagelet Default Administration page to access this page as an administrator.
- Click the Customize Media Sources icon on the Media Sources pagelet to access this page as a user.

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

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

Viewing the Media Sources Pagelet

Use the Media Sources page (GM_PE_3RD_MEDIA) to view the Media Sources pagelet that contains up to five links to publications or other content.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Media Sources on the Personalize Content page and return to the PeopleSoft homepage.

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

Viewing Enterprise Service Automation Navigation Collection Pagelets

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

Pages Used to View Enterprise Service Automation Navigation Collection Pagelets

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

Understanding Navigation Collection Pagelets

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

Navigation Collection pagelets support these business processes:

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

Viewing Navigation Collections

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

To view a Navigation Collection pagelet:

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

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

Maintaining Navigation Collections

Use the Navigation Collections - Find an Existing Collection page (PTPP_SCSRCH) to search for an existing Navigation Collection that you want to edit or delete.

You can use these to create new Navigation Collections.

Navigation

PeopleTools, Portal, Portal Utilities, Navigation Collections

Use the Maintain Collection - Navigation Collection page (PTPP_SCMAINTCOLL) to maintain Navigation Collection pagelets.

Navigation

Click the Edit link for an existing Navigation Collection on the Navigation Collections - Find an Existing Collection page.

Administrators can modify Navigation Collection pagelets as follows:

1. Search for the navigation collection that identifies the business process that you want to modify.
2. Click the Edit link corresponding to the Navigation Collection.
3. Add or edit links or folders on the Maintain Collection - Navigation Collection page.

See *PeopleTools: Portal Technology*, "Working With Navigation Pages."

Using Pagelets Enabled by PeopleSoft Contracts

Using Pagelets Enabled by PeopleSoft Contracts

This topic discusses how to:

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

Viewing the Top Five Contracts

This section discusses how to:

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

Pages Used to View the Top Five Contracts

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

Viewing Top Five Contracts

Use the Top Five Contracts pagelet page (CA_PE_TOPCON_PAGE) to view the five largest contracts that meet the filtering criteria specified on the Top Five Contracts Personalization page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Top Five Contracts.

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

Contract Number

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

Amount

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

Personalizing Top Five Contracts

Use the Personalization Top Five Contracts page (CA_PE_TOPCON_PRS) to define default display information for the Top Five Contracts pagelet.

Navigation

Click the Customize icon on the Top Five Contracts pagelet.

Image: Personalization Top Five Contracts page

This example illustrates the fields and controls on the Personalization Top Five Contracts page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Personalization Top Five Contracts' page. It features a header with the title 'Personalization Top Five Contracts' and a sub-header 'Filtering Criteria'. Below this, there are several input fields and dropdown menus for defining search criteria. The fields are arranged in two columns. The left column includes: '*Business Unit:' with a text box and a magnifying glass icon; '*From Sign Date' with a text box and a calendar icon; 'Legal Entity:' with a dropdown menu; 'Contract Type:' with a dropdown menu; 'Contract Class:' with a dropdown menu; 'Sold To Customer:' with a text box and a magnifying glass icon; 'SubCustomer 1:' with a text box and a magnifying glass icon; and 'SubCustomer 2:' with a text box and a magnifying glass icon. The right column includes: '*Currency Code:' with a text box and a magnifying glass icon; '*To Sign Date:' with a text box and a calendar icon; 'Region:' with a dropdown menu; and 'Contract Status:' with a dropdown menu.

Business Unit

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

Currency Code

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

From Sign Date and To Sign Date

Define the range of contract sign dates for which you want to display data on the Top Five Contracts pagelet.

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

- Legal Entity
- Region Code
- Contract Type
- Contract Status
- Sold To Customer
- Contract Class (contract classification)
- SubCustomer 1
- SubCustomer 2

Related Links

"Creating and Administering PeopleSoft Contracts (*PeopleSoft FSCM 9.2: Contracts*)"

Viewing Most Recent Contracts

This section discusses how to:

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

Pages Used to View Most Recent Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Most Recent Contracts pagelet	CA_PE_RCNT_W (wide), CA_PE_RCNT_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Most Recent Contracts.	View the most recently signed contracts that meet the filtering criteria specified on the Personalize Most Recent Contracts page.

Page Name	Definition Name	Navigation	Usage
Most Recent Contracts	CA_PE_RCNT_MORE	Click the More link on the Most Recent Contracts pagelet.	View additional recently signed contracts that meet your filter criteria.
Contract Summary	CA_CONTR_SUM_PNL	Click a contract number displayed on the Most Recent Contracts pagelet.	View details for a specific contract shown on the Most Recent Contracts pagelet.
Personalize Most Recent Contracts	CA_PE_RCNT_PRS	<ul style="list-style-type: none"> Click the Customize icon on the Most Recent Contracts pagelet. Click the Most Recent Contracts link on the ESA Portal Pack Pagelet Default Administration page. 	Define default display information for the Most Recent Contracts pagelet.

Most Recent Contracts Pagelet

Use the Most Recent Contracts pagelet (CA_PE_RCNT_W (wide), CA_PE_RCNT_N (narrow)) to view the most recently signed contracts that meet the filtering criteria specified on the Personalize Most Recent Contracts page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Most Recent Contracts.

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

Contract Number

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

More

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

Viewing Additional Details

Use the Most Recent Contracts page (CA_PE_RCNT_MORE) to view additional recently signed contracts that meet your filter criteria.

Navigation

Click the More link on the Most Recent Contracts pagelet.

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

Amount

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

Personalizing Most Recent Contracts

Use the Personalize Most Recent Contracts page (CA_PE_RCNT_PRS) to define default display information for the Most Recent Contracts pagelet.

Navigation

- Click the Customize icon on the Most Recent Contracts pagelet.
- Click the Most Recent Contracts link on the ESA Portal Pack Pagelet Default Administration page.

Image: Personalize Most Recent Contracts page

This example illustrates the fields and controls on the Personalize Most Recent Contracts page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Personalize Most Recent Contracts' page. It features a 'Filtering Criteria' section with three panels: 'Business Unit', 'Region Code', and 'Processing Status'. Each panel has a 'User Preferences' radio button and a 'Specify' text input with a search icon. Below these panels are several search fields: 'Contract Type', 'Contract Class', 'Legal Entity', 'Contract Status', and 'Sold To'. There is also a 'My Contracts' checkbox.

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

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

Business Unit

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

From User Preference

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

Specify

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

Region Code

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

From User Preference

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

Specify

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

Processing Status

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

Pending

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

Active

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

Closed

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

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

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

My Contracts

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

Restore Defaults

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

Viewing Contract Status Metrics

This section discusses how to:

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

Pages Used to View Contract Status Metrics

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

Viewing Contract Status Metrics

Use the Contract Status Metric pagelet page (CA_TICS_METR_STAT) to view and analyze the status of your contracts.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Contract Status Metric.

Here you can view the current contract count by status.

Personalizing Contract Status Metrics

Use the Personalize Contract Status Metric page (CA_TICS_OPR_STAT) to define default display information for the Contract Status Metric pagelet.

Navigation

Click the pagelet's Customize icon.

Image: Personalize Contract Status Metrics page

This example illustrates the fields and controls on the Personalize Contract Status Metrics page. You can find definitions for the fields and controls later on this page.

Personalize Contract Status Metrics

Filtering Criteria

Business Unit

☒ User Preferences

☐ Specify

Region Code:

Customer:

SubCustomer 1:

SubCustomer 2:

☐ My Contracts

*Currency Code:

Contract Type:

Contract Classification:

Contract Administrator:

Contract:

Specify Date Range

*Calendar ID

*Number of Prior Periods

Processing Status

☐ Show Pending ☒ Show Active ☐ Show Closed

Pagelet Format

☒ Tabular ☐ Chart

Sort by: ☒ By Count ☐ By Amount

Filtering Criteria

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

Specify Date Range

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

Calendar ID

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

Number of Prior Periods

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

Processing Status

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

Pagelet Format

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

Viewing Contract Milestone Metrics

This section discusses how to:

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

Pages Used to View Contract Milestone Metrics

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

Viewing Contract Milestone Metrics

Use the Contract Milestone Metric pagelet page (CA_TICS_METR_MS) to view and analyze the status for each milestone for all of your contracts that are in active status.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Contract Milestone Metric.

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

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

Milestone Status	Up to date status on milestones associated with contracts. The status may be <i>Pending</i> or <i>Ready</i> .
Contract Count	Total number of contracts.
Revenue Plan Impact Count	Provides the number of existing milestones that impact revenue.
Billing Plan Impact Count	Provides the number of existing milestones that impact billing.

Personalizing Contract Milestone Metrics

Use the Personalize Contract Milestone Metrics page (CA_TICS_OPR_MS) to define default display information for the Contract Milestone Metric pagelet.

Navigation

Click the pagelet's Customize icon.

Image: Personalize Contract Milestone Metrics page

This example illustrates the fields and controls on the Personalize Contract Milestone Metrics page. You can find definitions for the fields and controls later on this page.

Personalize Contract Milestone Metrics

Filtering Criteria

Business Unit: ☒ User Preferences ☐ Specify

☐ My Contracts

*Currency Code:

Contract Type:

Contract Classification:

Contract Administrator:

Contract:

Region Code:

Customer:

SubCustomer 1:

SubCustomer 2:

Specify Date Range

*Calendar ID:

*Number of Prior Periods:

Milestone Sort By

☒ Milestone Status ☐ Milestone ID

Pagelet Format

☒ Tabular ☐ Chart

Filtering Criteria

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

Specify Date Range

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

Calendar ID

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

Number of Prior Periods

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

Milestone Sort By

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

Pagelet Format

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

Viewing Contract Product Group Metrics

This section discusses how to:

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

Pages Used to View Contract Product Group Metrics

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

Viewing Contract Product Group Metrics

Use the Contract Product Group Metric pagelet page (CA_TICS_METR_PROD) to view and analyze product group information for all of your contracts that are in active status.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Contract Product Group Metric.

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

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

Product Group

Provides the product grouping name per contract.

Number of Records	Provides the number of products and services sold by product grouping.
Amount	Total value of sales by product grouping.

Personalizing Contract Product Group Metrics

Use the Personalize Contract Product Grouping Metrics page (CA_TICS_OPR_PROD) to define default display information for the Contract Product Group Metric pagelet.

Navigation

Click the pagelet's Customize icon.

Image: Personalize Contract Product Grouping Metrics page

This example illustrates the fields and controls on the Personalize Contract Product Grouping Metrics page. You can find definitions for the fields and controls later on this page.

Personalize Contract Product Grouping Metrics

Filtering Criteria

Business Unit: ☒ User Preferences ☐ Specify

☐ My Contracts

*Currency Code:

Contract Type:

Contract Classification:

Contract Administrator:

Contract:

Region Code:

Customer:

SubCustomer 1:

SubCustomer 2:

Specify Date Range

*Calendar ID:

*Number of Prior Periods:

Renewals

☐ Renewals Only

Pagelet Format

☒ Tabular ☐ Chart

Sort by: ☒ Count ☐ Amount

Filtering Criteria

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

Specify Date Range

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

Calendar ID

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

Number of Prior Periods

Enter a number of periods for the system to use to obtain the contract milestones that will appear on the pagelet. The system will start from the prior period and count backward for the specified number of periods. The system requires this field in

order to display the contract status on the pagelet. The system uses the contract sign date to compare with the date ranges specified by the number of periods.

Renewals

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

Pagelet Format

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

Using OTAs for PeopleSoft Contracts

This section discusses OTA calculations and how to personalize:

- Contract Revenue Forecast.
- Contract Sales.

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

Pages Used to Personalize OTAs for PeopleSoft Contracts

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	<ul style="list-style-type: none"> • Click the Customize icon on the Operational Threshold Alert pagelet • Click the Customize icon on the Operational Threshold Chart pagelet 	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page used to personalize individual OTA tolerance levels.
Operational Threshold Alert pagelet	PC_PE_OTA_LIST (wide) PC_PE_OTA_LIST_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Alert.	View up to five Operational Threshold Alerts that display real-time monitoring data according to tolerance levels that you define.
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage. Select Operational Threshold Chart.	View an Operational Threshold Alert that displays a real-time monitoring chart according to tolerance levels that you define.

Page Name	Definition Name	Navigation	Usage
Personalize Contract Revenue Forecast	CA_PE_CFR_PRS	<ul style="list-style-type: none"> Click the Contract Revenue Forecast link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Specify the business unit, region code, product options, date range, and alert settings for the Contract Revenue Forecast OTA. The Contract Revenue Forecast Operational Threshold Alert provides a projection of future revenue.
Personalize Contract Sales	CA_PE_SALES_PRS	<ul style="list-style-type: none"> Click the Contract Sales link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Specify the business unit, region code, date range, and alert settings for the Contract Sales OTA.

Understanding OTA Calculations in PeopleSoft Contracts

This section discusses calculations for these operational threshold alerts:

- Contract Revenue Forecast.
- Contract Sales.

Calculating Contract Revenue Forecast

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

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

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

Calculating Contract Sales

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

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

Personalize Contract Revenue Forecast Page

Use the Personalize Contract Revenue Forecast page (CA_PE_CFR_PRS) to specify the business unit, region code, product options, date range, and alert settings for the Contract Revenue Forecast OTA.

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

Navigation

- Click the Contract Revenue Forecast link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Contract Revenue Forecast page

This example illustrates the fields and controls on the Personalize Contract Revenue Forecast page. You can find definitions for the fields and controls later on this page.

Personalize Contract Revenue Forecast

Filtering Criteria
Summarize actual contracts revenue forecast by the following

Business Unit
☒ User Preferences
☐ Specify

Region Code
☒ From User Preference
☐ Specify

☐ My Contracts

*GL Business Unit:

Base Currency:

Contract Type:

Contract Status:

Contract Class:

Sold To:

Product Options
 Product Group: Product ID: Price Type:

Specify Date Range
☒ Detail Calendar MN Monthly Periods Calendar 1/1 *Number of Future Periods:
☐ Summary Calendar Q2 Quarterly Calendar 1/1

Alert Settings
 Enter the Alert Threshold Amount under which an alert will be triggered.
 *Target Revenue: ☐ Show Only if Alert

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

Business Unit

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

User Preferences

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

Specify

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

Region Code

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

From User Preference

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

Specify

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

My Contracts

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

GL Business Unit (General Ledger business unit)

Select a General Ledger business unit to filter contracts based on a specific GL business unit.

Base Currency

Displays the base currency for the selected GL Business Unit.

Contract Type

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

Contract Status

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

Contract Class (contract classification)

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

Sold To

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

Product Options

Product Group

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

Product ID

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

Price Type

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

Specify Date Range

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

Detail Calendar

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

Summary Calendar

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

Number of Future Periods

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

Alert Settings

Target Revenue

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

Show Only if Alert

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

Related Links

"Understanding Revenue Management (*PeopleSoft FSCM 9.2: Contracts*)"

Personalize Contract Sales Page

Use the Personalize Contract Sales page (CA_PE_SALES_PRS) to specify the business unit, region code, date range, and alert settings for the Contract Sales OTA.

Navigation

- Click the Contract Sales link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Contract Sales page

This example illustrates the fields and controls on the Personalize Contract Sales page. You can find definitions for the fields and controls later on this page.

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

Business Unit

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

User Preferences

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

Specify

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

Region Code

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

From User Preference

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

Specify

Select to view contract sales for contracts from a region code other than the region code specified in your user preferences.

You can specify a new region code or leave this field blank. If you leave this field blank, the system searches all regions when selecting the contracts to display on the pagelet.

My Contracts

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

Currency Code

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

Contract Type

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

Contract Class

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

Contract Status

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

Sold To

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

Specify Date Range

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

Calendar ID

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

Number of Prior Periods

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

Alert Settings**Target Sales**

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

Show Only if Alert

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

Related Links

"Understanding Revenue Management (*PeopleSoft FSCM 9.2: Contracts*)"

Using Pagelets Enabled by PeopleSoft Expenses

Using Pagelets Enabled by PeopleSoft Expenses

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

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

Understanding the Pagelets Designed for PeopleSoft Expenses

There are three types of pagelets designed for PeopleSoft Expenses:

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

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

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

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

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

See [Administer Expense Report and Time Report Pagelets](#).

Viewing Total Predicted Expenses

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

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

Pages Used to View Total Predicted Expenses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Administer Total Predicted Expenses	EX_PE_PRED_PRS	Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Total Predicted Expenses	Set up defaults and define the calendar ID and periods to filter on for the Total Predicted Expenses pagelet.
Total Predicted Expenses pagelet	EX_PE_PRED_TA_WD EX_PE_PRED_TA_NR	Click the Personalize Content link on the PeopleSoft homepage. Select Total Predicted Expenses.	Displays travel authorization data based on filter criteria set up by the system administrator and the user. The size of the pagelet depends on if you have personalized the layout for your portal homepage for two columns or three columns. To view billable, non-billable, and internal travel authorization amounts, use a wide layout.
Total Predicted Expenses	EX_PE_PRED_MOR	Click the More link on the Total Predicted Expenses pagelet.	Displays more travel authorization data. PeopleSoft Expenses displays only the More link if there are more than five Department IDs or Project IDs, depending on how you set up your system.

Page Name	Definition Name	Navigation	Usage
Total Predicted Expenses Summary	EX_PE_PRED_SUM	<ul style="list-style-type: none"> Depending on how you set up your system, click a Department ID or Project ID link on the Total Predicted Expenses pagelet. Travel and Expenses, Real-Time Analysis, Predicted Expenses Summary 	Enter more filter criteria (optional) and click Go to view list of travel authorizations.
Personalize Total Predicted Expenses	EX_PE_PRED_PRS	Click the Customize icon on the Total Predicted Expenses pagelet.	Set up user-specific defaults to filter on for the Total Predicted Expenses pagelet.

Understanding Total Predicted Expenses

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

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

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

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

Administer Total Predicted Expenses Page

Use the Administer Total Predicted Expenses pagelet (EX_PE_PRED_PRS) to set up defaults and define the calendar ID and periods to filter on for the Total Predicted Expenses pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Total Predicted Expenses

Image: Administer Total Predicted Expenses page

This example illustrates the fields and controls on the Administer Total Predicted Expenses page. You can find definitions for the fields and controls later on this page.

Administer Total Predicted Expenses

Number of Future Periods

*Calendar ID: Monthly *Number of Future Periods: 12

Personalization Options

☒ View by Department
☐ View by Project

PC Business Unit

☒ Projects User Preferences
☐ Specify

Project Filters

☐ Project Manager
☐ My Projects
☒ No Additional Filters

Project Manager

Project Manager	Name
1	

Return to ESA Portal Pack Default Admin Go to Expenses Pagelet Processing

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

Total Predicted Expenses Pagelet

Use the Total Predicted Expenses pagelet (EX_PE_PRED_TA_WD) to displays travel authorization data based on filter criteria set up by the system administrator and the user.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Total Predicted Expenses.

Department or Project

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

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

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

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

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

Total Predicted Expenses Summary Page

Use the Total Predicted Expenses Summary page (EX_PE_PRED_SUM) to enter more filter criteria (optional) and click Go to view list of travel authorizations.

Navigation

- Depending on how you set up your system, click a Department ID or Project ID link on the Total Predicted Expenses pagelet.
- Travel and Expenses, Real-Time Analysis, Predicted Expenses Summary

Image: Total Predicted Expenses Summary page (1 of 2)

This example illustrates the fields and controls on the Total Predicted Expenses Summary page (1 of 2). You can find definitions for the fields and controls later on this page.

Total Predicted Expenses Summary

Please select a date within the range from 09/01/2009 to 09/30/2010 as set by the Administrator.

From Date: To Date: Expense Billing Code:

Search Filters

☒ View by Department

GL Business Unit: US001 NEW YORK OPERATIONS

General Ledger ChartFields								
Dept	Oper Unit	Fund	Program	Class	Bud Ref	Product	Affiliate	Fund At
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

☐ View by Project

PC Business Unit:

Project:

Project Filters

☒ No Additional Filters

☐ Project Manager

☐ My Projects

Image: Total Predicted Expenses Summary page (2 of 2)

This example illustrates the fields and controls on the Total Predicted Expenses Summary page (2 of 2). You can find definitions for the fields and controls later on this page.

Total Predicted Expenses: Department View				
		Customize	Find	First 1-8 of 8 Last
Travel Authorization ID		Amount	Currency	Transaction Date
0000000019	Consulting and product demo	8,920.00	USD	10/05/2009
0000000020	Technical Training	8,940.00	USD	11/05/2009
0000000020	Technical Training	20.00	USD	11/06/2009
0000000020	Technical Training	20.00	USD	11/09/2009
0000000020	Technical Training	20.00	USD	11/10/2009
0000000021	Consulting and product demo	1,500.00	USD	12/01/2009
***TOTAL :		19,420.00	USD	

From Date and To Date

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

Expense Billing Code

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

Search Filters

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

Go

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

Total Predicted Expenses: Department View or Project View

Travel Authorization ID

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

Personalizing Your Total Predicted Expenses Pagelet

Use the Personalize Total Predicted Expenses page (EX_PE_PRED_PRS) to set up user-specific defaults to filter on for the Total Predicted Expenses pagelet.

Navigation

Click the Customize icon on the Total Predicted Expenses pagelet.

Image: Personalize Total Predicted Expenses page (1 of 2)

This example illustrates the fields and controls on the Personalize Total Predicted Expenses page (1 of 2). You can find definitions for the fields and controls later on this page.

Personalize Total Predicted Expenses

User ID: VP2 Name: Jeanette Bronte

Your system administrator sets the number of future periods for which you can view Total Predicted Expenses. To view by department, select View by Department, identify the GL business unit, and select one or more departments. To view by project, select View by Project and identify the PC business unit. You can also choose from the list of available project filters.

Number of Future Periods

Calendar ID: Monthly Periods Calendar 1/1 Number of Future Periods: 12

Personalization Options

☒ View by Department

GL Business Unit

☒ From Employee Profile

☐ Specify

Departments Customize | Find | View All | First 1 of 1 Last

	Department	Description		
1	42000	Manufacturing Support		

Image: Personalize Total Predicted Expenses page (2 of 2)

This example illustrates the fields and controls on the Personalize Total Predicted Expenses page (2 of 2). You can find definitions for the fields and controls later on this page.

☐ View by Project

PC Business Unit

☒ Projects User Preferences

☐ Specify

Project Filters

☐ Project ID

Projects Customize | Find | View All | First 1 of 1 Last

	Project	Description		
1	<input type="text"/>			

☐ Project Manager

Project Manager Customize | Find | View All | First 1 of 1 Last

	Project Manager	Name		
1	<input type="text"/>			

☐ My Projects

☒ No Additional Filters

[Restore Defaults](#)

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

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

Using Operational Threshold Alerts (OTA) for PeopleSoft Expenses

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

Pages Used to Personalize OTAs for PeopleSoft Expenses

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	<ul style="list-style-type: none"> Click the Customize icon on the Operational Threshold Alert pagelet. Click the Customize icon on the Operational Threshold Chart pagelet. 	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.
Operational Threshold Alert pagelet	PC_PE_OTA_LIST	Click the Personalize Content link on the PeopleSoft homepage.	View up to five Operational Threshold Alerts that display real-time monitoring data according to tolerance levels that you define.
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage.	View an Operational Threshold Alert that displays a real-time monitoring chart according to tolerance levels that you define.
Personalize Total Expense Costs	EX_PE_TEXF_PRS	Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.	Define default data for calculating and displaying the Total Expense Costs OTA.

Understanding the Total Expense Costs OTA

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

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

Personalize Total Expense Costs Page

Use the Personalize Total Expense Costs page (EX_PE_TEXPRPS) to define default data for calculating and displaying the Total Expense Costs OTA.

Navigation

Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Total Expense Costs page (1 of 2)

This example illustrates the fields and controls on the Personalize Total Expense Costs page (1 of 2). You can find definitions for the fields and controls later on this page.

Personalize Total Expense Costs

User ID: VP2 Name: Jeanette Bronte

Your system administrator sets the number of past periods for which you can view Total Expense Cost. To view by department, select View by Department, identify the GL business unit, and select one or more departments. To view by project, select View by Project and identify the PC business unit. You can also choose from the list of available project filters.

Number of Past Periods

Calendar ID: Monthly Number of Past Periods: 12

Personalization Options

☒ View by Department

GL Business Unit

☒ From Employee Profile

☐ Specify

Departments

Customize | Find | View All | First 1 of 1 Last

	Department	Description		
1	42000	Manufacturing Support		

Image: Personalize Total Expense Costs page (2 of 2)

This example illustrates the fields and controls on the Personalize Total Expense Costs page (2 of 2). You can find definitions for the fields and controls later on this page.

☐ View by Project

PC Business Unit

☒ Projects User Preferences

☐ Specify

Project Filters

☐ Project ID

Projects		Customize	Find	View All	First	1 of 1	Last
	Project	Description					
1	<input type="text"/>						

☐ Project Manager

Project Manager		Customize	Find	View All	First	1 of 1	Last
	Project Manager	Name					
1	<input type="text"/>						

☐ My Projects

☒ No Additional Filters

Alert Settings

Enter the Alert Threshold Amount above which an alert will be triggered.

Alert Threshold Amount: ☒ Show Only if Alert

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

Alert Threshold Amount

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

Show Only if Alert

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

Return to Personalize Alerts

Click to return to the Personalize Operational Threshold Alerts page.

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

Viewing Transactions in Progress (TIP)

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

- View expense and time report data.

- Personalize TIP pagelets.
- Administer TIP pagelets.

Understanding Transactions in Progress

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

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

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

Using the Expenses Transaction in Progress (EX_TIP_LOAD) Application Engine Batch Process

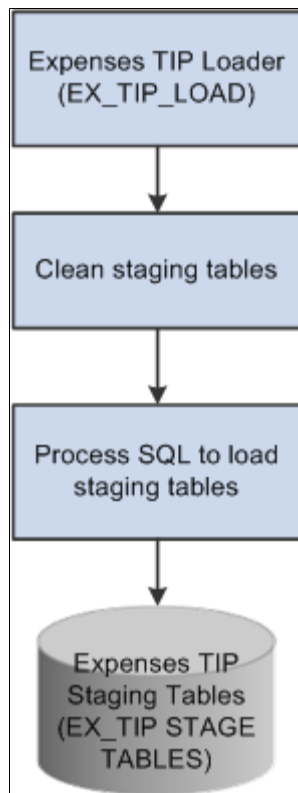
The Expenses Transaction in Progress Loader application engine (EX_TIP_LOAD) enables users to run a batch process to load a large amount of transaction in progress data from PeopleSoft Expenses. Using this process decreases the amount of time it takes to load the transactions in progress from the feeder systems to the TIP staging tables and display them in the Project Costing Transaction in Progress page.

When the EX_TIP_LOAD application is run, it deletes the staging tables, inserts any new TIP exceptions, and populates the EX_TIP staging tables so that you can search for and display these PeopleSoft Expenses transactions in progress on the Transactions in Progress page in PeopleSoft Project Costing.

This diagram describes the Expenses TIP Loader process flow to the staging tables.

Image: PeopleSoft Expenses TIP

Expenses TIP Loader process flow to the staging tables



Pages Used to View and Personalize Transactions in Progress

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Transactions in Progress - Expenses (Details)	EX_TIP	Travel and Expenses, Real-Time Analysis, Review Transaction in Progress Manager Self-Service, Travel and Expenses Center, Analysis, View Transactions in Progress	Add a transactions in progress, specify criteria, and click Search to display a list of expense and time report transactions in progress.
Transactions in Progress - Expenses (Graphical)	EX_TIP2	Travel and Expenses, Real-Time Analysis, Review Transaction in Progress, click the Graphical View link Manager Self-Service, Travel and Expenses Center, Analysis, View Transactions in Progress, click Search, then the Graphical View link.	Uses the search criteria to display a graphical view of expense and time report transactions in progress.

Page Name	Definition Name	Navigation	Usage
Personalize TIP for Expense Reports	EX_PE_TIP_PRS	<p>Click the Customize icon on a TIP pagelet for expense reports.</p> <p>To access the administrator pages, click Setup Financials/ Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Expense Report TIP link.</p>	Define default display information for TIP pagelets for expense reports.
Personalize TIP for Time Reports	EX_PE_TIPTE_PRS	<p>Click the Customize icon on a TIP pagelet for time reports.</p> <p>To access the administrator pages, click Setup Financials/ Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Time Report TIP link.</p>	Define default display information for TIP pagelets for time reports.
Expenses Pagelet Processing	RUN_EX_PORTAL_AE	<ul style="list-style-type: none"> • Travel and Expenses, Real-Time Analysis, Update Expenses Pagelet Info, Expenses Pagelet Processing • Click the Go to Expenses Pagelet Processing link on the Administer TIP for Time Reports page. • Click the Go to Expenses Pagelet Processing link on the Administer TIP for Expense Reports page. 	<p>Run the Expenses Pagelet Processing process to convert expense data to various currencies and summarize the information.</p> <p>The Expenses Transaction in Progress Loader application engine (EX_TIP_LOAD) enables you to run a batch process to load a large amount of transactions in progress data from PeopleSoft Expenses in order to decrease the amount of time it takes to load the transactions in progress from the feeder systems to the TIP staging tables and display them in the Project Costing Transaction in Progress page .</p>

TIP Stages

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

There are five TIP stages for PeopleSoft Expenses:

1. PeopleSoft Expenses estimated but actual expenses not submitted. This stage identifies expense reports with a status of *pending*. (EXESTNE)

2. PeopleSoft Expenses recorded but not approved. This stage identifies expense reports with a status of *submitted*, *partially approved*, and *approved*. (Still pending a final approval for payment.) (EXRECNA)
3. PeopleSoft Expenses approved but not paid or reimbursed. This stage identifies expense reports in *approved for payment* status. (EXAPRNP)
4. Time estimated but actual time not entered. This stage identifies time reports with a status of *pending*. (TEESTNE)
5. Time recorded but not approved. This stage identifies time reports with a status of *submitted* and *partially approved*. (TERECNA)
6. Travel authorizations with Project ChartFields for which the actual expenses are pending and have not been recorded. (TAUTNE)

For TIP stages 1 through 4 and stage 6, which are targeted at pending transactions, PeopleSoft Expenses uses the creation date to calculate the days inactive amount. There is no need to evaluate the approval level in this instance because the TIP stage refers to pending transactions.

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

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

Viewing and Personalizing Transactions in Progress

This section discusses how to:

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

Understanding How to Search for Transactions in Progress

To view PeopleSoft Expenses TIP pagelets, you must add a TIP stage type for each of the 6 expense reports and time reports. Select Travel and Expenses, Real-Time Analysis, Review Transaction in Progress and click the Add a New Value link. Click the Look up icon to obtain the search results. After selecting a TIP stage type, you can specify your search criteria defaults in the Transactions in Progress - Expenses (Details) page.

TIP stage types for PeopleSoft Expenses are:

- EXESTNE
- EXRECNA
- EXAPRNP

- TEESTNE
- TERECA
- TAUTNE

Image: Look Up Transactions in Progress search page

This example illustrates the fields and controls on the Look Up Transactions in Progress search page. You can find definitions for the fields and controls later on this page.

Transactions In Progress	Description
ALLTOPC	All transactions transmitted to Projects that are not costed or priced
APNOPY	Unpaid AP vouchers have been distributed to PC
APTOPC	AP Expenses recorded - not transmitted to Projects
ARTOPC	Receivables in Progress
BDTOPC	Budgets in Progress
BITOPC	Invoiced BI lines not distributed to Projects
CANOPC	Projects or Activities not assigned to a Contract
EXAPRNP	Expenses approved / not reimbursed - paid
EXESTNE	Expenses estimated but actual expenses not entered (past due)
EXRECNA	Expenses recorded / not approved
EXTOPC	Expenses approved not transmitted (staged) to Projects
FATOPC	FA in Progress
GLTOPC	Posted Journals not transmitted to Projects
INACTPC	Inactive Projects with unbilled transactions
INTOPC	Inventory costs - not transmitted to Projects
POTOPC	Purchase orders costs - not transmitted to Projects
REQTOPC	Requisitions not distributed to PC
TAUTNE	Travel Authorizations for which actual expenses have not been recorded
TEESTNE	Time estimated but actual time not entered (past due)
TERECNA	Time recorded / not approved
TMTOPC	Time approved not transmitted (staged) to Projects
UNSPQ	Unsources PO
UNSPREQ	Unsources Requisitions

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

Note: Although there are 23 TIP stages listed; only 6 belong to PeopleSoft Expenses. If you select a PeopleSoft Project Costing TIP stage, the Project Costing TIP inquiry page appears.

Related Links

"Transactions in Progress (*PeopleSoft FSCM 9.2: Project Costing*)"

Transactions in Progress - Expenses (Details) Page

Use the Transactions in Progress - Expenses (Details) page (EX_TIP) to add transactions in progress, specify criteria, and click Search to display a list of expense and time report transactions in progress.

Navigation

Travel and Expenses, Real-Time Analysis, Review Transaction in Progress

Manager Self-Service, Travel and Expenses Center, Analysis, View Transactions in Progress

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

This example illustrates the fields and controls on the Transactions in Progress - Expenses (Details) page (1 of 2). You can find definitions for the fields and controls later on this page.

Transactions in Progress - Expenses (Details)

User ID: VP1 Name: Kenneth Schumacher

Transactions in Progress: Time estimated but actual time not entered (past due)

Selection Parameters

*Days Inactive Range:

Specify at least one of the following criteria before pressing "Search".

Employee Criteria

Employee Name:

☒ No Additional Filters
☐ My Projects
☐ Project Manager

ChartField Criteria

GL Business Unit: US001 NEW YORK OPERATIONS

General Ledger ChartFields Customize | Find | View All | | First 1 of 1 Last

Operating Unit	Fund	Department	Program	Class	Budget Reference	Product	Affiliate	Fund Affiliate	Operating Unit Affiliate
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Projects Criteria

PC Business Unit:

Projects ChartFields

Project	Activity	Source Type	Category	Subcategory
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

This example illustrates the fields and controls on the Transactions in Progress - Expenses (Details) page (2 of 2). You can find definitions for the fields and controls later on this page.

[Graphical View](#)

Transactions				
Timesheet ID	Name	Report Status	Date of Last Update	Days Inactive
1 0000000029	Schumacher,Kenneth	Pending	10/31/2003	2149
2 0000000012	Schumacher,Kenneth	Pending	08/15/2000	3321
3 0000000024	Schumacher,Kenneth	Pending	10/31/2003	2149

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

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

Days Inactive Range

Displays the number of days since the last activity.

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

PeopleSoft Expenses calculates days inactive using the:

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

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

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

Graphical View

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

Report ID

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

Transactions in Progress - Expenses (Graphical) Page

Use the Transactions in Progress - Expenses (Graphical) page (EX_TIP2) to display a graphical view of expense and time report transactions in progress.

Navigation

Travel and Expenses, Real-Time Analysis, Review Transaction in Progress, click the Graphical View link

Manager Self-Service, Travel and Expenses Center, Analysis, View Transactions in Progress, click Search, then the Graphical View link.

Image: Transactions in Progress - Expenses (Graphical) page (1 of 2)

This example illustrates the fields and controls on the Transactions in Progress - Expenses (Graphical) page (1 of 2). You can find definitions for the fields and controls later on this page.

Transactions in Progress - Expenses (Graphical)

User ID: DVP1 Name: Smith, Jane

Transactions in Progress: Expenses estimated but actual expenses not entered (past due)

Selection Parameters

Days Inactive Range: All

Employee Specific

Employee Name: ☒ No Additional Filters
☐ My Projects
☐ Project Manager

ChartField Specific

GL Business Unit: US001 US001 NEW YORK OPERATIONS

General Ledger ChartFields [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

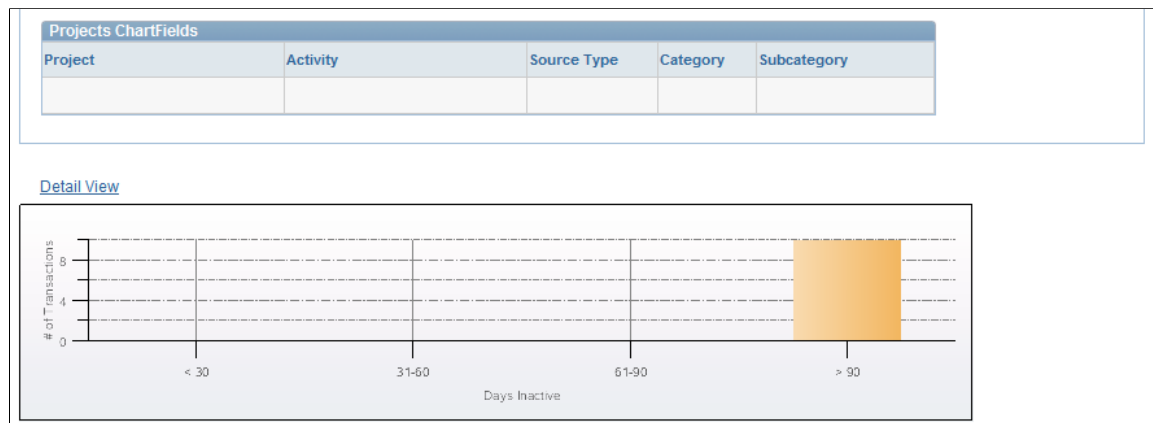
Operating Unit	Fund	Department	Program	Class	Budget Reference	Product	Affiliate	Fund Affiliate	Operating Unit Affiliate

Project Cost Specific

PC Business Unit:

Image: Transactions in Progress - Expenses (Graphical) page (2 of 2)

This example illustrates the fields and controls on the Transactions in Progress - Expenses (Graphical) page (2 of 2). You can find definitions for the fields and controls later on this page.



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

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

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

Personalize TIP for Expense Reports Page

Use the Personalize TIP for Expense Reports page (EX_PE_TIP_PRS) to define default display information for TIP pagelets for expense reports.

Navigation

Click the Customize icon on a TIP pagelet for expense reports.

To access the administrator pages, click Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Expense Report TIP link.

Image: Personalize TIP for Expense Reports page (1 of 2)

This example illustrates the fields and controls on the Personalize TIP for Expense Reports page (1 of 2). You can find definitions for the fields and controls later on this page.

Personalize TIP for Expense Reports

User ID: VP2 Name: Michael Buhler

Personalization Options

☒ View by Department

GL Business Unit

☒ From Employee Profile

☐ Specify

Departments Customize | Find | View All | First 1 of 1 Last

	Department	Description		
1	42000		+	-

☐ View by Project

PC Business Unit

☒ Projects User Preferences

☐ Specify

Project Filters

☐ Project ID

Projects Customize | Find | View All | First 1 of 1 Last

	Project	Description		
1			+	-

Image: Personalize TIP for Expense Reports page (2 of 2)

This example illustrates the fields and controls on the Personalize TIP for Expense Reports page (2 of 2). You can find definitions for the fields and controls later on this page.

☐ Project Manager

Project Manager Customize | Find | View All | First 1 of 1 Last

	Project Manager	Name		
1			+	-

☐ My Projects

☒ No Additional Filters

Pagelet Format

☒ Bar Graph ☐ Pie Graph

Restore Defaults

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

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

Bar Graph

Select to view search results as a bar graph.

Pie Graph

Select to view search results as a pie graph.

Note: The administrator sets the defaults for displaying TIP pagelets as a Bar Graph or a Pie Graph. If a user personalizes a time report pagelet and changes the default selection for Bar Graph or Pie Graph, the two time report pagelets will be displayed the same way. That is, both time report pagelets can be displayed either as a bar graph or as a pie graph, not one of each. Similarly, if a user personalizes an expense report pagelet and changes the default selection for Bar Graph or Pie Graph, the three expense report pagelets will be displayed the same way. That is, the three expense report pagelets can only be displayed either as a bar graph or as a pie graph, not one of each.

Administer Expense Report and Time Report Pagelets

Use the Administer TIP for Expense Reports or the Administer TIP for Time Reports page to obtain data for PeopleSoft Expenses and Time pagelets .

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

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

Image: Administer TIP for Expense Reports page

This example illustrates the fields and controls on the Administer TIP for Expense Reports page. You can find definitions for the fields and controls later on this page.

Administer TIP for Expense Reports

User ID: PSDEFAULT

Personalization Options

☒ View by Department

☐ View by Project

PC Business Unit

☒ Projects User Preferences

☐ Specify

Project Filters

☐ Project Manager

Project Manager

Customize | Find | View All | First 1 of 1 Last

	Project Manager	Name		
1	<input type="text"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

☐ My Projects

☒ No Additional Filters

Pagelet Format

☒ Bar Graph

☐ Pie Graph

[Go to Expenses Pagelet Processing](#)

Image: Administer TIP for Time Reports page

This example illustrates the fields and controls on the Administer TIP for Time Reports page. You can find definitions for the fields and controls later on this page.

Administer TIP for Time Reports

User ID: PSDEFAULT

Personalization Options

☒ View by Department
☐ View by Project

PC Business Unit

☒ Projects User Preferences
☐ Specify

Project Filters

☐ Project Manager
☐ My Projects
☒ No Additional Filters

Project Manager

Customize | Find | View All | 1 of 1 | First | Last

Project Manager	Name
1	

Pagelet Format

☒ Bar Graph
☐ Pie Graph

[Go to Expenses Pagelet Processing](#)

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

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

Go to Expenses Pagelet Processing (Travel and Expenses, Real-Time Analysis, Update Expenses Pagelet Info, Expenses Pagelet Processing)

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

When you run Expenses Transaction in Progress Loader application engine (EX_TIP_LOAD), you can run a batch process to load a large amount of transactions in progress data from PeopleSoft Expenses. This decreases the amount of time it takes to load the transactions in progress from the feeder systems to the TIP staging tables and display them in the Project Costing Transaction in Progress page.

Chapter 13

Using Pagelets Enabled by PeopleSoft Program Management

Using Pagelets Enabled by PeopleSoft Program Management

This topic discusses how to:

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

Viewing Change Control Analysis

This section discusses how to:

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

Pages Used to View Change Control Analysis

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Change Control Analysis pagelet	PC_PE_CHG_ANALYSIS	Click the Personalize Content link on the PeopleSoft homepage. Select Change Control Analysis.	View the top five projects with the highest number of changes.

Page Name	Definition Name	Navigation	Usage
Personalize Change Control Analysis	PC_PE_CHC_PRS	<ul style="list-style-type: none"> Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration <p>Click the Change Control Analysis link on the ESA Portal Pack Pagelet Default Administration page.</p> <ul style="list-style-type: none"> Click the Customize Change Control Analysis icon on the Change Control Analysis pagelet. 	Define default display information for the Change Control Analysis pagelet.

Viewing Change Control Analysis Information

Use the Change Control Analysis pagelet page (PC_PE_CHG_ANALYSIS) to view the top five projects with the highest number of changes.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Change Control Analysis.

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

<Project ID>

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

Show All / Enhanced

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

Personalizing the Change Control Analysis Pagelet

Use the Personalize Change Control Analysis page (PC_PE_CHC_PRS) to define default display information for the Change Control Analysis pagelet.

Navigation

- Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click the Change Control Analysis link on the ESA Portal Pack Pagelet Default Administration page.

- Click the Customize Change Control Analysis icon on the Change Control Analysis pagelet.

Image: Personalize Change Control Analysis page

This example illustrates the fields and controls on the Personalize Change Control Analysis page. You can find definitions for the fields and controls later on this page.

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

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

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

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

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

User Preferences

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

Specify

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

My Projects

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

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

- Project Manager

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

Restore Defaults

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

Viewing Critical Issues by Project

This section discusses how to:

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

Pages Used to View Critical Issues by Project

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

Viewing Critical Issues by Project

Use the Critical Issues by Project pagelet page (PC_PE_CRIT_BY_PROJ) to view a maximum of the top five projects that have the most open critical issues.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Critical Issues by Project.

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

Personalizing the Critical Issues by Project Pagelet

Use the Personalize Critical Issues by Project page (PC_PE_CRIT_PRS) to define default display information for the Critical Issues by Project pagelet.

Navigation

Click the Customize Critical Issues by Project icon on the Critical Issues by Project pagelet.

Image: Personalize Critical Issues by Project page

This example illustrates the fields and controls on the Personalize Critical Issues by Project page. You can find definitions for the fields and controls later on this page.

Personalize Critical Issues by Project

User ID: VP1 Name: Kenneth Schumacher

Critical Issues by Project

Business Unit

☐ Projects User Preferences

☐ Specify

☐ My Projects

Project Type:

Project Manager:

Project Status:

Specify Date Range

*Calendar ID:

*Number of Prior Periods:

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

Viewing Issues by Priority

This section discusses how to view issues by priority.

Page Used to View Issues by Priority

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

Issues by Priority Pagelet

Use the Issues by Priority pagelet page (PC_PE_ISU_CNT_PRIO) to view a chart that displays all the high, medium, and low issues that are assigned to the user.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Issues by Priority.

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

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

Viewing Issue Priority by Project

This section discusses how to:

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

Pages Used to View Issues by Priority by Project

Page Name	Definition Name	Navigation	Usage
Issue Priority by Project pagelet	PC_PE_PRIO_BY_PROJ	Click the Personalize Content link on the PeopleSoft homepage. Select Issue Priority by Project.	View a maximum of the top five projects that have the greatest number of open issues.
Personalize Issue Priority by Project	PC_PE_PRIO_PRS	<ul style="list-style-type: none"> • Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Issue Priority by Project link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Issue Priority by Project icon on the Issue Priority by Project pagelet. 	Define default display information for the Issue Priority by Project pagelet.

Viewing Issues by Priority by Project

Use the Issue Priority by Project pagelet page (PC_PE_PRIO_BY_PROJ) to view a maximum of the top five projects that have the greatest number of open issues.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Issue Priority by Project.

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

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

Personalizing the Issue Priorities by Project Pagelet

Use the Personalize Issue Priority by Project page (PC_PE_PRIO_PRS) to define default display information for the Issue Priority by Project pagelet.

Navigation

- Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click the Issue Priority by Project link on the ESA Portal Pack Pagelet Default Administration page.

- Click the Customize Issue Priority by Project icon on the Issue Priority by Project pagelet.

Image: Personalize Issue Priority by Project page

This example illustrates the fields and controls on the Personalize Issue Priority by Project page. You can find definitions for the fields and controls later on this page.

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

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

Viewing Top Five Issues

This section discusses how to:

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

Pages Used to View Top Five Issues

Page Name	Definition Name	Navigation	Usage
Top 5 Issues pagelet	PGM_PE_TISU (wide), PGM_PE_TISU_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Top 5 Issues.	View up to five projects or programs that have the highest number of open high priority issues.
Personalize Top 5 Issues	PGM_PE_TISU_PRS	<ul style="list-style-type: none"> • Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Top 5 Issues link on the ESA Portal Pack Pagelet Default Administration page. • Click the Customize Top 5 Issues icon on the Top 5 Issues pagelet. 	Define default display information for the Top 5 Issues pagelet.

Viewing the Top Five Issues

Use the Top 5 Issues pagelet (PGM_PE_TISU (wide)) to view up to five projects or programs that have the highest number of open high priority issues.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Top 5 Issues.

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

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

Personalizing the Top 5 Issues Pagelet

Use the Personalize Top 5 Issues page (PGM_PE_TISU_PRS) to define default display information for the Top 5 Issues pagelet.

Navigation

- Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click the Top 5 Issues link on the ESA Portal Pack Pagelet Default Administration page.

- Click the Customize Top 5 Issues icon on the Top 5 Issues pagelet.

Image: Personalize Top 5 Issues page

This example illustrates the fields and controls on the Personalize Top 5 Issues page. You can find definitions for the fields and controls later on this page.

Personalize Top 5 Issues

Top 5 Issues

Business Unit

Projects User Preferences

Specify

☒ My Projects

Project:

Activity:

Issue Priority:

Issue Type:

Issue Status:

Assigned To:

From Date:

To Date:

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

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

Viewing Top Five Risks

This section discusses how to:

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

Pages Used to View Top Five Risks

Page Name	Definition Name	Navigation	Usage
Top 5 Risks pagelet	PGM_PE_TOP_RISK (wide), PGM_PE_TOP_RISK_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Top 5 Risks.	View up to five active or potential risks in order of the risk status and priority.

Page Name	Definition Name	Navigation	Usage
Personalize Top 5 Risks	PGM_PE_TOP_RSK_PRS	<ul style="list-style-type: none"> Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Top 5 Risks link on the ESA Portal Pack Pagelet Default Administration page. Click the Customize Top 5 Risks icon on the Top 5 Risks pagelet. 	Define default display information for the Top 5 Risks pagelet.

Viewing the Top Five Risks

Use the Top 5 Risks pagelet (PGM_PE_TOP_RISK (wide)) to view up to five active or potential risks in order of the risk status and priority.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Top 5 Risks.

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

Personalizing the Top 5 Risks Pagelet

Use the Personalize Top 5 Risks page (PGM_PE_TOP_RSK_PRS) to define default display information for the Top 5 Risks pagelet.

Navigation

- Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click the Top 5 Risks link on the ESA Portal Pack Pagelet Default Administration page.

- Click the Customize Top 5 Risks icon on the Top 5 Risks pagelet.

Image: Personalize Top 5 Risks page

This example illustrates the fields and controls on the Personalize Top 5 Risks page. You can find definitions for the fields and controls later on this page.

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

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

Viewing Forecast to Complete Information

This section discusses how to:

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

Pages Used to View Forecast to Complete Information

Page Name	Definition Name	Navigation	Usage
Forecast to Complete pagelet	PC_PE_ETC_VARIANCE	Click the Personalize Content link on the PeopleSoft homepage. Select Forecast to Complete.	View the forecast to complete date variance for a maximum of five projects with the greatest variance.

Page Name	Definition Name	Navigation	Usage
Personalize Forecast to Complete	PC_PE_ETC_PRS	<ul style="list-style-type: none"> Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Forecast to Complete Variance link on the ESA Portal Pack Pagelet Default Administration page. Click the Customize Forecast to Complete icon on the Forecast to Complete pagelet. 	Define default display information for the Forecast to Complete pagelet.

Viewing Forecast to Complete Information

Use the Forecast to Complete pagelet page (PC_PE_ETC_VARIANCE) to view the forecast to complete date variance for a maximum of five projects with the greatest variance.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Forecast to Complete.

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

Personalizing the Forecast to Complete Pagelet

Use the Personalize Forecast to Complete page (PC_PE_ETC_PRS) to define default display information for the Forecast to Complete pagelet.

Navigation

- Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click the Forecast to Complete Variance link on the ESA Portal Pack Pagelet Default Administration page.

- Click the Customize Forecast to Complete icon on the Forecast to Complete pagelet.

Image: Personalize Forecast to Complete page

This example illustrates the fields and controls on the Personalize Forecast to Complete page. You can find definitions for the fields and controls later on this page.

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

Viewing Programs

This section discusses how to:

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

Pages Used to View Programs

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

Viewing My Program

Use the My Program pagelet page (PGM_PE_MYPGM (wide)) to view the specified program and the top four worst health projects.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select My Program.

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

Project (ID)

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

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

Program

Indicates if it is a program or a project.

Process Status

Displays the processing status of the project. Available values are: *Pending*, *Active*, or *Inactive*.

Project Manager

Displays the current project manager.

Project Type

Indicates the project type.

Project Status

Displays the state of the project in its progress toward completion.

% Complete (percent complete)

Displays the percentage of the project work that is complete. This value can be entered by a project team member or automatically calculated by the system.

Health

Displays a visual indicator based on the health of the project. Available indicators are:

Good (green diamond)

Fair (yellow triangle)

Poor (red square)

Personalizing the My Program Pagelet

Use the Personalize My Program page (PGM_PE_MYPGM_PRS) to define default display information for the My Program pagelet.

Navigation

Click the Customize My Program icon on the My Program pagelet.

Image: Personalize My Program page

This example illustrates the fields and controls on the Personalize My Program page. You can find definitions for the fields and controls later on this page.

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

Using OTAs for PeopleSoft Program Management

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

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

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

Pages Used to Personalize OTAs for PeopleSoft Program Management

Page Name	Definition Name	Navigation	Usage
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	<ul style="list-style-type: none"> • Click the Customize icon on the Operational Threshold Alert pagelet. • Click the Customize icon on the Operational Threshold Chart pagelet. 	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page used to personalize individual OTA tolerance levels.

Page Name	Definition Name	Navigation	Usage
Operational Threshold Alert pagelet	PC_PE_OTA_LIST (wide) PC_PE_OTA_LIST_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage.	View up to five OTAs that display real-time monitoring data according to tolerance levels that you define.
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	Click the Personalize Content link on the PeopleSoft homepage.	View an OTA that displays a real-time monitoring chart according to tolerance levels that you define.
Personalize Budget to Forecast Time Variance	PC_PE_BETV_PRS	<ul style="list-style-type: none"> Click the Budget to Forecast Time Variance link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Define default data for calculating and displaying the Budget to Forecast Time Variance OTA.
Personalize Projects Predicted to be Late	PC_PE_PJLT_PRS	<ul style="list-style-type: none"> Click the Projects Predicted to be Late link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Define default data for calculating and displaying the Projects Predicted to be Late OTA.
Personalize Actual to Forecast Utilization	RS_PE_RSAU_PRS	<ul style="list-style-type: none"> Click Actual to Forecast Utilization on the ESA Portal Pack Pagelet Default Administration page. Click the Customize icon on the Operational Threshold Alert pagelet or Operational Threshold Chart pagelet. <p>Click the Personalize icon on the Actual to Forecast Utilization line on the Personalize Operational Threshold Alerts page.</p>	Specify the business unit, date range, filter, and alert variance threshold percentage for the Actual to Forecast Utilization analysis.

Page Name	Definition Name	Navigation	Usage
Personalize Forecast Utilization	RS_PE_RSFU_PRS	<ul style="list-style-type: none"> Set Up Financials/ Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration <p>Click Forecast Utilization on the ESA Portal Pack Pagelet Default Administration page.</p> <ul style="list-style-type: none"> Click the Customize icon on the Operational Threshold Alert pagelet or Operational Threshold Chart pagelet. <p>Click the Personalize icon on the Forecast Utilization row on the Personalize Operational Threshold Alerts page.</p>	Specify the business unit, date range, filter, and alert threshold percentage for the Forecast Utilization OTA.

Related Links

[Viewing Enterprise Service Automation Navigation Collection Pagelets](#)

Understanding OTA Calculations in PeopleSoft Program Management

This section discusses calculations for these OTAs:

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

Calculating Budget to Forecast Time Variance

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

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

Variable	Calculation Method
Actual Hours	Sum of the values in the Project Summary table RESOURCE_QUANTITY field for rows belonging to the Projects Cost analysis group.
Estimated Hours	Estimated Remaining Hours + Actual Hours
Percent Variance	$((\text{Estimated Hours} - \text{Budget Hours}) / \text{Budget Hours}) \times 100$

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

Calculating Projects Predicted to be Late

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

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

Calculating Actual to Forecast Utilization

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

Variable	Calculation Method
Actual Utilization	A percentage equal to the actual resource hours entered, that are not denied, in PeopleSoft Expenses for the specified period of time, divided by resource capacity for that period of time.
Forecast Utilization	A percentage equal to the forecasted resource utilized hours for the specified period of time entered in Services Forecasting divided by the resource capacity for that period of time.

Variable	Calculation Method
Actual to Forecast Utilization Variance	<p>The actual utilization percentage minus the forecast utilization percentage. The system compares the absolute value of the variance to the alert variance threshold percentage value that is specified by an administrator or personalized by each user. If the variance is less than or equal to the alert variance threshold percentage, a green visual indicator appears on the OTA pagelet. If the variance exceeds the alert variance threshold percentage, a red alert visual indicator appears on the OTA pagelet.</p> <p>For example, if actual utilization is 70% and forecast utilization is 85%, the variance is -15%. If the alert variance threshold percentage value is 10%, a red alert visual indicator appears because the absolute value of the variance is greater than the alert variance threshold.</p>

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

Calculating Forecast Utilization

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

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

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

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

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

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

Personalize Budget to Forecast Time Variance Page

Use the Personalize Budget to Forecast Time Variance page (PC_PE_BETV_PRS) to define default data for calculating and displaying the Budget to Forecast Time Variance OTA.

Navigation

- Click the Budget to Forecast Time Variance link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Budget to Forecast Time Variance page

This example illustrates the fields and controls on the Personalize Budget to Forecast Time Variance page. You can find definitions for the fields and controls later on this page.

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

Personalize Projects Predicted to be Late Page

Use the Personalize Projects Predicted to be Late page (PC_PE_PJLT_PRS) to define default data for calculating and displaying the Projects Predicted to be Late OTA.

Navigation

- Click the Projects Predicted to be Late link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Projects Predicted to be Late page

This example illustrates the fields and controls on the Personalize Projects Predicted to be Late page. You can find definitions for the fields and controls later on this page.

Personalize Projects Predicted to be Late

Projects Predicted to be Late

Business Unit
☒ Projects User Preferences
☐ Specify

☒ My Projects
 Project Manager:
 Project Type:
 Project Status:

Alert Settings
 Enter the Alert Threshold Number of Projects above which an alert will be triggered.
 *Alert Threshold # of Projects: ☐ Show Only if Alert

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

Personalize Actual to Forecast Utilization Page

Use the Personalize Actual to Forecast Utilization page (RS_PE_RSAU_PRS) to specify the business unit, date range, filter, and alert variance threshold percentage for the Actual to Forecast Utilization analysis.

Navigation

- Click Actual to Forecast Utilization on the ESA Portal Pack Pagelet Default Administration page.
- Click the Customize icon on the Operational Threshold Alert pagelet or Operational Threshold Chart pagelet.

Click the Personalize icon on the Actual to Forecast Utilization line on the Personalize Operational Threshold Alerts page.

Image: Personalize Actual to Forecast Utilization page

This example illustrates the fields and controls on the Personalize Actual to Forecast Utilization page. You can find definitions for the fields and controls later on this page.

Personalize Actual to Forecast Utilization

Options

Business Unit

☒ User Preferences

☐ Specify

Specify Date Range

*Number of Past Weeks:

By Department

Department

By Location

Location

Alert Settings

Enter in the Alert Variance Threshold Percentage field the variance percentage that will trigger an Alert. The variance percentage is determined by taking the absolute value of the Actual Utilization percentage minus the Forecast Utilization Percentage for the period.

*Alert Variance Threshold Percentage

☐ Show Only if Alert

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

Number of Past Weeks

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

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

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

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

that you enter, a red alert visual indicator appears on the OTA pagelet.

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

Personalize Forecast Utilization Page

Use the Personalize Forecast Utilization page (RS_PE_RSFU_PRS) to specify the business unit, date range, filter, and alert threshold percentage for the Forecast Utilization OTA.

Navigation

- Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click Forecast Utilization on the ESA Portal Pack Pagelet Default Administration page.

- Click the Customize icon on the Operational Threshold Alert pagelet or Operational Threshold Chart pagelet.

Click the Personalize icon on the Forecast Utilization row on the Personalize Operational Threshold Alerts page.

Image: Personalize Forecast Utilization page

This example illustrates the fields and controls on the Personalize Forecast Utilization page. You can find definitions for the fields and controls later on this page.

Personalize Forecast Utilization

Options

Business Unit

☒ User Preferences

☐ Specify

Specify Date Range

*Number of Future Weeks:

☒ By Department

Departments [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Department	Description
1	

☒ By Location

Locations [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Location Code	Description
1	

Alert Settings

Enter in the Alert Threshold Percentage field the Forecast Utilization percentage below which an alert will be triggered.

*Alert Threshold Percentage ☐ Show Only if Alert

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

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

location, the system evaluates all resources based on the utilization definition of the business unit that you select.

User Preferences

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

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

Specify

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

Number of Future Weeks

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

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

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

By Department

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

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

The default value for individual users is specified by the administrator.

By Location

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

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

Alert Threshold Percentage

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

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

Show Only if Alert

Select for the OTA to appear on the pagelet or chart only if forecast utilization falls below the alert threshold percentage.

Deselect this option for the OTA to appear on the pagelet or chart if forecast utilization falls above, equals, or falls below the alert threshold percentage.

Restore Defaults

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

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

Using Pagelets Enabled by PeopleSoft Project Costing

Using Pagelets Enabled by PeopleSoft Project Costing

This topic discusses how to:

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

Viewing Top Projects

This section discusses how to:

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

Pages Used to View Top Projects

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Top Projects pagelet	PC_PE_TOP_PROJS (wide) PC_PE_TOP_PROJS_N (narrow)	Click the Personalize Content link on the PeopleSoft homepage. Select Top Projects.	View budget amounts for the top five projects using filter criteria that you specify on the Personalize Top Projects page.

Page Name	Definition Name	Navigation	Usage
Personalize Top Projects	PC_PE_TOP_PRS	<ul style="list-style-type: none"> Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration Click the Top Projects link on the ESA Portal Pack Pagelet Default Administration page. Click the Customize Top Projects icon on the Top Projects pagelet. 	Define default information to appear on the Top Projects pagelet.

Viewing Top Projects by Budget Amount

Use the Top Projects pagelet (PC_PE_TOP_PROJS (wide)) to view budget amounts for the top five projects using filter criteria that you specify on the Personalize Top Projects page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Top Projects.

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

Project ID

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

See "Setting Up and Using Project Valuation (*PeopleSoft FSCM 9.2: Project Costing*)".

% Complete (percent complete)

Displays the progress of the project and is calculated or entered manually based on project setup parameters. This field appears only on the wide version of this pagelet.

Cost Amount

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

Budget Total

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

Cost Variance	Displays a value calculated as: (Cost amount – Budget total). This field appears only on the wide version of this pagelet.
Curr (currency) or Currency Code	Displays the base currency for the business unit.
Project Status, Health, and Health As Of	These fields provide information about the project. They appear only on the wide version of this pagelet.

Personalizing Top Projects

Use the Personalize Top Projects page (PC_PE_TOP_PRS) to define default information to appear on the Top Projects pagelet.

Navigation

- Setup Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, ESA Portal Pack Pagelet Default Administration

Click the Top Projects link on the ESA Portal Pack Pagelet Default Administration page.

- Click the Customize Top Projects icon on the Top Projects pagelet.

Image: Personalize Top Projects page

This example illustrates the fields and controls on the Personalize Top Projects page. You can find definitions for the fields and controls later on this page.

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

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

User Preferences	Select to view only those projects with the project business unit that is specified in your user preferences.
Specify	Select to view projects from a business unit other than the project business unit that is specified in your user preferences. If you select Specify, you must enter a business unit value.
My Projects	Select to indicate that only those projects that you designate as part of your My Projects list appear on the Top Projects pagelet.

If you do not have any projects in your My Projects list, no data appears on the Top Projects pagelet.

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

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

Restore Defaults

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

Using OTAs for PeopleSoft Project Costing

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

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

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

Pages Used to Personalize OTAs for PeopleSoft Project Costing

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

Page Name	Definition Name	Navigation	Usage
Operational Threshold Chart pagelet	PC_PE_OTA_CHART	<p>Click the Personalize Content link on the PeopleSoft homepage.</p> <p>Select Operational Threshold Chart on the Personalize Content page and return to the PeopleSoft homepage.</p>	View an OTA that displays a real-time monitoring chart based on tolerance levels that you define.
Personalize Operational Threshold Alerts	PC_PE_OTA_PRS	<ul style="list-style-type: none"> Click the Customize Operational Threshold Alert icon on the Operational Threshold Alert pagelet. Click the Customize Operational Threshold Chart icon on the Operational Threshold Chart pagelet. 	Select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.
Personalize Budget to Actual Cost Variance	PC_PE_BACV_PRS	<ul style="list-style-type: none"> Click the Budget to Actual Cost Variance link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Define default data for calculating and displaying the Budget to Actual Cost OTA.
Personalize Budget to Actual Time Variance	PC_PE_BATV_PRS	<ul style="list-style-type: none"> Click the Budget to Actual Time Variance link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Define default data for calculating and displaying the Budget to Actual Time OTA.
Personalize Gross Margin	PC_PE_GRMG_PRS	<ul style="list-style-type: none"> Click the Gross Margin link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Define default data for calculating and displaying the Gross Margin OTA.

Page Name	Definition Name	Navigation	Usage
Personalize Projects Over Budget	PC_PE_OVER_PRS	<ul style="list-style-type: none"> Click the Projects Over Budget link on the ESA Portal Pack Pagelet Default Administration page. Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page. 	Define default data for calculating and displaying the Projects Over Budget OTA.

Related Links

[Understanding Enterprise Service Automation Pagelet Types](#)

Understanding OTA Calculations for PeopleSoft Project Costing

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

Calculating Budget to Actual Cost Variance

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

Variable	Calculation Method
Actual cost	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field on the Project Costing Definition page for the project.
Budget cost	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Cost Budget field on the Project Costing Definition page for the project.
Percent variance	$((\text{Actual costs} - \text{Budget costs}) \div \text{Budget costs}) \times 100$

Calculating Budget to Actual Time Variance

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

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

Variable	Calculation Method
Budget hours	Sum of the values in the Quantity field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Cost Budget field on the Project Costing Definition page for the project.
Percent variance	$(\text{Actual hours} - \text{Budget hours}) \div \text{Budget hours} \times 100$

Calculating Gross Margin

This table lists the calculations for the Gross Margin OTA:

Variable	Calculation Method
Total revenue recognized	<p>Sum of the values in the Project Business Unit Amount field in the summary table for all revenue rows with analysis types in the analysis group of <i>PSREV</i> (system revenue) that have been recognized. Rows with recognized revenue have a general ledger distribution status of <i>D</i> (distributed).</p> <hr/> <p>Note: To include fixed-amount revenue along with rate-based revenue, add the <i>FRV</i> (fixed cost revenue amount) analysis type to the <i>PSREV</i> analysis group.</p> <hr/>
Actual costs	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field on the Project Costing Definition page for the project.
Gross margin	$(\text{Total recognized revenue} - \text{Actual costs}) \div \text{Total recognized revenue} \times 100$

Calculating Projects Over Budget

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

Variable	Calculation Method
Actual cost	Sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field on the Project Costing Definition page for the project.

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

Personalize Budget to Actual Cost Variance Page

Use the Personalize Budget to Actual Cost Variance page (PC_PE_BACV_PRS) to define default data for calculating and displaying the Budget to Actual Cost OTA.

Navigation

- Click the Budget to Actual Cost Variance link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Budget to Actual Cost Variance page

This example illustrates the fields and controls on the Personalize Budget to Actual Cost Variance page. You can find definitions for the fields and controls later on this page.

Personalize Budget to Actual Cost Variance

Budget to Actual Cost Variance

Business Unit

☒ Projects User Preferences ☐ Specify

☒ My Projects Project Type: Project Manager: Project Status:

Specify Date Range

*Calendar ID: Monthly Periods Calendar 1/1 *Number of Prior Periods:

Alert Settings

Enter the Alert Threshold Percent Variance above which an alert will be triggered.

*Alert Threshold % Variance: ☐ Show Only if Alert

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

Specify Date Range

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

Calendar ID

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

Number of Prior Periods

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

Alert Settings

Alert Threshold % Variance (alert threshold percentage variance)

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

Show Only if Alert

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

Personalize Budget to Actual Time Variance Page

Use the Personalize Budget to Actual Time Variance page (PC_PE_BATV_PRS) to define default data for calculating and displaying the Budget to Actual Time OTA.

Navigation

- Click the Budget to Actual Time Variance link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Budget to Actual Time Variance page

This example illustrates the fields and controls on the Personalize Budget to Actual Time Variance page. You can find definitions for the fields and controls later on this page.

Personalize Budget to Actual Time Variance

Budget to Actual Time Variance

Business Unit

☒ Projects User Preferences ☐ Specify

☒ My Projects Project Manager:

Project Type: Project Status:

Specify Date Range

*Calendar ID: Monthly Periods Calendar 1/1 *Number of Prior Periods:

Alert Settings

Enter the Alert Threshold Percent Variance above which an alert will be triggered.

*Alert Threshold % Variance: ☐ Show Only if Alert

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

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

Personalize Gross Margin Page

Use the Personalize Gross Margin page (PC_PE_GRMG_PRS) to define default data for calculating and displaying the Gross Margin OTA.

Navigation

- Click the Gross Margin link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Gross Margin page

This example illustrates the fields and controls on the Personalize Gross Margin page. You can find definitions for the fields and controls later on this page.

Personalize Gross Margin

Gross Margin

Business Unit

☒ Projects User Preferences ☐ Specify

☒ My Projects Project Manager:

Project Type: Project Status:

Specify Date Range

*Calendar ID: MN Monthly Periods Calendar 1/1 *Number of Prior Periods: 3

Alert Settings

Enter the Alert Threshold Gross Margin Percentage below which an alert will be triggered.

*Alert Threshold Gross Margin %: 25.00 ☐ Show Only if Alert

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

Personalize Projects Over Budget Page

Use the Personalize Projects Over Budget page (PC_PE_OVER_PRS) to define default data for calculating and displaying the Projects Over Budget OTA.

Navigation

- Click the Projects Over Budget link on the ESA Portal Pack Pagelet Default Administration page.
- Click the Personalize icon for this OTA on the Personalize Operational Threshold Alerts page.

Image: Personalize Projects Over Budget page

This example illustrates the fields and controls on the Personalize Projects Over Budget page. You can find definitions for the fields and controls later on this page.

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

Viewing TIPs for PeopleSoft Project Costing

This section discusses how to view these TIPs:

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

Pages Used to View Transactions in Progress for PeopleSoft Project Costing

Page Name	Definition Name	Navigation	Usage
Unpriced in Progress pagelet	PC_PE_TIP_ALLTOPC	Click the Personalize Content link on the PeopleSoft homepage. Select Unpriced in Progress.	View a graph showing all expense transactions that are transmitted to PeopleSoft Project Costing that are not yet costed or priced.

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

Related Links

"Understanding the Pricing Process (*PeopleSoft FSCM 9.2: Project Costing*)"

"Viewing Transactions in Progress (*PeopleSoft FSCM 9.2: Project Costing*)"

[Prerequisites for the PeopleSoft ESA Portal Pack](#)

Viewing Unpriced in Progress

Use the Unpriced in Progress pagelet (PC_PE_TIP_ALLTOPC) to view a graph showing all expense transactions that are transmitted to PeopleSoft Project Costing that are not yet costed or priced.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Unpriced in Progress.

Transaction Inquiry Page

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

Viewing Payables in Progress

Use the Payables in Progress pagelet (PC_PE_TIP_APTOPC) to view a graph showing the number of payable expense transactions that are recorded but not yet transmitted to PeopleSoft Project Costing.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Payables in Progress.

Payables to Projects

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

Viewing Expenses in Progress

Use the Expenses in Progress pagelet (PC_PE_TIP_EXTOPC) to view a graph showing the number of expense transactions that are approved but not yet transmitted to PeopleSoft Project Costing.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Expenses in Progress.

Expenses to Projects

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

Viewing Inventory in Progress

Use the Inventory in Progress pagelet (PC_PE_TIP_INTOPC) to view a graph showing the number of inventory cost transactions that are not yet transmitted to PeopleSoft Project Costing.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Inventory in Progress.

Inventory to Projects

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

Viewing Purchasing in Progress

Use the Purchasing in Progress pagelet (PC_PE_TIP_POTOPC) to view a graph showing purchase order cost transactions that are not yet transmitted to PeopleSoft Project Costing.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Purchasing in Progress.

Purchasing to Projects

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

Viewing Expenses Time in Progress

Use the Expenses Time in Progress pagelet (PC_PE_TIP_TMTOPC) to view a graph showing the number of time entry transactions that are approved but not yet transmitted to PeopleSoft Project Costing.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Expenses Time in Progress.

Expenses to Projects

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

Using Pagelets Enabled by PeopleSoft Proposal Management

Using Pagelets Enabled by PeopleSoft Proposal Management

This topic discusses how to:

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

Viewing Proposal Operational Summary Information

This section discusses how to:

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

Pages Used to View Proposal Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Proposal Operational Summary pagelet	GM_PE_PROPOSAL (narrow) GM_PE_PROPOSAL_2 (wide)	Click the Personalize Content link on the PeopleSoft homepage. Select Proposal Operational Summary.	View a list of proposals based on criteria specified on the Personalize Proposals Operational Summary page.
Personalize Proposals Operational Summary	GM_PE_PROPOSAL_PRS	<ul style="list-style-type: none">• Set Up Financials/ Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Proposals• Click the Customize icon on the Proposal Operational Summary pagelet.	Define default display information for the Proposal Operational Summary pagelet. The default personalization is initially set by the system administrator.

Page Name	Definition Name	Navigation	Usage
Maintain Proposal	GM_OPPTY_HDR	Click the link under the Proposal field on the Proposal Operational Summary pagelet.	View proposal information.

Proposal Summary Information Pagelet

Use the Proposal Operational Summary pagelet page (GM_PE_PROPOSAL (narrow)) to view a list of proposals based on criteria specified on the Personalize Proposals Operational Summary page.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Proposal Operational Summary.

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

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

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

Personalizing the Proposal Operational Summary Pagelet

Use the Personalize Proposals Operational Summary page (GM_PE_PROPOSAL_PRS) to define default display information for the Proposal Operational Summary pagelet.

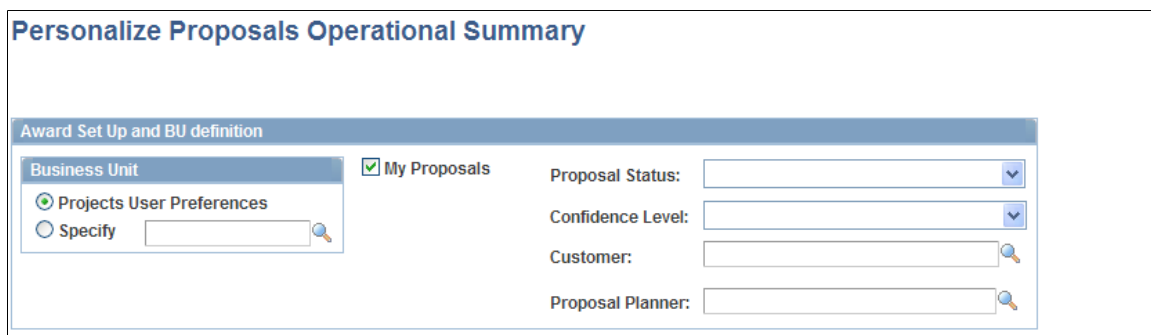
The default personalization is initially set by the system administrator.

Navigation

- Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Proposals
- Click the Customize icon on the Proposal Operational Summary pagelet.

Image: Personalize Proposals Operational Summary page

This example illustrates the fields and controls on the Personalize Proposals Operational Summary page. You can find definitions for the fields and controls later on this page.



User Preferences

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

Specify

Select to use a specific business unit to display proposals.

My Proposals

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

Proposal Status

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

Confidence Level

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

Customer

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

Proposal Planner

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

Viewing Proposal Revenue Pipeline Information

This section discusses how to:

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

Pages Used to View Proposal Revenue Pipeline Information

Page Name	Definition Name	Navigation	Usage
Proposal Revenue Pipeline pagelet	GM_PE_REVEN_PIPE (narrow) GM_PE_REVEN_PIPE_2 (wide)	Click the Personalize Content link on the PeopleSoft homepage. Select Proposal Revenue Pipeline.	View revenue information for future periods by confidence threshold as delineated by the user.
Personalize Proposal Revenue Pipeline	GM_PE_REV_PIPE_PRS	<ul style="list-style-type: none"> • Set Up Financials/ Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Proposal Revenue Pipeline • Click the Customize icon on the Proposal Revenue Pipeline pagelet. 	Define default display information for the Proposal Revenue Pipeline pagelet. The default personalization is initially set by the system administrator.

Viewing Proposal Revenue Pipeline Information

Use the Proposal Revenue Pipeline pagelet page (GM_PE_REVEN_PIPE (narrow)) to view revenue information for future periods by confidence threshold as delineated by the user.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Proposal Revenue Pipeline.

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

Personalizing Proposal Revenue Pipeline Information

Use the Personalize Proposal Revenue Pipeline page (GM_PE_REV_PIPE_PRS) to define default display information for the Proposal Revenue Pipeline pagelet.

The default personalization is initially set by the system administrator.

Navigation

- Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Proposal Revenue Pipeline
- Click the Customize icon on the Proposal Revenue Pipeline pagelet.

Image: Personalize Proposal Revenue Pipeline page

This example illustrates the fields and controls on the Personalize Proposal Revenue Pipeline page. You can find definitions for the fields and controls later on this page.

Business Unit

User Preferences

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

Specify

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

Currency

User Preferences

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

Specify

Select to use a specific currency to display proposal revenue.

Revenue Pipeline

My Proposals

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

Start Date and End Date

Select the beginning and ending dates that you want the system to use to graph proposal revenue. If the target due date on the proposal falls within the date range, then its revenue is included in the graph. If you do not enter any dates, the system uses the

current date and then adds six months. The date range cannot exceed six months.

Status

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

Confidence Level

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

Viewing Proposal Resource Demand Information

This section discusses how to:

- View proposal resource demand information.
- Personalize the Proposal Resource Demand pagelet.

Pages Used to View Proposal Resource Demand Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Proposal Resource Demand pagelet	GM_PE_RES_DEMAND (narrow) GM_PE_RES_DEMAND_2 (wide)	Click the Personalize Content link on the PeopleSoft homepage. Select Proposal Resource Demand.	Learn what the demand for resources will be in a future time period. The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed.
Personalize Proposal Resource Demand	GM_PE_REDMD_PRS	<ul style="list-style-type: none"> • Set Up Financials/ Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Resource Demand • Click the Customize icon on the Proposal Resource Demand pagelet. 	Define default display information for the Proposal Resource Demand pagelet. The default personalization is initially set by the system administrator.

Viewing Proposal Resource Demand Information

Use the Proposal Resource Demand pagelet page (GM_PE_RES_DEMAND (narrow)) to learn what the demand for resources will be in a future time period.

The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Proposal Resource Demand.

Use the information generated by this analytic to learn what the demand for resources will be in a future time period. The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed. The system displays a maximum of 10 project roles, generates a unique color for each job role, and displays a legend at the top of the page. Information contained in this pagelet can help you make more informed hiring and training decisions.

Personalizing Proposal Resource Demand Information

Use the Personalize Proposal Resource Demand page (GM_PE_REDMD_PRS) to define default display information for the Proposal Resource Demand pagelet.

The default personalization is initially set by the system administrator.

Navigation

- Set Up Financials/Supply Chain, Pagelets, Enterprise Service Automation, Portal Pack Defaults, Resource Demand
- Click the Customize icon on the Proposal Resource Demand pagelet.

Image: Personalize Proposal Resource Demand page

This example illustrates the fields and controls on the Personalize Proposal Resource Demand page. You can find definitions for the fields and controls later on this page.

Personalize Proposal Resource Demand

Resource Demand

Business Unit

☒ Projects User Preferences

☐ Specify

Time Configuration

☒ By Hour

☐ By Day

☐ My Proposals

Start Date:

End Date:

Status:

Confidence Level:

Business Unit

User Preferences

Select to display resource demand information based on the business unit that you set up in the user preferences profile.

Specify

Select to use a specific business unit to display resource demand information.

Time Configuration

By Hour	Select to display resource demand information in hours.
By Day	Select to display resource demand information in days.

Resource Demand

My Proposals	Select to display resource demand information from proposals that you have designated as your own by clicking the My Proposals button on the Maintain Proposal page or by adding proposals to the My Proposal Page in PeopleSoft Proposal Management.
Start Date and End Date	Select the beginning and ending dates that you want the system to use to graph resource demand information. If the target due date on the proposal falls within the date range, then its resource demand information is included in the graph. If you do not enter any dates, the system uses the current date and then adds three months.
Status	Select a status if you want to view resource demand information from proposals with a specific status only. If you do not specify a proposal status, the system displays resource demand information from proposals with all proposal statuses.
Confidence Level	Select a confidence level if you want to view resource demand information from proposals with a specific confidence level only. If you do not specify a confidence level, the system displays resource demand information from proposals with all confidence levels.

Using the Pagelet Enabled by PeopleSoft Resource Management

Using the Pagelet Enabled by PeopleSoft Resource Management

This topic discusses how to view resources that are currently unassigned or soon to be unassigned.

Prerequisite

Before you can view resources needing assignments you must establish a resource group for your user ID. If you select the Resources Needing Assignments pagelet to appear on your PeopleSoft homepage without establishing a resource group, a message appears stating that no data is available for the pagelet.

See "Specifying Staffing Workbench and Resource Utilization Options (*PeopleSoft FSCM 9.2: Resource Management*)".

Viewing Resources Needing Assignments

The Resources Needing Assignment pagelet options are shared with the options that are used for the Staffing Workbench in PeopleSoft Resource Management. In PeopleSoft Resource Management you establish resource groups for whom you are responsible so you can manage information about their current assignment status.

This section discusses how to personalize and view resources needing assignments.

Pages Used to View Resources Needing Assignments

Page Name	Definition Name	Navigation	Usage
Resources Needing Assignments pagelet	RS_PE_TOP_MYRES	Click the Personalize Content link on the PeopleSoft homepage. Select the Resources Needing Assignments check box under the Resource Management heading and save the page.	View up to five resources who have been unassigned for the longest period of time or are about to end their assignments. If all resources are assigned, view up to five resources whose assignment end dates are closest to the current date.

Page Name	Definition Name	Navigation	Usage
My Workbench Options - Workbench	RS_MYWKBNCH_OPT	<ul style="list-style-type: none"> Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet. Resource Management, Define User Options, My Workbench Options, Workbench 	Select the group of resources to appear on the Resources Needing Assignments pagelet.
My Workbench Options - Orders	RS_MYWKBNCHREQ_OPT	<ul style="list-style-type: none"> Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet. Select the Orders tab. Resource Management, Define User Options, My Workbench Options, Orders 	Select the default method by which you search for resources, using either a resource group or the owning organization on the service order.
My Workbench Options - Utilization	RS_MYWKBNCHRSC_OPT	<ul style="list-style-type: none"> Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet. Select the Utilization tab. Resource Management, Define User Options, My Workbench Options, Utilization 	Specify the number of calendar days prior to the end date of an assignment that a warning appears on the Resources Needing Assignments pagelet for the resource.

Personalizing the Resources Needing Assignments Pagelet

To personalize the pagelet:

Use the My Workbench Options - Workbench page (RS_MYWKBNCH_OPT) to select the group of resources to appear on the Resources Needing Assignments pagelet.

Navigation

- Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet.
 - Resource Management, Define User Options, My Workbench Options, Workbench
- Specify the default resource group, then click the Return to HomePage link.

Note: The system uses the selected resource group to determine which resources can appear on the Resources Needing Assignments pagelet.

2. Use the My Workbench Options - Utilization page (RS_MYWKBNCHRSC_OPT) to specify the number of calendar days prior to the end date of an assignment that a warning appears on the Resources Needing Assignments pagelet for the resource.

Navigation

- Click the Customize Resources Needing Assignments icon on the Resources Needing Assignments pagelet.

Select the Utilization tab.

- Resource Management, Define User Options, My Workbench Options, Utilization

Specify the Number of Days prior to the end date of an assignment that a warning appears.

If there are not five unassigned resources, the pagelet displays resources whose assignment end dates are closest to the current date.

If resources are on assignments that end in fewer or equal to the number of calendar days that you specify on the My Workbench Options - Utilization page, the resources appear on the Resources Needing Assignments pagelet with a yellow warning visual indicator.

If resources are on assignments that end in a number of days *greater* than the number of days that you specify, the resources appear on the pagelet with a green visual indicator which represents that the resource is fully staffed.

Note: The values that are used to personalize the Resources Needing Assignments pagelet are the Resource Group ID field (RS_RSRCGRP_NAME) and the Number of Days field (NUM_OF_DAYS) in the My Workbench Options component (RS_MYWKBNCH_OPT). No other field values in the My Workbench Options component affect the display of resources needing assignments on the pagelet.

Viewing Resources Needing Assignments

Use the Resources Needing Assignments pagelet (RS_PE_TOP_MYRES) to view up to five resources who have been unassigned for the longest period of time or are about to end their assignments.

If all resources are assigned, view up to five resources whose assignment end dates are closest to the current date.




Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select the Resources Needing Assignments check box under the Resource Management heading and save the page.

Note: Resources appear on this pagelet only if they have an assignment end date. For example, new resources with no assignment history can appear on the Staffing Workbench - Utilization page, but they do not appear on this pagelet.

The resources appear in ascending order of their last assignment end date.

Name	Displays the name of the resource that is currently unassigned, or whose assignment end dates are closest to the current date.
Bill Rate	Displays the resource's bill rate as specified for the resource's employee ID. If no bill rate is specified for the employee ID, the value is the rate associated with the job code in the Rates by Jobcode record (PC_RATE_JOBC) in PeopleSoft Project Costing. If neither value exists, the bill rate appears as <i>0.00</i> on this pagelet.
Currency	Displays the bill rate currency as specified for the resource's employee ID. If the bill rate appears as <i>0.00</i> , the currency value is blank.
End Date	Displays the end date of the resource's current assignment or, if the resource is not currently assigned, the end date of the resource's most recent assignment. If the assignment includes multiple date ranges, the last end date appears.
	This red indicator means that the corresponding resource is currently unassigned and requires immediate attention. If the current day is a workday as specified on the resource profile and stored in the Worker table (RS_WORKER_TBL), PeopleSoft Resource Management looks to see if the resource has a task scheduled on that day. If the current day is not a workday, PeopleSoft Resource Management looks at the next workday to see if the resource has a scheduled assignment on that day. If no assignment is scheduled, the resource is treated as unassigned.
	This yellow indicator means that the corresponding resource is currently on an assignment that ends in fewer or equal to the number of days specified on the My Workbench Options - Utilization page.
	This green indicator means that the corresponding resource is currently on an assignment that ends in a number of days greater than the number of days specified on the My Workbench Options - Utilization page.
More	Click this link to access the Staffing Workbench - Utilization page to view the assignment status for all of the resources in the resource group.

Chapter 17

Using Pagelets Enabled by PeopleSoft Staffing Front Office

Using Pagelets Enabled by PeopleSoft Staffing Front Office

This topic discusses how to view:

- Near Term Branch Agenda
- Overdue Branch Agenda
- My Agenda
- Team Agenda
- Branch Agenda
- Staffing Searches
- Applicant Hot List
- Pending Applicants
- Pending Applicants Aging
- Customer Hot List
- Contact Hot List
- Order Hot List

Viewing My Agenda

This section discusses how to view my agenda.

Pages Used to View My Agenda

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My Agenda	FO_ADD_AGN_PGLT	Click the Personalize Content link on the PeopleSoft homepage and select My Agenda.	A list of user specific agenda items in a pagelet

Page Name	Definition Name	Navigation	Usage
Personalize My Agenda	FO_AGN_CFG_PG	From the My Agenda pagelet, select Pagelet Settings and then select Personalize.	Select the time periods you want the system to display in the pagelet.

My Agenda Pagelet

Use the My Agenda pagelet (FO_ADD_AGN_PGLT) to view a list of user-specific agenda items in a pagelet.

Navigation

Click the Personalize Content link on the PeopleSoft homepage and select My Agenda.

Image: My Agenda pagelet

This example illustrates the fields and controls on the My Agenda pagelet. You can find definitions for the fields and controls later on this page.



Event	Today	Week	Month	Overdue
Availability	0	0	0	0
Call	0	0	0	1
Credit Check	0	0	0	0
Drug Screening	0	0	0	0
Interview	0	0	0	0
Offer Letter	0	0	0	0
Phone Screening	0	0	0	0
Reference Check	0	0	0	0

A large part of a staffing branch's daily activities include communications with customers, applicants, and other contacts. To manage these activities or events Staffing Front Office provides the My Agenda pagelet. In the course of a day, they are likely to access many different applicant, employee, and customer, order, and assignment records. In doing so, users might have to contact several individuals. The agenda helps track what they need to do in the immediate and near future to help them manage time, contacts, and future work.

When selecting a number in the grid, the system opens a new window, displaying the Review Agenda/History page.

Event

Displays all event types selected on the Event Types set up page.

Today

Displays a count of the agenda items due today for each event type displayed. Click the link to access the Agenda Detail page.

Week	Displays a count of the agenda items due in the current week for each event type displayed. For example, starting at the beginning of the current week (the first day of the week) until the end of the current week. Click the link to access the Agenda Detail page.
Month	Displays a count of the agenda items due in the current month for each event type displayed.. For example, starting at the beginning of the current month (the first day of the month) until the end of the current month. Click the link to access the Agenda Detail page.
Overdue	Displays a count of overdue agenda items for each event type displayed. Click the link to access the Agenda Detail page.

My Agenda - Configure User Options Pagelet

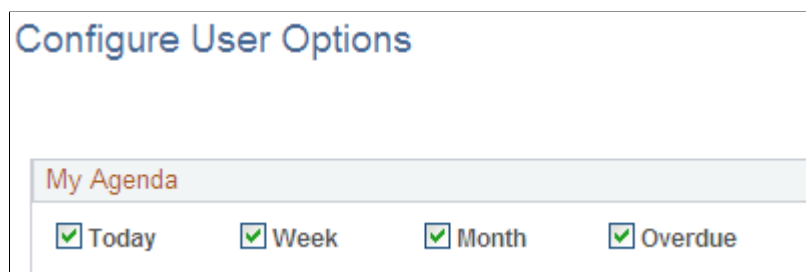
Use the My Agenda - Configure User Options pagelet (FO_AGN_CFG_PG) to select the time periods you want the system to display in the My Agenda pagelet.

Navigation

From the My Agenda pagelet, select Pagelet Settings and then select Personalize.

Image: My Agenda - Configure User Options

This example illustrates the fields and controls on the My Agenda - Configure User Options.



Viewing the Branch Agenda

This section describes how to:

- View the branch agenda.
- Personalize the branch agenda.

Pages Used to View Branch Agenda

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Branch Agenda	FO_BR_AGN_PGLT	Click the Personalize Content link on the PeopleSoft homepage and select Branch Agenda.	Displays the summary of all the agenda items related to a branch.
Configure User Options	FO_BR_AGN_CFG_PG	Click the Customize Branch Agenda button on the Branch Agenda pagelet. From the Branch Agenda pagelet, select Pagelet Settings and then select Personalize.	Select the time periods you want the system to display in the pagelet.

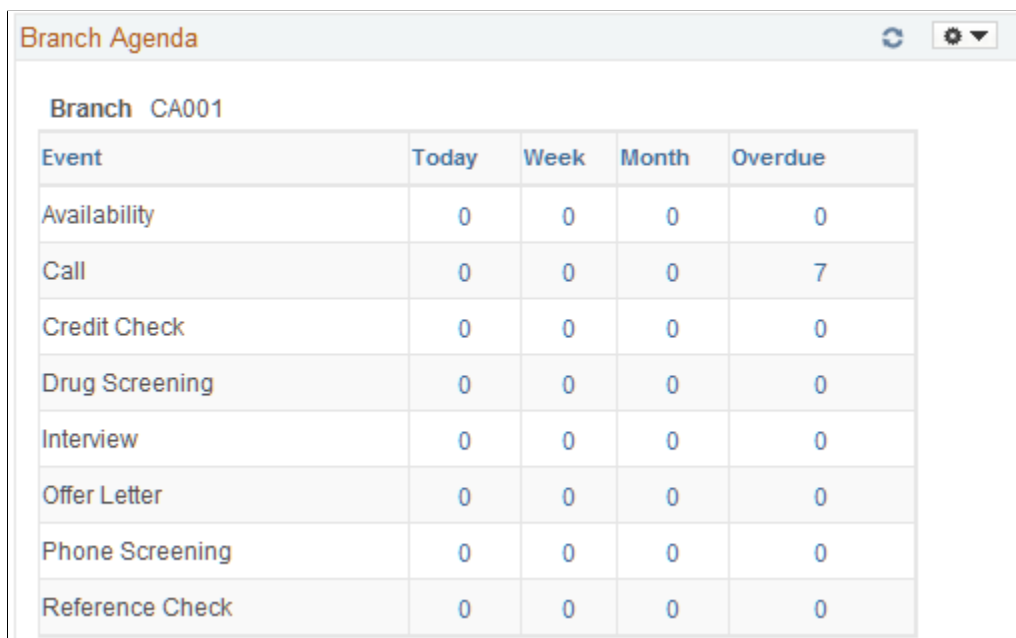
Branch Agenda Pagelet

Use the Branch Agenda pagelet (FO_BR_AGN_PGLT) to view the summary of all the agenda items related to a branch.

Navigation

Click the Personalize Content link on the PeopleSoft homepage and select Branch Agenda.

Image:



Branch Agenda				
Branch CA001				
Event	Today	Week	Month	Overdue
Availability	0	0	0	0
Call	0	0	0	7
Credit Check	0	0	0	0
Drug Screening	0	0	0	0
Interview	0	0	0	0
Offer Letter	0	0	0	0
Phone Screening	0	0	0	0
Reference Check	0	0	0	0

The fields on this pagelet operate the same as those on the My Agenda pagelet. Users can only select branches for which they are authorized.

Configure User Options – Branch Agenda Pagelet

Use the Configure User Options – Branch Agenda page (FO_BR_AGN_CFG_PG) to select the time periods you want the system to display on the pagelet.

Navigation

From the Branch Agenda pagelet, select Pagelet Settings and then select Personalize.

The Configure User Options – Branch Agenda options are similar to those for the [Viewing the Team Agenda](#). In addition, depending upon your permissions, you can select the branch for which you want to view agenda items.

Viewing the Team Agenda

This section discusses these pagelets:

- Team Agenda.
- Configure User Options.

Pages Used to View the Team Agenda

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Team Agenda	FO_TEAM_AGN_PGLT	Click the Personalize Content link on the PeopleSoft homepage and select Team Agenda.	Displays the summary of all the agenda items related to a team.
Configure User Options	FO_TEAM_AGN_CFG_PG	From the Team Agenda pagelet, select Pagelet Settings and then select Personalize.	Select the time periods you want the system to display in the pagelet.

Team Agenda Pagelet

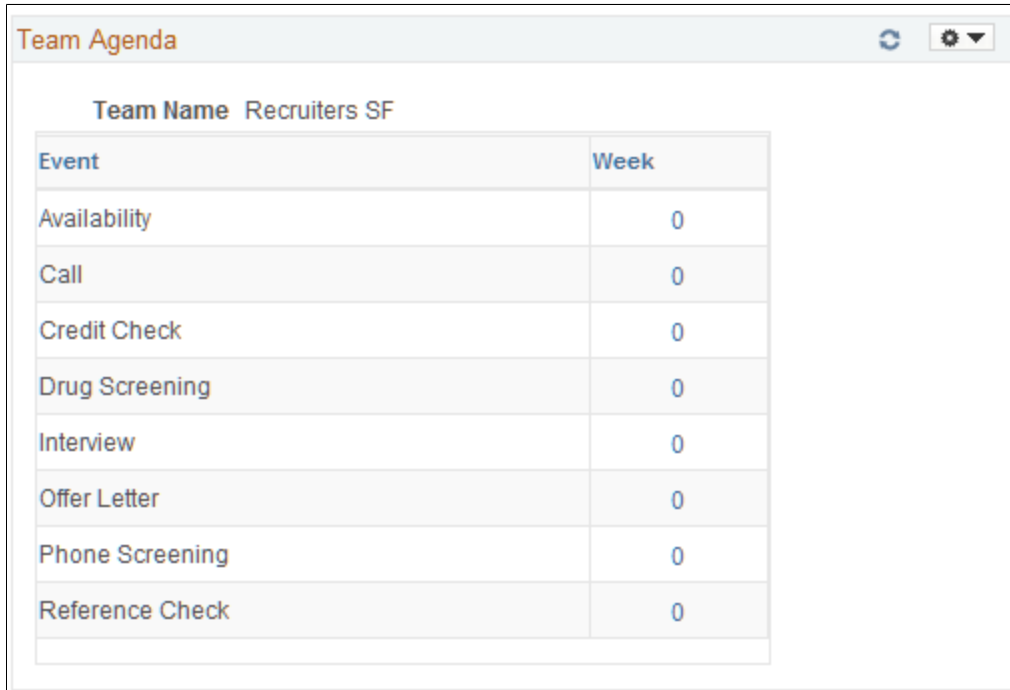
Use the Team Agenda page (FO_TEAM_AGN_PGLT) to display the summary of all the agenda items related to a team.

Navigation

Click the Personalize Content link on the PeopleSoft home page and select Team Agenda.

Image: Team Agenda pagelet

This example illustrates the fields and controls on the Team Agenda pagelet.



The screenshot shows the 'Team Agenda' pagelet interface. At the top, there is a header bar with the title 'Team Agenda' and two icons: a refresh button and a settings button. Below the header, the text 'Team Name Recruiters SF' is displayed. The main content area contains a table with two columns: 'Event' and 'Week'. The table lists various events and their corresponding week values, all of which are 0.

Event	Week
Availability	0
Call	0
Credit Check	0
Drug Screening	0
Interview	0
Offer Letter	0
Phone Screening	0
Reference Check	0

The fields on this pagelet operate the same as those on the [My Agenda Pagelet](#). Users can only select teams for which they are authorized to see.

Configure User Options - Team Agenda Pagelet

Use the Configure User Options pagelet (FO_TEAM_AGN_CFG_PG) to select the display options for the Team Agenda pagelet.

Navigation

From the Team Agenda pagelet, select Pagelet Settings and then select Personalize.

Image: Configure User Options pagelet

This example illustrates the fields and controls on the Configure User Options pagelet.

Team Agenda

Select the time periods to display on the pagelet. The system displays the number of items for each event in each time period.

Analyzing Branch Agenda

This section discussed how to analyze Branch Agenda.

Pages Used to View Hot Customers, Contacts, and Orders Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Near Term Branch Agenda	PTPG_PGVIEWER	Click the Personalize Content link on the Home page, and select Near Term Branch Agenda.	Use this page to view the open agenda items that are nearing the end date and assigned to a specified branch, categorized by the event type with which it is associated.
Overdue Branch Agenda	PTPG_PGVIEWER	Click the Personalize Content link on the Home page, and select Overdue Branch Agenda.	Use this page to view the open agenda items that are beyond their end date, assigned to a specified branch, and categorized by the event type with which it is associated.

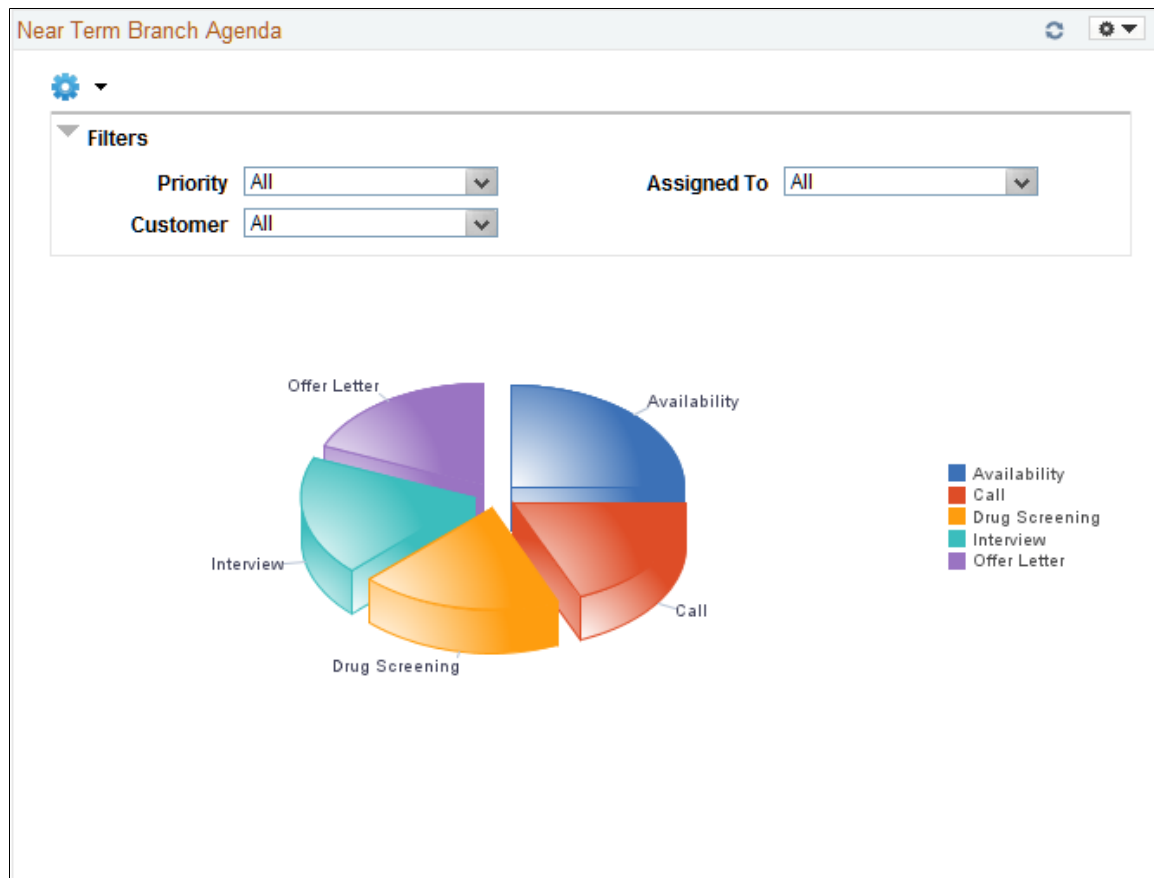
Near Term Branch Agenda Pagelet

Use the Near Term Branch Agenda pagelet (EP_NEAR_TERM_BRANCH_AGENDA) to view the open agenda items that are nearing the end date and assigned to a specified branch, categorized by the event type with which it is associated.

Navigation

Click the Personalize Content link on the Home page, and select Near Term Branch Agenda.

Image:



The Near Term Branch Agenda pagelet displays a Pivot Grid. This pivot grid is based on a query that displays all open agenda items that are assigned to a branch where the agenda end date is equal to the specified number of days from the present date. The specified number of days is defined on the Prompts page.

The agenda items displayed are grouped based on the event type associated with each agenda item. Only agenda items that are associated with events and have the Show on Pagelet check box selected are displayed in the pivot grid. The Show on Pagelet check box is on the on the Event Types page (Setup Financials/Supply Chain, Product Related, Staffing, General, Event Types). Agenda items that are associated to process events are excluded from the pivot grid.

Users have the option to change the assigned to branch and the number of days in which the agenda is due in the pivot grid prompt options. Users can narrow the pivot grid data based on these filters: Priority, Customer, and Assigned To (the individual or team to which the agenda is assigned).

When you click on a piece of the pie, the system provides an option to view the detail of that pie piece. Select Detailed View to access the Pivot Grid Drilldown page.

Action

Select to indicate that you want to perform the action selected in the Action drop-down field. Options include:

Review Agenda/History – The system opens a new window and displays the Review Agenda/History page for the agenda item.

Review Orders – The system opens a new window and displays the Orders page for the order to which the agenda is associated.

If the agenda item is not associated with an order, then the system opens the Search page for Orders.

See

"Understanding WorkCenters and Dashboards (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

PeopleTools: Pivot Grids

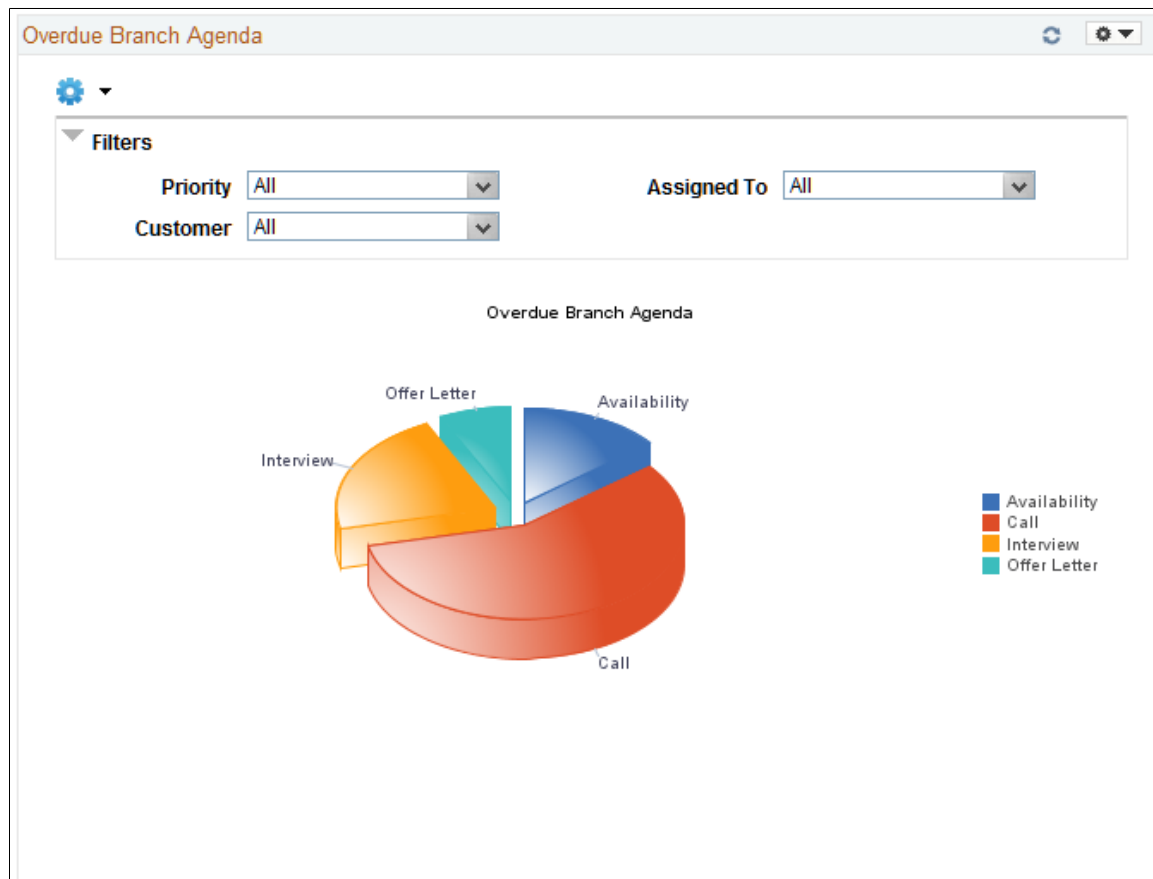
Overdue Branch Agenda Pagelet

Use the Overdue Branch Agenda pagelet (EP_OVERDUE_BRANCH_AGENDA) to view the open agenda items that are beyond their end date, assigned to a specified branch, and categorized by the event type with which it is associated.

Navigation

Click the Personalize Content link on the Home page, and select Overdue Branch Agenda.

Image:



The Overdue Branch Agenda pagelet displays a Pivot Grid. This pivot grid is based on a query that displays all open agenda items that are assigned to a branch and have passed the end date assigned to the agenda item.

The agenda item is displayed in the event type in which it is associated. Only agenda items that are associated with events that have the Show on Pagelet check box selected are displayed in the grid. The Show on Pagelet check box is determined on the Event Types page (Setup Financials/Supply Chain, Product Related, Staffing, General, Event Types). Agenda items that are associated with process events are not displayed.

Users have the option to change the assigned to branch in the pivot grid prompt options. Users can narrow the pivot grid data based on these filters: Priority, Customer, and Assigned To (the individual or team to which the agenda is assigned).

When you click on a piece of the pie, the system provides an option to view the detail of that pie piece. Select Detailed View to access the Pivot Grid Drilldown page.

Action Select to indicate that you want to perform the action selected in the Action drop-down field. Options include:

Review Agenda/History – The system opens a new window and displays the Review Agenda/History page for the agenda item.

Review Orders – The system opens a new window and displays the Orders page for the order to which the agenda is associated. If the agenda item is not associated with an order, then the system opens the Search page for Orders.

"Dashboards and Pivot Grids (*PeopleSoft FSCM 9.2: Application Fundamentals*)"

See PeopleTools: Pivot Grids

Performing Staffing Searches

This section discusses how to perform staff searches.

Page Used to Perform Staffing Searches

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Staffing Searches	FO_MYSEARCH_PGLT	Click the Personalize Content link on the Home page, and select Staffing Searches.	Use this page to view and access staffing searches.

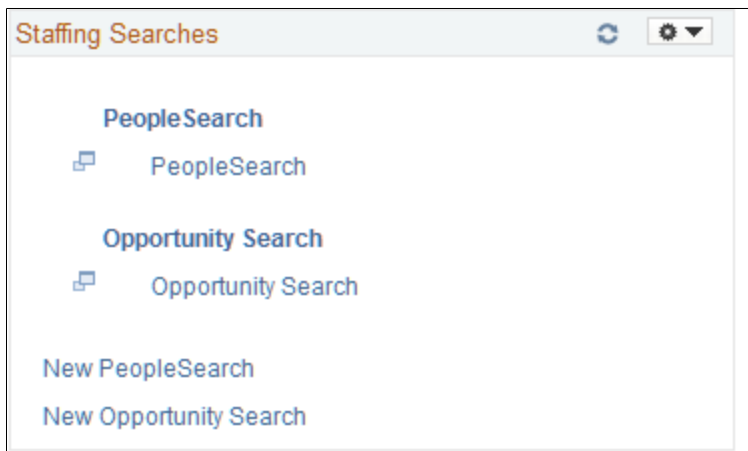
Staffing Searches Pagelet

Use the Staffing Searches pagelet (FO_MYSEARCH_PGLT) to view and access staffing searches.

Navigation

Click the Personalize Content link on the Home page, and select Staffing Searches.

Image:



PeopleSearch

Select to access the PeopleSearch page (*PeopleSoft 9.2: Staffing Front Office*). The system pulls the corresponding criterion into the PeopleSearch page.

Opportunity Search

Select to access the Opportunity Search page (*PeopleSoft 9.2: Staffing Front Office*). The system pulls the corresponding criterion into the Opportunity Search page.

New PeopleSearch

Select to access the PeopleSearch page (*PeopleSoft 9.2: Staffing Front Office*). The system opens the page with no search criteria.

New Opportunity Search

Select to access the Opportunity Search page (*PeopleSoft 9.2: Staffing Front Office*). The system opens the page with no search criteria.

Applicant Hot List Pagelet

This section discusses viewing the applicant hot List.

Pages Used to View the Applicant Hotlist

Page Name	Definition Name	Navigation	Usage
Applicant Hot List	FO_APL_HOTLST_PGLT	Click the Personalize Content link on the PeopleSoft homepage and select Applicant Hot List.	Lists the applicants that were added to a hot list.

Page Name	Definition Name	Navigation	Usage
Personalize Applicant Hot List	FO_DASH_CONFIG_PG	Click the Customize Applicant Hot List button on the Applicant Hot List pagelet.	Select the number of applicants you want to display in the pagelet.

Applicant Hot List Pagelet

Use the Applicant Hot List page (FO_APL_HOTLST_PGLT) to view the applicants that were added to a hot list.

Navigation

Click the Personalize Content link on the PeopleSoft homepage and select Applicant Hot List.

Image: Applicant Hot List pagelet

This example illustrates the fields and controls on the Applicant Hot List pagelet. You can find definitions for the fields and controls later on this page.

Category ID

You must enable categories on the User Preferences - Staffing General Preferences page before you can select categories here.

Name

Click the Name link to open a new window displaying the applicant record.

Email

Click the Email button for applicant to open a new window and send an email to the applicant.

Resume

Click the Resume button to view an applicant's resume. The system will display a message if the applicant does not have a resume attached to their record.

Action

Select one or more applicants, then perform any of these actions:

Add Agenda : A new window will open, allowing you to add agenda items for the selected applicants.

Add History : A new window will open, allowing you to add history items for the selected applicants.

Remove Applicant from List : Select to delete one or more applicants from the hot list.

Send Email: Select to send an email to the selected applicants.

View Resume: Select to review the resumes of the selected applicants.

More

Click to access the Applicant Hot List page.

Add Applicant

Click to add a new applicant to the database.

Viewing Hot Customers, Contacts, and Orders Pagelets

This section discusses viewing and accessing customers who are considered to be hot.

Pages Used to View Hot Customers, Contacts, and Orders Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Customer Hot List	FO_CST_HOTLST_PGLT	Click the Personalize Content link on the Home page, and select Customer Hot List.	View and access customers who are considered to be hot.
Contact Hot List	FO_CNT_HOTLST_PGLT	Click the Personalize Content link on the Home page, and select Contact Hot List.	View and access contacts who are considered to be hot.
Order Hot List	FO_ORD_HOTLST_PGLT	Click the Personalize Content link on the Home page, and select Order Hot List.	View and access orders that are considered to be hot.

Customer Hot List Pagelet

Use the Customer Hot List pagelet (FO_CST_HOTLST_PGLT) to view and access customers who are considered to be hot.

Navigation

Click the Personalize Content link on the Home page and select Customer Hot List.

Image:

Customers			
	Customer	Location	Action
<input type="checkbox"/>	Staffing Customer	Pleasanton, CA	<div></div>

[Select All](#) [Deselect All](#) [Add Customer](#)
[Remove from Hot List](#)

Customers can be added as hotlist customers from the Customer Information - General Info page. When a customer is added as a hotlist customer, the system adds customer information in the Customer Hotlist table (FO_CUST_HOT_TBL).

<select check box>

Select a check box next to the customer and select an action in the dropdown box.

Customer

Click the link to access the Customer Information – General Info page.

Action

Select an action item to perform on one or more customer.
Options include: Add Agenda, Add History, Add Order, and Review Agenda/History.

Remove from Hot List

Click to delete a customer from the hot list. You must select the check box to the left of the customer and then click this button. When a customer is removed from this pagelet, then all customer information for the customer is removed from the FO_CUST_HOT_TBL table.

Note: The customer is not removed from the database.

Add Customer

Click to access the Customer Information, General Information component where you can add a customer to the database.

Contact Hot List Pagelet

Use the Contact Hot List Pagelet (FO_CNT_HOTLST_PGLT) to view and access customer contacts who are considered to be hot.

Navigation

Click the Personalize link on the Home page and select Contact Hot List.

Image:

Contact Hot List				
Contacts				
	Name	Customer	Phone	Action
<input checked="" type="checkbox"/>	Mark Hegenberger	Staffing Customer	925/555-1663	[Dropdown Menu]

[Select All](#) [Deselect All](#) [Add Contact](#) [Remove from Hot List](#)

Customer contacts can be added as hotlist contacts from the Contact Information – Contact Customers page. When a contact is added as a hotlist contact, the system adds customer information in the Contact Hotlist table (FO_CNTC_HOT_TBL).

<select check box>

Select the check box next to the contact and select an action in the dropdown box.

Name

Click to access the Contact Information – Maintain Contacts page.

Customer

Click to access the Customer Information – General Info page.

Action

Select an action item to perform on one or more contacts. Options include: Add Agenda, Add History, Add Order, Review Agenda/History, and Send Email.

Remove from Hot List

Click to remove a contact from the hot list. You must select the check box to the left of the contact and then click this button. When a contact is removed from this pagelet, then all contact information is removed from the FO_CNTC_HOT_TBL table.

Note: The contact is not removed from the database.

Add Contact

Click to access the Contact Information component where you can add a contact to the database.

Order Hot List Pagelet

Use the Order Hot List Pagelet (FO_ORD_HOTLST_PGLT) to view and access customer orders that are considered to be hot.

Navigation

Click the Personalize link on the Home page and select Order Hot List.

Image:

Orders	Customer	Order Description	Action
<input type="checkbox"/>	Staffing Customer	Product Manager	[Dropdown Menu]

Select All Deselect All Add Order

Remove from Hot List

Customer orders can be added as hotlist orders from the Orders page. When an order is added as a hotlist order, the system adds order information in the Order Hotlist table (FO_ORD_HOT_TBL).

<select check box> Select the check box next to the Order and select an action in the dropdown box.

Customer Click to access the Customer Information – General Info page.

Order Description Click to access the Order page.

Action Select an action item to perform on one or more contacts.
Options include: Add Agenda, Add History, Review Agenda/History, and Send Email.

Remove from Hot List Click to remove an order from the hot list. You must select the check box to the left of the order and then click this button.
When an order is removed from this pagelet, then all order information is removed from the FO_ORD_HOT_TBL table.

Note: The order is not removed from the database.

Add Order Click to access the Add/Update Orders component where you can add a new order to the database.

Viewing Pending Applicants

This section discusses how to view pending applicants.

Pages Used to View Pending Applicants

Page Name	Definition Name	Navigation	Usage
Pending Applicants	FO_PNDG_APPL_PGLT1	Click the Personalize Content link on the PeopleSoft homepage and select View Pending Applicants.	View all applicants that have not been associated to any assignment yet.
Personalize Pending Applicants	FO_PNDG_APPL_CFG	Click the Customize Pending Applicants button on the Pending Applicants pagelet.	Set the period for which the applicants should be displayed in the Pending Applicants pagelet.

Pending Applicants Pagelet

Use the Pending Applicants pagelet (FO_PNDG_APPL_PGLT1) to view all applicants that have not been associated to any assignment yet.

Navigation

Click the Personalize Content link on the PeopleSoft homepage and select View Pending Applicants.

Image: Pending Applicants pagelet

This example illustrates the fields and controls on the Pending Applicants pagelet. You can find definitions for the fields and controls later on this page.

Pending Applicants

Applicants			
	Name	Order Description	Resume
<input type="checkbox"/>	Stein, Carl	System Analyst	
<input type="checkbox"/>	Moretti, Dennys	General Practitioner	
<input type="checkbox"/>	Stein, Carl	General Practitioner	
<input type="checkbox"/>	Pepper, Kristen	Computer Programmer	
<input type="checkbox"/>	Gonzales, Eric	Description	
<input type="checkbox"/>	Moretti, Dennys	Description	
<input type="checkbox"/>	Pepper, Kristen	Description	
<input type="checkbox"/>	Smith, Bernard	Description	
<input type="checkbox"/>	Stein, Carl	Description	
<input type="checkbox"/>	Wingrove, Anna	Description	

Select All Deselect All **Action** **More** **Add Applicant**

Use this page to view a list of pending applicants that require an action from a staffing recruiter. The page displays applicants in this order:

1. All valid applicants and pending applicants that are associated with an order.
2. Valid applicants that are not associated with an order.
3. Pending applicants that are not associated with an order.

Name	Position your mouse over the name link to view contact information. Click to access the Applicants – Contact Information page, which opens in a new window.
Order Description	Displays order information when the applicant is assigned to an order.
Resume	<p>Click to access the resume belonging to the applicant, when it is available.</p> <p>When you position the mouse over this icon:</p> <ul style="list-style-type: none"> • If a resume is available, the system displays a message that reads, “View Resume.” • If a resume is not available, the system displays a message indicating that a resume is not available for the related applicant.
Action	<p>Select one of the following actions:</p> <p><i>Add Agenda:</i> Select to open the "Agenda Detail Page (PeopleSoft 9.2: Staffing Front Office)" where you can add an agenda item for the selected applicant.</p> <p><i>Add History:</i> Select to open the "History Details Page (PeopleSoft 9.2: Staffing Front Office)" where you can add a history item for the selected applicants.</p> <p><i>Add to Considering List:</i> Select to add the selected applicants to the considering list of the corresponding order.</p> <p><i>Add to Hot List:</i> Select to have the system automatically add the selected applicants to the Hot List. The system displays a message confirming that the applicant is added to the hot list.</p> <p><i>Make Invalid:</i> Select to mark the selected applicants invalid.</p> <p><i>Make Valid:</i> Select to mark the selected applicants valid.</p> <p><i>Remove from List:</i> Select to have the system automatically remove the applicant from the list. The system displays a message that reads, “This will delete the Applicant from the list.” You must respond by clicking the OK or Cancel button. If you click OK, the system displays a message confirming that the action was performed successfully. Keep in mind that the system removes the applicant from the list that is displayed. This does not mean that the applicant is no longer pending activities on the Staffing hiring and on-boarding process.</p>

Send Email: Select to send an email to the selected applicants. You must associate an email template to your role to use this option.

More

Click to access the Pending Applicants page where you can view more applicants at one time.

(legend)

Displays the definition of the green circle and the red square. The legend is configurable by clicking the Pagelet Settings drop down arrow, selecting Personalization, and then selecting the Show Legend check box.

Add Applicant

Click to access the PeopleSoft Applicants – Contact Information page (Staffing, Resources, Applicants, Applicants), where you can add an applicant.

Viewing Pending Applicants Aging

This section describes how to:

- View pending applicants aging.
- Personalize pending applicants aging.

Pages Used to View Pending Applicants Aging

Page Name	Definition Name	Navigation	Usage
Pending Applicants Aging	FO_PNDG_APPL_PGLT2	Click the Personalize Content link on the PeopleSoft homepage and select Pending Applicants Aging.	Displays the number of pending applicants for each aging period defined.
Personalize Pending Applicants Aging	FO_AGE_CFG_PGLT	Click the Customize Pending Applicants Aging button on the Pending Applicants Aging pagelet.	Define the aging periods to display on the Pending Applicants Aging pagelet.

Viewing Pending Applicants Aging

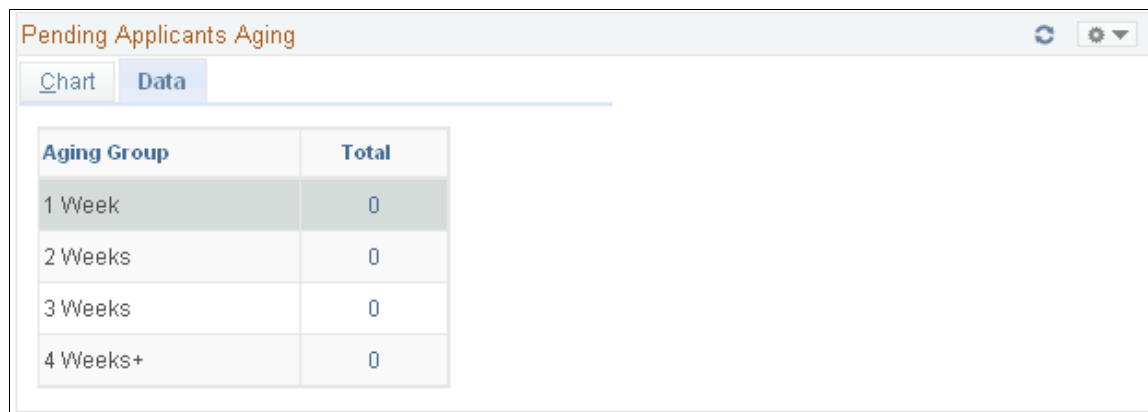
Use the Pending Applicants Aging pagelet (FO_PNDG_APPL_PGLT2) to displays the number of pending applicants for each aging period defined.

Navigation

Click the Personalize Content link on the PeopleSoft homepage and select Pending Applicants Aging.

Image: Pending Applicants Aging page

This example illustrates the fields and controls on the Pending Applicants Aging page. You can find definitions for the fields and controls later on this page.



The screenshot shows a web page titled "Pending Applicants Aging". It has two tabs: "Chart" and "Data". The "Data" tab is selected, displaying a table with two columns: "Aging Group" and "Total". The table contains four rows of data, all showing a count of 0.

Aging Group	Total
1 Week	0
2 Weeks	0
3 Weeks	0
4 Weeks+	0

Use this page to view a list of applicants that require action from the staffing recruiter. This list includes all applicants who have applied for a job that is managed by the recruiter. This list is different for each recruiter.

The number of days that an applicant requires action is calculated by the system based on the effective date on the Applicant page.

Aging Group

Displays the labels that are defined on the Configure User Options page, which can be accessed by clicking on the Customize Pending Applicants Aging button.

Total

Click to access the Pending Applicants Search page.

Personalizing Pending Applicants Aging

Use the Personalize Pending Applicants Aging page (FO_AGE_CFG_PGLT) to define the aging periods to display on the Pending Applicants Aging pagelet.

Navigation

Click the Customize Pending Applicants Aging button on the Pending Applicants Aging pagelet.

Image: Configure User Options page

This example illustrates the fields and controls on the Configure User Options page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Configure User Options' page with a section titled 'Personalize Aging Buckets'. It features a table with columns: *Sequence Number, Days From, Days To, and Label. The table contains four rows of data, each with a sequence number, start and end days, and a label. To the right of each row are '+' and '-' buttons for adding or removing rows. Above the table is a navigation bar with 'Personalize | Find |' icons, and 'First 1-4 of 4 Last'.

*Sequence Number	Days From	Days To	Label		
1	0	7	1 Week	+	-
2	8	14	2 Weeks	+	-
3	15	21	3 Weeks	+	-
4	22	999	4 Weeks +	+	-

Sequence Number Enter the order that you want the labels to appear on the Pending Applicants Aging pagelet.

Days From and Days To Enter the days that each label represents.

Label Enter a label to display on the pagelet.

Viewing Reports and Processes

This section describes how to:

- View reports and processes.
- Personalize reports and processes.

Pages Used to View Reports and Processes

Page Name	Definition Name	Navigation	Usage
Reports and Processes	FO_MYREPT_PGLT	Click the Personalize Content link on the PeopleSoft homepage and select Reports and Processes.	Provides links to reports and processes user can run.
Personalize Reports and Processes	FO_USER_REPORT	Click the Customize Reports and Processes button on the Reports and Processes pagelet.	Lists all the reports which the administrator has configured in his configuration page.

Viewing Reports and Processes

Use the Reports and Processes pagelet (FO_MYREPT_PGLT) to provides links to reports and processes user can run.

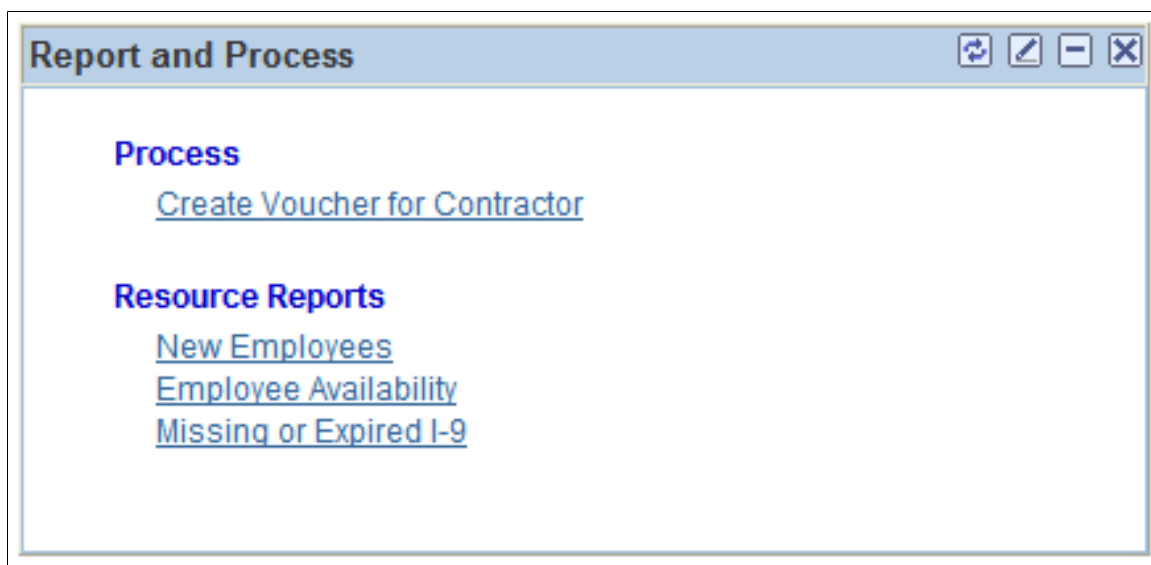
Navigation

Click the Personalize Content link on the PeopleSoft homepage and select Reports and Processes.

The reports and processes displayed on this pagelet vary based on settings selected by the administrator.

Image: Report and Process pagelet

This example illustrates the fields and controls on the Report and Process pagelet. You can find definitions for the fields and controls later on this page.



Personalizing Reports and Processes

Use the Configure User Options page (FO_USER_REPORT) to lists all the reports which the administrator has configured in his configuration page.

Navigation

Click the Customize Reports and Processes button on the Reports and Processes pagelet.

If the Admin has given the user permission to add links then the Add and delete buttons would be enabled. Then the user will be able to add new links other than the ones which admin has already configured.

Image: Configure User Options page

This example illustrates the fields and controls on the Configure User Options page. You can find definitions for the fields and controls later on this page.

Configuration ID CONF01 Test 01

User ID VP1

Link Groups Find | View 1 First 1-2 of 2 Last

*Group Label + -

Display Order

Link List Customize | Find | First 1 of 1 Last

Define Link/Security	Display Order	Link Label	Link Type	Run Control ID	Show Link
Define	<input type="text" value="1"/>	Create Voucher for Contractor	Menu Item	FOAP_VP1	<input checked="" type="checkbox"/>

*Group Label + -

Display Order

Link List Customize | Find | First 1-3 of 3 Last

Define Link/Security	Display Order	Link Label	Link Type	Run Control ID	Show Link
Define	<input type="text" value="2"/>	Employee Availability	Menu Item	NEWEMP_VP1	<input checked="" type="checkbox"/>
Define	<input type="text" value="3"/>	Missing or Expired I-9	Menu Item	NEWEMP_VP1	<input checked="" type="checkbox"/>
Define	<input type="text" value="1"/>	New Employees	Menu Item	NEWEMP_VP1	<input checked="" type="checkbox"/>

Viewing My Searches

This section describes how to:

- View my searches.
- Personalize my searches.

Pages Used to View My Searches

Page Name	Definition Name	Navigation	Usage
My Searches	FO_MYSEARCH_PGLT	Click the Personalize Content link on the PeopleSoft homepage and select My Searches.	Displays a list of saved searches available as quick links from the pagelet.
Personalize My Searches	FO_MYSRCH_CFG_PG	Click the Customize My Searches button on the My Searches pagelet.	Add or delete searches listed on the My Searches pagelet.

Viewing My Searches

Use the My Searches pagelet (FO_MYSEARCH_PGLT) to display a list of saved searches available as quick links from the pagelet.

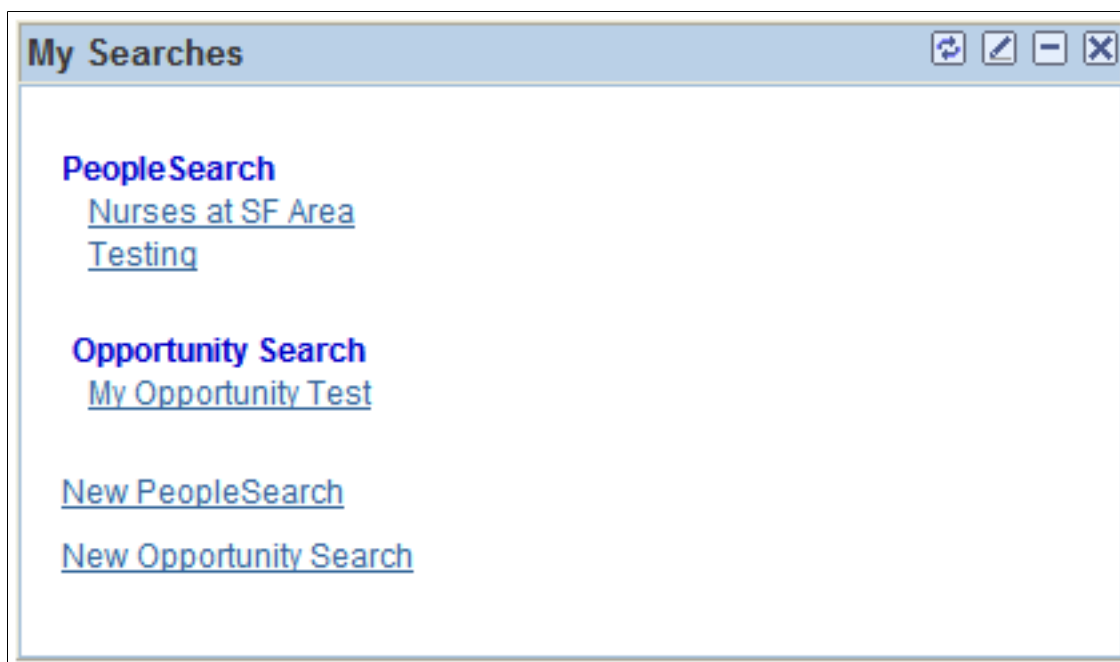
Navigation

Click the Personalize Content link on the PeopleSoft homepage and select My Searches.

The links displayed on this page vary based on options selected on the customize page.

Image: My Searches Pagelet

This example illustrates the fields and controls on the My Searches Pagelet. You can find definitions for the fields and controls later on this page.



Personalizing My Searches

Use the Personalize My Searches page (FO_MYSRCH_CFG_PG) to add or delete searches listed on the My Searches pagelet.






Navigation

Click the Customize My Searches button on the My Searches pagelet.

Image: Personalize My Searches page

This example illustrates the fields and controls on the Personalize My Searches page. You can find definitions for the fields and controls later on this page.

Configure User Options

My Searches							
				Customize Find 	First 	1-3 of 3 	Last
Search Type	Saved Search Name	Search Description	Show in List				
Opportunity Search 	MYOPP 	My Opportunity Test	<input checked="" type="checkbox"/>				
PeopleSearch 	NURSES SF 	Nurses at SF Area	<input checked="" type="checkbox"/>				
PeopleSearch 	TESTING 	Testing	<input checked="" type="checkbox"/>				

Search Type

Choose either *Opportunity Search* or *People Search*.

Saved Search Name

Select the name of the search to display on the pagelet.

Show in List

Select this checkbox to show the search on the pagelet

Using Pagelets Enabled by PeopleSoft IT Asset Management

Using Pagelets Enabled by PeopleSoft IT Asset Management

This topic provides an overview of reporting metrics pagelets and discusses how to:

- Generate metrics.
- Work with progress report.
- Work with reporting metrics pagelets.

Understanding Reporting Metrics

PeopleSoft IT Asset Management (ITAM) organizes enterprise IT assets into a clear presentation of business value, with certifiable accuracy. Valuable business information is expressed in high level, concise metrics that invite users to drill down to any level of detail from the big picture in the portal. The pagelets contain information on total IT asset valuation, hardware and software inventory, missing, misappropriated, and misconfigured inventory, as well as specifying leases and contracts that need attention.

Some of the pagelets include charting functionality, which provides a graphical representation of the information that resides in the corresponding record. These charts are included with the pagelets when you select to display the pagelet on your PeopleSoft Home page. Additionally, when you position your mouse over a portion of the chart, hover text appears that displays the value and corresponding description of the data representation.

PeopleSoft IT Asset Management provides these metrics pagelets:

<i>Pagelet</i>	<i>Description</i>
Asset Financial Statistics	Displays a snapshot of enterprise IT asset current valuation.
Assets Not Reporting	Displays devices that have failed to report an inventory, allowing managers to investigate the absences. This pagelet includes charting functionality.
Hardware Inventory	Counts all IT hardware—by subtype—that appears in the third-party inventory and asset repository databases. It also provides a summary count of IT hardware that appears in one database, but not the other. This pagelet includes charting functionality.

Pagelet	Description
Hardware Progress Report	Displays at-a-glance results to date of IT hardware progress achieved against a user defined goal.
Integration Data Load Errors	<p>Displays the types of errors that are produced by the load process (IT_LOAD_PROC) for the latest discovery request. Also displayed is the corresponding number of errors for each type: Unmapped Primary User, Unmapped IP Address, Duplicate Serial ID, and GL to HR business unit mapping error. You can drill down from this high-level pagelet to the Integration Data Load Errors details page.</p> <p>This pagelet includes charting functionality.</p>
Inventory Exceptions	Displays a high level view of the differences between the Asset Repository and the third-party inventory database—the difference between what is on the books and the physical inventory for IT assets.
Lease End Metric	Displays IT-related leases that will expire within the next n (user-defined) days, providing a reminder to undertake lease-end inventory activities. You can drill down to the assets that are associated with those leases.
Software Device Monitor	Displays installed software by software device group ID. This metric is designed for IT Subtypes that are based on Serial ID software authorizations and includes a comparison of installed licenses to authorized software licenses. An alert is displayed by software title when the installed software licenses exceed the authorized software licenses.
Software Inventory Monitor	Provides the counts of total licenses versus installed licenses and displays the counts for authorized and unauthorized users.
Software Pending Requisitions	<p>Displays a running scorecard on software licenses that users need to acquire to keep the enterprise in compliance.</p> <p>This pagelet includes charting functionality.</p>
Software Progress Report	Displays at-a-glance results to date of IT software progress achieved against a user defined goal
Software Renewal	Provides alerts to the IT Asset Manager when the contract needs to be renewed or renegotiated.

Generating Metrics

This section discusses how to generate reporting metrics.

Page Used to Generate Metrics

Page Name	Definition Name	Navigation	Usage
Generate Metrics	IT_METRIC_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, IT Asset Management, Generate Metrics, Generate Metrics	Select options to generate metrics that appear in the pagelets.

Generating Metrics

Use the Generate Metrics page (IT_METRIC_RUN) to select options to generate metrics that appear in the pagelets.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, IT Asset Management, Generate Metrics, Generate Metrics

Image: Generate Metrics page

This example illustrates the fields and controls on the Generate Metrics page. You can find definitions for the fields and controls later on this page.

Generate Metrics

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) [Run](#)

Request Find | View All First 1 of 1 Last

*Request ID: 1 Process Frequency: Always

As Of Date: 12/31/2010

Generate Metrics

- ☒ Assets Not Reporting
- ☒ Lease Renewal
- ☒ Financial Statistics
- ☒ Hardware Inventory
- ☒ Inventory Exception
- ☒ Software Inventory Monitor
- ☒ Software Pending Requisition
- ☒ Software Renewal
- ☒ Software Device Monitor

Assets Not Reporting Metrics

Inventory Age:

Employee Software Metrics

Publisher:

Software Title:

Hardware Inventory Metrics

Business Unit: Location:

Department: Mfg ID:

Empl ID: Model:

Request

Process Frequency

Select the frequency for the report to run. Values are: *Always*, *Don't* and *Once*.

Generate Metrics

Select the metrics to be generated.

Assets Not Reporting

If you select Assets Not Reporting, the system displays the Assets Not Reporting Metrics group box.

Hardware Inventory

If you select Hardware Inventory, the system displays the Hardware Inventory Metrics group box.

Software Inventory Monitor, Software Pending Requisition, and Software Renewal

If you select any of these metrics, the system displays the Employee Software Metrics group box.

Software Device Monitor

Selecting the Software Device Monitor impacts Software Pending Requisitions and Software Inventory Monitor. The Software Device Monitor calculates the number of licenses associated with devices and needs to update that information in the Software Inventory Monitor as well as Software Pending Requisitions (specifically the Installed column.) The Software Device Monitor is capable of updating the information as it is displayed in Software Device Monitor and Software Pending Requisitions; however, it does not insert new rows into the metric.

If the hierarchy of Software Device Groups is six levels or more, the Software Device Monitor issues a warning with respect to its effect on overall performance. It is recommended that the hierarchy be no greater than five levels. Additionally, a warning is issued about the possibility of double counting when a software device is associated with a software title via two different Software Device Groups. This issue should be corrected immediately by removing the device so that it belongs to only one group for a software title.

Note: There may be software titles that are impacted by the Software Device Monitor that do not already exist in the Software Pending Requisitions or the Software Inventory Monitor. For a completely accurate display of current information, it is recommended that the Software Inventory Monitor as well as the Software Pending Requisition be run whenever the Software Device Monitor runs.

Assets Not Reporting Metrics

Inventory Age

Select an inventory age from the Inventory Age table.

Employee Software Metrics

Publisher

Select a supplier ID.

Software Title

Select a software title.

Hardware Inventory Metrics

Business Unit	Select a business unit.
Department	Select a department.
EmplID	Select an employee ID.
Location	Select a location.
Mfg ID	Select a manufacturer ID.
Model	Enter a model.

Working with Progress Reports

This section discusses how to:

- Edit the progress report template.
- Run the progress report.
- Work with progress reports.

Pages Used to Work with Progress Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Add/Update Progress Report	IT_PRGS_TMPL	IT Asset Management, IT Asset Management Center, Portal Setup, Edit Progress Report Template, Add/Update Progress Report	Create or edit a progress report template.
Progress Report	IT_PRGS_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, IT Asset Management, Run Progress Report, Progress Report	Run the progress report.
Progress Report Detail	IT_PRGS_DTL	IT Asset Management, Inventory Views, Progress Report Detail, Progress Report Detail	View progress report details.

Editing the Progress Report Template

Use the Add/Update Progress Report page (IT_PRGS_TMPL) to create or edit a progress report template.

Navigation

IT Asset Management, IT Asset Management Center, Portal Setup, Edit Progress Report Template, Add/Update Progress Report

Image: Add/Update Progress Report page

This example illustrates the fields and controls on the Add/Update Progress Report page. You can find definitions for the fields and controls later on this page.

Template ID

The unique identifier for the progress report.

Progress Status

Valid values for Progress Status are: *New*, *In Progress*, and *Complete*.

If you select *New*, the first time run result is saved as the target number for the Group By Area defined on this page.

If the value is *In Progress*, all other fields are greyed out and not available for modification of any parameters.

If the value is *Complete* and saved, the target numbers are cleared and all results in the detail table are purged.

Description

Enter a text description. This description appears in the description column on the pagelet.

Asset Type

Select *IT Hardware* or *IT Software* to identify the pagelet for this report.

Group By Area

Select to group the results by area. Values are: *Business Unit*, *Department ID*, or *Location*.

Third Party Parameters

Select parameter fields to define the selection criteria. The Compare Operator is a translate value which includes: =, <>, *Like*, and *Not Like*. Value is a free-form text field. You must enter at least one parameter.

You can list the same attribute multiple times if you use the equal operator. For example if you wanted to search on a manufacturer of TOSHIBA or IBM, you could add another line for MFG ID = IBM. Because the MFG ID attribute is repeated, the condition will be treated as an OR condition. Conditions that

are not for the same attribute will be treated as AND conditions. When the attribute is repeated the same operator used in the first instance of that attribute must be repeated.

When the user selects *Software* as a parameter, the valid compare operators are *Exists*, *Not Exists*, *Like*, and *Not Like*.

Note: If you are using the User Defined Date field you must enter the date value in the following format: YYYY-MM-DD.

Organizational Parameters

Define the Area Scope of the project within the organization. Values include: *Business Unit*, *Department ID*, or *Location*.

The Compare Operator is a translate value which includes: >, >=, <, <=, =, <>, *Like*, and *Not Like*. Value is a free form text field. Enter at least one parameter.

The organization parameter is not sent to the third party database; rather it is a filtering criteria that is used once the data is sent back to the PeopleSoft application.

Running the Progress Report

Use the Progress Report page (IT_PRGS_RUN) to run the progress report.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, IT Asset Management, Run Progress Report, Progress Report

Image: Progress Report page

This example illustrates the fields and controls on the Progress Report page. You can find definitions for the fields and controls later on this page.

Report Template ID

Select the Report Template ID to run. Only templates with report status of *New* and *In Progress* can be chosen. Leave this field blank to process all report template IDs with a status of *New* or *In Progress*.

Process Frequency

Valid values are: *Always*, *Don't Run*, and *Process Once*.

Working with Progress Reports

Use the Progress Report Detail page (IT_PRGS_DTL) to view progress report details.

Navigation

IT Asset Management, Inventory Views, Progress Report Detail, Progress Report Detail

Image: Progress Report Detail page

This example illustrates the fields and controls on the Progress Report Detail page. You can find definitions for the fields and controls later on this page.

Progress Report Detail

Search

Use Saved Search

[Save Search Criteria](#) [Delete Saved Search](#)

Report Template ID =

Area Value =

IT Subtype =

Business Unit =

Asset Identification =

Manufacturer ID =

Empl ID =

IP Address from Third Party =

Report Template Parameters

Third Party Parameters [Customize](#) | [Find](#) | [View All](#) | | [First](#) | [1-2 of 2](#) | [Last](#)

Parameter Field ID	Compare Operator	SetID	Value	Value
1 IT_SUBTYPE	=		LAPTOP	
2 MFG_ID	=	SHARE	TOSHIBA	

Organizational Parameters [Customize](#) | [Find](#) | [View All](#) | | [First](#) | [1 of 1](#) | [Last](#)

Area Scope	Compare Operator	SetID	Value	Value
1				

Assets [Customize](#) | [Find](#) | [View All](#) | | [First](#) | [1-3 of 3](#) | [Last](#)

Template ID	Serial ID	IT Subtype	Manufacturer ID	Model	Name	Empl ID	IP Address from Third Party
HARDWARE-DEMO	00C0D010401E	MULTI-CPU	DELLCOMP	Latitude C400	Avery,John	XHEEE199	
HARDWARE-DEMO	109RMP2AY	LAPTOP	TOSHIBA	TECRA M1	Unger,Randy	XHEEE111	
HARDWARE-DEMO	1J1CJMWZM276	LAPTOP	COMPAQ	Evo N400c	Vincent,Andrew	XHEEE214	

The Progress Report Detail page displays details for the hardware or software progress reports metric. This page is accessible from the navigation path or drilldown from the Hardware or Software Progress Report pagelets.

Use the common search parameters to display the details for each project. Drill down on the Serial ID to access a printable view of the asset or the EmplID to access those assets for which a given employee is the custodian.

Report Template Parameters

The report template parameters group box displays the report parameters for the Report Template ID that is selected in the Search group box. If no report template ID is selected, then the Report Template Parameters grids do not contain data. The report template parameters are displayed in the following two grids:

- Third Party Parameters - lists the parameter field IDs that were used in the Progress Report Request. These values determine the data, if any, that is returned from the third party.

- **Organizational Parameters** - lists the area scope values that were used in the Progress Report Request. These values determine the data, if any, that is returned from the third party. Organizational parameters are optional as part of the Report Template ID definition.

Working with Reporting Metrics Pagelets

This section discusses how to:

- View asset financial statistics.
- View non-reporting assets.
- View hardware inventory.
- View hardware progress reports.
- View integration data load errors.
- View inventory exceptions.
- View lease end metrics.
- View related links.
- View software device monitor.
- View software inventory.
- View pending software requisitions.
- View software progress reports.
- View software renewal.

Pages Used to Work with Reporting Metrics Pagelets

Page Name	Definition Name	Navigation	Usage
Asset Financial Statistics pagelet	IT_PE_FIN_STAT	Click the Personalize Content link on the PeopleSoft homepage. Select Asset Financial Statistics.	Review a snapshot of enterprise IT asset current valuation.
Assets Not Reporting pagelet	IT_PE_UNDISC	Click the Personalize Content link on the PeopleSoft homepage. Select Assets Not Reporting.	Review data and graphic representation of the devices that have failed to report an inventory within a specified time period, allowing managers to investigate the absences.

Page Name	Definition Name	Navigation	Usage
Hardware Inventory pagelet	IT_HRDWR_SUM	Click the Personalize Content link on the PeopleSoft homepage. Select Hardware Inventory.	Count all IT hardware—by subtype—that appears in the third party and asset repository databases. View a summary count and graphic representation of IT hardware that appears in one database but not the other.
Hardware Progress Report pagelet	IT_PRGS_HWC	Click the Personalize Content link on the PeopleSoft homepage. Select Hardware Progress Report.	Review up-to-date results of IT asset change or upgrade initiatives.
Integration Data Load Errors pagelet	IT_LOAD_ERR_SUM	Click the Personalize Content link on the PeopleSoft homepage. Select Integration Data Load Errors.	Review summarized totals and graphic representation of the data mapping errors that are encountered during integration of staged data from third-party discovery suppliers.
Inventory Exceptions pagelet	IT_PE_INV_EXCEPT	Click the Personalize Content link on the PeopleSoft homepage. Select Inventory Exceptions.	Review a summary of the differences between the Asset Repository and the third-party database.
Lease End Metrics pagelet	AM_LEASE_SUM	Click the Personalize Content link on the PeopleSoft homepage. Select Lease End Metrics.	Review IT-related leases that will expire within the next n days. Drill down to the assets associated with the leases.
Related Links pagelet	IT_PE_THIRDLINK	Click the Personalize Content link on the PeopleSoft homepage. Select Related Links.	Link to frequently accessed URLs.
Software Device Monitor pagelet	IT_PE_SWDG_SUM	Click the Personalize Content link on the PeopleSoft homepage. Select Software Device Monitor..	Review the installed software licenses versus serial ID-based authorized software licenses. An alert displays when installed software licenses exceed the number authorized.
Software Inventory Monitor pagelet	IT_SFTWR_INV	Click the Personalize Content link on the PeopleSoft homepage. Select Software Inventory Monitor.	Review the counts of total licenses versus installed licenses, the counts for authorized and unauthorized users.

Page Name	Definition Name	Navigation	Usage
Software Pending Requisitions pagelet	IT_SFTWR_PEND	Click the Personalize Content link on the PeopleSoft homepage. Select Software Pending Requisitions.	Review a list and graphic representation of software licenses that the company must acquire to keep the enterprise in compliance.
Software Progress Report pagelet	IT_PRGS_SWC	Click the Personalize Content link on the PeopleSoft homepage. Select Software Progress Report.	Review the up-to-date results of IT asset change or upgrade initiatives.
Software Renewal pagelet	IT_SFTWR_RENEW	Click the Personalize Content link on the PeopleSoft homepage. Select Software Renewal.	Review the alerts to the IT Asset Manager when a contract needs to be renewed or renegotiated.

Viewing Asset Financial Statistics

Use the Asset Financial Statistics pagelet (IT_PE_FIN_STAT) to review a snapshot of enterprise IT asset current valuation.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Asset Financial Statistics.

Image: Asset Financial Statistics pagelet

This example illustrates the fields and controls on the Asset Financial Statistics pagelet. You can find definitions for the fields and controls later on this page.

Asset Financial Statistics				
Amount in 1000's		As Of Date: 10/15/2009		
DIVISION	Avg Life Remaining	Year to Date Depreciation	Units	Net Book Value
NO DEPTID	49.6		100	5.75

Currency: USD Rate Type: CRRNT

Avg Life Remaining (average life remaining)

Displays a value that is calculated based on the following algorithm: Sum of (Useful life – Life to Date life) / Quantity of assets with useful life available.

Depending upon the depreciation method, some assets may not have a useful life attached. In those cases, the asset will not be computed for the algorithm. If quantity equals zero, a not applicable (N/A) legend will appear on that field.

Year to Date Depreciation

Displays the algebraic addition of all the assets to be included in the statistics.

Units

Displays the algebraic addition of quantity field for every asset ID to be included in the statistics.

Net Book Value

Displays the algebraic addition of net book value for every asset to be included in the statistics.

Viewing Non-Reporting Assets

Use the Assets Not Reporting pagelet (IT_PE_UNDISC) to review data and graphic representation of the devices that have failed to report an inventory within a specified time period, allowing managers to investigate the absences.

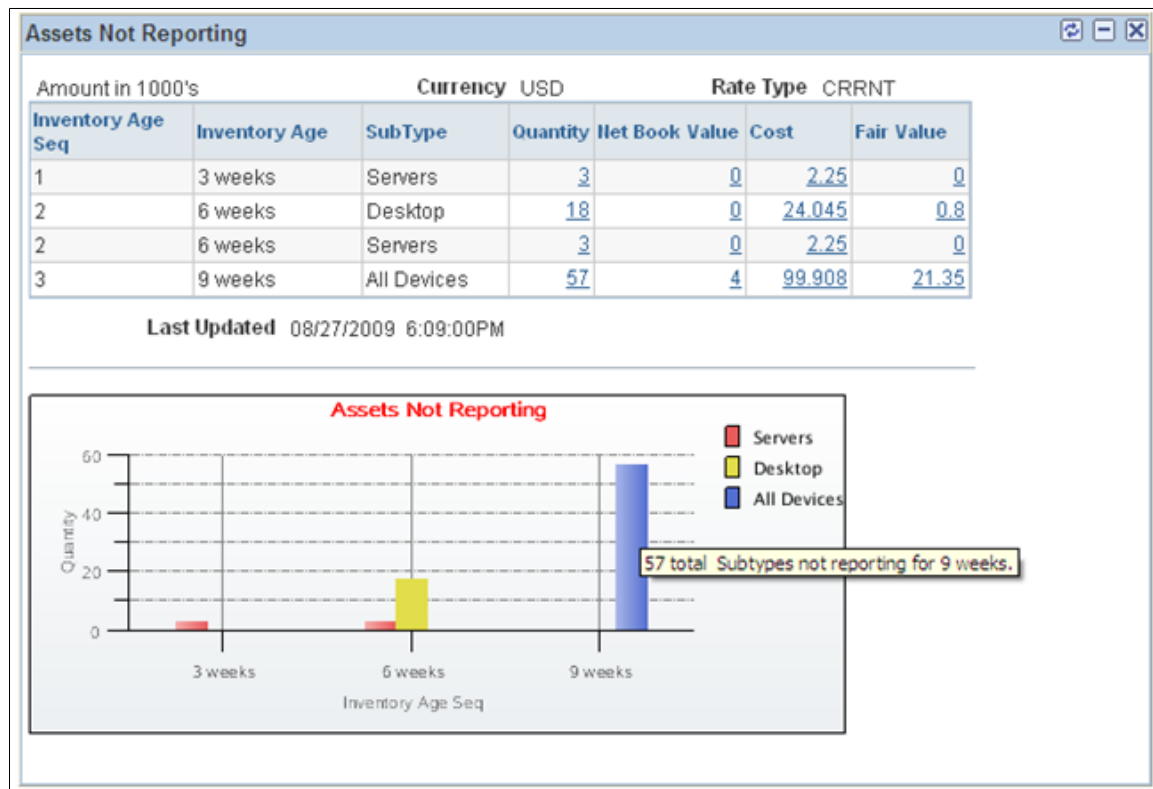
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Assets Not Reporting.

Image: Assets Not Reporting pagelet

This example illustrates the fields and controls on the Assets Not Reporting pagelet. You can find definitions for the fields and controls later on this page.



The Assets Not Reporting portal pagelet provides counts of reporting failures for each type of device. It also includes the Assets Not Reporting bar chart of the data.

Quantity

Displays the number of assets by subtype that are not reporting. Click the link to drill back to the Assets Not Reporting page and review the assets.

Net Book Value, Cost, and Fair Value Displays the financial information for financial assets. Click the links to access the Assets Not Reporting page.

Note: The columns for Net Book Value, Cost and Fair Value display on the pagelet only when Financial Impact is enabled on the Installation Options - Asset Management page and when the columns are selected for viewing in User Preferences for a given user. Also select the rounding amount for those values within User Preferences. A user may select to see one, two or all three of the columns. The aggregate values displayed in these three columns apply to only the financial assets that are included in the total number of exceptions, even though the number of exceptions includes both financial and nonfinancial assets.

Assets Not Reporting (bar chart)

The Assets Not Reporting chart is included at the bottom of the pagelet. Mouse over the graph to view the number of assets that are not reporting accompanied by the description for each category. The bars are based on the column quantity from the record.

See "Understanding the IT Asset Inventory Tool (*PeopleSoft FSCM 9.2: IT Asset Management*)".

See "Managing Assets Not Reporting (*PeopleSoft FSCM 9.2: IT Asset Management*)".

Hardware Inventory Pagelet

Use the Hardware Inventory pagelet (IT_HRDWR_SUM) to count all IT hardware—by subtype—that appears in the third party and asset repository databases.

View a summary count and graphic representation of IT hardware that appears in one database but not the other.

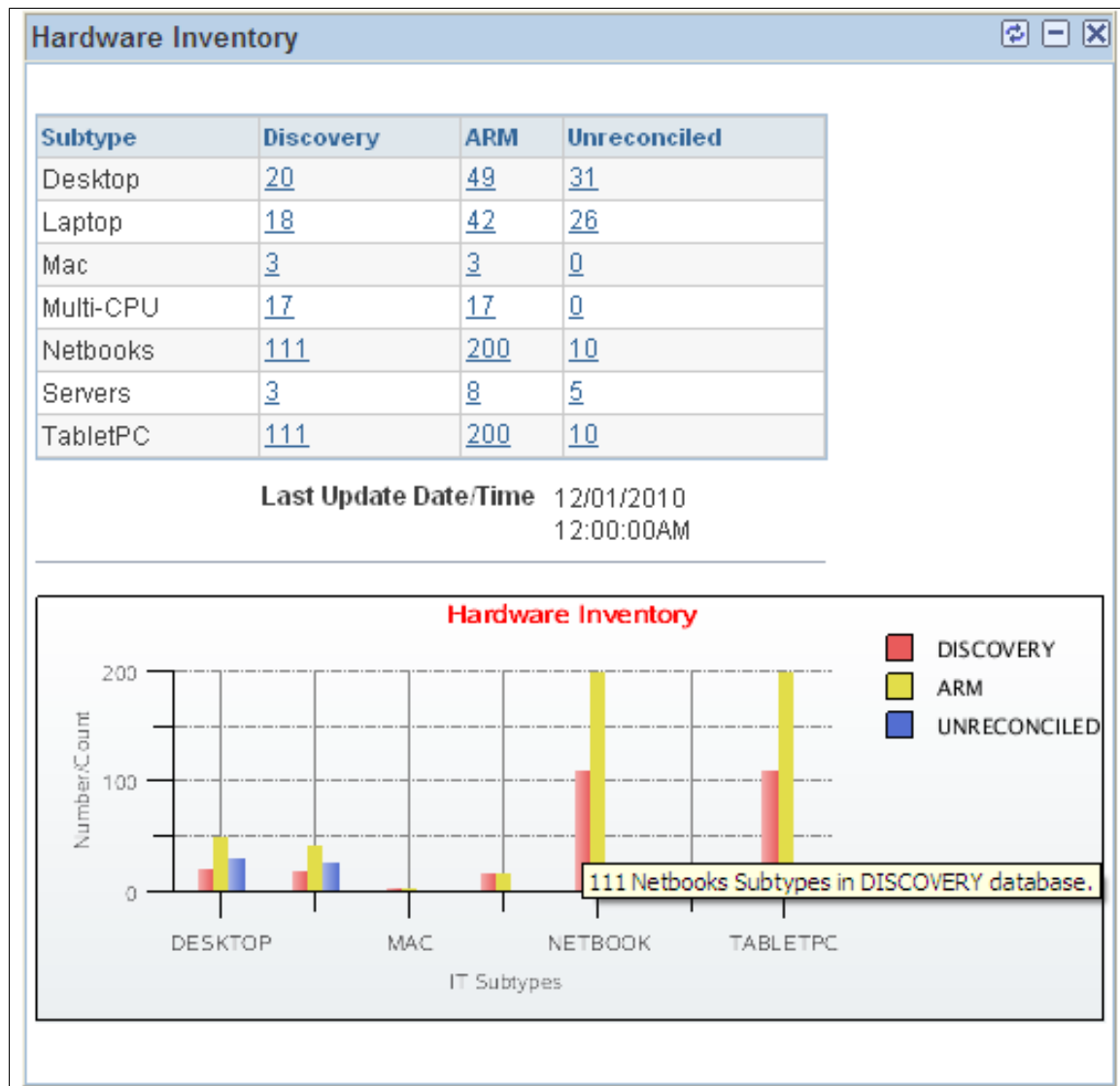
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Hardware Inventory.

Image: Hardware Inventory pagelet

This example illustrates the fields and controls on the Hardware Inventory pagelet. You can find definitions for the fields and controls later on this page.



Discovery

Displays the number of assets per subtype found in the third party database. Click the link to access the Hardware Inventory page.

On the Hardware Inventory page, the system populates the IT Subtype with the link value that you clicked in the pagelet. The system enters *Discovery DB* as the Source Database.

ARM

Displays the number of assets per subtype found in the asset repository. Click the link to access the Hardware Inventory page.

On the Hardware Inventory page, the system populates the IT Subtype with the link value that you clicked in the pagelet. The system enters *Asset Repository* as the Source Database.

Unreconciled

The Unreconciled Assets column contains the combined count of those assets that exist in only one of the databases—third party or the asset repository. The system displays the number of assets per subtype that are found in only one database. Click the link to access the Hardware Inventory page.

On the Hardware Inventory page, the system populates the IT Subtype with the link value that you clicked in the pagelet. The system enters *Both ARM and Discovery* as the Source Database.

Note that it changes the operator to \neq (not equal.) The query returns those assets NOT in ARM ADDED TO the assets NOT in Discovery.

Hardware Inventory (bar chart)

The Hardware Inventory pagelet includes the Hardware Inventory bar chart, which displays the number of assets from Discovery, ARM, and Unreconciled for each Subtype. Mouse over the graph and view the number and description for each Subtype.

Related Links

"Working with Hardware Inventory (*PeopleSoft FSCM 9.2: IT Asset Management*)"

Hardware Progress Report Pagelet

Use the Hardware Progress Report pagelet page (IT_PRGS_HWC) to review up-to-date results of IT asset change or upgrade initiatives.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Hardware Progress Report.

Image: Hardware Progress Report pagelet

This example illustrates the fields and controls on the Hardware Progress Report pagelet. You can find definitions for the fields and controls later on this page.

Report	Area	Target	To Do	% Complete
Laptop Memory Upgrade	US001	10	3	70.00

Last Update Date/Time: 12/18/2004 9:21:39AM

Report

Defines which template (a container for report parameters) drives this line of data.

Target

Displays the total number of expected actions at the outset of a project such as the count of machines that meet the criteria. This number is generated when the report is run for the first time.

To Do

Displays the number of outstanding actions in a project. Click to access the Progress Report Detail page and view a list of items for a specific project. On the Progress Report Detail page, you can drill down to the details for each item in the project.

Note: Only those hardware assets that are in physical use are analyzed and processed through the progress report.

Integration Data Load Errors Pagelets

Use the Integration Data Load Errors pagelet (IT_LOAD_ERR_SUM) to review summarized totals and graphic representation of the data mapping errors that are encountered during integration of staged data from third-party discovery suppliers.

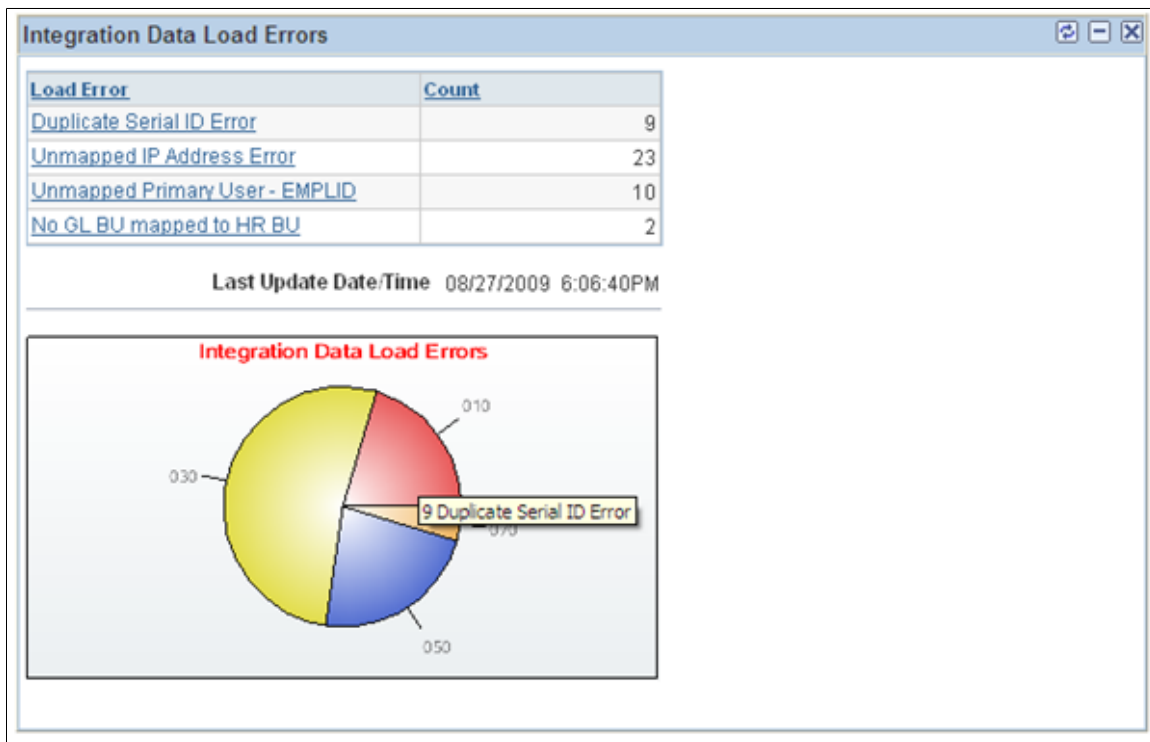
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Integration Data Load Errors.

Image: Integration Data Load Errors pagelet

This example illustrates the fields and controls on the Integration Data Load Errors pagelet. You can find definitions for the fields and controls later on this page.



Load Error

Displays the summarized totals of the data mapping errors that are encountered during integration of staged data from third-party discovery suppliers. Drill down from the following links to view details on the Integration Data Load Errors page:

- [Unmapped Primary User - EMPLID](#)
- [Unmapped IP Address Error](#)
- [Duplicate Serial ID Error](#)
- [Unmapped Manufacturer Error](#)
- [No GL BU mapped to HR BU](#)

Count

Displays the number of exceptions for each integration data load error.

Note: It is not necessary to run the Generate Metrics process in order to produce these totals. The IT_LOAD_PROC is submitted automatically when the data is received through the integration.

Inventory Exceptions Pagelet

Use the Inventory Exceptions pagelet (IT_PE_INV_EXCEPT) to review a summary of the differences between the Asset Repository and the third-party database.

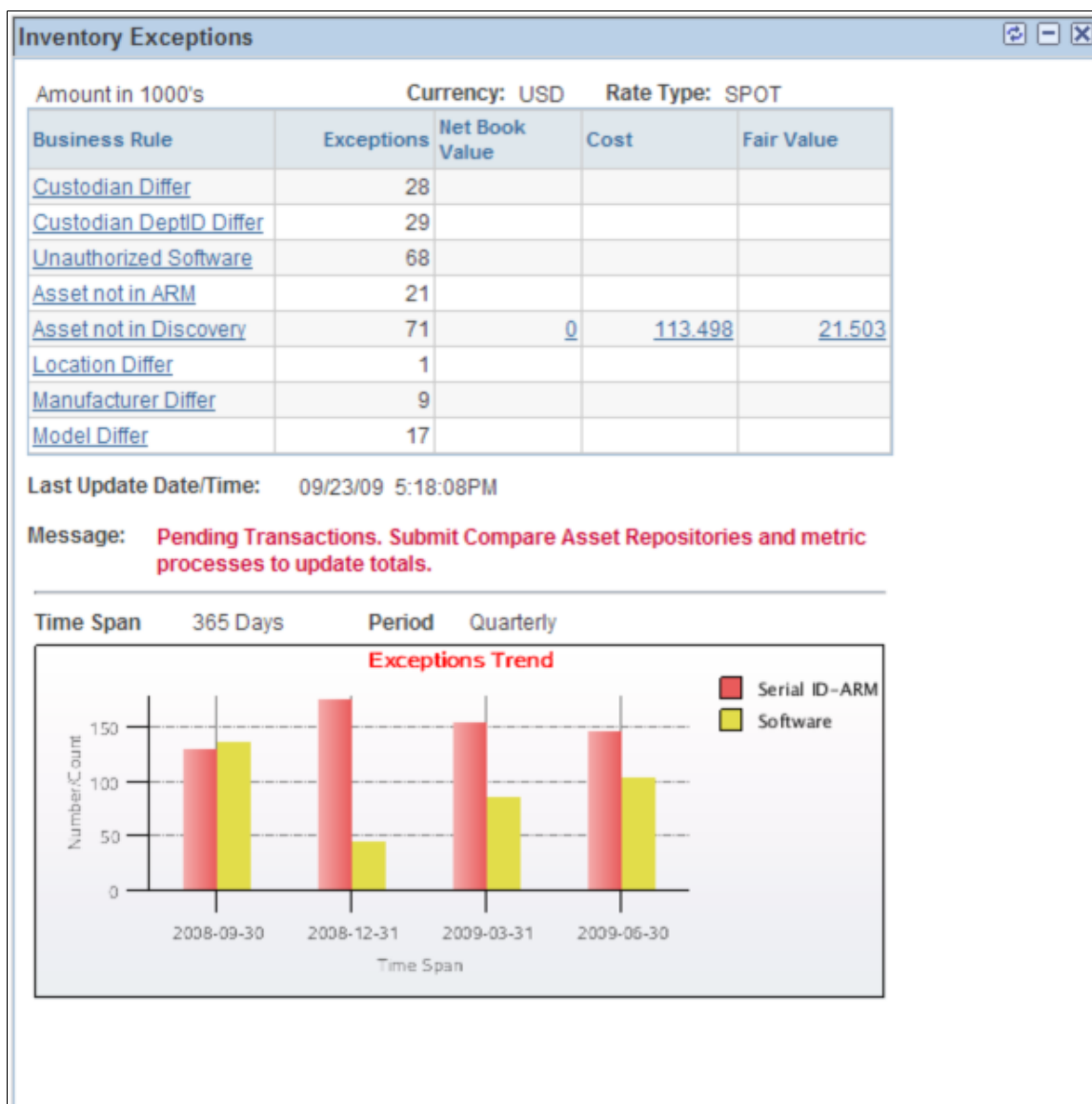
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Inventory Exceptions.

Image: Inventory Exceptions pagelet

This example illustrates the fields and controls on the Inventory Exceptions pagelet. You can find definitions for the fields and controls later on this page.



Business Rule

Displays each of the business rules that will generate an exception. Click the link to access the Manage Exceptions page.

Exceptions	Displays the number of exceptions for each business rule.
Net Book Value	Displays the total net book value (NBV) of the <i>financial</i> assets included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the NBV for each financial asset from the Manage Exceptions page.
Cost	Displays the total cost basis of the <i>financial</i> assets that are included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the Cost for each financial asset from the Manage Exceptions page.
Fair Value	Displays the total fair value (FV) of the <i>financial</i> assets that are included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the FV for each financial asset from the Manage Exceptions page.
Exceptions Trend (graph)	Displays a graph of the business rule exceptions over time. See PeopleSoft IT Asset Management, Managing Exceptions, Viewing Manage Exceptions Trend.

Note: The columns for Net Book Value, Cost and Fair Value display on the Inventory Exceptions pagelet only when Financial Impact is enabled on the Installation Options - Asset Management page and when the columns are selected for viewing in User Preferences for a given user. A user may select to see one, two or all three of the columns. The aggregate values displayed in these three columns apply to only the financial assets that are included in the total number of exceptions, even though the number of exceptions includes both financial and nonfinancial assets.

See "Setting Up Business Rules (*PeopleSoft FSCM 9.2: IT Asset Management*)".

Lease End Metrics Pagelet

Use the Lease End Metrics pagelet (AM_LEASE_SUM) to review IT-related leases that will expire within the next n days.

Drill down to the assets associated with the leases.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Lease End Metrics.

Image: Lease End Metric pagelet

This example illustrates the fields and controls on the Lease End Metric pagelet. You can find definitions for the fields and controls later on this page.

Lease End Metric		
Lessor	Days Before End Date	Lease
DELL-001	126	Dell laptop lease
HP-001	126	HP Compaq laptop lease
HP-001	126	HP Compaq desktop lease
Last Update Date/Time: 08/27/2009 6:09:25PM		

Lessor Click the link to access the Lease Summary by Lessor page.

Days Before End Date Displays the number of days before lease expiration in ascending order.

Lease Click the link to access the Link Details page.

See "Working with Leases (*PeopleSoft FSCM 9.2: IT Asset Management*)".

Related Links Pagelet

Use the Related Links pagelet (IT_PE_THIRDLINK) to link to frequently accessed URLs.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Related Links.

See "Creating Related Links (*PeopleSoft FSCM 9.2: IT Asset Management*)".

Software Device Monitor Pagelet

Use the Software Device Monitor pagelet (IT_PE_SWDG_SUM) to review the installed software licenses versus serial ID-based authorized software licenses.

An alert displays when installed software licenses exceed the number authorized.




Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Software Device Monitor..

Image: Software Device Monitor pagelet

This example illustrates the fields and controls on the Software Device Monitor pagelet. You can find definitions for the fields and controls later on this page.

Software Device Monitor					
Group Id:	CEO				
Group Name:	CEO's Group				
Software Title	Alert	Installed	Authorized	Declared	Unresolved
Adobe Acrobat Professional		5	4	18	13
Adobe Photoshop		5	4	18	7
Dreamweaver				0	1
Microsoft Office 2003		18	4	18	51
Last Update Date/Time: 08/27/2009 6:09:06PM					

Software Title

Displays the software licenses that are configured for tracking by Software Device Group ID.

The Software Device Group is a grouping of machines that is used to associate a Content Manager (EMPLID) to a group of machines by their Serial ID. Group definitions can contain groups as well as machines.

Alert

Displays a warning icon if the number of installed licenses exceeds the number of authorized licenses. Alerts are not displayed for device groups that are defined as count licenses on the Define Software Titles/Users page.

Installed

Displays the count of licenses that are installed based on Serial ID according to the Asset Repository.

Authorized

Displays the count of authorized licenses associated with a serial ID. Count license device groups are not included in the count.

Declared

Displays the count of licenses that are declared for the Software Device Group based on Serial ID.

Click the link to access the Software Device Inventory page. The search option for the software title and Group ID will be supplied.

Unresolved

Displays the number of licenses associated with devices that do not belong to any Software Device Group, or licenses for devices that are not in the Asset Repository. For those devices in the Asset Repository but not in any Software Device Group, the licenses are counted and the number of CPUs are as defined

in the Asset Repository. Machines that are not in the Asset Repository are counted as one per device.

Click the link to access the Resolve Device Licenses page. Search by Software Title or by Serial Number.

See "Resolve Device Licenses Page (*PeopleSoft FSCM 9.2: IT Asset Management*)".

See "Define Software Titles/Users Page (*PeopleSoft FSCM 9.2: IT Asset Management*)".

Software Inventory Monitor Pagelet

Use the Software Inventory Monitor pagelet (IT_SFTWR_INV) to review the counts of total licenses versus installed licenses, the counts for authorized and unauthorized users.

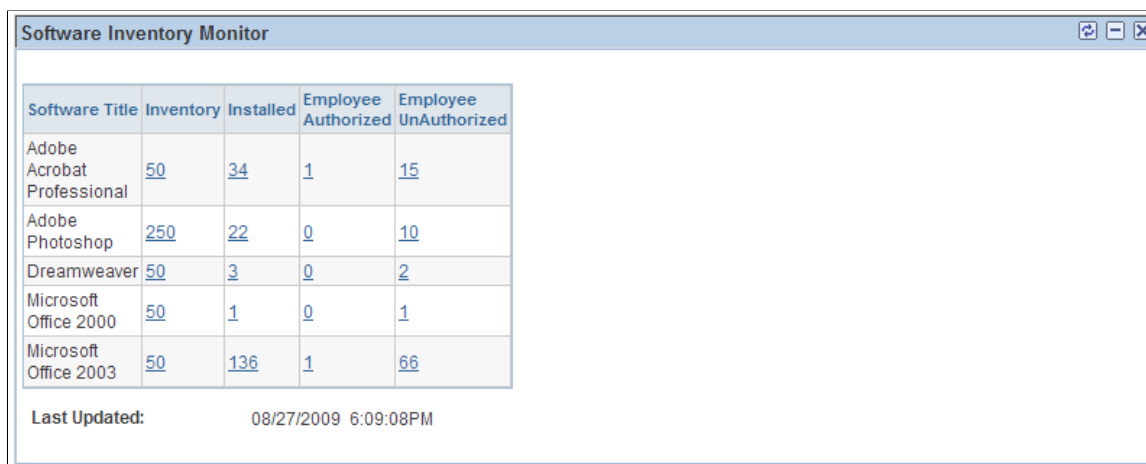
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Software Inventory Monitor.

Image: Software Inventory Monitor pagelet

This example illustrates the fields and controls on the Software Inventory Monitor pagelet. You can find definitions for the fields and controls later on this page.



Software Title	Inventory	Installed	Employee Authorized	Employee Unauthorized
Adobe Acrobat Professional	50	34	1	15
Adobe Photoshop	250	22	0	10
Dreamweaver	50	3	0	2
Microsoft Office 2000	50	1	0	1
Microsoft Office 2003	50	136	1	66

Last Updated: 08/27/2009 6:09:08PM

Software Title

Displays the software licenses that are configured for tracking.

Inventory

Displays the count of purchased software licenses. This column includes both employee and device authorizations.

Click the link to access the Software License Inventory page.

Installed

Displays the count of users that installed the specific software. This column includes both employee and device authorizations.

Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied.

Employee Authorized

Displays the count of authorized users who installed the software. This column excludes device authorizations.

Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied as well as the value of Employee Authorized in the Authorized Search option.

Employee Unauthorized

Displays the count of unauthorized users who installed the software. This column excludes device authorizations.

Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied as well as the value of Employee Unauthorized in the Authorized Search option.

See "Working with Software Inventory (*PeopleSoft FSCM 9.2: IT Asset Management*)".

Software Pending Requisitions Pagelet

Use the Software Pending Requisitions pagelet (IT_SFTWR_PEND) to review a list and graphic representation of software licenses that the company must acquire to keep the enterprise in compliance.

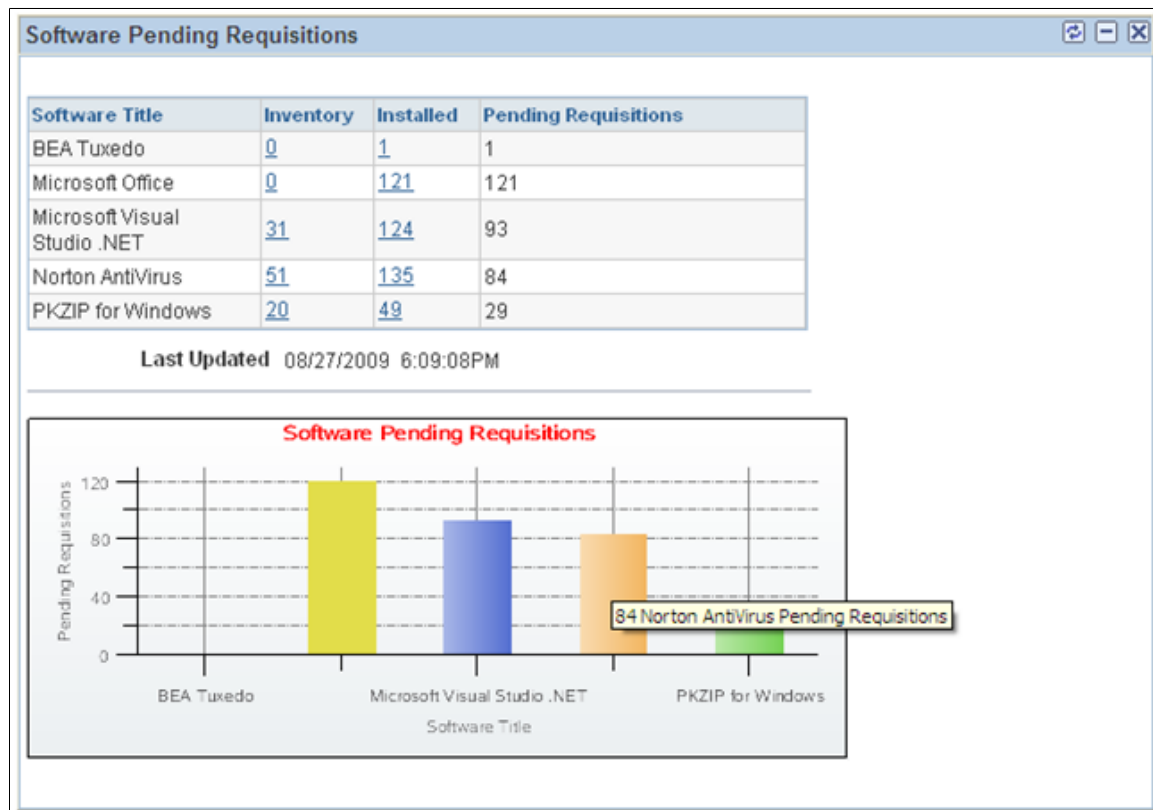
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Software Pending Requisitions.

Image: Software Pending Requisitions pagelet

This example illustrates the fields and controls on the Software Pending Requisitions pagelet. You can find definitions for the fields and controls later on this page.



Software Title

Shows only those software titles that are defined with track requisitions *On* and when the installed copies exceed the purchased copies.

Inventory

Displays the number of purchased copies of the software title.

Click the link to access the Software License Inventory page.

Installed

Displays the number of installed copies of the software title.

This column includes both employee and device authorizations.

Click the link to access the Discover Software Inventory page.

Pending Requisitions

Displays the difference between the number of purchased copies and the number of installed copies.

Software Pending Requisitions (bar chart)

This pagelet includes a corresponding bar chart at the bottom. Mouse over the Software Pending Requisitions bar chart

and view the number of pending requisitions with respective software titles.

Software Progress Report Pagelet

Use the Software Progress Report pagelet (IT_PRGS_SWC) to review the up-to-date results of IT asset change or upgrade initiatives.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Software Progress Report.

Image: Software Progress Report pagelet

This example illustrates the fields and controls on the Software Progress Report pagelet. You can find definitions for the fields and controls later on this page.

Report	Area	Target	To Do	% Complete
Remove DreamWeaver	US001	1	1	0.00

Last Update Date/Time: 12/20/2004 1:20:54PM

Report	Defines which template (a container for report parameters) drives this line of data.
Area	Displays the associated business unit.
Target	Displays the total number of expected actions at the outset of a project such as the count of machines that meet the criteria. This number is generated when the report is run for the first time.
To Do	Displays the number of outstanding actions in a project. Click to view a list of items for a specific project. On the Progress Report Detail page, you can drill down to the details for each item in the project.
% Complete	Displays the percentage of completion for a project.

Software Renewal Pagelet

Use the Software Renewal pagelet (IT_SFTWR_RENEW) to review the alerts to the IT Asset Manager when a contract needs to be renewed or renegotiated.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Software Renewal.

Image: Software Renewal pagelet

This example illustrates the fields and controls on the Software Renewal pagelet. You can find definitions for the fields and controls later on this page.

Software Renewal Pagelet			
Supplier ID	Contract Id	Contract Type	Expiration Date
0000000045	TEST01	CO	10/31/2009
ITV0000049	MM2004B	SW	10/27/2009
ITV0000051	MSEA2004	MT	12/30/2009
ITV0000055	ORACLE001	NO	12/31/2004
Last Updated 08/27/2009 6:08:53PM			

Software assets with contracts that have an expiration date, with a status of *Active* and with a Renewal Notice value (that is, the renewal notice is not blank), will be included in the Software Renewal metric if the system date or As of Date of the process is greater than the expiration date minus the number of days entered in the Renewal Notice.

Supplier ID

Displays values from the supplier table.

Contract Id

Displays the contract number determined during negotiations with supplier.

Contract Type

Displays the user-defined contract type.

Expiration Date

Displays the end date of the contract.

Using Pagelets Enabled by PeopleSoft Maintenance Management

Using Pagelets Enabled by PeopleSoft Maintenance Management

This topic discusses how to:

- Set up PeopleSoft Maintenance Management for the PeopleSoft Asset Lifecycle Management (ALM) Portal Pack.
- View scheduler's work orders.
- View my assigned work orders.
- View my service requests.
- View backlog by work order types.
- View unassigned work order tasks.
- View reviewed work orders tasks.
- View scheduled work order tasks.
- View most costly assets to maintain.
- View top five problem codes.

Setting Up PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack

This section provides an overview of PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack and lists the pages used to set up Maintenance Management for the ALM Portal Pack.

Pages Used to Set Up PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Update Work Order Portal Data	WM_PE_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Maintenance Management, Run Work Order Portal Metrics	Run a process that summarizes the transaction data and improves the response time for displaying the service request, work order, backlog, and work order task data on the pagelets for PeopleSoft Maintenance Management in the PeopleSoft ALM portal pack.
Update Most Costly Asset Data	WM_PE_ASSET_RUN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Maintenance Management, Run Asset Related Metrics	Run a process that summarizes the transaction data and improves the response time for displaying the asset data on the Update Most Costly Assets and the Top Five Problems pagelets for PeopleSoft Maintenance Management in the PeopleSoft ALM portal pack.

Understanding PeopleSoft Maintenance Management for PeopleSoft ALM Portal Pack

If you are currently using PeopleSoft Maintenance Management and want to use the Maintenance Management pagelets in the PeopleSoft ALM Portal Pack, you must schedule and run the Update Work Order Portal Data Application Engine process (WM_PE) and Update Most Costly Asset Data Application Engine process (WM_PE_ASSET). The Update Work Order Portal Data and Update Most Costly Asset Data processes summarize transaction data in order to improve response times when viewing the pagelets. The data is stored in summary tables and is displayed on pagelets according to your personalized settings. While the Update Work Order Portal Data and Update Most Costly Asset Data process greatly improves response times for reading the data, it also imposes limitations on when changes to the transaction data are reflected in the pagelets. Changes in the transaction data are not reflected in the pagelets in real time. You must periodically rerun the process to refresh the pagelets. We recommend setting up a recurring job to execute the Update Work Order Portal Data and Update Most Costly Asset Data process on a periodic basis. How often you run the collector process depends on a number of factors such as:

- How quickly you need the data updated.
- How much data you have in the system—the longer your system operates, the more data has to be summarized, hence the longer the data loader process can take to execute.
- How many system resources are available to your process scheduler.

Viewing Scheduler's Work Orders

This section discusses how to view the Scheduler's Work Orders pagelet.

Pages Used to View Scheduler's Work Orders

Page Name	Definition Name	Navigation	Usage
Scheduler's Work Orders pagelet	EP_WM_MY_WO	Click the Personalize Content link on the PeopleSoft home page. Select Scheduler's Work Orders.	View the work order tasks for which the current logged-in is responsible for scheduling.
Work Order - Schedules	WM_WO_TASK_SCHED	Click a description link on the Scheduler's Work Orders pagelet.	View details for a specific work order shown on the Scheduler's Work Orders pagelet.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the Go to Workbench link on the Scheduler's Work Orders pagelet.	Access and update work order tasks assigned to this scheduler.

Viewing Scheduler's Work Orders

Use the Scheduler's Work Orders pagelet (EP_WM_MY_WO) to view the work order tasks for which the current logged-in is responsible for scheduling.

Navigation

Click the Personalize Content link on the PeopleSoft home page.

Select Scheduler's Work Orders.

This pagelet displays work order tasks that are for the user to schedule.

Description

Click this link to access the Work Order - Schedules page for a specific work order. You can view the details associated with the task.

Priority

Displays the importance of the tasks assigned.

Required Date

Displays the date that the task needs to occur.

Task Status

Display the state of the work order task.

Go to Workbench

Click this link to access and update the work orders assigned to this scheduler on the Work Order Workbench.

Viewing My Assigned Work Orders

This section discusses how to view the My Assigned Work Orders pagelet.

Pages Used to View My Assigned Work Orders

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My Assigned Work Orders pagelet	EP_WM_MY_WO_TECH	Click the Personalize Content link on the PeopleSoft homepage. Select My Assigned Work Orders.	View the work order tasks that have been assigned to the user currently logged into the system.
Work Order - Schedules	WM_WO_TASK_SCHED	Click a description link on the My Assigned Work Orders pagelet.	View details for a specific work order shown on the My Assigned Work Orders pagelet.
Technician Workbench	WM_WOE_WB	Click the Go to Workbench link.	Access and update the assigned work order tasks for this user.

Viewing My Assigned Work Orders Pagelet

Use the My Assigned Work Orders pagelet page (EP_WM_MY_WO_TECH) to view the work order tasks that have been assigned to the user currently logged into the system.

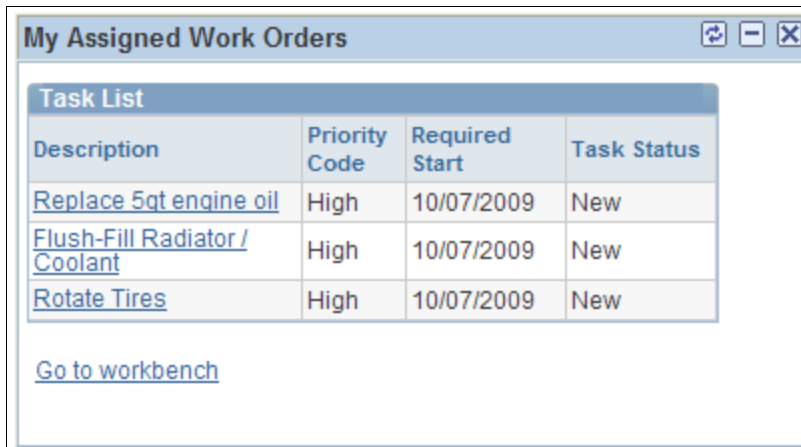
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select My Assigned Work Orders.

Image: My Assigned Work Orders page

This example illustrates the fields and controls on the My Assigned Work Orders page. You can find definitions for the fields and controls later on this page.



This pagelet displays the work orders assigned to the user currently logged into the system, the priority of each work order, the required start date of the work order, and the status of each task associated with the work order that is assigned to this user. Click the Go to Workbench link to access the Technician Workbench for this user. The user can update work order tasks on this page as needed.

Viewing My Service Requests

This section discusses how to view the Viewing My Service Requests pagelet.

Pages Used to View My Service Requests

Page Name	Definition Name	Navigation	Usage
My Service Requests pagelet	EP_WM_MY_WR	Click the Personalize Content link on the PeopleSoft homepage. Select My Service Request.	View the five most recent work requests that belong to the user logged into the system.
Update Service Request	WM_WORK_REQUEST_SS	Click a service request number that appears on the My Service Requests pagelet.	View details for a specific work request shown on the My Service Requests pagelet.
My Service Requests	WM_MY_REQUESTS	Click Go to my requests page link on My Service Request pagelet.	View all service requests opened by the user logged into the system.

Viewing My Service Requests

Use the My Service Requests pagelet (EP_WM_MY_WR) to view the five most recent work requests that belong to the user logged into the system.

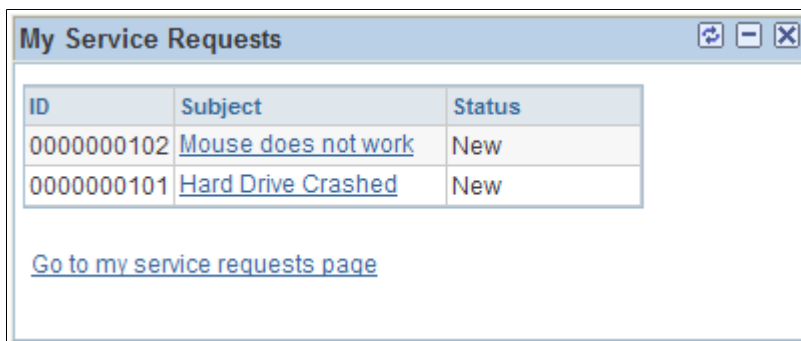
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select My Service Request.

Image: My Service Requests page

This example illustrates the fields and controls on the My Service Requests page. You can find definitions for the fields and controls later on this page.



This pagelet displays the five most recent service requests for the user who is logged into the system. The service request id, subject and status display.

Subject

Click this link to access the My Service Request page for a specific Service request. This link is not available if you do not have authorization to access this page. The page identifies the problem or issue that needs to be addressed.

Status

Displays the current status of the service request.

Go to my service requests page

Click to view all service requests entered by the user logged into the system.

Viewing Backlog by Work Order Type

This section discusses how to:

- View the work order backlog information.
- Personalize the Work Order Portal Personalization page.

Pages Used to View Backlog by Work Order Type

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Backlog by Work Order Type pagelet	EPWM_PE_BACKLOG_GBL	Click the Personalize Content link on the PeopleSoft home page. Select Backlog by Work Order Type.	View the backlog of work orders by work order type.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the work order type code link on the Backlog by Work Order Type page.	View the workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Backlog by Work Order Type icon at the top of the Backlog by Work Order Type pagelet.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Backlog by Work Order Type Pagelet

Use the Backlog by Work Order Type pagelet page (EPWM_PE_BACKLOG_GBL) to view the backlog of work orders by work order type.

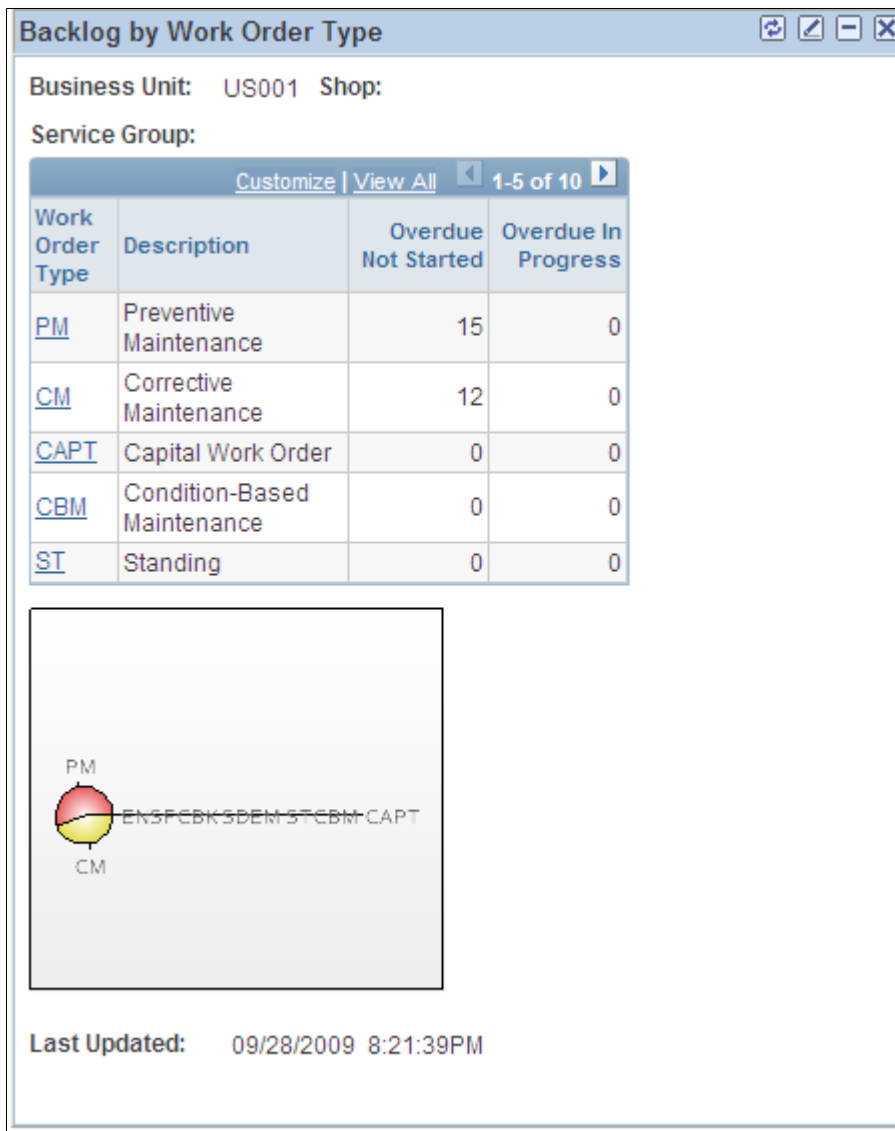
Navigation

Click the Personalize Content link on the PeopleSoft home page.

Select Backlog by Work Order Type.

Image: Backlog by Work Order Type page

This example illustrates the fields and controls on the Backlog by Work Order Type page. You can find definitions for the fields and controls later on this page.



The Backlog by Work Order Type pagelet provides a high-level statistical summary of the overall backlog of work orders, which are broken down into different categories for a particular work order business unit, service group, and/or shop. This backlog is an accumulation of work orders not started or not complete on time. All work orders need to be dealt with directly in PeopleSoft Maintenance Management until the work is completed and the costs applied.

The pie chart is a visual summarization of the total Overdue Not Started and Overdue In Progress broken down by Work Order Type.

By clicking the Work Order Type link, the system navigates to the Work Order Workbench page.

Overdue Not Started

Displays the number of work order tasks with a Required End Date that is less than the current date, a status that is not equal to *Complete*, *Closed* or *Cancelled* and the Actual Start Date is null.

Overdue in Progress

Displays the number of work order tasks with a Required End Date that is less than the current date, a status that is not equal to *Complete*, *Closed* or *Cancelled*, the Actual Start Date is not null and the Required End Date is not null, and less than the Run Time Date.



Click this icon to refresh the data on the pagelet.



Click this icon to access the Work Order Portal Personalization page.



Click this icon to minimize the displaying page.



Click this icon to remove the pagelet from the display.

Work Order Portal Personalization Page

Use the Work Order Portal Personalization page (WM_PE_PRS) to define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Navigation

Click the Customize Backlog by Work Order Type icon at the top of the Backlog by Work Order Type pagelet.

Image: Work Order Portal Personalization page

This example illustrates the fields and controls on the Work Order Portal Personalization page. You can find definitions for the fields and controls later on this page.

Work Order Portal Personalization

Shared by Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks.
Shop and Service Group options are ignored by Unassigned Work Order Tasks.
Service Group option is ignored by Scheduled Work Order Tasks.

Work Order Business Unit	Shop
<input checked="" type="radio"/> User Preference <input type="radio"/> Specify <input type="text"/>	<input checked="" type="radio"/> User Preference <input type="radio"/> Specify <input type="text"/>
Service Group <input checked="" type="radio"/> User Preference <input type="radio"/> Specify <input type="text"/>	

You can either use the default user preferences or select a value for the work order business unit, service group or shop.

Note: The Work Order Portal Personalization page is shared by the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets. Shop and service group options are not used by the Unassigned Work Order Tasks pagelet. The service group option is not used by the Scheduled Work Order Tasks pagelet.

Viewing Unassigned Work Order Tasks

This section provides an overview and discusses how to view unassigned work order tasks information.

It is important to review new work orders in a timely manner. When a work order is first created, the work order is not reviewed and is in an initial stage. The first status of a work order is configurable by the customer. Based on the initial customer defined status, the system infers the work order has not been planned, reviewed, or assigned. Some refer to this view as the *unplanned backlog*, which is often used as a measure of planning efficiency.

This pagelet displays work orders that have an *initial* customer-defined status (unplanned or unassigned) that needs attention and displays the work orders in a prioritized manner, sorted by urgency and age. A count of the work orders is shown for each priority based on age. Each age group is totaled by the end column giving a grand total for the group.

The pie chart is a graphical summarization of the total unassigned work order tasks by priority.

Pages Used to View Unassigned Work Order Tasks

Page Name	Definition Name	Navigation	Usage
Unassigned Work Order Tasks pagelet	EPWM_PE_INITIAL_GBL	Click the Personalize Content link on the PeopleSoft homepage. Select Unassigned Work Order Tasks.	View work order tasks grouped by priority that are <i>Unassigned</i> or <i>Unplanned</i> status.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the Priority code on the Unassigned Work Order Task page.	View the work order workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Unassigned Work Order Tasks icon on the Unassigned Work Order Tasks pagelet.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Viewing Unassigned Work Order Tasks

Use the Unassigned Work Order Tasks pagelet (EPWM_PE_INITIAL_GBL) to view work order tasks grouped by priority that are Unassigned or Unplanned status.

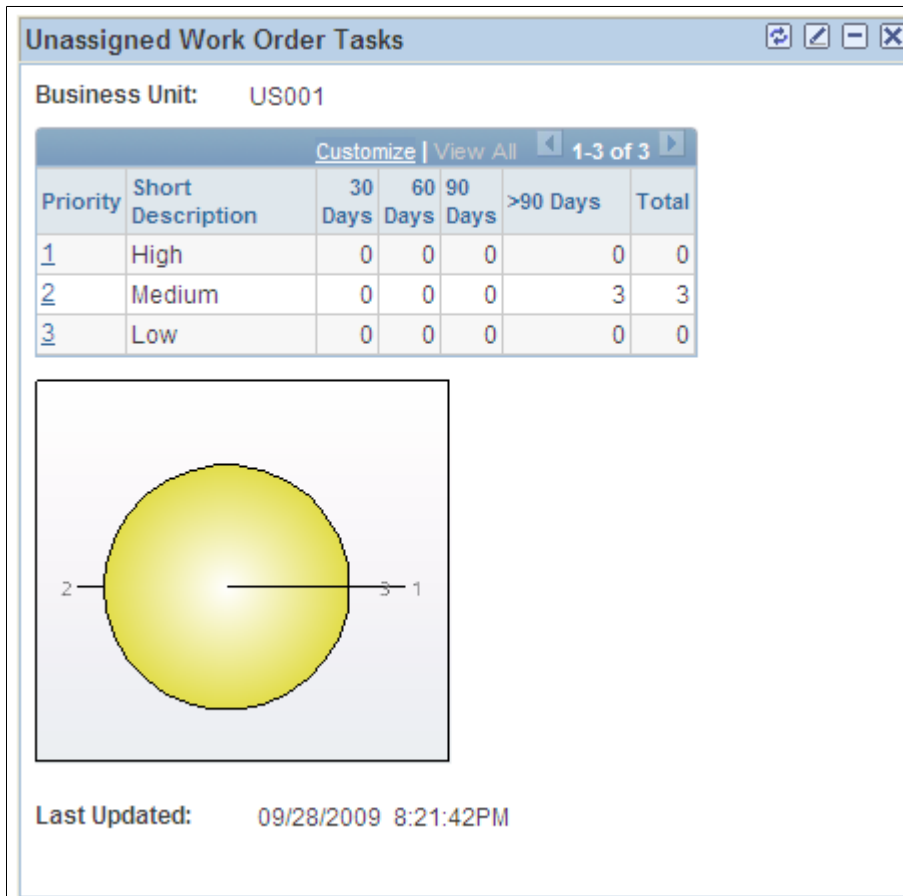
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Unassigned Work Order Tasks.

Image: Unassigned Work Order Tasks page

This example illustrates the fields and controls on the Unassigned Work Order Tasks page. You can find definitions for the fields and controls later on this page.



Priority

Click the Priority link to transfer the Work Order Workbench page to view a list of work orders for the selected priority, sorted by descending date.

From the list of work orders on the technician workbench, click the Work Order ID link to view the work order details.

Note: The Priority field is a configurable value.

30 Days, 60 Days, 90 Days, and >90 Days (greater than 90 days)

Displays the number of work orders unassigned by priority and aging days based on the creation date of the work order.

Total

Displays the total of all columns and represents all work orders for the given priority.

Note: This pagelet is dependent on the Initial Status field being set during implementation. The Initial Status field is established during system setup, and work orders cannot be created until the initial status is defined.

Note: This pagelet can only be personalized for the work order business unit. The pagelet is restricted in this way so a user does not accidentally filter out important work orders. See the Personalizing Backlog by Work Order Type section of this topic for information on specifying the work order business unit.

Note: Work orders created from preventive maintenance schedules are not included in this pagelet.

Viewing Reviewed Work Order Tasks

This section discusses how to view reviewed work order information.

This pagelet displays work orders that have been reviewed. The work orders are known by the planners, have not been scheduled, but are kept in the system for execution at the appropriate time. The work orders are not cancelled or scheduled, but are in the queue for processing.

These work orders represent a backlog of work that has been identified as necessary, but has not yet been completely planned and scheduled.

Pages Used to View Reviewed Work Order Tasks

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Reviewed Work Order Tasks pagelet	EPWM_PE_REVIEWED_GBL	Click the Personalize Content link on the PeopleSoft homepage. Select Reviewed Work Order Tasks.	View work orders grouped by priority and age that have been reviewed but not scheduled.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the Priority code on the Unassigned Work Order Task page.	View the work order workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Reviewed Work Order Tasks icon on the Reviewed Work Order Tasks pagelet.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Viewing Reviewed Work Order Tasks

Use the Reviewed Work Order Tasks pagelet page (EPWM_PE_REVIEWED_GBL) to view work orders grouped by priority and age that have been reviewed but not scheduled.

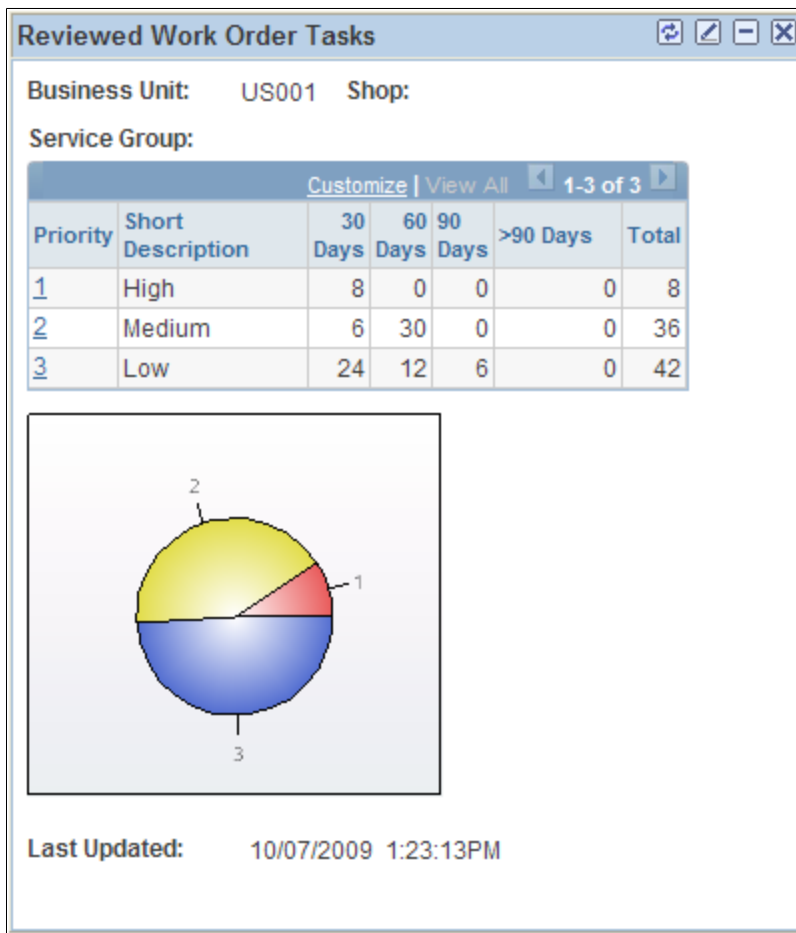
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Reviewed Work Order Tasks.

Image: Reviewed Work Order Tasks page

This example illustrates the fields and controls on the Reviewed Work Order Tasks page. You can find definitions for the fields and controls later on this page.



Priority

Click the Priority link to transfer to the Work Order Workbench page to view a list of work orders for the selected priority, sorted by descending date.

Note: The Priority field is a configurable value.

30 Days, 60 Days, 90 Days, and >90 Days (greater than 90 days)

Displays the number of work orders reviewed by priority and aging days based on the creation date of the work order.

Total

Displays the total of all columns and represents all work orders for the given priority.

Note: See the Personalizing Backlog by Work Order Type section of this topic for information on personalizing this pagelet.

Note: This pagelet is dependent on the status of the work order. The status must not be equal to an initial status, complete, closed, or cancelled. The Scheduled Start Date is equal to *Null* and the Standing Work Order field is equal to *False*.

Note: This pagelet is dependent on the Initial Status field being changed to another active status. This requires a business process the user must establish in order to view the complete backlog. If the status is not changed, the work orders are included in the Backlog by Work Order Type pagelet and do not appear in the Reviewed Work Orders pagelet.

Viewing Scheduled Work Order Tasks

This section discusses how to view scheduled work order tasks information.

This pagelet is similar to the Unassigned Work Orders Tasks pagelet displaying the task view and lists work order tasks that are scheduled. The pagelet lists tasks grouped by general work type and service group.

Pages Used to View Scheduled Work Order Tasks

Page Name	Definition Name	Navigation	Usage
Scheduled Work Order Tasks pagelet	EPWM_PE_SCHEDULED_GBL	Click the Home link at the top of the screen to access the PeopleSoft home page. Click the Personalize Content link on the PeopleSoft homepage. Select Scheduled Work Order Tasks.	View work orders grouped by general work type and service group that are scheduled.
Work Order Workbench	WM_WOTSK_WORKBENCH	Click the link under Week 1 or Week 2 code on the Scheduled Work Order Tasks pagelet.	View the work order workbench for the user logged into the system.
Work Order Portal Personalization	WM_PE_PRS	Click the Customize Scheduled Work Order Tasks icon on the Scheduled Work Order Tasks page.	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Viewing Scheduled Work Order Tasks

Use the Scheduled Work Order Tasks pagelet (EPWM_PE_SCHEDULED_GBL) to view work orders grouped by general work type and service group that are scheduled.

Navigation

Click the Home link at the top of the screen to access the PeopleSoft home page. Click the Personalize Content link on the PeopleSoft homepage.

Select Scheduled Work Order Tasks.

Image: Scheduled Work Order Tasks page

This example illustrates the fields and controls on the Scheduled Work Order Tasks page. You can find definitions for the fields and controls later on this page.

Scheduled Work Order Tasks					
Business Unit: US001		Shop:			
Customize View All 1-5 of 6					
Service Group	Work Type Group	Week 1	Scheduled Labor Hours	Week 2	Scheduled Labor Hours
FACILITES	Non-Preventive	0	0.00	0	0.00
FACILITES	Preventive	0	0.00	0	0.00
ITAM	Non-Preventive	0	0.00	0	0.00
ITAM	Preventive	0	0.00	0	0.00
Maint	Non-Preventive	0	0.00	0	0.00

Last Updated: 09/28/2009 8:21:43PM

Work Type Group

Displays the scheduled work as either preventive or corrective (non-preventive).

Week 1 and Week 2

Displays the number of tasks that are scheduled to start that week. By clicking the Count link, the system displays the Work Order Workbench page.

Scheduled Labor Hours

The total hours of the tasks scheduled for that week.

Note: See the Personalizing Backlog by Work Order Type section of this topic for information on personalizing this pagelet.

Note: Work order scheduling and shop configuration settings for scheduling labor are required so labor assignments can be made. Labor assignments are required to provide estimated labor hours. The work order Scheduled Start Date field is required and is within fourteen days of the run time of the pagelet.

Viewing Most Costly Assets to Maintain

This section discusses how to:

- View the most costly assets to maintain.
- Personalize the most costly assets to maintain pagelet.

This pagelet graphically represents the most costly assets based on the user personalization options specified. It displays the five pieces of equipment with the highest maintenance costs for the period specified on the Most costly assets to maintain Personalization page. The display contains for each asset the asset description and total maintenance cost for the period. Clicking a link on any of the five assets takes the user to the Track Service and Repair – Event page.

You can select an AM business unit, asset type, asset subtype, make, model, recent number of months and life to date fields. The date fields enable the user to determine which periods of costs to examine: costs incurred during most recent user-defined number of calendar months (user can select from 1-24) or life to date.

Pages Used to View Most Costly Assets to Maintain

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Most Costly Assets to Maintain Personalization pagelet	WM_TOP_COST_PRS	Click the Home link at the top of the screen to access the PeopleSoft home page. Click the Personalize Content link on the PeopleSoft homepage. Select Most Costly Assets to Maintain.	View the most costly assets to maintain.
Track Service and Repairs	ASSET_MAINT_01	Click the asset link on the Most Costly Assets to Maintain Personalization pagelet.	View the service and repair details for that asset.
Most costly assets to maintain Personalization	WM_TOP_COST_PRS	Click the Customize Most Costly Assets to Maintain icon on the Most Costly Assets to Maintain pagelet.	Define default display information for the pagelet.

Most Costly Assets to Maintain Pagelet

Use the Most Costly Assets to Maintain Personalization pagelet page (WM_TOP_COST_PRS) to view the most costly assets to maintain.

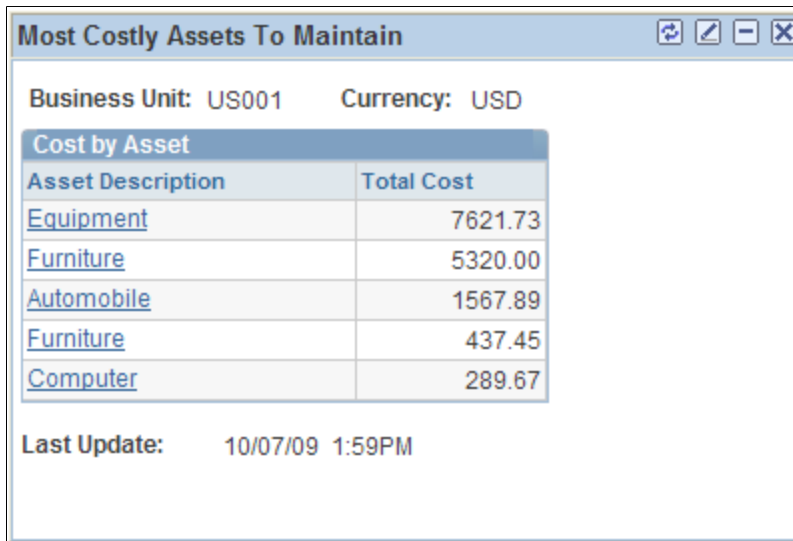
Navigation

Click the Home link at the top of the screen to access the PeopleSoft home page. Click the Personalize Content link on the PeopleSoft homepage.

Select Most Costly Assets to Maintain.

Image: Most Costly Assets to Maintain page

This example illustrates the fields and controls on the Most Costly Assets to Maintain page. You can find definitions for the fields and controls later on this page.



Most Costly Assets To Maintain	
Business Unit: US001 Currency: USD	
Cost by Asset	
Asset Description	Total Cost
Equipment	7621.73
Furniture	5320.00
Automobile	1567.89
Furniture	437.45
Computer	289.67
Last Update: 10/07/09 1:59PM	

Asset Description

Click the asset link to view details of the asset. You can view the detailed service and repair history for this asset.

Total Cost

Displays the total cost of service and repairs for this asset.

Viewing Most Costly Assets to Maintain Personalization

Use the Most costly assets to maintain Personalization page (WM_TOP_COST_PRS) to define default display information for the pagelet.

Navigation

Click the Customize Most Costly Assets to Maintain icon on the Most Costly Assets to Maintain pagelet.

Image: Most Costly Assets to Maintain Personalization page

This example illustrates the fields and controls on the Most Costly Assets to Maintain Personalization page. You can find definitions for the fields and controls later on this page.

Access the Most costly assets to maintain Personalization page.

Asset Business Unit

You can either use the default user preferences or select a value for the asset business unit

Asset Type	Select to filter by an asset type. If nothing is select, the pagelet displays all asset types.
Asset Subtype	Select to filter by an asset subtype. You must select an asset type before you can select a subtype.
Manufacturer ID (manufacturer identification)	Enter a manufacturer to further filter the data.
Model	Enter the model information to further filter the data.

Date Option

Recent number of months	Enter the number of months to filter your search. By entering a specific number of months, you can view the costliest asset to maintain based on data for those recent months.
--------------------------------	--

Life to date

Select to calculate cost based on all maintenance history data

Viewing Top Five Problem Codes

The Top 5 Problem Codes pagelet graphically represents the most reported problem codes based on the user personalization options specified. The bars represent a count of work order tasks.

Note: This pagelet requires problem, cause, and resolution codes to be set up and updated appropriately throughout the life cycle of the work order.

This section discusses how to:

- View the top five problem codes.
- Personalize the Top Five Problem Codes pagelet.

Pages Used to View Top Five Problem Codes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Top 5 Problem Codes pagelet	EP_WM_TOP_PROBLEMS	Click the Personalize Content link on the PeopleSoft homepage. Select Top 5 Problem Codes.	View the most reported problem codes.
Top 5 Problems Pagelet Personalization	WM_TOP_PROB_PRS	Click the Customize Top 5 Problem Codes icon on the Top 5 Problem Codes pagelet.	Define default display information for the Top 5 Problem Codes pagelet.

Viewing Top 5 Problem Codes

Use the Top 5 Problem Codes pagelet (EP_WM_TOP_PROBLEMS) to view the most reported problem codes.

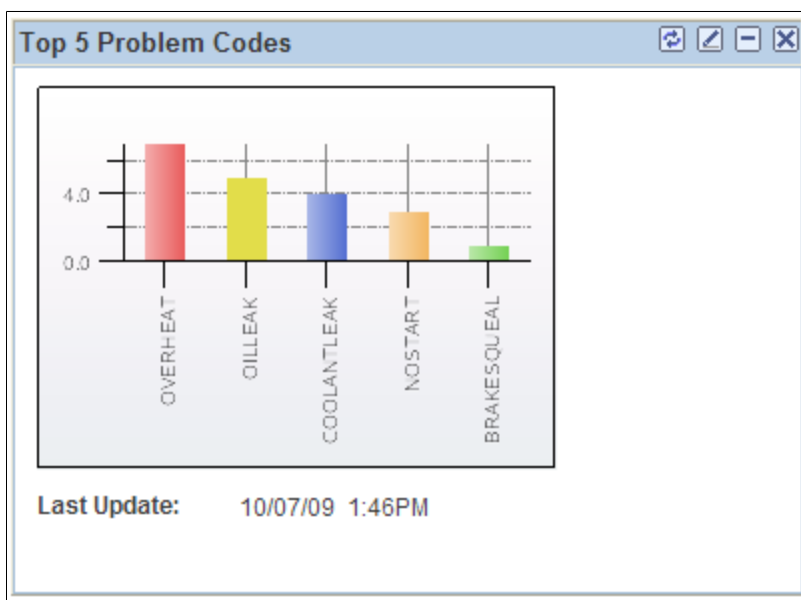
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Top 5 Problem Codes.

Image: Top 5 Problem Codes page

This example illustrates the fields and controls on the Top 5 Problem Codes page. You can find definitions for the fields and controls later on this page.



Personalizing Top 5 Problem Codes

Use the Top 5 Problems Pagelet Personalization page (WM_TOP_PROB_PRS) to define default display information for the Top 5 Problem Codes pagelet.

Navigation

Click the Customize Top 5 Problem Codes icon on the Top 5 Problem Codes pagelet.

Image: Top 5 Problems Pagelet Personalization page

This example illustrates the fields and controls on the Top 5 Problems Pagelet Personalization page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Top 5 Problems Pagelet Personalization' page. It features several filter sections, each with a 'User Preference' (selected) and a 'Specify' (unselected) radio button, followed by a text input field and a magnifying glass icon. The sections are: 'Work Order Business Unit', 'Service Group', and 'Shop'. Below these are 'Problem Group', 'Asset Type' (which includes a dropdown arrow), and 'Asset Subtype'.

Use the fields to filter which group of problem codes to analyze and which assets the pagelet will examine when counting the frequency of problem occurrences. You can use the default business unit that is set up in User Preferences for this user or select a different PeopleSoft Maintenance Management business unit. You can select a service group, shop, problem group, asset type and asset subtype.

Using Pagelets Enabled by PeopleSoft Real Estate Management

Using Pagelets Enabled by PeopleSoft Real Estate Management

This topic discusses how to:

- Set up PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack.
- Set up portal pack default administration.
- Review Property Site Acquisition information.
- View real property statistics.
- View space utilization.
- View my lease portfolio.
- View lease revenues.
- View lease costs.
- View lease statistics.
- View lease optimization.
- View my tasklist.

Setting Up PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack

This section provides an overview of PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack and lists the page used to set up Real Estate Management for the ALM Portal Pack.

Page Used to Set Up PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load Pagelet Data	RUN_RE_PGLT_DATA	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Data Collector	Run a process that creates summary data used by PeopleSoft Real Estate Management pagelets in the PeopleSoft ALM Portal Pack.

Understanding PeopleSoft Real Estate Management for the PeopleSoft ALM Portal Pack

If you currently use PeopleSoft Real Estate Management and want to use the PeopleSoft Real Estate Management pagelets in the PeopleSoft ALM Portal Pack, you must schedule and run the Real Estate Portal Data Collector Application Engine process (RE_PGLT_DATA). The Real Estate Portal Data Collector process summarizes transaction data in order to improve response times when viewing the pagelets. The data is stored in summary tables and is displayed on pagelets according to your personalized settings. While the Real Estate Portal Data Collector greatly improves response times for reading the data, it also imposes limitations on when changes to the transaction data are reflected in the pagelets. Changes in the transaction data are not reflected in the pagelets in real time. You must periodically rerun the Real Estate Portal Data Collector process to refresh the pagelets. We recommend setting up a recurring job to execute the Real Estate Portal Data Collector on a periodic basis. How often you run the collector process depends on a number of factors such as:

- How quickly you need the data updated.
- How much data you have in the system—the longer your system operates, the more data has to be summarized, hence the longer the data loader process can take to execute.
- How many system resources are available to your process scheduler.

Setting Up Portal Pack Default Administration

This section provides an overview and discusses how to set up portal pack default administration.

Page Used to Set Up Portal Pack Default Administration

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Portal Pack Default Administration - Real Estate Management	RE_PP_DEF_ADMIN	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults	Define user defaults for each pagelet.

Understanding Portal Pack Default Administration

The portal pack default administration page enables you to establish default filters for your pagelets. When setting up the PeopleSoft Real Estate Management system, you need to first identify default filters from an administrative level. The administrative settings provide the default personalization values that individual users inherit if they do not establish their own values. The administration values can only be established at the Administration level. After the administrative default values are defined, each user can establish their own defaults through the Portal Pack Default Administration page.

See "Understanding User Preferences (*PeopleSoft FSCM 9.2: Application Fundamentals*)".

Portal Pack Default Administration - Real Estate Management Page

Use the Portal Pack Default Administration - Real Estate Management page (RE_PP_DEF_ADMIN) to define user defaults for each pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults

Image: Portal Pack Default Administration - Real Estate Management page

This example illustrates the fields and controls on the Portal Pack Default Administration - Real Estate Management page. You can find definitions for the fields and controls later on this page.

Portal Pack Default Administration
Real Estate Management

*Administrator: Kenneth Schumacher

Property Information

[Property Statistics](#) [Space Utilization](#)

Lease Property Information

[My Lease Portfolio](#) [Lease Revenue](#)
[Lease Costs](#) [Lease Statistics](#)
[Lease Optimization](#)

Property Information

Click the links to access the personalization pages used to define pagelet default filters.

Lease Property Information

Click the links to access the personalization pages used to define pagelet default filters.

Reviewing Property Site Acquisition Information

This section provides an overview of Property Site Acquisition information and discusses how to:

- View site statistics.
- View recently acquired sites.
- View recent site acquisition request performances.

Pages Used to View Property Site Acquisition Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Site Statistics	RE_SITEREG_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Site Statistics.	View site statistics.
Recently Acquired Sites	RE_RASITE_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Recently Acquired Sites.	View recently acquired sites.
Recent SAR Exec. Performance	RE_SAR_REP_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Recent SAR Exec. Performance.	view recently finalized site acquisition requests.

Understanding Property Site Acquisition Information

The Property Site Acquisition pagelets provide you with high level information related to recently acquired sites, site statistics and information on finalized site acquisition requests.

Site Statistics Pagelet

Use the Site Statistics page (RE_SITEREG_PGLT) to view site statistics.

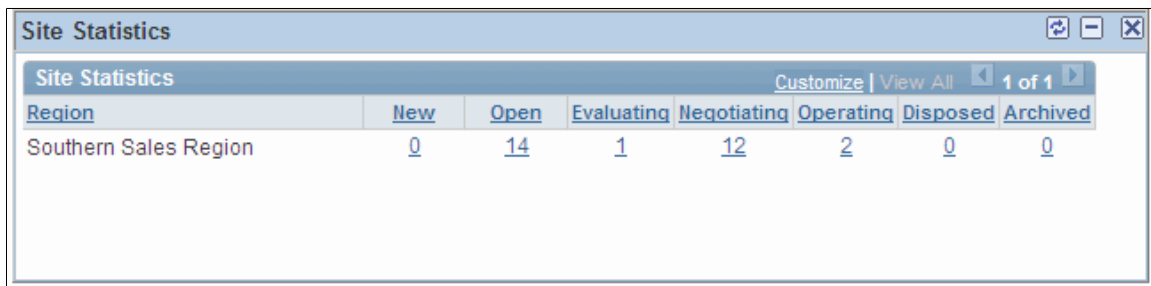
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Site Statistics.

Image: Site Statistics pagelet

This example illustrates the fields and controls on the Site Statistics pagelet. You can find definitions for the fields and controls later on this page.



Site Statistics							
Site Statistics							
Region	New	Open	Evaluating	Negotiating	Operating	Disposed	Archived
Southern Sales Region	0	14	1	12	2	0	0

This pagelet shows the number of sites in each region based on the status. The users can drill down into each site from the linked field Site ID.

Recently Acquired Sites Pagelet

Use the Recently Acquired Sites page (RE_RASITE_PGLT) to view recently acquired sites.

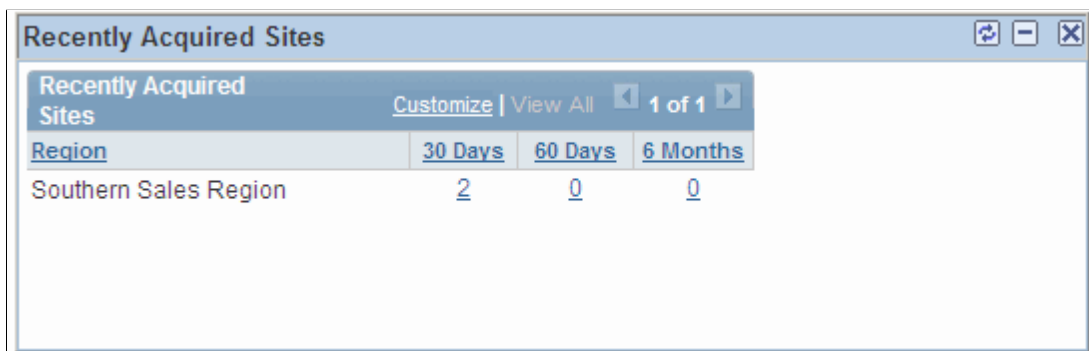
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Recently Acquired Sites.

Image: Recently Acquired Sites pagelet

This example illustrates the fields and controls on the Recently Acquired Sites pagelet. You can find definitions for the fields and controls later on this page.



Recently Acquired Sites			
Recently Acquired Sites			
Region	30 Days	60 Days	6 Months
Southern Sales Region	2	0	0

This pagelet contains a list of sites that have been finalized as acquired. Linked fields include Site ID, SAR ID, Lease ID, Asset ID, and Project ID. Users can define the time span this pagelet displays. Options include 30 days, 60 days, 6 months and so on.

Recent SAR Exec Performance Pagelet

Use the Recent SAR Exec. Performance page (RE_SAR_REP_PGLT) to view recently finalized site acquisition requests.

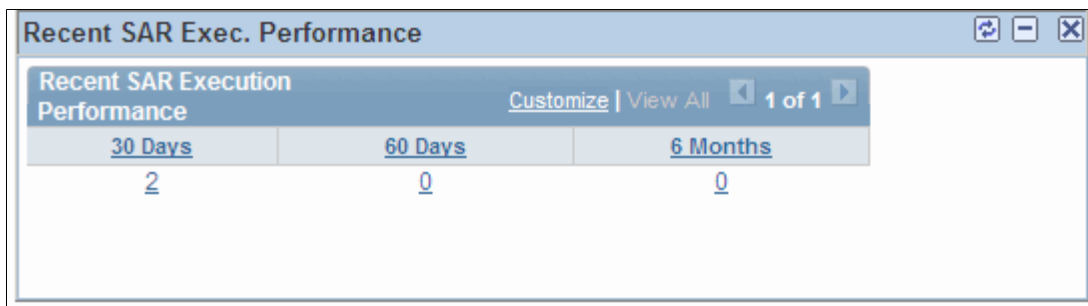
Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Recent SAR Exec. Performances.

Image: Recent SAR Exec. Performance pagelet

This example illustrates the fields and controls on the Recent SAR Exec. Performance pagelet. You can find definitions for the fields and controls later on this page.



This page displays a list of recent site acquisition requests that have a status of *Finalized*. Users can define the date range they want to view.

Viewing Real Property Statistics

This section provides an overview of real property statistics and discusses how to:

- View real property statistics.
- View property breakdown by region.
- Personalize the Property Statistics pagelet.

Pages Used to View Real Property Statistics

Page Name	Definition Name	Navigation	Usage
Property Statistics pagelet	RE_PROPSTATS_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Property Statistics.	View property information such as number of properties, total area and occupancy summarized by business unit, region, and property type.
Property Statistics - Region	RE_PROPSTATS_DTL	Click the Region link on the Property Statistics pagelet.	View property statistic by region.

Page Name	Definition Name	Navigation	Usage
Personalize Property Statistics - Administration	RE_PROPSTATS_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Property Statistics, Personalize Property Statistics - Administration	Setup default filter criteria for property statistics data.

Understanding Real Property Statistics

Property statistics provides you with an immediate, high-level statistical summary of your overall property holdings broken down by ownership status. This pagelet contains Asset Management-based property information that you can view whether PeopleSoft Real Estate Management is installed or not. The property statistics pagelet data derives from the area statistics stored in the Asset Repository.

Note: Property statistics data is not dependent on the Computer Aided Facilities Management (CAFM) system.

Viewing Property Statistics

Use the Property Statistics pagelet page (RE_PROPSTATS_PGLT) to view property information such as number of properties, total area and occupancy summarized by business unit, region, and property type.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Property Statistics.

Owned/Leased	Displays whether the property is owned or leased.
Region	Click this link to view the property detail page within that region.
Properties	Displays the total number of properties in that region.
Total Area (x1000) (total area in thousands)	Displays the total area of the property in thousands.
Current Occupancy	Displays the total current number of occupants residing on the property.

Viewing Property Breakdown by Region

Use the Property Statistics - Region page (RE_PROPSTATS_DTL) to view property statistic by region.

Navigation

Click the Region link on the Property Statistics pagelet.

Image: Property Statistics - Region page

This example illustrates the fields and controls on the Property Statistics - Region page. You can find definitions for the fields and controls later on this page.

Property Statistics - Midwest Sales Region			
Leased Property Details		Customize Find View All First 1-2 of 2 Last	
Property	Total Area	Current Occupancy	Active Leases
Building One	5,039.83	597	20
Building Two	5,039.83	597	8

Property

Click the link to view detailed property data stored in the asset repository.

Active Leases

Displays the number of active leases associated with the property. This column is visible only if the Property Class filter is set to *Site* or *Building*. This total includes all child properties for the site or building.

Personalizing the Property Statistics Pagelet

Use the Personalize Property Statistics - Administration page (RE_PROPSTATS_PRS) to setup default filter criteria for property statistics data.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Property Statistics, Personalize Property Statistics - Administration

Image: Personalize Property Statistics - Administration page

This example illustrates the fields and controls on the Personalize Property Statistics - Administration page. You can find definitions for the fields and controls later on this page.

Business Unit

User Preferences

Select to have the system display property statistics for only those properties with the business unit that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display property statistics for properties from a business unit other than the business unit that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must enter a business unit value.

Unit of Measure

User Preferences

Select to have the system display property statistics in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display property statistics in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Property Class

Select to filter by a specific property class. Values are: *Building* or *Site*.

Property Sub-Class

Select to filter by a subclass. Property subclass is used to further categorize the property class. For instance, a *Building* can be a warehouse, an office building, a retail outlet, and so on. A *Site* can be a campus, a building site, empty land, and so on.

Note: Property subclass is related to property class. There is a parent-child relationship between the two. You cannot select a subclass without first selecting a property class.

Viewing Space Utilization

This section provides an overview of space utilization and discusses how to:

- View space utilization.
- Personalize the Space Utilization pagelet.

Pages Used to View Space Utilization

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Space Utilization pagelet	RE_SPACEUTL_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Space Utilization.	View usage statistics of each property summarized by region and ownership property types.
Personalize Space Utilization - Administration	RE_SPACEUTL_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Space Utilization, Personalize Space Utilization - Administration	Define default information for the Space Utilization pagelet.

Understanding Space Utilization

View the usage statistics of each property summarized by region and the type of ownership properties with the Space Utilization pagelet. The Space Utilization pagelet enables you to view the total occupied area and the unoccupied area in the properties you selected in the personalization settings. Click the Region link to navigate to the detailed page listing all the properties by ownership status. You can display this pagelet only if ALM is installed.

View Space Utilization

Use the Space Utilization pagelet (RE_SPACEUTL_PGLT) to view usage statistics of each property summarized by region and ownership property types.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Space Utilization.

Occupied (x1000) (occupied per thousand)

Displays the total occupied space (in thousands) for all properties within the specified region.

Vacant (vacant per thousand)

Displays the total vacant space (in thousands) for all properties within the specified region.

Occupancy Rate

Displays the percentage of occupied space for all properties within the specified region. Calculation method: $(\text{Occupied Space} / (\text{Occupied Space} + \text{Vacant Space})) \times 100$.

Personalizing the Space Utilization Pagelet

Use the Personalize Space Utilization - Administration page (RE_SPACEUTL_PRS) to define default information for the Space Utilization pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Space Utilization, Personalize Space Utilization - Administration

Image: Personalize Space Utilization - Administration page

This example illustrates the fields and controls on the Personalize Space Utilization - Administration page. You can find definitions for the fields and controls later on this page.

Personalize Space Utilization - Administration

User ID: VP1 Kenneth Schumacher

Filter Criteria

Business Unit	Unit of Measure
<input type="radio"/> User Preferences <input checked="" type="radio"/> Specify <input type="text" value="US001"/>	<input type="radio"/> User Preferences <input checked="" type="radio"/> Specify <input type="text" value="Square Meters"/>

*Property Class:

Property Subclass:

Business Unit

User Preferences

Select to have the system display usage statistics for only those properties with the business unit that is specified in your user preferences on the Asset Management - User Preferences page.

Specify

Select to have the system display usage statistics for properties from a business unit other than the business unit that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must enter a business unit value.

Unit of Measure**User Preferences**

Select to have the system display usage statistics in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display property statistics in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Property Class

Select to filter by a specific property class. Values are: *Building* or *Site*.

Property Sub-Class

Select to filter by a subclass. Property subclass is used to further categorize the property class. For instance, a *Building* can be a warehouse, an office building, a retail outlet, and so on. A *Site* can be a campus, a building site, empty land, and so on.

Note: Property subclass is related to property class. There is a parent-child relationship between the two. You cannot select a subclass without first selecting a property class.

Viewing My Lease Portfolio

This section provides an overview of My Lease Portfolio and discusses how to:

- View My Lease Portfolio.
- Personalize the My Lease Portfolio pagelet.

Pages Used to View My Lease Portfolio

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My Lease Portfolio pagelet	RE_MYLEASES_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select My Lease Portfolio.	View a summary of leases you've added to your portfolio broken down by lease types and regions.

Page Name	Definition Name	Navigation	Usage
My Lease Portfolio	RE_MYPRTFL	Click the Region link to view all leases in that region.	Add or view leases in your portfolio.
Personalize My Lease Portfolio - Administration	RE_MYLEASES_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, My Lease Portfolio, Personalize My Lease Portfolio - Administration	Define default display information for the My Lease Portfolio pagelet.

Understanding My Lease Portfolio

The My Lease Portfolio pagelet is summarized by the lease type—payables, receivable, and sublease. You can view the total number of leases for each lease type and region, the total area of all leases of that region by lease type, and the average life or the sum of all the leases term divided by total number of leases in a region. The total rented area is shown in 000s (rounded to thousands).

Note: This pagelet displays only leases that you add to your portfolio; otherwise this pagelet is blank.

My Lease Portfolio Pagelet

Use the My Lease Portfolio pagelet page (RE_MYLEASES_PGLT) to view a summary of leases you've added to your portfolio broken down by lease types and regions.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select My Lease Portfolio.

Leases Displays the number of leases in your portfolio by lease type and region.

Area Rented (x1000) (area rented in thousands) Displays the total rented area of all leases for that region by lease type.

Avg. Life (Yrs) (average life in years) Displays the sum of all the lease terms divided by total number of leases in a region. This is displayed in thousands.

Personalizing the My Lease Portfolio Pagelet

Use the Personalize My Lease Portfolio - Administration page (RE_MYLEASES_PRS) to define default display information for the My Lease Portfolio pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, My Lease Portfolio, Personalize My Lease Portfolio - Administration

Image: Personalize My Lease Portfolio - Administration page

This example illustrates the fields and controls on the Personalize My Lease Portfolio - Administration page. You can find definitions for the fields and controls later on this page.

Personalize My Lease Portfolio - Administration

User ID: VP1 Kenneth Schumacher

Filter Criteria

Business Unit <input type="radio"/> User Preferences <input checked="" type="radio"/> Specify <input type="text" value="US001"/>	Region <input checked="" type="radio"/> User Preferences <input type="radio"/> Specify <input type="text"/>
Lease Status <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Disputed <input checked="" type="checkbox"/> Expired <input checked="" type="checkbox"/> Holdover <input checked="" type="checkbox"/> Closed	Unit of Measure <input type="radio"/> User Preferences <input checked="" type="radio"/> Specify <input type="text" value="Square Feet"/>
Obligation Type <input type="text"/>	

Business Unit

User Preferences

Select to have the system display leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify

Select to have the system display leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Region

User Preferences

Select to have the system display leases for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display leases from a region other than the region that is specified in your user preferences on the Lease

Administration - User Preferences page. If you select Specify, you must enter a region value.

Lease Status

Select to filter by one or more lease statuses.

Unit of Measure

User Preferences

Select to have the system display the area rented in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display the area rented in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Obligation Type

Select to filter by a specific obligation type. Values are: *Receivable Lease*, *Payable Lease*, or *Sub-Lease*.

Viewing Lease Revenue

This section provides an overview of lease revenue and discusses how to:

- View lease revenue.
- Personalize the Lease Revenue pagelet.

Pages Used to View Lease Revenue

Page Name	Definition Name	Navigation	Usage
Lease Revenue pagelet	RE_LEASESREV_P	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Revenue.	View revenues from receivables leases summarized by regions.
Personalize Lease Revenue - Administration	RE_LEASEREV_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Revenue, Personalize Lease Revenue - Administration	Define default information for the Lease Revenue pagelet.

Understanding Lease Revenue

The Lease Revenue pagelet summarizes the revenue from receivable leases that are in the status of *Processed* in the transaction queue. The revenue includes the recurring and nonrecurring transactions for a lease. The information is summarized by region and the amounts are rounded to the thousands. The system uses the user personalization settings for unit of measure to calculate area and the currency to display the results.

Viewing Lease Revenue

Use the Lease Revenue pagelet page (RE_LEASESREV_P) to view revenues from receivables leases summarized by regions.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Lease Revenue.

Region

Displays the region. Click to access the Payment Transaction page. The system passes the current filter values through to the page so that the transaction totals match the amounts that are in the pagelet.

Amount (x1000) (amount in thousands)

Displays the revenue from receivables lease in a region. The amount that the system displays is based on the filters that you select on the Personalize Lease Revenue - Administration page.

Revenue per Rent Sq. ft. (revenue per rentable square foot)

Displays the average rent revenue per unit of measure of rentable area. This is calculated as (Total lease revenue of all receivable leases) ÷ (Rentable area on all receivable leases). The unit of measure is based on the value selected on the Personalize Lease Revenue - Administration page. The system uses the currency from the Personalize Lease Revenue - Administration page.

Revenue per Total Sq. ft. (revenue per total square foot)

Displays the average revenue per unit of measure of total area. This is calculated as (Total lease revenue of all receivable leases) ÷ (Total area on all receivable leases). The unit of measure is based on the value selected on the Personalize Lease Revenue - Administration page.

Personalizing the Lease Revenue Pagelet

Use the Personalize Lease Revenue - Administration page (RE_LEASEREV_PRS) to define default information for the Lease Revenue pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Revenue, Personalize Lease Revenue - Administration

Image: Personalize Lease Revenue - Administration page

This example illustrates the fields and controls on the Personalize Lease Revenue - Administration page. You can find definitions for the fields and controls later on this page.

Personalize Lease Revenue - Administration

User ID: VP1 Kenneth Schumacher

Filter Criteria

Business Unit <input type="radio"/> User Preferences <input checked="" type="radio"/> Specify US001	Calendar *Calendar Monthly Prior Periods 100
Currency <input type="radio"/> User Preferences <input checked="" type="radio"/> Specify USD	Region <input checked="" type="radio"/> User Preferences <input type="radio"/> Specify
Transaction Group <input checked="" type="checkbox"/> Base Rent <input checked="" type="checkbox"/> Operating Expense <input checked="" type="checkbox"/> Percent Rent <input checked="" type="checkbox"/> Miscellaneous Rent <input checked="" type="checkbox"/> Manual Fee	Unit of Measure <input type="radio"/> User Preferences <input checked="" type="radio"/> Specify Square Feet
Lease Type *	

Business Unit

User Preferences

Select to have the system display revenue for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify

Select to have the system display revenue for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Calendar

The Administrator sets the maximum number of periods worth of data that will appear.

Calendar

Enter the calendar that the system uses to calculate the TimeSpan for which data is summarized in the pagelet. The

system uses this value in combination with the value in the Prior Periods field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and 2 for prior periods, the system populates the pagelet data for the previous two months.

Prior Periods

Specify the number of prior accounting periods from current period to be included in the calculation

Currency**User Preferences**

Select to have the system display the revenue from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display revenue from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a currency value.

Region**User Preferences**

Select to have the system display lease revenue for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify

Select to have the system display lease revenue from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Transaction Group

Select to filter by one or more transaction groups.

Unit of Measure**User Preferences**

Select to have the system display lease revenue in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display the revenue in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

Viewing Lease Costs

This section provides an overview of lease costs and discusses how to:

- View a summary of lease costs.
- Personalize the Lease Costs pagelet.

Pages Used to View Lease Costs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Lease Costs	RE_LEASECOST_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Costs.	View a summary of the costs of maintaining PeopleSoft Payables leases.
Payment Transactions	RE_TXN_MANAGER	Click the Region link to view the transaction queue. The data on this page is summarized on the Lease Cost pagelet.	Displays the details that make up the summary of costs for maintaining payables leases.
Personalize Lease Costs - Administration	RE_LEASECOST_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Costs, Personalize Lease Costs - Administration	Define default display information for Lease Costs pagelet.

Understanding Lease Costs

The Lease Costs pagelet is a summary of the costs of maintaining payables leases. Lease costs include the recurring and nonrecurring transactions for a lease. The information is summarized by region and the amounts are rounded to the thousands. The system uses the user personalization settings for unit of measure to calculate area and the currency to display the results.

Lease Costs Pagelet

Use the Lease Costs pagelet (RE_LEASECOST_PGLT) to view a summary of the costs of maintaining PeopleSoft Payables leases.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Lease Costs.

Region	Displays the region. Click to access the Payment Transactions page. The system passes the current filter values through to the page so that the transaction totals match the amounts that are in the pagelet.
Amount (x1000) (amount in thousands)	Displays the costs from payables leases in a region. The amount that the system displays is based on the filters that you select on the Personalize Lease Cost - Administration page.
Cost per Rent Sq. ft. (cost per rentable square foot)	Displays the average cost per unit of measure of rentable area. This is calculated as <i>(Lease cost of all payable leases) ÷ (Rentable area on all payable leases)</i> where the unit of measure is based on the value selected on the Personalize Lease Cost - Administration page.
Cost per Total Sq. ft. (cost per total square feet)	Displays the average cost per unit of measure of total area. This is calculated as <i>(Total lease cost of all payable leases) ÷ (Total area on all payable leases)</i> where the unit of measure is based on the value selected on the Personalize Lease Cost - Administration page.

Personalizing the Lease Cost Pagelet

Use the Personalize Lease Costs - Administration page (RE_LEASECOST_PRS) to define default display information for Lease Costs pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Costs, Personalize Lease Costs - Administration

Image: Personalize Lease Costs - Administration page

This example illustrates the fields and controls on the Personalize Lease Costs - Administration page. You can find definitions for the fields and controls later on this page.

Business Unit

User Preferences

Select to have the system display costs for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify

Select to have the system display costs for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Calendar

Calendar

Enter the calendar that the system uses to calculate the TimeSpan for which data is summarized in the pagelet. The system uses this value in combination with the value in the Prior Periods field to specify the start and end date filters for

pagelet data. For example, if you enter *Monthly* for calendar and 2 for prior periods, the system populates the pagelet data for the previous two months.

Prior Periods

Specify the number of prior accounting periods from current period to be included in the calculation.

Currency**User Preferences**

Select to have the system display the costs from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display costs from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a currency value.

Region**User Preferences**

Select to have the system display lease costs for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify

Select to have the system display lease costs from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Transaction Group

Select to filter by one or more transaction groups.

Unit of Measure**User Preferences**

Select to have the system display lease costs in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display the revenue in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

Viewing Lease Statistics

This section provides an overview of lease statistics and discusses how to:

- View lease statistics.
- Personalize the Lease Statistics pagelet.

Pages Used to View Lease Statistics

Page Name	Definition Name	Navigation	Usage
Lease Statistics pagelet	RE_LEASEOPT_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Statistics.	View the ratio of total area, usable area and area actually rented, summarized by region. You can navigate to Lease Maintenance search page to see the list of leases for the region selected.
Personalize Lease Statistics - Administration	RE_LEASEOPT_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Statistics, Personalize Lease Statistics - Administration	Define default information for the Lease Statistics pagelet.

Understanding Lease Statistics

The Lease Statistics pagelet lists the ratio of total area, usable area and rented area summarized by region. You can navigate to the Lease Maintenance search page to see the list of leases of the region clicked.

The information displayed is summarized by region. You can view the total area data, usable area, and rented area specified by your personalization filters. The total area is the sum of the total area of the filtered leases by region; usable area is the sum of total usable area of the filtered leases; and rented area displays the total rented area of the filtered leases. All the area calculations are in 000s (rounded to thousands). Clicking the Region link takes you to the Lease Maintenance search page, which lists all of the filtered leases for that region.

Lease Statistics Pagelet

Use the Lease Statistics pagelet (RE_LEASEOPT_PGLT) to view the ratio of total area, usable area and area actually rented, summarized by region.

You can navigate to Lease Maintenance search page to see the list of leases for the region selected.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Lease Statistics.

Region	Displays the region. Click to access the Lease Maintenance search page, which lists all of the filtered leases for that region.
Total Area	Displays the sum of the total area of the leases by region.
Rentable	Displays the sum of the total rental area of the leases by region.
Usable	Displays the sum of the total usable area of the leases by region.

Personalize Lease Statistics - Administration Pagelet

Use the Personalize Lease Statistics - Administration pagelet (RE_LEASEOPT_PRS) to define default information for the Lease Statistics pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Statistics, Personalize Lease Statistics - Administration

Image: Personalize Lease Statistics - Administration page

This example illustrates the fields and controls on the Personalize Lease Statistics - Administration page. You can find definitions for the fields and controls later on this page.

Personalize Lease Statistics - Administration

User ID: VP1 Kenneth Schumacher

Filter Criteria

Business Unit <input type="radio"/> User Preferences <input checked="" type="radio"/> Specify <input type="text" value="US001"/>	Unit of Measure <input type="radio"/> User Preferences <input checked="" type="radio"/> Specify <input type="text" value="Square Feet"/>
Lease Status <input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Disputed <input checked="" type="checkbox"/> Expired <input checked="" type="checkbox"/> Holdover <input checked="" type="checkbox"/> Closed	Lease Type <input type="text" value="Retail Location"/>
Region <input checked="" type="radio"/> User Preferences <input type="radio"/> Specify <input type="text"/>	User Assigned Lease Administrator <input type="text"/> Portfolio Manager <input type="text"/>
Lease Obligation <input checked="" type="radio"/> Payables <input type="radio"/> Receivables	

Business Unit

User Preferences

Select to have the system display the area for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify

Select to have the system display the area for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Unit of Measure

User Preferences

Select to have the system display the area in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display the area in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select Specify, you must select a unit of measure value.

Lease Status

Select to filter by one or more lease statuses. If you do not select any statuses, then no data appears in the pagelet.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

User Assigned

Lease Administrator and Portfolio Manager

Select to filter by specific lease administrator or portfolio manager.

Region

User Preferences

Select to have the system display the area for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify

Select to have the system display the area from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Lease Obligation

Select Payables or Receivables to display the total, rentable, and usable area in the pagelet for the payables leases or the receivables leases.

Viewing Lease Optimization

This section provides an overview of lease optimization and discusses how to:

- View lease optimization.
- Personalize the Lease Optimization pagelet.

Pages Used to View Lease Optimization

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Lease Optimization pagelet	RE_LSOPTIMIZE_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select Lease Optimization.	View the ratio of subleasing with respect to total leased area and the ratio of recovery of lease cost by subleasing activity.
Lease Cost - <Region>	RE_LSCOSTS_DTL	Click a lease cost link in the Lease Optimization pagelet.	View the details for the summary of costs for payables leases.
Sublease Revenue - <Region>	RE_SUBLSREV_DTL	Click a sublease revenue link in the Lease Optimization pagelet.	View the details for the summary of sublease revenues.
Personalize Lease Optimization - Administration	RE_LSOPTIMIZE_PRS	Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Optimization, Personalize Lease Optimization - Administration	Define default information for the Lease Optimization pagelet.

Understanding Lease Optimization

The Lease Optimization pagelet summarizes the costs of maintaining payables leases and the revenues from subleasing activity. It also provides information on the subleasing ratio and cost recovery ratio. The subleasing ratio is the ratio of subleased area to the total area of subleased payables leases. The cost recovery ratio is the ratio of sublease revenue to the costs of subleased payables leases. Lease costs include the recurring and nonrecurring transactions for all payables leases which are subleased and sublease revenue includes recurring and nonrecurring transactions from subleasing.

You can view the lease cost, sublease revenue, sublease ratio, and cost recovery ratio based on your personalization filters. The system displays the information summarized by region. The lease cost and sublease revenue are in the thousands. You can click a lease cost to transfer to the Lease Cost page on which you can view all of the filtered leases for the region row that you select. You can click a sublease

revenue to access the Sublease Revenue page on which you can view all of the filtered leases from the region row that you select.

Viewing Lease Optimization

Use the Lease Optimization pagelet page (RE_LSOPTIMIZE_PGLT) to view the ratio of subleasing with respect to total leased area and the ratio of recovery of lease cost by subleasing activity.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select Lease Optimization.

Lease Cost (x1000)	Displays the sum of recurring and nonrecurring financial terms for all payables leases that have sublease activity. The system displays the amount based on all of the filters defined on the Personalize Lease Optimization - Administration page. The system includes processed transactions for this pagelet.
Sublease Revenue (x1000)	Sum of recurring and nonrecurring financial terms for subleases. The amount will be subject to all the filters defined. The system displays the amount based on all of the filters defined on the Personalize Lease Optimization - Administration page. The system includes processed transactions for this pagelet.
Sublease Ratio	Displays the sublease ratio that is calculated as $(\text{Total area of all subleases}) \div (\text{Total area of all payable leases that are subleased})$.
Cost Recovery Ratio	Displays the cost recovery ratio that is calculated as $(\text{Sublease revenue}) \div (\text{Lease cost})$.

Personalizing the Lease Optimization Pagelet

Use the Personalize Lease Optimization - Administration page (RE_LSOPTIMIZE_PRS) to define default information for the Lease Optimization pagelet.

Navigation

Set Up Financials/Supply Chain, Pagelets, Asset Lifecycle Management, Real Estate Management, Portal Pack Defaults, Lease Optimization, Personalize Lease Optimization - Administration

Image: Personalize Lease Optimization - Administration page

This example illustrates the fields and controls on the Personalize Lease Optimization - Administration page. You can find definitions for the fields and controls later on this page.

Personalize Lease Optimization - Administration

User ID: VP1 Kenneth Schumacher

Filter Criteria

Business Unit

☐ User Preferences

☒ Specify US001

Calendar ID

*Calendar Monthly

Prior Periods 100

Transaction Group

☒ Base Rent

☒ Operating Expense

☒ Percent Rent

☒ Miscellaneous Rent

☒ Manual Fee

Currency

☐ User Preferences

☒ Specify USD

Region

☒ User Preferences

☐ Specify

Business Unit

User Preferences

Select to have the system display values for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.

Specify

Select to have the system display the values for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a business unit value.

Calendar ID

Calendar

Enter the calendar that the system uses to calculate the TimeSpan for which data is summarized in the pagelet. The system uses this value in combination with the value in the Prior Periods field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and 2 for prior periods, the system populates the pagelet data for the previous two months.

Prior Periods

Specify the number of prior accounting periods from current period to be included in the calculation.

Transaction Group

Select to filter by one or more transaction groups. .

Currency**User Preferences**

Select to have the system display the values from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.

Specify

Select to have the system display the values from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a currency value.

Region**User Preferences**

Select to have the system display values for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Specify

Select to have the system display values from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Viewing My Tasklist

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

- View your tasklist.
- View your critical dates.

Pages Used to View My Tasklist

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
My Tasklist pagelet	RE_MYTASKS_PGLT	Click the Personalize Content link on the PeopleSoft homepage. Select My Tasklist.	View a summary of all critical dates for a specific user.

Page Name	Definition Name	Navigation	Usage
My Critical Dates	RE_OPT_RECIP	Click the link in the Options column on the My Tasklist page.	View all leases with the specified lease option within the supplied date range.

Understanding the Tasklist

You can view a summary of all critical dates assigned to you. This pagelet displays the details and the critical date assignments summarized into incremental timelines. The option column shows the different types of lease options with critical dates assigned. This column provides a link enabling you to drill down into the Lease Maintenance search page showing all the leases and the selected lease options by lease and timeline.

My Tasklist Pagelet

Use the My Tasklist pagelet page (RE_MYTASKS_PGLT) to view a summary of all critical dates for a specific user.

Navigation

Click the Personalize Content link on the PeopleSoft homepage.

Select My Tasklist.

Option

Displays the different types of lease options with critical dates assigned.

Urgent

Displays the count of lease options with critical dates that fall within this timeline (0 - 7 days from report date). You can click the number link to view the lease options that require action.

30 Days

Displays the count of lease options with critical dates that fall within this timeline (8 - 59 Days from report date). You can click the number link to view the lease options that require action.

60 Days

Displays the count of lease options with critical dates that fall within this timeline (60 - 89 Days from report date). You can click the number link to view the lease options that require action.

90 Days

Displays the count of lease options with critical dates that fall within this timeline (90 Days + from report date). You can click the number link to view the lease options that require action.

My Critical Dates Page

Use the My Critical Dates page (RE_OPT_RECIP) to view all leases with the specified lease option within the supplied date range.

Navigation

Click the link in the Options column on the My Tasklist page.

Image: My Critical Dates page

This example illustrates the fields and controls on the My Critical Dates page. You can find definitions for the fields and controls later on this page.

My Critical Dates

Name: Kenneth Schumacher

Search Criteria

Date From: 01/01/2009 To: 10/30/2009

Lease Number:

Lease Option:

Critical Date Status: ☐ Show Completed Tasks

Search Results Customize | Find | First 1-6 of 6 Last

Task Complete	Option Date	Option Name	Lease Name	Critical Date Status	Date Completed	Role	Message Text
<input type="checkbox"/>	07/15/2009	1st Renewal Option	13307 Elm Street	Active		SVP Real Estate	Notice Date For 1st Renewal Option
<input type="checkbox"/>	07/15/2009	1st Renewal Option	5000 Yellowstone Parkway	Active		SVP Real Estate	Notice Date For 1st Renewal Option
<input type="checkbox"/>	07/15/2009	1st Renewal Option	417 Rue Madeleine	Active		SVP Real Estate	Notice Date For 1st Renewal Option
<input type="checkbox"/>	07/15/2009	1st Renewal Option	67-5 Rue de la Chamonix	Active		SVP Real Estate	Notice Date For 1st Renewal Option
<input type="checkbox"/>	07/15/2009	2nd Renewal Option	67-5 Rue de la Chamonix	Active		SVP Real Estate	Notice Date for 2nd Renewal Option
<input type="checkbox"/>	01/01/2009	3rd Renewal Option	775 Boulevard Volterre	Active		SVP Real Estate	3rd Renewal Option

Date From and To

Select to filter lease options by the date range. You can view all lease options that fall within that date range.

Lease Option

Select to filter by lease options. You can view all critical dates associated with that option.

Critical Date Status

Select to view active or inactive statuses for that critical date.

Show Completed Tasks

Select to display all tasks you've marked completed.

Task Complete

Select to mark the task as complete for the option. By selecting the task as complete, you can filter your search to view only tasks that require action.

Note: This is not part of PeopleSoft Workflow. This enables you to keep track of actions you have taken with the lease options.

Option Date

Display the lease option expiration date. Any action required for this option needs to occur prior to this date.

Lease Name

Click the link to view all lease options associated with the lease. This link takes you to the Options page in the Maintain Lease component.

Date Completed

Displays the date the you completed the task. When you mark a task complete, the system populated this field with the date you completed the task.

Understanding PeopleSoft Supply Chain Portal Pack Pagelets

Understanding PeopleSoft Supply Chain Portal Pack Pagelets

This topic presents a table containing the PeopleSoft Supply Chain Portal Pack pagelets.

PeopleSoft Supply Chain Management Portal Pack Pagelets Overview

This table lists the pagelets that comprise the PeopleSoft Supply Chain Portal Pack, and identifies:

- The functional role of individual using the pagelet.
- The audience for the pagelet: employees, or customers.
- The usage of the pagelet.
- The enabling application.

(The enabling application provides the data that appears in the pagelet.)

Note: When combined with employee in the audience column, the customer refers only to a broker user, who is an external customer who conducts business on behalf of other customers, and does not refer to an individual consumer.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Availability (CDT_AVAIL_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	PeopleSoft Order Management
Buying Agreements (CDT_SCONSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays buying agreements. Employees can navigate into buying agreement details.	PeopleSoft Order Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Current Product Summary (CDT_PROD_SUM_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays information about the selected product, including the description. Employees can navigate to see detailed product information, view the list prices by inventory business unit, and check price and availability.	PeopleSoft Order Management.
Customer Notes (CDT_CUSTNOTE_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays notes that are assigned to a customer.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.
Customer Promotions Calendar (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	Lists customer promotions and promotion details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, customer ID, customer name, and dates). Note: In the three-column format, the description and customer name columns don't appear on the pagelet.	PeopleSoft Promotions Management
Customer Search (CDT_CUST_SRCH_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Enables employees to search for existing customers to populate the additional pagelets with customer data.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Discretionary Funding Status (TD_MY_CHECKBOOK)	Broker, Salesperson.	Employee	Displays available discretionary fund total amounts (from top down funds and accrual funds) for which a user is authorized for a given period, as well as the amounts that are committed, planned, spent, and returned against all discretionary funds. Note: This pagelet is only available in the two column format.	PeopleSoft Promotions Management
Discretionary Funding Status — Details by Fund pagelet TD_DISC_FUND_STAT)	Broker, Salesperson.	Employee	Displays available discretionary fund details (from top down funds and accrual funds) for each fund for which a user is authorized for a given period, as well as the amounts that are committed, planned, spent, and returned against these discretionary funds.	PeopleSoft Promotions Management.
Discretionary Funding Status — Fund Details by Customer and Promotion pagelet (TD_FUND_STAT_DTLS)	Broker, Salesperson.	Employee	Displays available discretionary fund total amounts by customer and promotion for a specific fund for which a user is authorized, as well as the amounts that are committed, planned, spent, and returned against this discretionary fund. Note: This pagelet is only available in the two column format.	PeopleSoft Promotions Management.
Expiring Buying Agreements (CDT_SCONDT_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	PeopleSoft Order Management

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Invoice Summary (CDT_INVCSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays summarized invoice information. Employees can navigate into invoice details.	PeopleSoft Billing.
Last 10 Product Purchases (CDT_RECPROD_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays the last ten purchases for a customer. Employees can navigate to see order and product information.	PeopleSoft Order Management
Last 10 Shipments (CDT_RECSHIP_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays the last ten shipments for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management
Most Recent Bills	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click View All Bills to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing
Most Recent Consolidated Bills (WC_BILL_LIST_CSS)	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
My Promotions (MY_PROMO_PGLT, MY_PROMO_PGLTW)	Broker, Salesperson	Employee	<p>Displays all customer promotions and national allowances for the user with promotion details (promotion description, status, customer name, and first and last order dates).</p> <hr/> <p>Note: In the three-column format, first order and last order date columns don't appear and the customer ID displays on the pagelet instead of the customer name.</p> <hr/>	PeopleSoft Promotions Management
Nat'l Allow & Promo Calendar (National Allowance and Promotional Calendar) (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	<p>Lists national allowance and customer promotion details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, customer ID, customer name and dates).</p> <hr/> <p>Note: In the three-column format, the description and customer name columns don't appear on the pagelet.</p> <hr/>	PeopleSoft Promotions Management
National Allowances Calendar (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	<p>Lists national allowance details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, and dates).</p> <hr/> <p>Note: In the three-column format, the promotion description column does not appear on the pagelet.</p> <hr/>	PeopleSoft Promotions Management

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Planned Promotional Funds (TD_PLAN_PROMO_FUND)	Broker, Salesperson.	Employee	Displays the promotion description, customer ID, promotion costs (fixed and variable), net incremental sales, and return on investment for all promotions the user is authorized to that are not canceled, closed, or customer approved. Note: This pagelet is only available in the two column format.	PeopleSoft Promotions Management
Product Alternates (CDT_PALT_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays alternates for a product. Employees can navigate to view product information.	PeopleSoft Order Management
Product Notes (CDT_PRODNOTE_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson	Employee, Customer	Displays notes that are assigned to a product.	PeopleSoft Order Management
Product Sales (TD_PRODUCT_SALES, TD_PRODUCT_SALESW)	Broker, Salesperson, Sales Manager, Customer Service Representative	Employee	Displays in graphic format the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products that the user is authorized for on the PeopleSoft Promotions Management active product tree.	PeopleSoft Promotions Management
Product Search (CDT_PROD_SRCH_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson	Employee, Customer	Enables employees to search for existing products to populate the additional pagelets with product data.	PeopleSoft Order Management
Product Specifications (CDT_PSPECS_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson	Employee, Customer	Displays product specifications for a product.	PeopleSoft Order Management

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Recent Conversations (CDT_CONVSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add new conversations.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft eBill Payment, PeopleSoft Billing, or PeopleSoft Receivables.
Recent Orders (CDT_ORDSUM)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent orders. Employees can navigate into order details.	PeopleSoft Order Management
Recent Quotes (CDT_QUOTESUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent quotes. Employees can navigate into quotation details.	PeopleSoft Order Management
Recent RMAs (CDT_RMASUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent quotes. Employees can navigate into RMA details.	PeopleSoft Order Management
Review Promotions (REVIEW_PROMO_PGLT, REVIEW_PROMO_PGLTW)	Broker, Salesperson	Employee	<p>Displays all customer promotions and national allowances for the user with promotion details (description, status, customer ID, entered on date, contact ID, calendar code and promotion period).</p> <hr/> <p>Note: In the three-column format, contact ID, calendar code and promotion period columns don't appear on the pagelet.</p> <hr/>	PeopleSoft Promotions Management
Sales History by Customer (TD_SALES_HIST)	Broker, Salesperson, Sales Manager, Customer Service Representative	Employee	<p>Displays customers with the expected promotional sales amount from all promotions for the user, the actual sales amount for the current period, and the actual sales amount from the same period last year.</p> <hr/> <p>Note: This pagelet is only available in the two column format.</p> <hr/>	PeopleSoft Promotions Management

<i>Pagelet Name</i>	<i>Roles</i>	<i>Audience</i>	<i>Usage</i>	<i>Enabling Application(s)</i>
Schedule Past Due Date (CDT_PASTSHIP_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays schedules past the ship date for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management
Trade Promotions (CDT_PROMO_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	PeopleSoft Promotions Management

Using Employee-Facing Supply Chain Management (SCM) Pagelets

Using Employee-Facing Supply Chain Management (SCM) Pagelets

The PeopleSoft Supply Chain Portal Pack includes pagelets for use in the employee portal registry. This topic discusses:

- Identify pagelets by functional role.
- Personalize PeopleSoft Promotions Management pagelets.
- View promotions.
- View promotion fund information.
- View product sales.
- View customer information.
- View product information.

Note: Pagelets are documented in a Pagelets Used to <Task Description> table when they do not require extensive discussion.

Identifying Pagelets by Functional Role

PeopleSoft provides these employee-oriented role groupings as examples of how to organize pagelet access by function. This section discusses:

- Broker pagelets.
- Customer Service Manager and Customer Service Representative pagelets.
- Salesperson pagelets.
- Sales Manager pagelets.

Broker Pagelets

These pagelets enable brokers to view key information about customers and products and effectively manage promotions:

- Availability.
- Current Product Summary.
- Customer Promotions Calendar.
- Discretionary Funding Status.
- Discretionary Funding Status — Details by Fund.
- Discretionary Funding Status — Fund Details by Customer and Promotion.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar. (national allowance and promotions calendar)
- National Allowance Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specification.
- Review Promotions.
- Sales History by Customer.

Note: Brokers also use many of the customer service-oriented pagelets. Additional broker-oriented pagelets are discussed in the "Customer-Facing Supply Chain Management Pagelets" topic.

Customer Service Manager and Customer Service Representative (CSR) Pagelets

These pagelets enable customer service managers and representatives to view key information about customers and products and effectively manage promotions:

- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.

- Customer Notes.
- Customer Search.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Recent Orders.
- Recent Quotes.
- Recent RMAs (recent returned material authorizations).
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Salesperson's Pagelets

These pagelets enable salespersons to view key information about customers and products and effectively manage promotions:

- Availability.
- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.

- Customer Promotions Calendar.
- Customer Search.
- Discretionary Funding Status.
- Discretionary Funding Status — Details by Fund.
- Discretionary Funding Status — Fund Details by Customer and Promotion.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar. (national allow and promotions calendar)
- National Allowances Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications
- Recent Orders.
- Recent Quotes.
- Recent RMAs (returned material authorizations)
- Review Promotions.
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Sales Manager Pagelets

These pagelets enable sales managers to effectively manage promotions:

- Product Sales.
- Sales History by Customer.

Personalizing PeopleSoft Promotions Management Pagelets

This section discusses how to:

- Personalize Promotion Calendar Options.
- Personalize Promotions Portal Options.

Personalize Promotions Portal Calendar Page

Use the Personalize Promotions Portal Calendar page from the Customer Promotions Calendar pagelet, the National Allowance Calendar pagelet, or the Nat'l Allow and Promo Calendar pagelet to select personalization options for these pagelets.

Employees can decide what months they want to display on the calendar pagelets and what customer promotion and national allowance statuses they want to include in the calendar data.

This page is dynamic. The status fields that appear are different depending on the calendar pagelet from which you access this page.

Number of Calendars To Display

Select the number of calendars to display on the pagelet. This option allows you to display multiple calendars with different customization options.

Display Calendar

Select to display the calendar on the pagelet. If this option is not selected, the promotion and national allowance details are displayed without the calendar.

Starting Month

Select the starting month for the calendar pagelet. Options are:

- *Current Minus x Months:*

The system displays data on the calendar beginning with the current month minus the number of months that is entered in the x Months field.

- *Current Month:* (default)

The system displays data on the calendar beginning with the current month.

- *Current Plus x Months:*

The system displays data on the calendar beginning with the current month plus the number of months that is entered in the x Months field.

- *User Defined*

Use this option if you want the system to display the calendar by using a user-defined option. This option requires custom coding to enable the calendar to work with the user-defined option.

From Date

Select the promotion date that the system uses to determine if a promotion appears on the calendar. Options are:

- *First Arrival Date, First Order Date*
- *First Ship Date*

Through Date

Select the promotion date that the system uses to determine if a promotion appears on the calendar. Options are:

- *Last Arrival Date, Last Order Date*
- *Last Ship Date.*

Display

Select the number of months, one to six, to display for this calendar.

Customer Promotion Status

Select the customer promotion statuses for which you want to view data on the calendar.

This group box is available only when customizing the Customer Promotions Calendar pagelet or the Nat'l Allow & Promo Calendars pagelet.

National Allowance Status

Select the national allowance statuses for which you want to view data on the calendar.

This group box is available only when customizing the National Allowances Calendar pagelet or the Nat'l Allow & Promo Calendars pagelet.

Personalize Promotions Management Pagelet

Use the Personalize Promotions Management pagelet from the Review Promotions pagelet, the My Promotions pagelet, the Sales History by Customer pagelet, the Product Sales pagelet, the Discretionary Funding Status pagelet, or the Planned Promotional Funds pagelet to select personalization options for these pagelets.

Personalize Promotions Management Pagelet when accessed from the Discretionary Funding Status or Planned Promotional Funds pagelets.

Customer Promotion Status

Select the customer promotion statuses for which you want to view data on the My Promotions or Review Promotions pagelet.

National Allowance Status

Select the national allowance statuses for which you want to view data on the My Promotions or Review Promotions pagelet.

From Sales Calendar and Through Sales Calendar

Select a sales calendar from which and through which to display data on the Product Sales or Sales History by Customer pagelet.

Period

Select a period of time within the selected from and through sales calendar for which to display data on the Product Sales or Sales History by Customer pagelet.

Note: The default setID is used to determine the currency in which to display the data if one is not specified on this page. The default setID does not determine what promotional data is displayed because the user can view data from all setIDs for which they are authorized.

Viewing Promotions

This section discusses:

- My Promotions pagelet.
- Review Promotions pagelet.
- Customer Promotions Calendar.
- National Allowances Calendar.

Pagelets Used to View Promotions

Use the following pagelets to view promotional information.

<i>Pagelets</i>	<i>Usage</i>	<i>For More Information</i>
Customer Promotions Calendar	<p>Lists customer promotions and promotion details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, customer ID, customer name, first order, and last order).</p> <hr/> <p>Note: In the three-column format, the description and customer name columns don't appear on the pagelet.</p> <hr/>	
My Promotions	<p>Displays all customer promotions and national allowances for the user with promotion details as specified on the Personalize Promotions Management page (description, status, customer name, first order date, and last order date).</p> <hr/> <p>Note: In the three-column format, first order and last order date columns don't appear and the customer ID displays on the pagelet instead of the customer name.</p> <hr/>	

Pagelets	Usage	For More Information
National Allowances Calendar	<p>Lists national allowance details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, first order and last order dates).</p> <hr/> <p>Note: In the three-column format, the description column doesn't appear on the pagelet.</p> <hr/>	
Nat'l Allow & Promo Calendar (national allowances and promotions calendar)	<p>Lists national allowances and customer promotion details, in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, customer ID, customer name, first order and last order dates).</p> <hr/> <p>Note: In the three-column format, the description and customer name columns don't appear on the pagelet. In addition, the customer ID and customer name columns are not populated for a national allowance on the pagelet.</p> <hr/>	
Review Promotions	<p>Displays all customer promotions and national allowances for the user with promotion details as specified on the Personalize Promotions Management page (promotion, status, customer ID, entered on date, contact ID, calendar code, promotion period).</p> <hr/> <p>Note: In the three-column format, contact ID, calendar code and promotion period columns don't appear on the pagelet.</p> <hr/>	

Viewing Calendar Information

This section discusses:

- Customer Promotions Calendar pagelet.
- Nat'l Allow & Promo pagelet. (national allowance and promotions pagelet)
- National Allowance Calendar pagelet.

Customer Promotions Calendar Pagelet

Access the Customer Promotions Calendar pagelet.

Nat'l Allow & Promo Calendar (national allowance and promotions calendar) Pagelet

Access the Nat'l Allow & Promo Calendar pagelet.

National Allowances Calendar Pagelet

Access the National Allowances Calendar Pagelet

Viewing Promotion Fund Information

This section discusses:

- Discretionary Funding Status pagelet.
- Discretionary Funding Status - Details by Fund pagelet.
- Discretionary Funding Status - Fund Details by Customer and Promotion pagelet.
- Planned Promotional Funds pagelet.

Discretionary Funding Status Pagelet

Use the Discretionary Funding Status pagelet to display available discretionary fund total amounts for a period (from top down funds and accrual funds), as well as the amounts that are planned, committed, spent, and returned against all discretionary funds. Click on the View Details link to see detailed information about the amounts for specific funds.

Top Down Funds	Displays the total of all funds with a fund type of discretionary, a funding method of top down, and a status of approved.
Accrued Funds	Displays the total of all funds with a fund type of discretionary, a funding method of fixed accrual, rolling accrual, or zero-based accrual, and a status of approved.
Total Funds	Displays an amount, which is equal to Top Down Funds plus the Accrued Funds.
Planned	Displays the total of all customer promotions with statuses of planned, released, pending approval, management approved, customer canceled, closed and recalled.
Committed/Approved	Displays the total of all customer promotions with a status of customer approved.
Balance of Funds to Plan	Display an amount, which is equal to the Total Funds amount minus the Planned amount plus the Committed/Approved amount.
Total Spent	Displays the total of all off-invoice discounts that are given, all credits that are given, all deductions that are written off,

	all checks that are written, and all overhead costs that are accumulated for promotions against discretionary funds.
Total Return	Displays the total amount received against RMAs for promotions that are associated with discretionary funds.
Balance of Funds to Spend	Displays an amount, which is equal to the Total Funds amount minus the Total Spent amount plus the Total Return amount.

Note: This pagelet is only available in the two column format.

Discretionary Funding Status - Details by Fund Pagelet

Discretionary Funding Status - Details by Fund pagelet.

Total Funds	Displays the total amount budgeted for this fund.
Planned	Displays the total of all customer promotions for this fund with statuses of planned, released, pending, approval, management approved, customer canceled, closed, and recalled.
Committed/Approved	Displays the total amount of all customer promotions for this fund with a status of customer approved.
Balance of Funds to Plan	Displays an amount equal to the Total Funds amount minus the Committed/Approved amount plus the Planned amount.
Total Spent	Displays the total of all off-invoice discounts that are given, all credits that are given, all deductions that are written off, all checks that are written off, and all overhead costs that are accumulated for promotions against this discretionary fund.
Total Return	Displays the total amount received against RMAs for promotions that are associated with this discretionary fund.
Balance of Funds to Spend	Displays an amount equal to the Total Funds amount minus the Total Spent amount plus the Total Return amount.

Note: This pagelet is only available in the two column format.

Discretionary Funding Status - Fund Details by Customer and Promotion Pagelet

Discretionary Funding Status - Fund Details by Customer and Promotion pagelet.

Total Funds	Displays the total budgeted amount for the specific customer and fund.
Planned	Displays the total of all customer promotions for the specific fund and customer with statuses of planned, released, pending

	approval, management approved, customer canceled, closed, and recalled.
Committed/Approved	Displays the total of all customer promotions for the specific fund and customer with a status of customer approved.
Balance of Funds to Plan	Displays an amount equal to the Total Funds amount minus the Committed/Approved amount plus the Planned amount.
Total Spent	Displays the total of all off-invoice discounts that are given, all credits that are given, all deductions that are written off, all checks that are written off, and all overhead costs that are accumulated for promotions against this discretionary fund for the specific customer.
Total Return	Displays the total amount received against RMAs for promotions that are associated with the specific discretionary fund and customer.
Balance of Funds to Spend	Displays an amount equal to the Total Funds amount minus the Total Spent amount plus the Total Return amount.

Note: This pagelet is only available in the two column format.

Planned Promotional Funds Pagelet

Use the Planned Promotional Funds pagelet to display the promotion description, customer ID, promotion costs (fixed and variable), net incremental sales, and return on investment for all promotions that are not canceled, closed, or customer approved.

Note: This pagelet is only available in the two column format.

Viewing Product Sales

This section discusses:

- Product Sales pagelet.
- Sales History by Customer pagelet.

Viewing Product Sales Pagelets

Use the Product Sales pagelet to display, in bar chart format, the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products for which the user is authorized on the active product tree defined on the Promotions Options - General Options page in PeopleSoft Promotions Management. If returns have been received for the product, the returned amount is subtracted from the actual sales amount.

Related Links

"Understanding Sales Order Entry (*PeopleSoft FSCM 9.2: Order Management*)"

Sales History by Customer Pagelet

Access the Sales History by Customer pagelet.

Displays customers with the expected promotional sales amount from all promotions, the actual sales amount for the current period, and the actual sales amount from the same period last year. The expected promotional sales amount is the sum of all planned ship quantities multiplied by the product prices defined on the promotions. The actual sales amounts include all invoiced amounts for the customer, not just invoiced amounts for promotional activity, minus any returns received for the customer.

Note: This pagelet is only available in the two column format.

Viewing Customer Information

This section discusses:

- Buying Agreements.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Search.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Recent Orders.
- Recent Quotes.
- Recent RMAs.
- Schedules Past Ship Date.
- Trade Promotions.

Pagelets Used to View Customer Information

Use the following pagelets to view customer information.

Pagelet Name	Usage	For More Information
Buying Agreements	Displays buying agreements. Employees can navigate into buying agreement details.	See "Understanding Buying Agreements (<i>PeopleSoft FSCM 9.2: Order Management</i>)".
Customer Account Balances	Displays account balances for a customer.	See "General Information - Credit Profile - General Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Customer Aging	Displays customer aging information.	See "General Information - Credit Profile - General Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Customer Conversations	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add a new conversation.	See "Understanding Conversations (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Customer Notes	Displays notes that are assigned to a customer.	See "General Information - Notes Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Customer Search	Enables employees to search for existing customers to populate the additional pagelets with customer data.	See "Adding General Customer Information (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)". See .
Expiring Buying Agreements	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	See "Setting Up Buying Agreements (<i>PeopleSoft FSCM 9.2: Order Management</i>)".
Invoice Summary	Displays summarized invoice information. Employees can navigate into invoice details.	See "Standard Billing - Add a New Value Page (<i>PeopleSoft FSCM 9.2: Billing</i>)".
Last 10 Product Purchases	Displays the last 10 purchases for a customer. Employees can navigate to see order and product information.	See "Establishing Product Definitions (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Last 10 Shipments	Displays the last 10 shipments for a customer. Employees can navigate to see order and shipping information.	See "Maintaining Order Schedule Information (<i>PeopleSoft FSCM 9.2: Order Management</i>)".
Recent Orders	Displays recent orders. Employees can navigate into order details.	See "Understanding Sales Order Entry (<i>PeopleSoft FSCM 9.2: Order Management</i>)". See "Maintaining Header and Line Information (<i>PeopleSoft FSCM 9.2: Order Management</i>)". See "Maintaining Order Schedule Information (<i>PeopleSoft FSCM 9.2: Order Management</i>)".

Pagelet Name	Usage	For More Information
Recent Quotes	Displays recent quotes. Employees can navigate into quotation details.	See "Understanding Sales Order and Quotation EIPs in PeopleSoft Order Management (<i>PeopleSoft FSCM 9.2: Order Management</i>)".
Recent RMAs	Displays recent returns. Employees can navigate into RMA details.	See "Understanding Sales Order and Quotation EIPs in PeopleSoft Order Management (<i>PeopleSoft FSCM 9.2: Order Management</i>)".
Schedules Past Ship Date	Displays schedules that are past the ship date for a customer. Employees can navigate to see order and shipping information.	See "Maintaining Additional Order Schedule Information (<i>PeopleSoft FSCM 9.2: Order Management</i>)".
Trade Promotions	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	

Viewing Product Information

This section discusses:

- Availability.
- Current Product Summary.
- Product Alternates.
- Product Notes.
- Product Search.
- Product Specifications.

Pagelets Used to View Product Information

Use the following pagelets to view product information.

Pagelet Name	Usage	For More Information
Availability	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	See "Maintaining Order Schedule Information (<i>PeopleSoft FSCM 9.2: Order Management</i>)".

Pagelet Name	Usage	For More Information
Current Product Summary	Displays information about the product, including the description. Employees can navigate to see detail product information, view the list prices by inventory business unit, and check price and availability.	See "Establishing Product Definitions (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Product Alternates	Displays alternates for a product. Employees can navigate to view product information.	See "Attachments Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Product Notes	Displays notes that are assigned to a product.	See "Notes Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Product Search	Enables employees to search for existing products to populate the additional pagelets with product data.	See "Notes Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".
Product Specifications	Displays product specifications for a product.	See "Product Specifications Page (<i>PeopleSoft FSCM 9.2: Order to Cash Common Information</i>)".

Using Customer-Facing Supply Chain Management Pagelets

Using Customer-Facing Supply Chain Management Pagelets

The PeopleSoft Supply Chain Portal Pack includes pagelets for use in the customer portal registry. This topic discusses how to:

- View pagelets by functional role.
- View billing information.

Note: Pagelets are documented in a Pagelets Used to <Task Description> table when they do not require extensive discussion.

Pagelets by Functional Role

PeopleSoft provides these customer-oriented role groupings as examples of how to organize pagelet access by function.

This section discusses:

- Broker pagelets.
- Customer pagelets.

Note: The sample data contains customer and broker roles that you can use as examples for organizing access and security.

Broker Pagelets

These pagelets enable a broker, an external user who conducts business on behalf of customers, to effectively manage promotions and view customer billing information:

- Availability.
- Current Product Summary.
- Customer Promotions Calendar.
- Discretionary Funding Status.
- Most Recent Bills.

- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar.
- National Allowance Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Review Promotions.
- Sales History by Customer.

Note: Many of the broker-oriented pagelets are also used by customer service employees and are documented in the Employee-Facing Supply Chain Management Pagelets topic.

Related Links

[Identifying Pagelets by Functional Role](#)

Customer Pagelets

These pagelets enable customers to view billing information:

- Most Recent Bills.
- Most Recent Consolidated Bills.

Viewing Billing Information

This section discusses how to view billing information.

Pagelets Used to View Billing Information

Use the following pagelets to view billing information.

<i>Pagelet Name</i>	<i>Usage</i>	<i>For More Information</i>
Most Recent Consolidated Bills.	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	See "Understanding PeopleSoft eBill Payment Self-Service Transactions (<i>PeopleSoft FSCM 9.2: eBill Payment</i>)".
Most Recent Bills.	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click View All Bills to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	See "Viewing PeopleSoft eBill Payment Pagelets (<i>PeopleSoft FSCM 9.2: eBill Payment</i>)".

