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PeopleSoft

PeopleSoft FSCM 9.2: PeopleSoft Services Procurement

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PeopleSoft FSCM 9.2: PeopleSoft Services Procurement
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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.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help 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. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. 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 families 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 family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, 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: 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.

Typographical Convention	***Description***
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.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Typographical Convention	***Description***
⇒	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)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft FSCM Related Links

Oracle Help Center

Hosted Online Help

PeopleSoft Information Portal

My Oracle Support

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Keyword Search within Components " (Application Fundamentals) topic.

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

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Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

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in	Connect with PeopleSoft on LinkedIn

Chapter 1

Getting Started with PeopleSoft Services Procurement

Common Elements Used In Services Procurement

Field or Control	***Description***
Approver	An individual who views and approves requisitions, work orders, timesheets, progress logs, expenses, or invoices. This individual is usually the requester's manager.
Business Unit	Identification code that represents a high-level organization of business information. Use a business unit to define regional or departmental units within a larger organization.
Deliverables-Based Service	Deliverables-based requisitions and work orders that reflect requirements generally performed by an entire work force, such as an entire project, not just the hours worked by a single service provider.
Department	Department that generates the service requisition and work order.
Description	Can be brief text up to 10, 15, or 30 characters, or long text up to 254 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. This date also determines when you can view and change information. Pages and batch processes that use the information use the current row.
Invoice Date	Date the invoice was created.
Invoice Manager	Individual who has the authority to generate and manage invoices.
Invoice Number	Number assigned to invoice upon creation.
Line Number	Eligible lines associated with the requisition ID.

Field or Control	***Description***
Multi-Resource Based Service	Multi-resource requisitions and work orders combine the features of both deliverable- and resource-based services. This provides a high-level service that controls certain elements, such as the overall not to exceed amount, as well as separate but related individual child services for each of the specific services performed to accomplish the overall task.
Project	Project ID associated with the requisition line or work order.
Rate Sheet	Rate template that is defined and associated with a requisition line service and location code.
Requester	An individual within the enterprise who can create and manage service projects, activities, requisitions and work orders, view sourcing and bid and response information. This individual can also approve timesheets, progress logs, and expenses.
Requisition	Document used to request services for qualified service providers.
Resource-Based Service	Resource requisitions and work orders enable you to request the services of an individual service provider.
Run Control ID	An identifier that, when paired with the user ID, uniquely identifies the process you are running. In addition, it enables important parameters to be available for a process when it runs. This ensures that when a process runs in the background, it does not have to prompt you for any additional values. All parameters are stored within the system and associated with run control IDs and user IDs.
Scope of Work	Description of the work to be performed by the service provider.
Service	Identifies the job to be performed by the service provider who fills the position.
Service Coordinator	Individual working with both the requester and the supplier to fill the requisition request.
Service Provider	Candidate submitted to fill the work order.
Service Provider Contact	Individual submitting the qualified bid.
Service Provider Identifier	User-defined attributes that uniquely identify an individual service provider, such as passport number, driver's license number, or social security number.

Field or Control	***Description***
Service Provider Roster	List of active and inactive service providers associated with a service provider contact.
SetID	Identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define the company's structure and processing options.
Sourcing	Process used to send requisitions to suppliers in an effort to fill a requirement.
Status	Indicates whether a row in a table is *Active* or *Inactive.* You cannot display inactive rows on transaction pages or use them for running batch processes. The *Inactivate* value also enables you to maintain an audit trail of data you no longer use.
Supplier Network	Collection of one or more suppliers associated with a business unit that is involved in the services procurement process.
Services Template	Defines the time and progress reporting defaults for the structure and attributes to be used when entering time, expenses, and progress for the business unit.
User ID	System identifier for the individual who generates a transaction.
Visibility	Determines whether an activity is considered public or private. Private activities are not visible when non-involved parties view timesheet information.
Work Order	Specifies the basic terms and conditions of a project. This is also known as the Statement of Work.
✎	Navigates to the selected record in edit mode.

PeopleSoft Services Procurement Business Processes

PeopleSoft Services Procurement provides these business processes:

- Fulfillment facilitates the procurement process and provides the ability to capture role and skill specific requisitions, source the requisition to suppliers in the supplier network, and qualify and procure service providers.
- Administration enables management of the ongoing work process by providing project and activity definition and enabling service providers to log time and status information.

- Settlement extends services administration by providing a self-invoicing ability and creating invoices based on approved timesheets, progress logs, and expenses.
- Analytics runs interactive reports against a data mart. The reports analyze supplier information to help manage your services spend.

These business processes are discussed in the business process topics in this documentation.

Delivered User Roles

The PeopleSoft system delivers the following access for user roles:

See Maintaining Users and Team Setup.

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

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

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

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

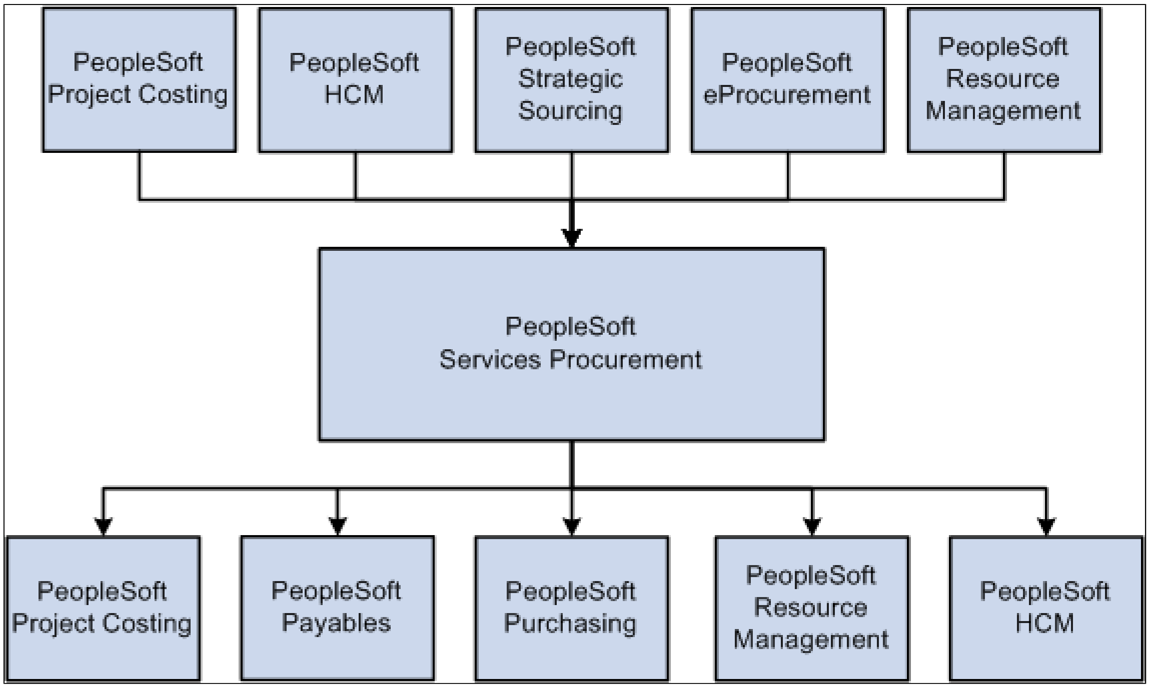
User Role	***Access***
Administrator continued	• Define suppliers by service. • Define supplier by region and service. • Define service provider identifiers. • Define requester user. • Register service coordinators. • Register provider contacts. • Register service providers. • Register Administrators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

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

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

PeopleSoft Services Procurement Integrations

PeopleSoft Services Procurement integrates with these PeopleSoft applications:



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

Integration considerations are discussed in the implementation set of topics in this documentation.

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

PeopleSoft Payables

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

See Integrating with Accounts Payables Applications.

PeopleSoft Project Costing

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

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

PeopleSoft Purchasing

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

See Integrating with PeopleSoft Purchasing.

PeopleSoft Resource Management

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

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

See Integrating With PeopleSoft Resource Management.

PeopleSoft Strategic Sourcing

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

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

PeopleSoft Human Capital Management

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

See Understanding PeopleSoft Services Procurement and Human Capital Management Integration.

PeopleSoft Services Procurement Implementation

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

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

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

Component	***Component Interface***	***Reference***
Competencies	RS_COM_COMPTNCY_TBL	See Maintaining Service Setup.
Project Costing Options	PROJECT_BU_OPTIONS	See Setting Up Business Unit Definitions.
Preferred Merchant	EX_MERCHANT_SETUP	See Maintaining Settlement Setup.
Expense Location	EX_LOCATION_SETUP	See Maintaining Settlement Setup.
Distance Rate	EX_AUTO_RATE_SETUP	See Maintaining Settlement Setup.
Add Suppliers	EM_VENDOR_CI	See Defining Service Supplier Setup.
Rate Sheet	SPB_RATESHEET	See Maintaining Service Setup
Requester Setup	REQUESTOR_TBL_CI	See Maintaining Users and Team Setup.

Other Sources of Information

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

see the product documentation for *PeopleTools: Component Interfaces*

Related Product Documentation

The *PeopleSoft Services Procurement 9.1 Documentation* provides you with implementation and processing information for your PeopleSoft Services Procurement system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of this documentation.

The following companion documentation contains information that applies specifically to PeopleSoft Services Procurement.

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

Chapter 2

Navigating in PeopleSoft Services Procurement

Navigating In PeopleSoft Services Procurement

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

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

Pages Used to Navigate in PeopleSoft Services Procurement

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

Define Services Procurement

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

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

Page Name	***Navigation***	***Usage***
Service Setup	Click Service Setup on the Define Services Procurement page.	Maintain service setup for requisitions and work orders
Competency Setup	Click Competency Setup on the Service Setup page.	Maintain competencies and associate them to a competency types and set IDs. Maintain rating models.
Rate Sheet Setup	Click Rate Sheet Setup on the Service Setup page.	Maintain rate sheets and rate sheet lists.
Service (Project Role) Setup	Click Service (Project Role) Setup on the Service Setup page.	Maintain services (project roles) and associated service types. Maintain experience values
Service Type Setup	Click Service Type Setup on the Service Setup page.	Maintain service types for both resource and deliverable services. Maintain Surveys by Service Type.
Survey Setup	Click Survey Setup on the Service Setup page.	Maintain response types, work order surveys and service types for a survey.
Tasks and Task Group Setup	Click Tasks and Task Group Setup on the Service Setup page.	Maintain logistical tasks and task groups for work orders and associate them to service types.
Service Supplier Setup	Click Service Supplier Setup on the Define Services Procurement page.	Define supplier as a services supplier.
Deliverable Service Setup	Click Deliverable Service Setup on the Service Supplier Setup page.	Maintain services, suppliers and regions for deliverable services.
Resource Service Setup	Click Resource Service Setup on the Service Supplier Setup page.	Maintain service types, suppliers and regions for resource services.
Settlement Setup	Click Settlement Setup on the Define Services Procurement page.	Maintain time and expense reporting, invoicing and other settlement options.
Invoicing Setup	Click Invoicing Setup on the Settlement Setup page.	Maintain payment terms and accounts payable interface.

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

Chapter 3

PeopleSoft Services Procurement Portal Pagelets

Understanding PeopleSoft Services Procurement Pagelets

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

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

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

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

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

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

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

Pagelet Security

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

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

Using Pagelets by Functional Role

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

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

- Requester
- Service Coordinator
- Approver

Related Links

Maintaining Users and Team Setup

Requester

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

Related Links

Requester Defaults Page

Service Coordinator

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

Related Links

Service Coordinator Defaults Page

Approver

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

Viewing and Using PeopleSoft Services Procurement Pagelets

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

Pages Used to View and Use PeopleSoft Services Procurement Pagelets

Available Services Procurement pagelets include:

- Interview Schedule pagelet.
- Recently Created Requisitions pagelet.

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

This table provides details on PeopleSoft Services Procurement pagelets.

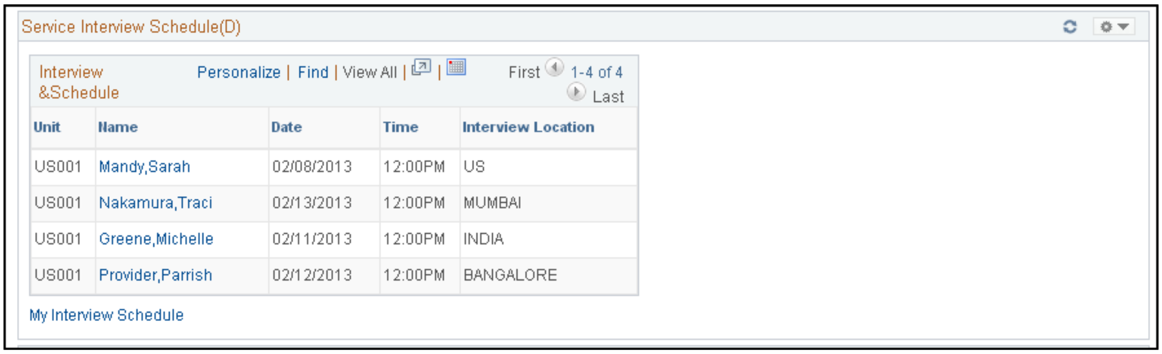
Pagelet Name	***Roles***	***Usage***
Service Interview Schedule	Requester	Provides a synopsis of the scheduled interviews. See Creating and Maintaining Interview Schedules.
Recent Service Requisitions (SPF_E_RCNTRQ)	Requester	Displays the five most recent requisitions that you created. See Understanding Requisitions.
Recent Service Work Orders (SPF_E_RCNTWO)	Requester, Service Coordinator	Displays the five most recent work orders requiring action with statuses of *Created, Submitted,* and *Approved.* See Understanding Services Work Orders.
Service Timesheets Approval (SPA_E_TIMAPR)	Requester, Approver	Displays the timesheets and amounts including expenses that are awaiting approval. See Understanding Time Management in PeopleSoft Services Procurement.

Pagelet Name	***Roles***	***Usage***
Service Progress Logs Approval (SPA_E_PLGAPR)	Requester, Approver	Displays progress logs that need approval if you are using a deliverables-based payment system. See Understanding Progress Logs.
Logistical Tasks (SPF_E_LGTASK)	Requester	Displays the five most recent activities that need to be completed before a work order can be released. See Viewing Logistical Tasks.
Service Expense Variance Chart (SPR_E_EXPLIM)	Requester, Service Coordinator	Provides a summary graph of total amount spent compared to total work order amount. This is listed in a bar chart by work order. See Understanding Settlements in PeopleSoft Services Procurement.
Service Supplier Headcount (SPR_E_SUPCNT)	Requester, Service Coordinator	Displays the top five suppliers by headcount in a graphical format. See Analyzing Service Provider Rosters.
Service Supplier Analysis (SPR_E_SUPANALYZ)	Service Coordinator	Provides a method to compare suppliers based upon supplier performance, service provider performance, and rate. See Analyzing Service Provider Performance.
Service Requisition Approval	Requester, Approver	Displays the requisitions that are awaiting approval. See Approving and Denying Requisitions.
Service Work Order Approval	Requester, Service Coordinator, Approver	Displays the work orders that are awaiting approval. See Submitting and Approving Work Orders.
Service Invoice Approval		Displays the invoices that are awaiting approval. See Approving Invoices.
Create New Time Sheet	Service Provider, Proxy	Allows creation of new timesheets.

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

Services Interview Schedule Pagelet

This example illustrates the fields and controls on the Interview Schedule pagelet.



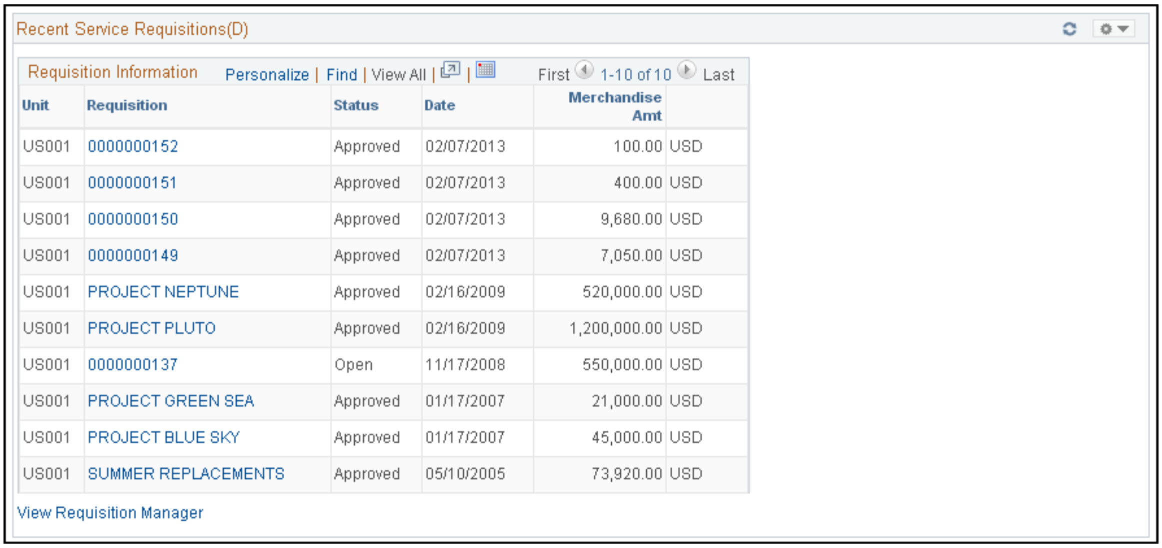
Unit	Name	Date	Time	Interview Location
US001	Mandy,Sarah	02/08/2013	12:00PM	US
US001	Nakamura,Traci	02/13/2013	12:00PM	MUMBAI
US001	Greene,Michelle	02/11/2013	12:00PM	INDIA
US001	Provider,Parrish	02/12/2013	12:00PM	BANGALORE

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

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

Recent Service Requisitions Pagelet.

This example illustrates the fields and controls on the Recent Service Requisitions pagelet.



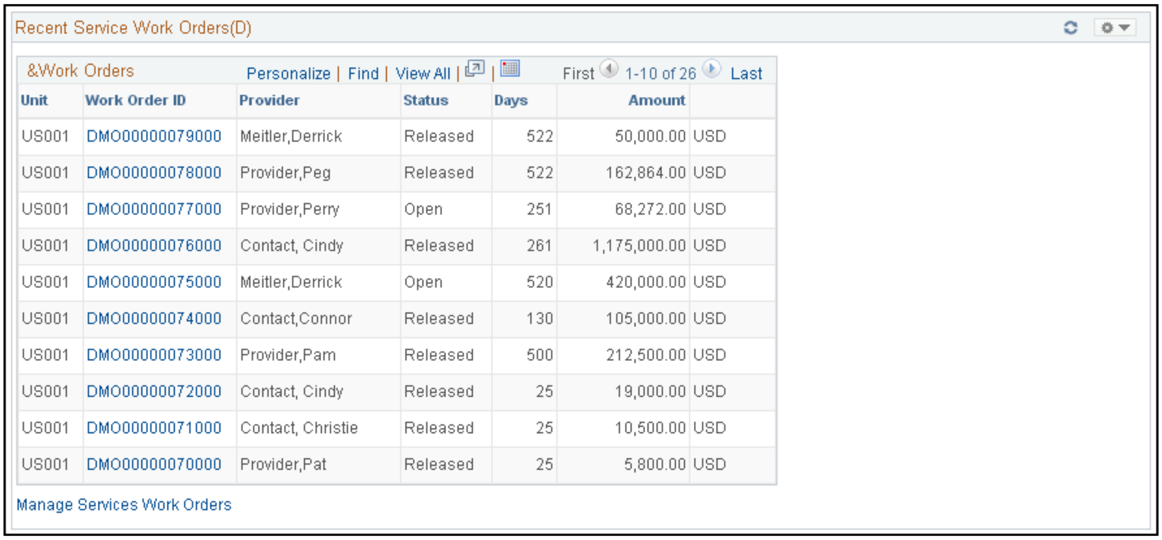
Unit	Requisition	Status	Date	Merchandise Amt	
US001	0000000152	Approved	02/07/2013	100.00	USD
US001	0000000151	Approved	02/07/2013	400.00	USD
US001	0000000150	Approved	02/07/2013	9,680.00	USD
US001	0000000149	Approved	02/07/2013	7,050.00	USD
US001	PROJECT NEPTUNE	Approved	02/16/2009	520,000.00	USD
US001	PROJECT PLUTO	Approved	02/16/2009	1,200,000.00	USD
US001	0000000137	Open	11/17/2008	550,000.00	USD
US001	PROJECT GREEN SEA	Approved	01/17/2007	21,000.00	USD
US001	PROJECT BLUE SKY	Approved	01/17/2007	45,000.00	USD
US001	SUMMER REPLACEMENTS	Approved	05/10/2005	73,920.00	USD

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

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

Recent Work Orders Pagelet.

This example illustrates the fields and controls on the Recent Service Work Orders pagelet.



Unit	Work Order ID	Provider	Status	Days	Amount	
US001	DMO00000079000	Meitler,Derrick	Released	522	50,000.00	USD
US001	DMO00000078000	Provider,Peg	Released	522	162,864.00	USD
US001	DMO00000077000	Provider,Perry	Open	251	68,272.00	USD
US001	DMO00000076000	Contact, Cindy	Released	261	1,175,000.00	USD
US001	DMO00000075000	Meitler,Derrick	Open	520	420,000.00	USD
US001	DMO00000074000	Contact,Connor	Released	130	105,000.00	USD
US001	DMO00000073000	Provider,Pam	Released	500	212,500.00	USD
US001	DMO00000072000	Contact, Cindy	Released	25	19,000.00	USD
US001	DMO00000071000	Contact, Christie	Released	25	10,500.00	USD
US001	DMO00000070000	Provider,Pat	Released	25	5,800.00	USD

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

- Click a work order ID to navigate to the selected work order.
- Click **Manage Services Work Orders** to access the Services Work Order roster page.

Service Timesheet Approval Pagelet

This example illustrates the fields and controls on the Service Timesheet Approval pagelet.

Service Timesheet Approval(D)

Timesheets Personalize | Find | View All | First 1-2 of 2 Last

Unit	Time Report ID	Provider	End Date	Hours	
US001	SMP0000355	Mandy,Sarah	02/23/2013	40.0000	USD
US001	SMP0000354	Mandy,Sarah	02/09/2013	16.0000	USD

Manage Timesheet Approvals

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

- Click the **Time Report ID** link to access specific transaction details and approve the timesheet.
- Click **Manage Timesheet Approvals** link to access the Approval Monitor page.

Service Progress Log Approvals Pagelet

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

- Click the **Progress Log ID** link to access details of a specific transaction and approve that item.
- Click the **Maintain Progress Logs** link to access the Approval Monitor page.

Related Links

Understanding Progress Logs

Service Expense Approvals Pagelet

Use this pagelet to view the 10 most recent expense sheets awaiting approval. The pagelet displays the following details: Business Unit, Expense Sheet ID, Creation date, Service Provider, Provider Contact, Amount, and Currency. The Expense approval data are sorted by end date in ascending order; therefore, expense sheets awaiting approval the longest appear first. You can perform the following tasks using the Expenses Awaiting Approval pagelet:

- Click the **Expense Sheet ID** link to access details of a specific transaction and approve that item.
- Click the **Manage Expense Approvals** link to access the Approval Monitor page.

Viewing the Logistical Tasks Pagelet

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

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

Related Links

Viewing Logistical Tasks

Expense Variance Chart Pagelet.

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

Related Links

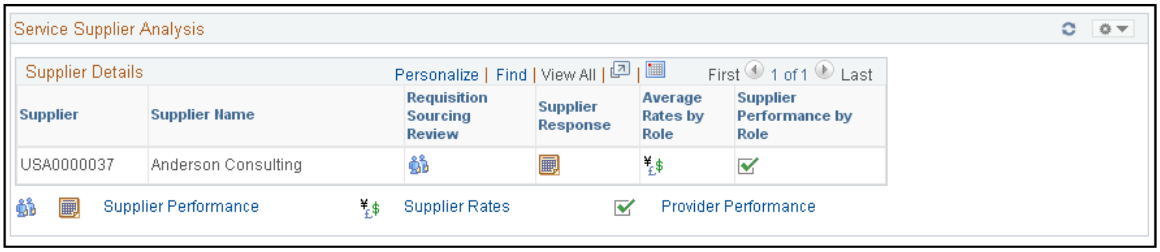
Analyzing Expense Variance

Supplier Headcount Chart Pagelet.

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

Services Supplier Analysis Pagelet.

This example illustrates the fields and controls on the Services Supplier Analysis pagelet.



Supplier	Supplier Name	Requisition Sourcing Review	Supplier Response	Average Rates by Role	Supplier Performance by Role
USA0000037	Anderson Consulting			¥£$	✓

Field or Control	***Description***
👥	Click to access the Supplier Sourcing Review popup report.
▦	Click to access the Supplier Response popup report.
¥£$	Click to access the Average Rates by Role popup report.
☑	Click to access the Supplier Performance by role popup report.

Requisition Approval Pagelet.

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

Related Links

Understanding Requisitions

Work Order Approval Pagelet.

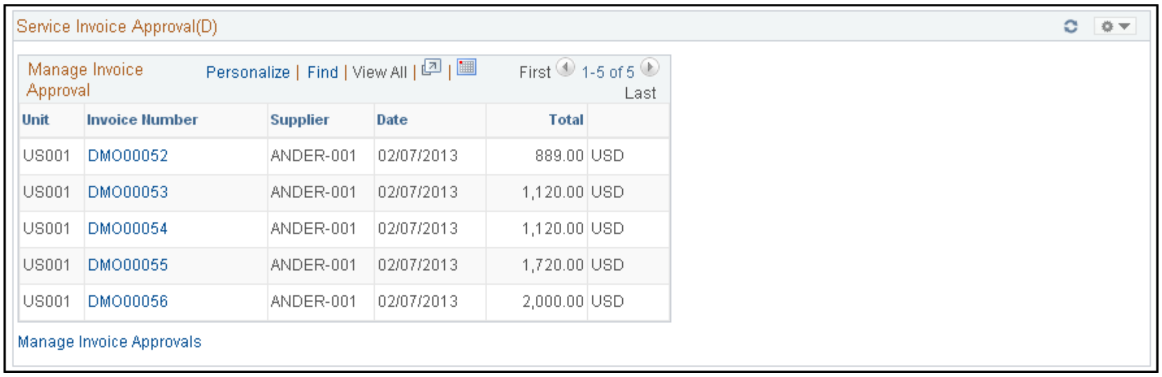
Use this pagelet to view work orders that require approval. You can select the work order ID to access the Work Order Approval page. You can also select the Manage Services Work Orders link to Navigate to the Work Order Roster. This pagelet displays Business Unit, Work Order ID and Service Provider name.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

Related Links

Understanding Services Work Orders

Service Invoice Approval Pagelet.

This example illustrates the fields and controls on the Service Invoice Approval pagelet.



Unit	Invoice Number	Supplier	Date	Total	
US001	DMO00052	ANDER-001	02/07/2013	889.00	USD
US001	DMO00053	ANDER-001	02/07/2013	1,120.00	USD
US001	DMO00054	ANDER-001	02/07/2013	1,120.00	USD
US001	DMO00055	ANDER-001	02/07/2013	1,720.00	USD
US001	DMO00056	ANDER-001	02/07/2013	2,000.00	USD

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

Related Links

Understanding Settlements in PeopleSoft Services Procurement

Chapter 4

Setting Up PeopleSoft Services Procurement

Understanding the PeopleSoft Services Procurement Implementation Process

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

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

Implementation Order

To set up PeopleSoft Services Procurement:

1. Set up installation options.
2. Define general options.
3. Create business units.
4. Define bid factors.
5. Define competencies.
6. Define services, project roles, service types, and service activities.
7. Define rate sheets.
8. Define settlements.
9. Define projects.
10. Configure time and expense.
11. Set up users.
12. Configure the supplier network.
13. Define suppliers by service type and region.
14. Set up logistical tasks.

15. Set up file attachment servers.

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

See Maintaining Service Setup.

Related Links

“Services Procurement Installation Options Page” (Application Fundamentals)

Setting Up Business Unit Definitions

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

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

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

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

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

This topic provides an overview of the PeopleSoft Purchasing-related business units and discusses how to set up business unit definitions.

Pages Used to Set Up Business Unit Definitions

Page Name	***Definition Name***	***Usage***
Reason Code Setup Page	SPB_REASONCD_BU	Establish reason code types for each negative transaction and determine whether the reason code type is required.
eProcurement Business Unit Options Page	PV_BUS_UNIT_PM	Define eProcurement business unit options.
Project Costing Definition Page	BUS_UNIT_TBL_PC	Define PeopleSoft Projects business units.

Page Name	***Definition Name***	***Usage***
Project Costing Options Page.	BUS_UNIT_OPT_PC	Define PeopleSoft Projects business unit options.
Services Procurement Bus Unit Page	BUS_UNIT_TBL_SP	Define Business Unit settings for Services Procurement transactions
ChartFields for Actual Allocation Display on Expense Page	SPA_EXP_CHART	Select the ChartFields that you want displayed on expense entry pages.

Understanding the PeopleSoft Purchasing-Related Business Units

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

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

Strategic Sourcing Business Unit Definition Page

Use the Strategic Sourcing Business Unit Definition page (BUS_UNIT_TBL_A1) to define PeopleSoft Strategic Sourcing business units.

Navigation:

Set Up Financials/Supply Chain > **Business Unit Related** > **Sourcing, Business Unit Definition**

Services Procurement > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Strategic Sourcing Definition**

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

See “Understanding Business Units in PeopleSoft Strategic Sourcing” (PeopleSoft Strategic Sourcing).

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

Purchasing - Business Unit Definition Page

Use the Purchasing - Business Unit Definition page (BUS_UNIT_TBL_PM) to Define PeopleSoft Purchasing business units.

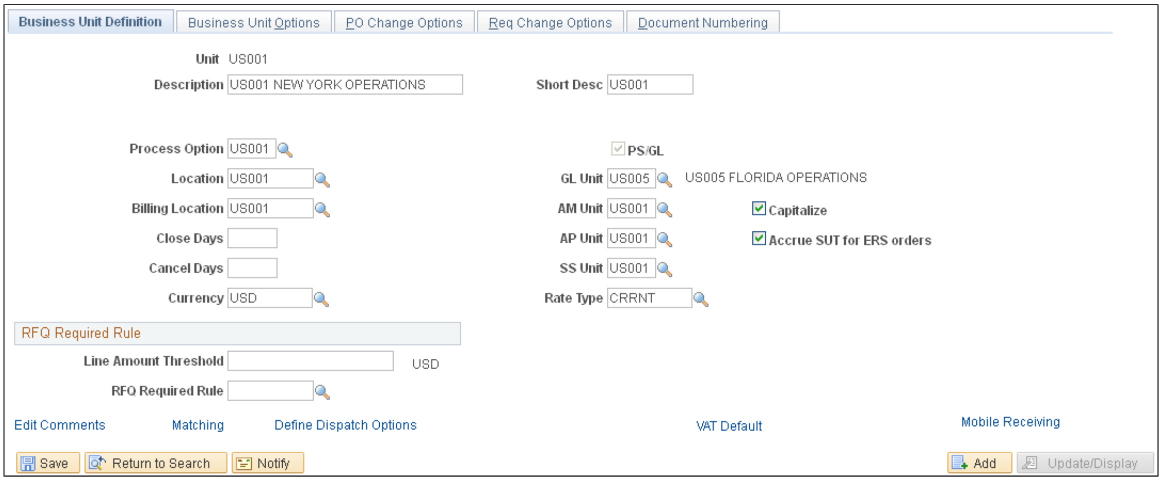
You can also link PeopleSoft Purchasing business units to PeopleSoft Services Procurement business units.

Navigation:

Set Up Financials/Supply Chain > Business Unit Related > Purchasing > Purchasing Definition

Services Procurement > Define Services Procurement > General Setup > Business Unit Definitions > Purchasing Definition

This example illustrates the fields and controls on the Purchasing - Business Unit Definition page. You can find definitions for the fields and controls later on this page.



Unit US001
Description US001 NEW YORK OPERATIONS
Short Desc US001
Process Option US001
☑ PS/GL
Location US001
GL Unit US005 US005 FLORIDA OPERATIONS
Billing Location US001
AM Unit US001
☑ Capitalize
Close Days
AP Unit US001
☑ Accrue SUT for ERS orders
Cancel Days
SS Unit US001
Currency USD
Rate Type CRRNT
Line Amount Threshold USD
RFQ Required Rule

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

Field or Control	***Description***
Location	Enter the physical location (address) of the business unit. This location appears as the printed address on dispatched transactions to identify the company's location.
Billing Location	Enter the invoice destination location for this business unit. Available locations are defined on the Location Definition page. This location appears by default on purchasing documents created for the business unit. This location is not necessarily the same as the company address. For example, the billing location might be a post office box, or the payables department might have a different address from the purchasing department.
Currency	Enter the default currency of the business unit.
Rate Type	Enter the rate type to use for currency conversion. The currency code and rate type appear by default on all purchasing documents for this business unit.

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

See “Establishing PeopleSoft Purchasing Business Units” (PeopleSoft Purchasing).

Purchasing Business Unit - Business Unit Options page

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

Related Links

“Purchasing Definition - Business Unit Options Page” (PeopleSoft Purchasing)

Services Procurement Bus Unit Page

Use the Services Procurement Bus Unit (Services Procurement business unit) page (BUS_UNIT_TBL_SP) to define PeopleSoft Services Procurement business units.

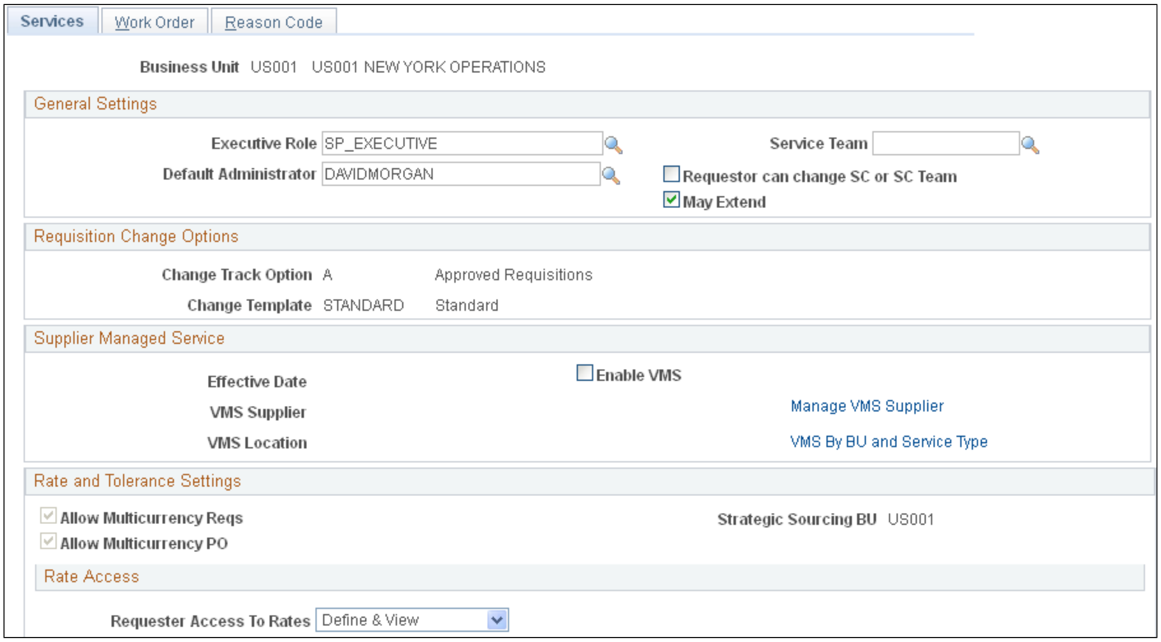
You also define your own consolidation structures for accounting and reporting purposes.

Navigation:

Set Up Financials/Supply Chain > **Business Unit Related** > **Services Procurement** > **Services Procurement Options**

Services Procurement > **General Setup** > **Business Unit Definitions** > **Services Procurement Defn**

This example illustrates the fields and controls on the Services Procurement Business Unit page 1 of 3. You can find definitions for the fields and controls later on this page.



Business Unit US001 US001 NEW YORK OPERATIONS

General Settings

Executive Role SP_EXECUTIVE

Service Team

Default Administrator DAVIDMORGAN

☐ Requestor can change SC or SC Team

☑ May Extend

Requisition Change Options

Change Track Option A Approved Requisitions

Change Template STANDARD Standard

Supplier Managed Service

Effective Date

☐ Enable VMS

VMS Supplier

Manage VMS Supplier

VMS Location

VMS By BU and Service Type

Rate and Tolerance Settings

☑ Allow Multicurrency Reqs

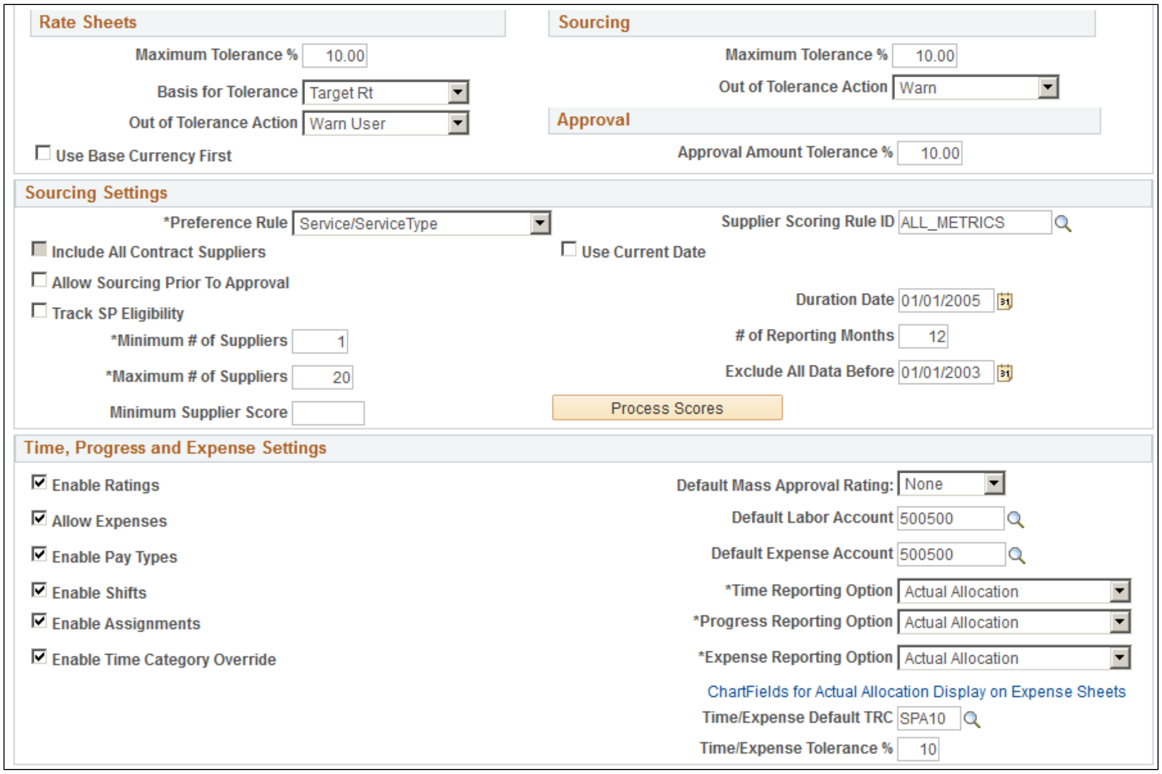
☑ Allow Multicurrency PO

Strategic Sourcing BU US001

Rate Access

Requester Access To Rates Define & View

This example illustrates the fields and controls on the Services Procurement Business Unit page 2 of 3. You can find definitions for the fields and controls later on this page.



Rate Sheets

Maximum Tolerance % 10.00

Basis for Tolerance Target Rt

Out of Tolerance Action Warn User

☐ Use Base Currency First

Sourcing

Maximum Tolerance % 10.00

Out of Tolerance Action Warn

Approval

Approval Amount Tolerance % 10.00

Sourcing Settings

*Preference Rule Service/ServiceType

Supplier Scoring Rule ID ALL_METRICS

☐ Include All Contract Suppliers

☐ Use Current Date

☐ Allow Sourcing Prior To Approval

☐ Track SP Eligibility

Duration Date 01/01/2005

*Minimum # of Suppliers 1

# of Reporting Months 12

*Maximum # of Suppliers 20

Exclude All Data Before 01/01/2003

Minimum Supplier Score

Time, Progress and Expense Settings

☑ Enable Ratings

Default Mass Approval Rating: None

☑ Allow Expenses

Default Labor Account 500500

☑ Enable Pay Types

Default Expense Account 500500

☑ Enable Shifts

*Time Reporting Option Actual Allocation

☑ Enable Assignments

*Progress Reporting Option Actual Allocation

☑ Enable Time Category Override

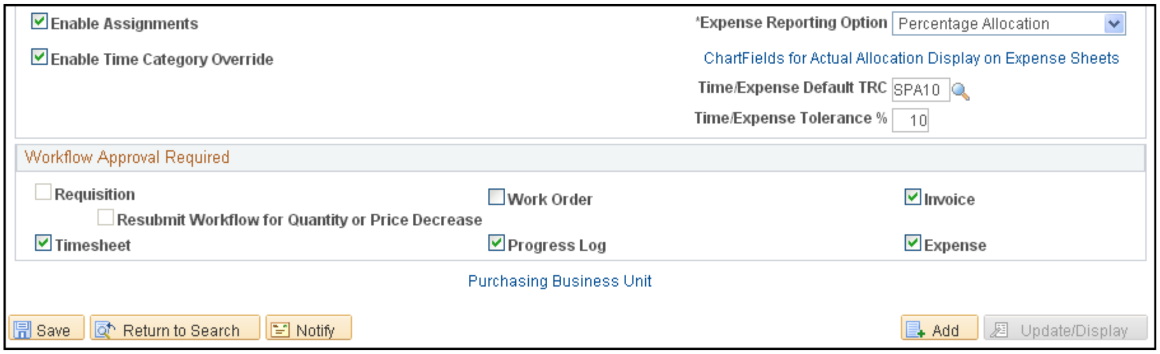
*Expense Reporting Option Actual Allocation

ChartFields for Actual Allocation Display on Expense Sheets

Time/Expense Default TRC SPA10

Time/Expense Tolerance % 10

This example illustrates the fields and controls on the Services Procurement Business Unit page 3 of 3. You can find definitions for the fields and controls later on this page.



☑ Enable Assignments

☑ Enable Time Category Override

*Expense Reporting Option: Percentage Allocation

ChartFields for Actual Allocation Display on Expense Sheets

Time/Expense Default TRC: SPA10

Time/Expense Tolerance %: 10

Workflow Approval Required

☐ Requisition
☐ Resubmit Workflow for Quantity or Price Decrease
☐ Work Order
☑ Invoice
☑ Timesheet
☑ Progress Log
☑ Expense

Purchasing Business Unit

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

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

General Settings

Field or Control	***Description***
Executive Role	Enter the executive role that has full access to all reporting business units for interactive reporting.
Service Team	Click to add a default service coordinator team to the PeopleSoft Services Procurement business unit. The system uses this default if the service requester does not have a default team, and the requisition region/service type does not have a team defined. The service team is not required.
Default Administrator	Select the user that should receive any administrator notifications for this business unit.

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

Field or Control	***Description***
Requester can change SC or SC Team (requester can change service coordinator or service coordinator team)	Select to specify whether a requester can override the service coordinator or service coordinator team that is supplied by default onto the requisition. **Note:** The requester cannot override the default service coordinator or team for requisitions or work orders that are under VMS (supplier managed services) management, regardless of this setting.
May Extend	Select to enable a requester or a service coordinator to extend a requisition or a work order. If this check box is not selected, you cannot extend a requisition or work order. Extending a requisition or work order enables a service to be assigned to a fixed-price requisition or multiple unique service providers that can be sourced to a requisition to fill the required services. When the requisition is filled, the system enables the multiple unique service providers to report time against a single work order. Service providers can enter time against multi-resource work orders and then the reported time triggers consumption against a single top-line, multi-resource work order.

Requisition Change Options

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

See “Business Unit Definition Page” (PeopleSoft eProcurement).

Field or Control	***Description***
Change Track Option	Select an option that indicates whether you are going to track changes made to PeopleSoft Services Procurement requisitions and purchase orders and the category of requisition that are eligible for change order tracking. If the system you are using does not have PeopleSoft eProcurement installed, you can edit the change fields using this page. When eProcurement is installed the change fields are display-only fields. You can edit them using the eProcurement Business Unit page. Change track options include: • *A:* Select to start tracking changes after the requisition status is Approved. The system continues to track changes for the requisition after it has been budget checked and as it goes through sourcing. • *B:* Select to start tracking changes after the requisition has a budget check status of Valid. If PeopleSoft Commitment Control has not been enabled, this option does not appear. • *N:* Do not track requisition changes. • *S:* Select to start tracking changes after the requisition status is Sourced. See “Changing Requisitions” (PeopleSoft eProcurement).
Change Template	Select the template that you want to use to track change orders. The template determines the records and fields the system tracks for changes. If the **Change Track Option** field value is not **None,** then this field is a required field and the system uses this change template for tracking changes. The system uses the change template to track PeopleSoft Services Procurement requisitions and to determine whether re-approval of the requisition is necessary after changes, if you are using PeopleSoft Approval Framework for approvals. Fields that are defined in the change template and that have the **Reapprove** check box selected are automatically resubmitted through PeopleSoft Approval Framework for re-approval. See “PO Change Options (purchase order change options) Page” (PeopleSoft Purchasing).

Supplier Managed Service (VMS)

Field or Control	***Description***
Effective Date	Displays the effective date for the supplier-managed service.
Enable VMS (enable supplier managed services)	Select this option to determine whether requisitions or work orders for this business unit are under VMS management by default. After you select this option, you must define at least one VMS supplier and VMS fee. **Note:** VMS supplier and markup costs that are defined here apply for the VMS services provided within the business unit that do not have a service type level VMS override defined. If you select this option, the current **VMS Supplier** and **VMS Location** fields associated with the VMS provider appear on the page.
VMS Supplier(supplier managed services supplier) and **VMS Location**	Displays the VMS supplier and location that has been defined on the Manage VMS Supplier page.

Field or Control	***Description***
Manage VMS Supplier (manage supplier managed services supplier)	Click to access the VMS Supplier by Business Unit page, where you can define the effective-dated VMS supplier and supplier location information.

Field or Control	***Description***
VMS by BU and Service Type (supplier managed service by business unit and service type)	Click to access the VMS by BU and Service Type page, where you can define any override of the business unit's VMS settings for this service type, and view the current VMS suppliers and locations defined for business unit and service type combinations.

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

Rate and Tolerance Settings

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

Field or Control	***Description***
Strategic Sourcing BU (PeopleSoft Strategic Sourcing business unit)	Displays the PeopleSoft Sourcing business unit.

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

Rate Access

Field or Control	***Description***
Requester Access to Rates	Select a value to define what occurs when requesters view pages that contain rate information: Values are: *Define and View:* Requester has access to define and view rates when creating requisitions and manual work orders. *No Access:* Requesters do not have access to rates when creating requisitions and manual work orders. *View Only:* Requesters have access to view rates only when creating requisitions and manual work orders.

Field or Control	***Description***
Skip SC Rate Definition When Rate Sheet Present (skip service coordinator rate definition when rate sheet is present)	Select to not route, requisitions and work orders to service coordinators when a rate sheet is present. This check box appears only when you select the *View Only* or the *No Access* value in the **Requester Access to Rates** field. If you do not select this option, all requisitions and work orders are routed to the service coordinator for rate definition prior to approval when the requester has no access to define rates.

Rate Sheets

Field or Control	***Description***
Maximum Tolerance % (maximum tolerance percentage)	Enter the total percentage by which the requisition and work order rates can exceed the rate defined on the rate sheet.
Basis for Tolerance	Select *Range* or *Target Rt* (target rate). The base for tolerance is recognized on the rate sheet. Select *Range* if the tolerance cannot exceed the minimum or maximum range defined on the rate sheet. Select *Target Rate* if the tolerance cannot exceed the target range defined for the rate sheet.
Out of Tolerance Action	Select *Not Allow* or *Warn* as the action that occurs when a requisition is outside the tolerance. The *Not Allow* option prevents the requisition or work order from being saved.
Use Base Currency First	Select to define currency for rate sheet tolerance. If this check box is selected, the system uses the currency and rate type defined on the purchasing business unit rate sheet for the selected region and role. The system then uses the base currency amount defined in the rate sheet for tolerance checking. If the check box is not selected, then the system uses the transaction currency. If a rate sheet does not exist for the transaction currency, then the system uses the base currency to search for a comparable rate sheet.

Sourcing

Field or Control	***Description***
Maximum Tolerance % (maximum tolerance percentage)	Enter the total percentage by which suppliers can exceed the defined rate on a requisition when submitting bids. For resource-based requisitions, the tolerance check is against the requisition rate. For deliverables-based requisitions, the tolerance check is against the requisition amount.
Out of Tolerance Action	Select *Not Allow* or *Warn* as the action that occurs when a supplier submittal is outside the tolerance. The *Not Allow* value prevents the supplier from submitting the bid if it is out of tolerance.

Approval

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

Sourcing Settings

Field or Control	***Description***
Preference Rule	Select *Region* or *Service/Service Type* as the preferred sourcing method when you source requisitions to suppliers. For example, if you select *Region* as the preference rule, all suppliers defined for that region appear first on the sourcing selection page. If *Service/Service Type* is the preferred rule, all suppliers defined for the service or service type appear on the sourcing selection page. This is a required field.
Supplier Scoring Rule ID	Enter the scoring rule (group of matrixes) used to score suppliers.

Field or Control	***Description***
Include All Contract Suppliers	If this check box is enabled, suppliers with contracts are returned in the sourcing selection even if they are not defined for the requisition region or service type. If this check box is disabled, the sourcing selection ignores contract suppliers. **Note:** This check box is enabled only if the **PO Service Contracts Enabled** check box is selected on the Services Procurement Installation Options page.
Use Current Date	Select this box to use the current date rather than a specific date as the starting point for reporting.
Allow Sourcing Prior to Approval	Select to indicate that sourcing is allowed before requisition approval is granted.
Track SP Eligibility (track service provider eligibility)	Click to indicate that you want to control the use of reason codes when the status of a supplier changes. The eligibility feature tracks service providers that have been identified as not eligible for new assignments and provides warnings that these service providers should not be selected to fill new work orders. The services administrator maintains setup data related to the service provider and maintains the provider's acceptability status in the system. As part of tracking the eligibility of service providers, service coordinators receive services bid submittals from suppliers. They can then initiate work order replacements and determine whether a candidate submitted with similar identifying information as an individual who was previously identified as ineligible is actually the same person. To support comparing and determining potentially ineligible service providers, the system uses service provider identifiers. These identifiers provide high-level unique information about a service provider. Examples of service provider identifiers include Social Security numbers, driver's licenses, and passport IDs.

Field or Control	***Description***
Duration Date	Enter the date used to determine the absolute beginning date of the analysis data. The system retrieves data from this date forward. The current system date appears by default. This field appears only when the **Use Current Date** check box is not selected. **Note:** If the values that you enter in the **Duration Date** and **# of Reporting Months** (number of reporting months) fields define a date before the entered start date, the system does not retrieve data prior to the entered start date. For example, if the start date is 01/01/2010, the duration date is 06/30/2010, and the number of reporting months is 12 (indicating 12 months of data prior to 06/30/2010), the system retrieves data only for the period between 01/01/2010 and 06/30/2010. The system does not retrieve data prior to 01/01/2010 or, in this example, between 07/01/2009 and 12/31/2009.
Minimum # of Suppliers (minimum number of suppliers) and **Maximum # of Suppliers** (maximum number of suppliers)	Enter the minimum and maximum number of suppliers to be returned from the sourcing rules that should appear on the sourcing selection page.
# of Reporting Months (number of reporting months)	The system uses this date to determine the period to use to retrieve the analysis data. Enter the number of months before or after the duration date for which the system retrieves data. Enter a positive value in the **# of Reporting Months** field to indicate the number of months starting from the duration data to be included in the process. Enter a negative number to indicate the number of months before the duration date to include in the process. **Note:** The system does not retrieve data prior to the entered start date, regardless of the values entered in the **Duration Start Date** and **# of Reporting Months** fields.
Exclude All Data Before	The system uses this date to retrieve data

Field or Control	***Description***
Minimum Supplier Score	Enter the minimum score that a supplier must have to bid on a requisition. Suppliers must have this score or higher to meet the requisition requirements and appear on the sourcing selection page. Suppliers below the score do not appear on the sourcing selection page. **Note:** You can also define a minimum supplier score at the service type level. If a minimum score is defined, that score takes precedence over the minimum score setting defined at the business unit level.
Process Scores	Click to access the Supplier Score page, where you can process scores for the specified scoring rule ID.

Time, Progress and Expense Settings

Field or Control	***Description***
Enable Ratings	Select to enable use of performance ratings on time sheets and progress logs. By default, the check box is deselected.
Default Mass Approval Rating	Select the rating to be used when you are approving time sheets and progress logs en masse. Values are *Excellent, Fair, Good, Poor,* and *None.* **Note:** This field is accessible only if *Enable Ratings* is selected. **Note:** If you leave this field blank, the rating of *None* appears by default on all time sheets and progress logs that are mass approved.
Allow Expenses	Select to allow the entry of expense amounts on requisitions and work orders. By default, the check box is deselected, meaning that expenses are not allowed. **Note:** This check box is enabled only if the **SP Expenses Enabled** check box is selected on the Services Procurement Installation Options page.
Default Expense Account	Select the account to use as the default expense account for submitted expenses.

Field or Control	*Description*
Enable Pay Types	Select to allow suppliers to enter the breakdown of the rate that they are bidding, for example, how much goes to the service provider, how much is supplier markup, and so forth. By default, the check box is deselected, meaning that the supplier enters one rate inclusive of all rate breakdowns. **Note:** This check box is enabled only if the **SP Pay Types Enabled** check box is selected on the Services Procurement Installation Options page. **Note:** This check box is also used in conjunction with the SP_HIDE_RATE_BREAKDOWN role action to determine whether the rate breakdown components are specified and displayed on requisitions.
Time Reporting Option	Use this option to determine whether the service provider reports time against specific ChartField distributions, or whether the total time is entered and distribution percentages are used to automatically split time or progress according to the percentage on the ChartField distribution defined for the work order. This is the highest-level default and you can override it by the setting defined for individual service types. Values are: • *Actual Allocation:* Select to enable the service provider to report actual time against each ChartField distribution line defined on the work order. **Note:** This option applies to resource-based requisitions and work orders only. • *Percent Allocation:* Select to enable the service provider or service provider contact to report total time or progress against a work order. The distribution percentage is used to automatically allocate time or progress across the predefined ChartField distribution lines.

Field or Control	***Description***
Progress Reporting Option	Use this option to capture the default reporting option for Progress Logs. This is the highest-level default and you can override it by the setting defined for individual service types. Values are: • *Actual Allocation:* Select to enable the service provider contact to report actual progress against each ChartField distribution line defined on the work order. • *Percent Allocation:* Select to enable the service provider contact to report the Progress against a Work order. The distribution percentage defined in the Work order is used to automatically allocate the progress across those predefined Chart Field distribution lines. This is the default value.
Expense Reporting Option	Use this option to determine if the service provider reports expenses against specific ChartField distributions. This option also determines if the total expense is entered and distribution percentages are used to automatically split expense according to the percentage on the ChartField distribution defined for the work order. This is the highest-level default and you can override it by the setting that is defined for individual service types. Options include: • *Actual Allocation:* Select to enable the service provider or service provider contact to report actual expense against each ChartField distribution line defined on the work order. • *Percent Allocation:* Select to enable the service provider or service provider contact to report total expense against a work order. The distribution percentage is used to automatically allocate expense across the predefined ChartField distribution lines.
Enable Shifts	Select to enable the business unit to use shifts on time sheets.

Field or Control	***Description***
Time/Expense Default TRC (time and expense default time reporting code)	Select a TRC. The system uses this TRC as the default for time calculations when no time reporting rule is associated with the time template. **Note:** It is advised that you select a TRC with a multiplication factor of 1.0, because the TRC is used in all invoice calculations for time with no associated time reporting rule. For example, if you select a TRC that has a multiplication factor of 2.0, the invoice amounts using this TRC are equal to the total hours multiplied by the rate on the work order multiplied by 2.0. The system displays a warning message if you use a multiplication factor other than 1.0 as the default.
Enable Assignments	Select to enable the business unit to use assignments when entering time sheets for this business unit.
Time/Expense Tolerance %(time/expense tolerance percentage)	Enter a tolerance percentage that the system can use to determine whether the time and expense is within an acceptable range.
Enable Time Category Override	Select this option if time reported can be overridden.
Default Labor Account	Select the account to use as the default account for labor.
Expense Reporting Option	Use this option to determine whether the service provider reports expenses against specific ChartField distributions, or whether the total expense is entered and distribution percentages are used to automatically split expenses according to the percentage on the ChartField distribution defined for the work order. This is the highest-level default and you can override it by the setting that is defined for individual service types. Values include: • *Actual Allocation:* Select to enable the service provider or service provider contact to report actual expense against each ChartField distribution line defined on the work order. • *Percent Allocation:* Select to enable the service provider or service provider contact to report total expense against a work order. The distribution percentage is used to automatically allocate expense across the predefined ChartField distribution lines.

Field or Control	*Description*
ChartFields for Exp Allocation (ChartFields for expense allocation)	Click to access the ChartFields for Actual Allocation Display on Expense page.

Workflow Options

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

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

Field or Control	***Description***
Expense	Select to indicate that you want to require that the approval framework is used for expense approvals.

Related Links

Using Shifts on Timesheets

Assignment Page

Edit Time Categories Page

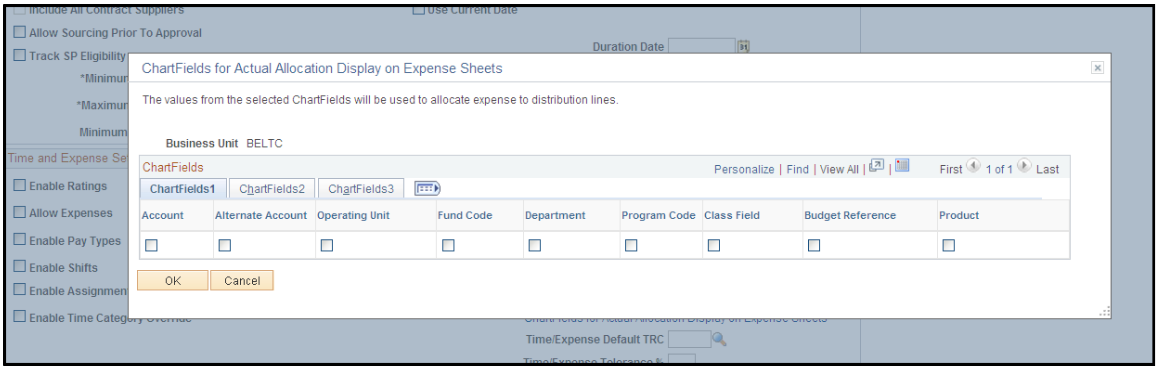
ChartFields for Actual Allocation Display on Expense Page

Use the ChartFields for Actual Allocation Display on Expense page for allocations

Navigation:

Services Procurement > **General Setup** > **Business Unit Definitions** > **Services Procurement Defn**, click the ChartFields for Exp Allocation link

This example illustrates the fields and controls on the ChartFields for Actual Allocation Display on Expense page . You can find definitions for the fields and controls later on this page.



ChartFields for Actual Allocation Display on Expense Sheets

The values from the selected ChartFields will be used to allocate expense to distribution lines.

Business Unit BELTC

ChartFields

Account	Alternate Account	Operating Unit	Fund Code	Department	Program Code	Class Field	Budget Reference	Product
☐	☐	☐	☐	☐	☐	☐	☐	☐

ChartFields

Select the ChartFields the system displays on expense entry pages. This page enables you to select ChartFields that are used to allocate distribution lines for expenses.

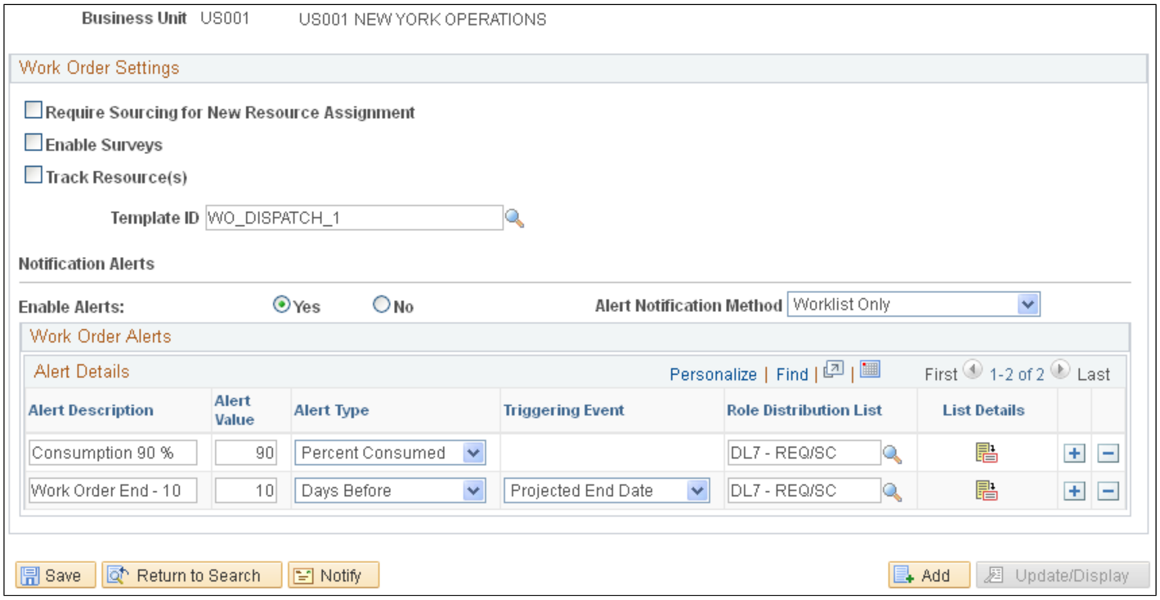
Work Order Settings Page

Use the Work Order Settings page (BUS_UNIT_TBL_SP_WO) to enable surveys and work order approvals, track deliverable resources, determine whether new assignments require sourcing, and set up work order alert notifications.

Navigation:

Select the Work Order Settings tab on the Services Procurement Business Unit page

This example illustrates the fields and controls on the Work Order Settings page. You can find definitions for the fields and controls later on this page.



Business Unit US001 US001 NEW YORK OPERATIONS

Work Order Settings

☐ Require Sourcing for New Resource Assignment

☐ Enable Surveys

☐ Track Resource(s)

Template ID WO_DISPATCH_1

Notification Alerts

Enable Alerts: ● Yes ○ No **Alert Notification Method** Worklist Only

Work Order Alerts

Alert Details

Alert Description	Alert Value	Alert Type	Triggering Event	Role Distribution List
Consumption 90 %	90	Percent Consumed		DL7 - REQ/SC
Work Order End - 10	10	Days Before	Projected End Date	DL7 - REQ/SC

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

See Role Distribution List Page .

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

Work Order Settings

Field or Control	***Description***
Require Sourcing New Resource Assignment	Select to indicate that service coordinators must use the sourcing process when choosing a work order replacement for this business unit **Note:** If you do not select this option, service coordinators can bypass the sourcing process when choosing a work order replacement.

Field or Control	***Description***
Enable Surveys	Select to indicate that surveys can be used for work orders that are related to the specified business unit.

Field or Control	***Description***
Track Resources(s)	Select to enable tracking of individuals who provide services on deliverable-based work orders for this business unit.
Template ID	Enter the template type that you want to use to print the Purchase Order Dispatch report. The template controls the report layout used by BI Publisher to generate reports. The template provides a common framework across PeopleSoft Purchasing, eProcurement, and Services Procurement for purchase order dispatches. The purchase order dispatch incorporates BI Publisher to segregate the data from the layout. Templates enable you to easily format purchase order layouts and better meet specific requirements for the Purchase Order report.
Enable Alerts	Select to indicate whether to use alerts for the work order. Values are *Yes* and *No.*
Alert Notification Method	When the **Enable Alerts Yes** button is selected, the alert notification must be sent using a worklist only or email and worklist. The Work Order grid also appears when the button is selected.

Work Order Alerts

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

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

Field or Control	***Description***
Alert Value	Enter a value to determine when the work order event triggers. **Note:** This value is represented in days and percent. For example, you might create a work order alert for Consumption 80%, with the alert value set to *80.* When the system reaches an 80% consumption rate, the work order event triggers. As well, you might create a work order alert for Work Order End - 10, with the alert value set to *10,* to indicate that the work order will trigger 10 days before the work order is scheduled to end.
Alert Type	Select the type of alert that the system uses to trigger the work order notification. Values are: • *Days Before:* Indicates the number of days before a specific event that the notification triggers. • *Days After:* Indicates the number of days after a specific event that the notification triggers. • *Percent Consumption:* Indicates a percent that must be reached for a work order event notification to trigger. **Note:** The **Alert Type** and **Alert Value** fields work in combination together.

Field or Control	***Description***
Triggering Event	Select to indicate the type of work order event that will trigger this alert notification when the alert type is set to either *Days After* or *Days Before.* Values are: • *Actual End Date* • *Actual Start Date* • *Approval Date* • *Cancel Date* • *Closed Date* • *Entered Date* • *Projected End Date* • *Projected Start Date* • *Released Date* • *Terminated Date* • *Work Order End Date* If the alert type is *Days After,* all of these values except for *Work Order End Date* are available. If the alert type is *Days Before,* then only the *Projected End Date, Projected Start Date,* and *Work Order End Date* fields are available.
Role Distribution List	Select the list of users who will receive the work order notification.
▤	Click the **List Details** button to view the list of roles that are included on the selected distribution list.
⊞	Click to add a new default alert for the service type.
⊟	Click to delete a new default alert for the service type.

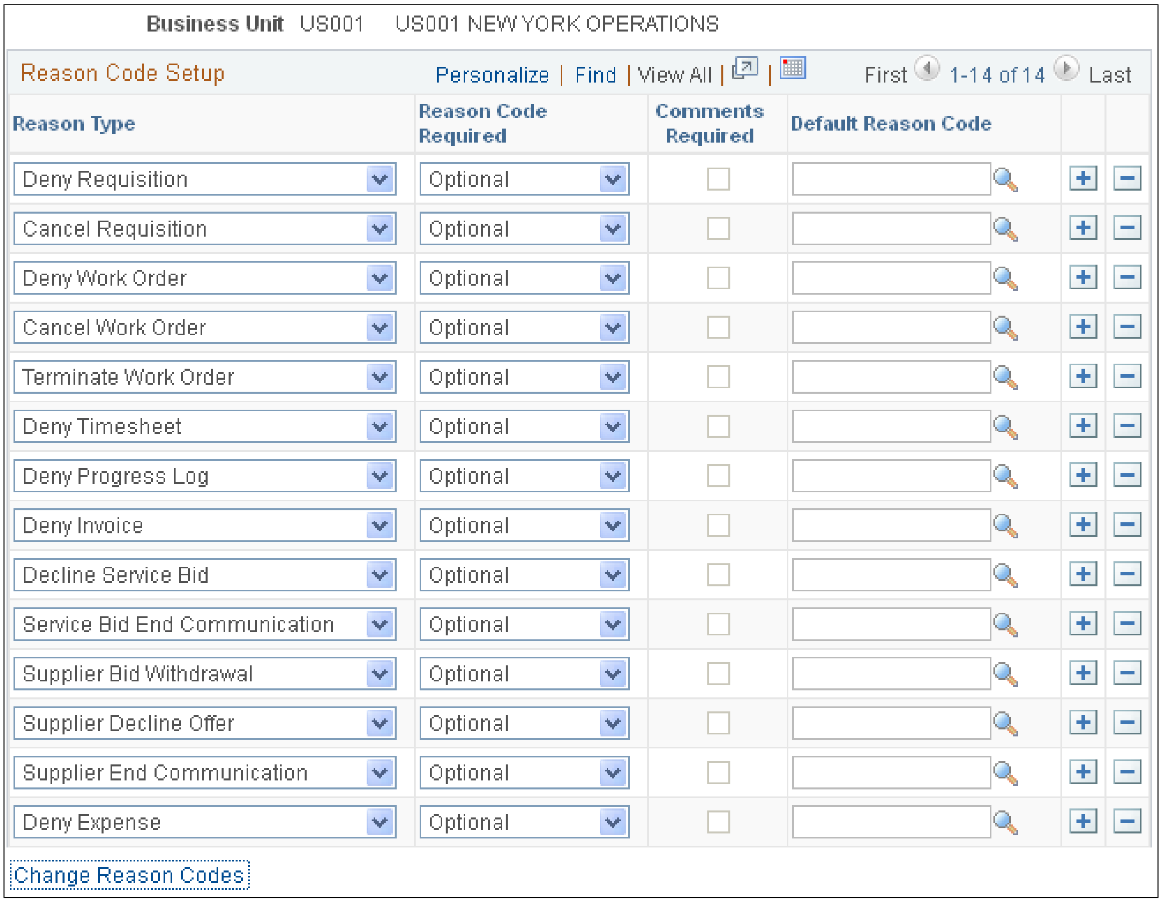
Reason Code Setup Page

Use the Reason Code Setup page (SPB_REASONCD_BU) to establish reason code types for each negative transaction and determine whether the reason code type is required.

Navigation:

Select the Reason Code Setup tab on the Services Procurement Business Unit page.

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



Business Unit US001 US001 NEW YORK OPERATIONS

Reason Code Setup

Reason Type	Reason Code Required	Comments Required	Default Reason Code
Deny Requisition	Optional	☐	
Cancel Requisition	Optional	☐	
Deny Work Order	Optional	☐	
Cancel Work Order	Optional	☐	
Terminate Work Order	Optional	☐	
Deny Timesheet	Optional	☐	
Deny Progress Log	Optional	☐	
Deny Invoice	Optional	☐	
Decline Service Bid	Optional	☐	
Service Bid End Communication	Optional	☐	
Supplier Bid Withdrawal	Optional	☐	
Supplier Decline Offer	Optional	☐	
Supplier End Communication	Optional	☐	
Deny Expense	Optional	☐	

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

See Reason Code Page .

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

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

Field or Control	***Description***
Reason Type	Select a PeopleSoft Services Procurement reason type. Reason types correspond to actions and reason codes are the reasons given for the action. You can add a reason code that provides more specific reasons for performing an action. Services Procurement provides reason types and codes, but you can add more to meet business requirements. As an example, for using the Eligibility Status reason type, you can establish several reason codes that describe the possible reasons why a service provider would be ineligible for an assignment. An example might be a reason code for poor performance or a personnel issue. Then, when the service provider is not used, the service coordinator can select which reason code best describes why the provider is not eligible. System-supplied reason types include: • *Cancel Requisition:* Used as a reason to cancel a services requisition. • *Cancel Work Order:* Used to cancel a service work order. • *Decline Service Bid:* Used to decline a services bid submission. • *Deny Expense:* Used to deny an expense. • *Deny Progress Log:* Used to deny the approval of a progress log. • *Deny Requisition:* Used to deny the approval of a requisition. • *Deny Timesheet:* Used to deny a timesheet. • *Deny Work Order:* Used to deny the approval of a work order. • *Eligibility Status:* Used as a reason when a service provider is not eligible to fill a work order. • *Deny Invoice:* Used to reject an invoice. • *Service Bid End Communication:* Used as a reason when the bid process between the service coordinator and the supplier officially ends. • *Supplier Bid Withdrawal:* Used as a reason when a supplier withdraws a bid. • *Supplier Decline Offer:* Used when the supplier has declined an offer. • *Supplier End Communication:* Used when the supplier ends communication related to a bid. • *Terminate Work Order:* Used to terminate a work order. • *Procurement Change:* Used for change tracking on requisitions. This value is display only, it appears when

Field or Control	***Description***
	a value has been defined on the Procurement Change Reason Codes page. It is not editable from the Services Procurement Reason Code Setup page

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

Field or Control	***Description***
Comments Required	Select if reason comments are required for this reason type. **Note:** Comments can be required only if the **Reason Code Required** field is set to *Mandatory.*

Field or Control	***Description***
Default Reason Code	Select the reason code that you want the system to automatically apply when you are performing the task for the corresponding reason type. You can override the code if needed.
Change Reason Code	Click to access procurement options for PeopleSoft Purchasing. When the system uses reason codes from the Purchasing business unit, you can use the Procurement Change Reason Codes page to update reason code settings for changes in PeopleSoft Services Procurement. These settings enable you to define default reason codes for reason types. You can also define whether reason codes or comments should be required when changing a requisition. You can use reason codes for reason type *Procurement Change.* This reason type enables you to select the default reason code for users entering a change request.

eProcurement Business Unit Options Page

Use the eProcurement Business Unit Options page (PV_BUS_UNIT_PM) to define eProcurement business unit options.

Navigation:

Services Procurement > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Maintain ePro Options in sPro**

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

Field or Control	*Description*
Workflow Approval Required	Select to enable the workflow for the PeopleSoft eProcurement business unit. **Note:** The setting that you define here is used for Services Procurement requisitions as well.
Resubmit Workflow for Quantity or Price Decrease	Select to indicate that you want to resubmit a requisition for approval when the quantity or price has decreased. This check box is available when you select to enable workflow approval for the business unit.

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

Project Costing Definition Page

Use the Project Costing Definition page (BUS_UNIT_TBL_PC) to define PeopleSoft Projects business units.

Navigation:

- **Set Up Financials/Supply Chain** > **Business Unit Related** > **Project Costing** > **Setup PC BU Definition**
- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Project Costing Definition**

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

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

Related Links

“Services Procurement Installation Options Page” (Application Fundamentals)

Project Costing Options Page.

Use the Project Costing Options page (BUS_UNIT_OPT_PC) to define PeopleSoft Projects business unit options.

Navigation:

- **Set Up Financials/Supply Chain** > **Business Unit Related** > **Project Costing** > **Setup PC BU Options**
- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Project Costing Options**

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

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

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

Defining System-Wide Definitions

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

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

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

Pages Used to Define System-Wide Definitions

Page Name	***Definition Name***	***Usage***
“Account Types Page” (Application Fundamentals)	ACCT_TYPE	Maintain account types such as asset, liability, or expense.
Assign Catalogs to Business Unit	PV_REQ_BU_CAT	Assign catalog values for a business unit. The catalog that you choose determines the categories that are available when creating service types.
“Auto Numbering Page” (Application Fundamentals)	AUTO_NUM_PNL	Define automatic numbering specifications for PeopleSoft fields, such as a unique prefix for regular customers or for customers who are also suppliers. The system automatically increments numbers by one.
“Calendar Builder Page” (Application Fundamentals)	CALENDAR_BUILDER	Define and reference a calendar as the base for other calendars.
“Currency Code Page” (PeopleSoft Global Options and Reports)	CURRENCY_CD_TABLE	Define currency. To meet the needs of your multicurrency business, Oracle supports the euro and delivers the Currency Code table with many common currencies identified according to ISO standards.

Page Name	***Definition Name***	***Usage***
“Department Page” (Application Fundamentals)	DEPARTMENT	Manage department numbers and department names.
“Calendar Periods Page” (Application Fundamentals)	DETAIL_CALENDAR1	Define begin and end dates and the number of accounting periods in the fiscal year calendar.
Setting Up Servers for Attachments	SAC_ATT_ADMIN	Define the servers that you store attachments. See also“Administer File Attachments Page” (Application Fundamentals)
“Location - Definition Page” (Application Fundamentals)	LOCATION_TBL	Define a location code, such as a branch office or shipping office.
“Location - Detail Page” (Application Fundamentals)	LOCATION_TBL2	Add details to a location definition.
Query Manager	QRY_SELECT	The query defines which fields will comprise the index for a search definition. Search Framework uses PS Queries and Connected Queries to collect the data for indexing by Search Framework.
“Connected Query Manager Page ” (PeopleSoft Global Options and Reports)	PSCONQRSSRCH	Connected Query enables you to connect multiple queries together in a parent-child relationship, where the child queries filter results for the parent queries. Using Connected Query lets you connect numerous simpler queries, rather than writing one more complicated query. The smaller more modular queries can be reused in different queries. Services Procurement uses a Connected Query to collect the data for indexing by Search Framework. This allows for hierarchical layout of the data rather than making it flat.

Page Name	***Definition Name***	***Usage***
"Search Definition Page " (PeopleSoft Expenses)	PTSF_SEARCH_DEF	Use this page to add new search definitions. Created in the Search Framework designer interface, a search definition maps the PeopleSoft Query fields to searchable attributes in the Search Framework . The search definition also enables you to attach security attributes to restrict access to the search results. The search definition provides the information required by the framework to enable the system to create search results (search documents).
Search Category	PTSF_SEARCH_CATGR	Use this page to add new search categories. Created in the Search Framework designer interface, search categories enable you to group search definitions logically. A search definition must belong to at least one search category. End users run searches against search categories, not individual search definitions. It is a requirement that at least one search category exists with exactly the same name as the search definition. Search categories will need to be defined for each search group used by the applications.
Deploy/Delete Object	PTSF_DEPLOY_SBO/ PTSF_DEPLOY_CAT	Use this page to Deploy/delete objects. Once the Search Definition and Search Category are created, they have to be deployed. The Search Definition has to be deployed first. This process creates the Search Framework source and schedule objects. Search Framework maintains its own definition of an index in the form of the Search Framework source object. The Search Category is automatically deployed when the Search Definition is Deployed. Deletion can also be done from the same page.
Schedule Search Index Page	PTSF_SCHEDULE_SI	Use this page to schedule (or create) a new search index. Once the index and category have been deployed, search index can be created. "Building an Index" (Application Fundamentals)
Search Test Page	PTSF_SRCH_TEST_M/ PTSF_SRCH_TEST_RES	Use this page to test Search Framework output. Once the Search index has been built, the results can be tested using the Search Test page.

Page Name	***Definition Name***	***Usage***
Reason Code Page	SPB_REASON_CD	Define reason codes related to each reason type.
Region Codes Page	REGION_CD	Define Services Procurement region codes.
Region Codes Address Page	REGION_CD_ADDR	Enter service region code address information. Region Codes Page
Service Region Structure	PSTREEMGR or SPB_ REGIONLOCATION	Maintain region structures using region tree or location by region. The **Region Tree Structure** check box on the Services Procurement Installation Options page determines which method is used. The navigation for this page changes depending on your setting for the **Use Region Tree Structure** check box defined on the Services Procurement Installation Options page. When you select the **Use Region Tree Structure** option on the Services Procurement Installation Options page, the system accesses the Tree Manager page, where you can maintain the region structure. If you do not select the **Use Region Tree Structure** option, the system navigates you to the Location by Region page, where you can specify locations that are included in each region.
"Ship To Locations Page" (PeopleSoft Source to Settle Common Information)	SHIPTO_HDR	Define a ship to location code. This location is used on the service requisition as the place where the services are to be performed.
Tree Manager Page	PSTREEMGR	View and modify trees needed for service regions and purchase items. "Maintaining the FED_RC02_Accounts Tree" (PeopleSoft General Ledger)
"Units of Measure Page" (Application Fundamentals)	UNITS_OF_MEASURE	Establish units of measure for your resources.

Related Links

"Account Types Page" (Application Fundamentals)

“Department Page” (Application Fundamentals)
“Setting Up Locations” (Application Fundamentals)
“Establishing Regions and Region Codes” (Application Fundamentals)
“Defining Additional Common Information” (Application Fundamentals)

Understanding Reason Codes

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

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

Note: You create the appropriate reason codes to use throughout the fulfillment process for each reason type.
When a user denies a transaction for a business unit that uses reason codes, the appropriate reason code confirmation page automatically appears so that you can enter the reason that the transaction was denied. Comments entered for the reason code are supplied by default, but you can change the values.
If the reason code and comments are mandatory for a business unit, all actions associated with that reason type within the business unit require a reason code and comments.

Defining Automatic Numbering

These Services Procurement fields use automatic numbering:

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

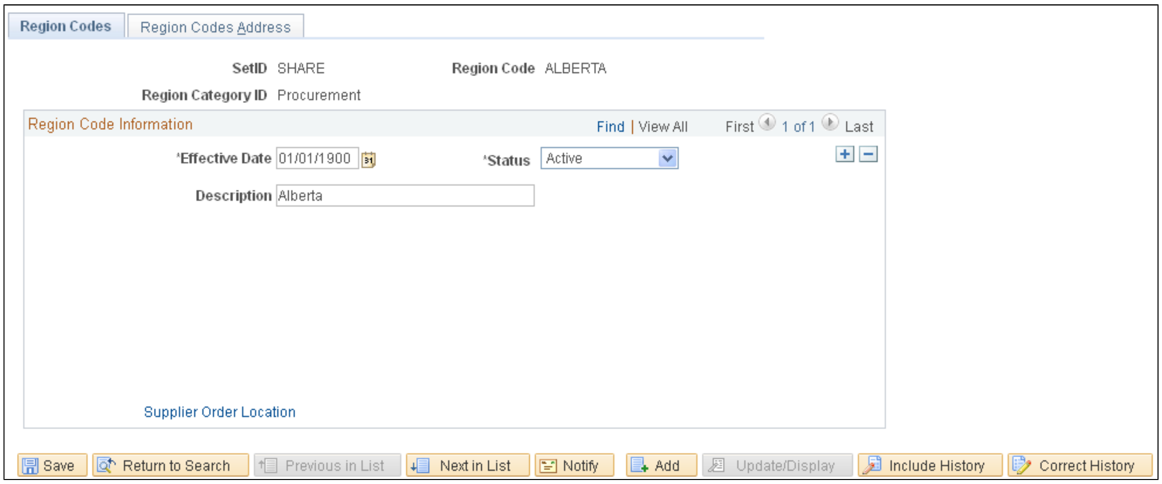
Region Codes Page

Use the Region Codes page (REGION_CD) to Define Services Procurement region codes.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **General Setup** > **System-Wide Definitions** > **Service Region Code**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Regions/Ratesheets** > **Define Region and Rates**

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



SetID SHARE

Region Code ALBERTA

Region Category ID Procurement

*Effective Date 01/01/1900

*Status Active

Description Alberta

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

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

Setting Up Servers for Attachments

Use the “Administer File Attachments Page” (Application Fundamentals) (SAC_ATT_ADMIN) to add new file attachment servers, and change the currently active server.

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

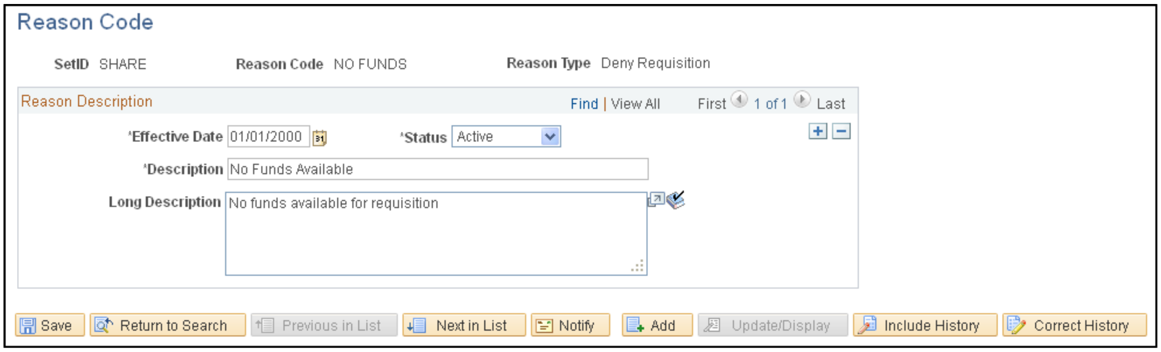
Reason Code Page

Use the Reason Code page (SPB_REASON_CD) to define reason codes related to each reason type.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **General Setup** > **System-Wide Definitions** > **Service Reason Code**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Define sPro Reason Codes**

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



Reason Code

SetID SHARE

Reason Code NO FUNDS

Reason Type Deny Requisition

Reason Description

*Effective Date 01/01/2000

*Status Active

*Description No Funds Available

Long Description No funds available for requisition

Reason Codes - Requisitions

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

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

  Note: If a requester cancels the requisition header, the reason code and comments are copied to all canceled lines. If a requester cancels individual lines and the last line is canceled, the system prompts the requester to cancel the header as well. If the requester cancels the header, the reason code for the header is supplied by default from the last line, and you can change it to a different reason code. If encumbrances are enabled (in a commitment-controlled environment), the canceled line amounts are deducted from the encumbrance amount.

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

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

Reason Codes - Sourcing

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

Reason Codes - Bidding

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

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

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

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

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

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

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

Reason Codes - Work Orders

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

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

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

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

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

Reason Codes - Timesheets

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

Reason Codes - Progress Logs

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

Reason Codes - Invoices

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

Reason Codes – Expenses

Reason codes are available for Expenses when the expense approvers deny an expense sheet. A confirmation page appears, and the approver can enter a reason code and related comments.

Defining Project and Activities Definitions

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

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

This topic discusses how to define project and activities definitions.

Pages Used to Define Project and Activities Definitions

Page Name	***Definition Name***	***Usage***
Project Types Page	SPA_PROJ_TYPE_DEFN	Maintain project types.
Manage Services Projects	SPA_MANAGE_PROJ	Manage services projects from a central location.
Maintain Services Projects Page	SPA_PROJECT	Maintain project information. This page is available only when Project Costing is implemented.
Project Activities Page	SPA_PROJ_ACT	Define a project activity.
Service Activities Page	SPB_SETID_ACTIVITY	Define service activities for deliverables-based services.
Bid Factors by Activity Page	SP_BDFTR_BY_ACT_PG	Define the bid factors by deliverable activity. Service Activities Page
Bid Factor Group Page	SP_BDFTR_GRP_SRCH	Select bid factors to add to the service activity. Service Activities Page
Activities by Service Page	SPB_SRC_ACT	Associate one or more activities with a service.

Page Name	***Definition Name***	***Usage***
Activities by Service Type Page	SP_ACT_BY_SVTYP	Associate one or more activities with a service type. This page is available only when Project Costing is not implemented.

Project Types Page

Use the Project Types page (SPA_PROJ_TYPE_DEFN) to maintain project types.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Project/Activities Definitions** > **Project Types**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Projects** > **Manage Project Types**

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

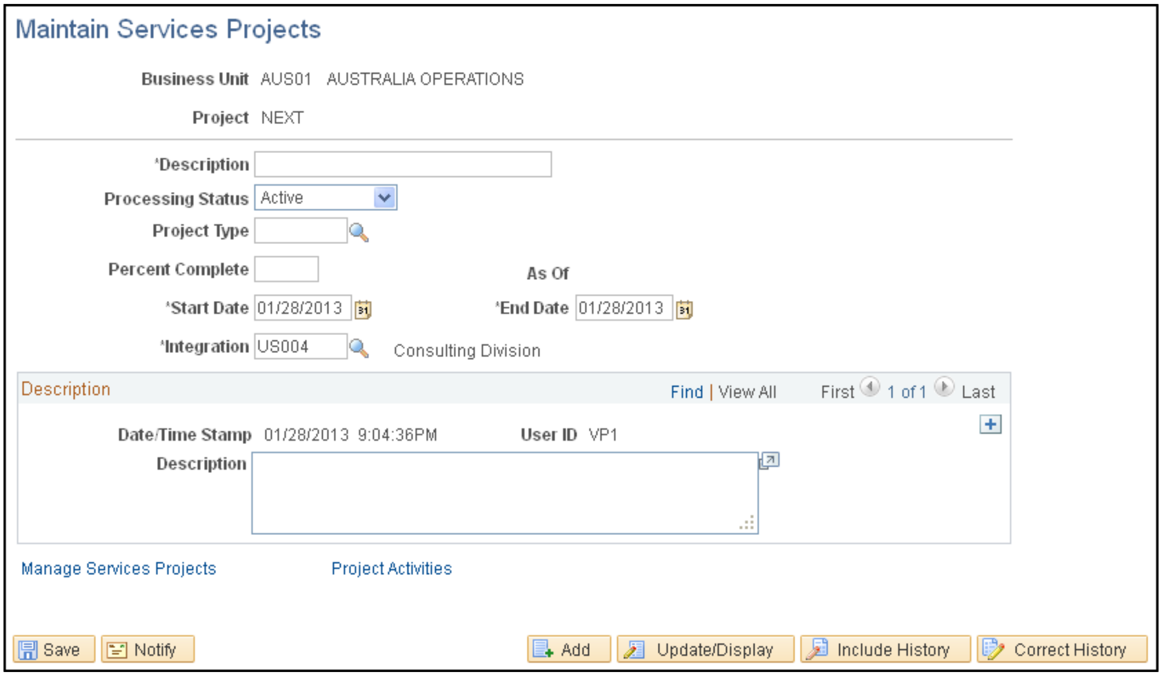
Maintain Services Projects Page

Use the Maintain Services Projects page (SPA_PROJECT) to maintain project information.

Navigation:

Click the **Add** button or click the link for an existing project from the Manage Service Projects page.

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



Maintain Services Projects

Business Unit AUS01 AUSTRALIA OPERATIONS

Project NEXT

*Description

Processing Status Active

Project Type

Percent Complete

As Of

*Start Date 01/28/2013

*End Date 01/28/2013

*Integration US004 Consulting Division

Description

Date/Time Stamp 01/28/2013 9:04:36PM

User ID VP1

Description

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

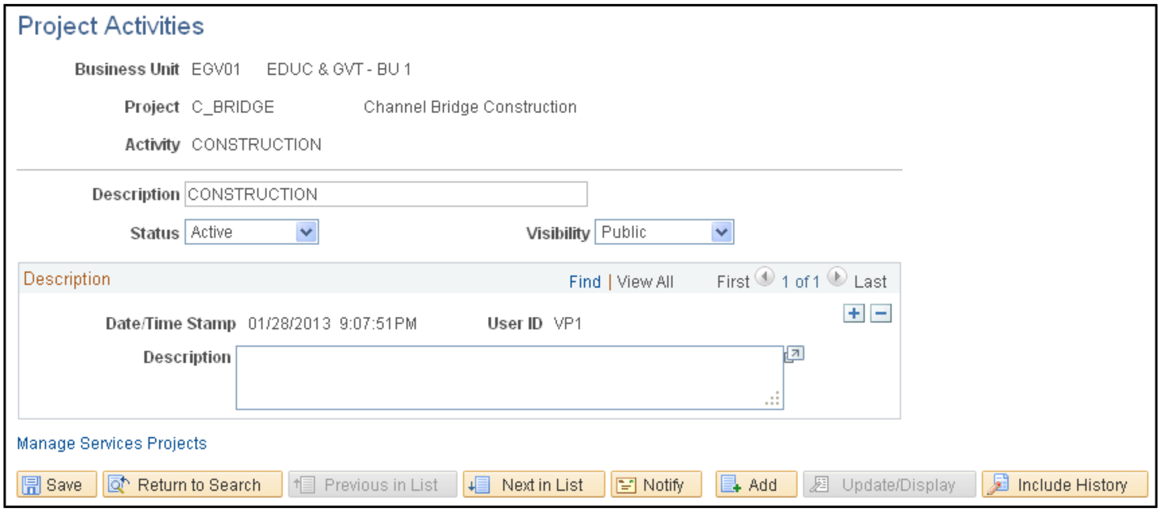
Project Activities Page

Use the Project Activities page (SPA_PROJ_ACT) to define a project activity.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Project/Activity Definitions** > **Project Activities**
- **Services Procurement** > **Manage Projects and Activities** > **Manage Project Activities**

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



Project Activities

Business Unit EGV01 EDUC & GVT - BU 1

Project C_BRIDGE Channel Bridge Construction

Activity CONSTRUCTION

Description CONSTRUCTION

Status Active

Visibility Public

Description

Date/Time Stamp 01/28/2013 9:07:51PM

User ID VP1

Description

Field or Control	***Description***
Description	Enter the activity description.
Status	Select the activity status. Values are *Active* and *Inactive.*

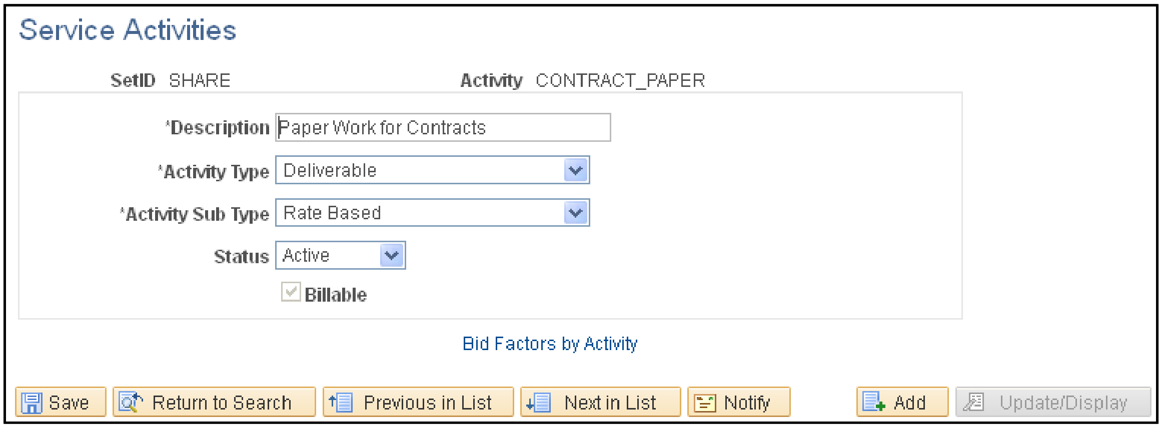
Service Activities Page

Use the Service Activities page (SPB_SETID_ACTIVITY) to define service activities for deliverables-based services.

Navigation:

- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Types/Services** > **Define Service Activity Codes**
- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Project/Activity Definitions** > **Service Activities**

This example illustrates the fields and controls on the Service Activities Page. You can find definitions for the fields and controls later on this page.



Service Activities

SetID SHARE

Activity CONTRACT_PAPER

*Description Paper Work for Contracts

*Activity Type Deliverable

*Activity Sub Type Rate Based

Status Active

☑ Billable

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

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

Field or Control	***Description***
Activity Type	Select an activity type. Values are: • *Deliverable:* Select to activate the **Activity Sub Type** field values of *Rate Based* and *Milestone* activities. • *Resource:* Select to activate the **Activity Sub Type** field values of *Generic Activity* and *Specific Activity.*

Field or Control	***Description***
Activity Sub Type	Activity sub type is used to indicate the type work that this activity can be used for. The available values depend on the activity type that was selected. When the activity type is *Resource,* the available **Activity Sub Type** values are *Generic Activity* and *Specific Activity.* Specific activities can be associated with resource-based service types and selected on related work orders to make them available during time entry. Generic activities are not related to work orders, but are available during time entry for any resource-based work order. When the **Activity Type** is *Deliverable,* the available **Activity Sub Type** values are *Milestone* and *Rate Based.* Specific activities can be associated with deliverable-based work orders to make them available during time entry.

Field or Control	***Description***
Status	Select a status. Values are *Active* and *Inactive.* Inactive activities cannot be added to a service type or work order.

Field or Control	***Description***
Billable	Select to indicate that time associated with this activity is billable. This value acts as a default for the Activities by Service Type page.
Bid Factors by Activity	Click to access the Bid Factors by Activity page. You use the page to associate bid factors with activities. When you enter a service on a deliverable-based requisition, the bid factors linked to the activities for the service appear on the requisition. This enables suppliers to enter responses to these bid factors. The suppliers responses can be compared with each other to determine which supplier has the best bid. Click **Select Bid Factor Group** to select bid factors from existing bid factor groups. Click **OK** to return to the Bid Factors by Service page.

Activities by Service Page

Use the Activities by Service page (SPB_SRC_ACT) to associate one or more activities with a service.

Navigation:

- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Types/Services** > **Define Activities by Service**
- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Project/Activity Definitions** >

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

Field or Control	***Description***
Activity	Enter an activity to associate with a service.

Field or Control	***Description***
Rate Amount	Enter a deliverable rate amount. **Note:** This option is used for rate-based activities only.

Field or Control	***Description***
Rate Unit of Measure	Enter the rate in the unit of measure that is used throughout the fulfillment process. **Note:** This option is used for rate-based activities only.

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

Activities by Service Type Page

Use the Activities by Service Type page (SP_ACT_BY_SVTYP) to associate one or more activities with a service type.

Navigation:

- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Types/Services** > **Activities by Service Type**
- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Project/Activity Definitions** > **Activities by Service Type**

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

Field or Control	***Description***
Activity	Enter an activity to associate with a service type.

Field or Control	***Description***
Billable	Indicate whether this is a billable activity for the service type.

Field or Control	*Description*
Status	Indicate whether the status of the activity is active or inactive for the service type. Inactive activities cannot be selected during time or progress entry.

Establishing Services Procurement ChartField Security

ChartFields are the fields that store charts of accounts and provide the system with the basic structure to segregate and categorize transactional and budget data. PeopleSoft software enables you to restrict access to your financial data within PeopleSoft Services Procurement and across all PeopleSoft Financials Supply Chain Management (FSCM) applications. The ChartField Security feature prevents unauthorized employees and contractors from viewing and editing financial data. Other security features within PeopleSoft software enable you to restrict access by business unit, ledger, SetID, pay cycle, book code, and project ID; however, the ChartField Security feature enables you to restrict access to specific financial data by restricting access to a ChartField value or combination.

Security by ChartField combination enables you to allow access to most financial data, such as requisitions and work order costs, and still restrict access to sensitive data, such as service costs. Using ChartField security, you can enable access to sensitive ChartField combinations by user IDs, user roles, or permission lists.

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

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

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

Chapter 5

Setting Up Application Specific Options for PeopleSoft Services Procurement

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Prerequisites

You must perform the following:

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

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

Related Links

Replace Service Coordinator Page

Maintaining Service Setup

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

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

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

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

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

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

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

This topic discusses how to maintain service setup.

Pages Used to Maintain Service Setup

Page Name	***Definition Name***	***Usage***
Service Request Types	SP_REQUEST_TYPE	Maintain service request types.
Role Distribution List Page	SP_DSTRLST	Specify the role distribution lists that receive work order surveys and alerts.
Competency Page	RS_CM_TYPE_TBL	Enter a long or short description for new competency types.
Competency Page	RS_CM_COMPTNCY_TBL	Define competencies. “Establishing Application Setup Tables for Competencies” (PeopleSoft Resource Management)
Maintain Competencies by SetID Page	SP_COMPBYSETID_PG	Define competencies by SetID.
Rating Model Page	RS_CM_REVW_RAT_TBL	Select the model used to rate a candidate's competency.
Service Types Page	SPB_ROLE_TYPE	Set up service types.
Service/Role by Service Type Page	SPB_ROLESBYTYPE	Define Service (project roles) by role type.
Surveys by Service Type Page	SP_SURVEY_BY_SVTYP	Associate service type with one or more surveys.
VMS Supplier by Business Unit and Service Type Page	SPB_VMS_BU_SRVC	Associate the VMS supplier by business unit and service type. This page is only available if you do not have the Managed Service Provider Installation option enabled on the Services Procurement Installation Options page.
Assign Individual Services to Multi Resource Service Page	SPB_MULTI_SRVC	Maintain service type/service by multi-resource service type.
Service/Project Role	SPB_PROJ_ROLE	Set up service (project role).

Page Name	***Definition Name***	***Usage***
Service/Project Role Attributes Page	SPB_ROLE_COMP_PG	Maintain service (project role) attributes
Service Types by Service	SPB_PJROLE_SERVICE	View service types associated with services.
Years of Experience	SP_EXPERIENCE_PG	Maintain Experience values.
Maintain Rate Sheet Page	SPB_RATESHEET_NEW	Maintain standard rates by region and service (project role).
Rate Sheet List Page	SPB_RS_LIST	View rate sheet lists.
Logistical Tasks Page	SPB_TASK_PG	Maintain work order logistical tasks.
Logistical Task Group	SPB_TASK_GROUP_PG	Define logistical task groups.
Tasks by Task Groups	SPB_TASKTOGROUP_PG	Associate one or more tasks to a task group.
Task Group by Service Type	SPB_ROLE_TASKGP_PG	Define task groups by service type.
Response Type Page	SP_SUR_RESTYP	Define formats and answer choices for work order survey questions.
Setup Survey Page	SP_SUR_DEFN	Define questions, role distribution lists and response types for work order surveys.
Survey Setup - Service Type Page	SP_SUR_DEFN_SVTYP	View the service types related to the survey.

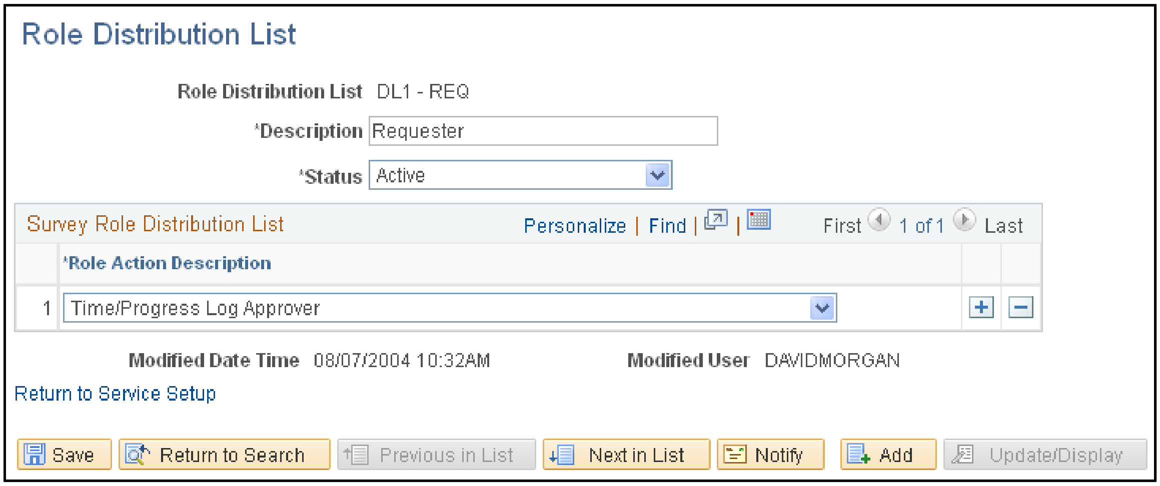
Role Distribution List Page

Use the Role Distribution List page (SP_DSTRLST) to specify the role distribution lists that receive work order surveys and alerts.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Role Distribution Lists**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Role Distribution Lists**

This example illustrates the fields and controls on the Role Distribution List page. You can find definitions for the fields and controls later on this page.



Role Distribution List DL1 - REQ

*Description Requester

*Status Active

1 Time/Progress Log Approver

Modified Date Time 08/07/2004 10:32AM

Modified User DAVIDMORGAN

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

Field or Control	***Description***
Role Distribution List	Indicates the name of the new distribution list.
Role Action Description	Select from the available work order role actions for the distribution list.

Related Links

Setting Up Surveys

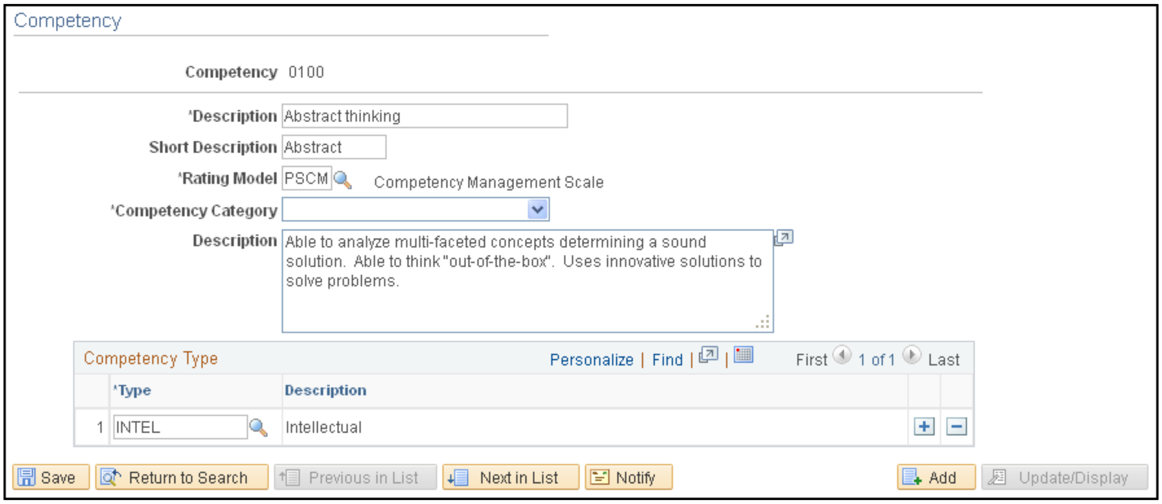
Competency Page

Use the Competency Types page (RS_CM_TYPE_TBL) to enter a long or short description for new competency types.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Competency Setup** > **Define Competency Types**
- **Set Up Financials/Supply Chain** > **Common Definitions** > **Resource Data** > **Competency Types**

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



Competency 0100

*Description: Abstract thinking

Short Description: Abstract

*Rating Model: PSCM Competency Management Scale

*Competency Category:

Description: Able to analyze multi-faceted concepts determining a sound solution. Able to think "out-of-the-box". Uses innovative solutions to solve problems.

Competency Type

	*Type	Description
1	INTEL	Intellectual

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

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

Field or Control	***Description***
Rating Model	Select the model used to rate a candidate's competency.

Competency Type

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

Maintain Competencies by SetID Page

Use the Competencies by SetID page (SP_COMPBYSETID_PG) to define competencies by SetID.

Navigation:

Services Procurement > **Define Services Procurement** > **Service Setup** > **Competency Setup** > **Maintain Competencies by SetID**

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

Rating Model Page

Use the Rating Model page (RS_CM_REVW_RAT_TBL) to select the model used to rate a candidate's competency.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Competency Setup** > **Rating Models**
- **Set Up Financials/Supply Chain** > **Common Definitions** > **Resource Data** > **Rating Models**

Field or Control	*Description*
Rating	Enter a rating number. Use this number to determine the range for the best and worst ratings.
Review Pts (review points)	Enter the review points associated with the rating code, if desired. **Note:** This value is not used within services procurement.

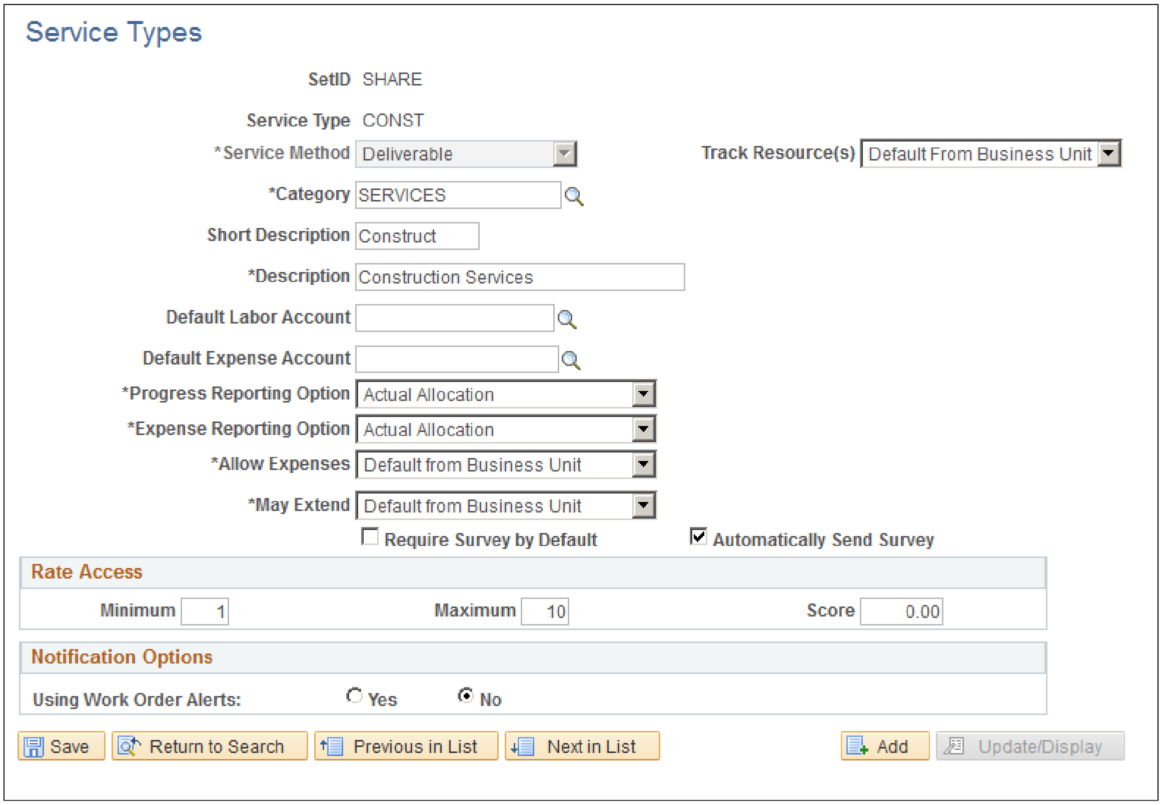
Service Types Page

Use the Service Types page (SPB_ROLE_TYPE) to set up service types.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Service Type Setup** > **Service Types**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Types/Services** > **Service Type**

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



Service Types

SetID SHARE

Service Type CONST

*Service Method Deliverable

Track Resource(s) Default From Business Unit

*Category SERVICES

Short Description Construct

*Description Construction Services

Default Labor Account

Default Expense Account

*Progress Reporting Option Actual Allocation

*Expense Reporting Option Actual Allocation

*Allow Expenses Default from Business Unit

*May Extend Default from Business Unit

☐ Require Survey by Default ☑ Automatically Send Survey

Rate Access

Minimum 1 Maximum 10 Score 0.00

Notification Options

Using Work Order Alerts: ○ Yes ● No

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

Field or Control	***Description***
Service Type	Enter a name for the service type. After you save the service type, you cannot update the name.
Service Method	Select the service method for the service type. Available options are: *Deliverable:* Select to request services that are generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider. *Multi Resource:* Select to request services that support multiple unique services and service providers. When you select this value and enter a service type, the system displays the Multi Services Information grid box when you enter a service type. *Resource:* Select to request the services of an individual service provider.

Field or Control	***Description***
Track Resources	Use this option to track resources for deliverable-based work orders. The system firsts looks to the service type to determine if resources should be tracked for deliverable-based work orders. If you do not select this option, the business unit setting is used. **Note:** This option is only available for deliverable-based engagements.
Category	Select the item category for the service type.
Default Labor Account	Select the account to use as the default account for labor. This field is optional. If a value is specified for this field, then the system uses it as a default when a requisition or work order is created. If a value is not specified for this field, then the system derives a value from the business unit.
Default Expense Account	Select an account to use as the default account for the submitted expenses. This field is optional. If a value is specified for this field, then the system uses it as a default when a requisition or work order is created. If a value is not specified for this field, then the system derives a value from the business unit.
Progress Reporting Option	Use this option to capture the default report option for Service Type of Service Method **Deliverable**. • *Actual Allocation:* Select to enable the service provider contact to report actual progress against each ChartField distribution line defined on the work order. • *Default from Business Unit*: Select to use the default reporting option specified for the business unit. This is the default value. • *Percent Allocation:* Select to enable the service provider contact to report total percentage progress against a work order. The distribution percentage is used to automatically allocate progress across the predefined ChartField distribution lines.

Field or Control	***Description***
Expense Reporting Option	Use this option to determine if the service provider reports expenses against specific ChartField distributions. This option also determines if the total expense is entered and distribution percentages are used to automatically split expense according to the percentage on the ChartField distribution defined for the work order. This is the highest-level default and you can override it by the setting that is defined for individual service types. Options include: • *Actual Allocation:* Select to enable the service provider or service provider contact to report actual expense against each ChartField distribution line defined on the work order. • *Percent Allocation:* Select to enable the service provider or service provider contact to report total expense against a work order. The distribution percentage is used to automatically allocate expense across the predefined ChartField distribution lines. • *Default from Business Unit*: Select to use the default reporting option specified for the business unit.
Time Reporting Option	Use this option to determine whether service types with a service method of *Resource* require the service provider to report time against specific ChartField combinations, or whether the total time is entered and distribution percentages automatically split time or progress according to the ChartField distribution defined for the work order. Values are: • *Actual Allocation:* Select to enable the service provider to report actual time against each ChartField distribution line defined on the work order. • *Default from Business Unit:* Select to use the default reporting option specified for the business unit. • *Percent Allocation:* Select to enable the service provider or service provider contact to report total time or progress against a work order. The distribution percentage is used to automatically allocate time or progress across the predefined ChartField distribution lines. **Note:** Service types defined with a service method of *Deliverable* are automatically set to a time reporting option of *Percent Allocation.*

Field or Control	***Description***
Allow Expenses	Select how you want to track and report expenses for assignments. You can use the default value assigned at the business unit level, allow expenses or not allow expenses. **Note:** When you select *Yes* value, the expense rate and expense amount fields are available on requisitions and work orders. You can also enter and modify expenses for Progress Logs and Invoices.
May Extend	Select the value that you want to control whether requesters or service coordinators can extend requisitions or work orders that use this service type. Extending a requisition or work order enables a service to be assigned to a fixed-price requisition or multiple-unique service providers that can be sourced to a requisition to fill the required services. When the requisition is filled, the system enables the multiple-unique service providers to report time against a single work order. Service providers can enter time against multi-resource work orders and then the reported time triggers consumption against a single top-line, multi-resource work order. Field values include: *Default from Business Unit:* Select to use the value defined for the **May Extend** check box on the Services Procurement Bus Unit page. When the check box is selected requesters and service coordinators can extend requisitions or work orders. When the check box is deselected, they cannot extend requisitions or work orders. *No:* Select to prevent requesters or service coordinators from extending requisitions or work orders that use this service type. *Yes:* Select to enable requesters and service coordinators to extend requisitions and work orders that use this service type.
Require Survey by Default	Select to indicate that surveys are mandatory for work orders that are associated with the specified service type. If you select this check box, surveys must be complete before the work order is finalized. **Note:** You can override the status of a mandatory survey on a work order.
Automatically Send Survey	Select to indicate that a survey will be automatically sent to a recipient at the time the work order is terminated, closed, or canceled. If a survey is not sent automatically, then you must click the Send Survey to Recipients button on the work order. **Note:** If a survey is automatic, it is sent to all recipients that are tied to the role as specified on the role distribution list.

Rate Access

Field or Control	***Description***
Minimum and **Maximum**	Enter the minimum and maximum number of suppliers to be returned from the sourcing rules.
Score	Enter a score range between 0 and 100. Supplier scores must fall within the required score range to meet requisition source requirements.

Notification Options

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

See Work Order Settings Page.

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

Related Links

Understanding Time Management in PeopleSoft Services Procurement

Work Order Settings Page

Understanding Services Work Orders

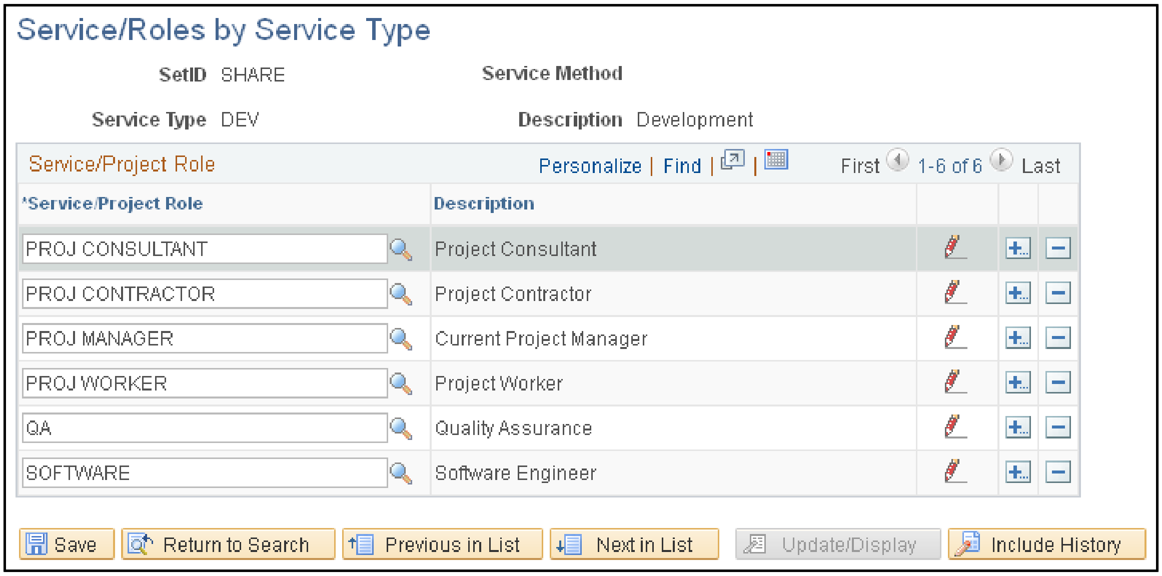
Service/Role by Service Type Page

Use the Service/Roles by Service Type page (SPB_ROLESBYTYPE) to define Service (project roles) by role type.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Service Type Setup** > **Services/Roles by Service Type**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Types/Services** > **Define Roles by Service Types**

This example illustrates the fields and controls on the Service/Role by Service Types page . You can find definitions for the fields and controls later on this page.


Service/Roles by Service Type

SetID SHARE

Service Method

Service Type DEV

Description Development

*Service/Project Role	Description
PROJ CONSULTANT	Project Consultant
PROJ CONTRACTOR	Project Contractor
PROJ MANAGER	Current Project Manager
PROJ WORKER	Project Worker
QA	Quality Assurance
SOFTWARE	Software Engineer

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

Field or Control	***Description***
Service/Project Role	Select the title for the services and project role.
Description	Displays the description for the services and project role.

Assign Individual Services to Multi Resource Service Page

Use the Assign Individual Services to Multi Resource Service page (SPB_MULTI_SRVC) to maintain service type/service by multi-resource service type.

Navigation:

Services Procurement, Define Services Procurement, Service Type Setup, Service Type/Service by Multi Resource Service Type/Service

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

Field or Control	***Description***
Service/Project Role	Select a service and project role combination that you want to use.

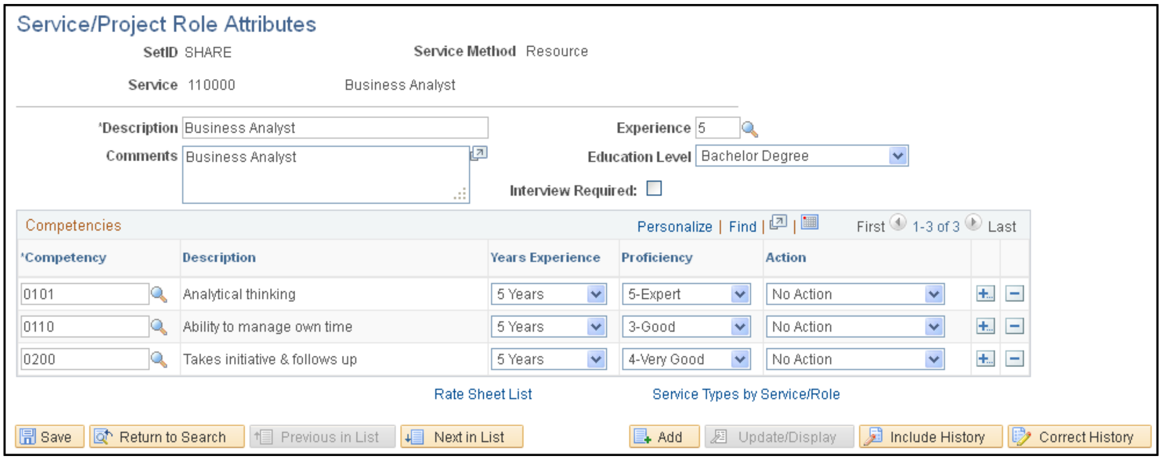
Service/Project Role Attributes Page

Use the Service/Project Role Attributes page (SPB_ROLE_COMP_PG) to set up service (project role).

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Service (Project Role) Setup** > **Service/Project Role Attribute**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Types/Services** > **Define Service Role Attribute**

This example illustrates the fields and controls on the Service/Project Role Attributes page. You can find definitions for the fields and controls later on this page.



Service/Project Role Attributes

SetID SHARE

Service Method Resource

Service 110000 Business Analyst

*Description Business Analyst

Experience 5

Comments Business Analyst

Education Level Bachelor Degree

Interview Required: ☐

Competencies

*Competency	Description	Years Experience	Proficiency	Action
0101	Analytical thinking	5 Years	5-Expert	No Action
0110	Ability to manage own time	5 Years	3-Good	No Action
0200	Takes initiative & follows up	5 Years	4-Very Good	No Action

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

Field or Control	***Description***
Description	Enter the description of the service (project role). **Note:** This value appears by default on the requisition as the job title.
Comments	Enter comments that describe the service (project role). **Note:** This value appears by default on the requisition as the scope of work.

Field or Control	***Description***
Experience	Enter the years of experience that this service (project role) requires. **Note:** This value appears by default on the requisition as the experience.
Education Level	Enter the lowest level of education that this service (project role) requires. **Note:** This value appears by default on the requisition as the education level.
Interview Required	Select if this service (project role) requires an interview before hiring someone for the position. If an interview is required, the system does not allow a service provider to be hired until interviews have been conducted. **Note:** This value appears by default on the requisition as the interview required.
Competencies	Add or delete competencies to a service. **Note:** The competencies associated to the services default onto the requisition.

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

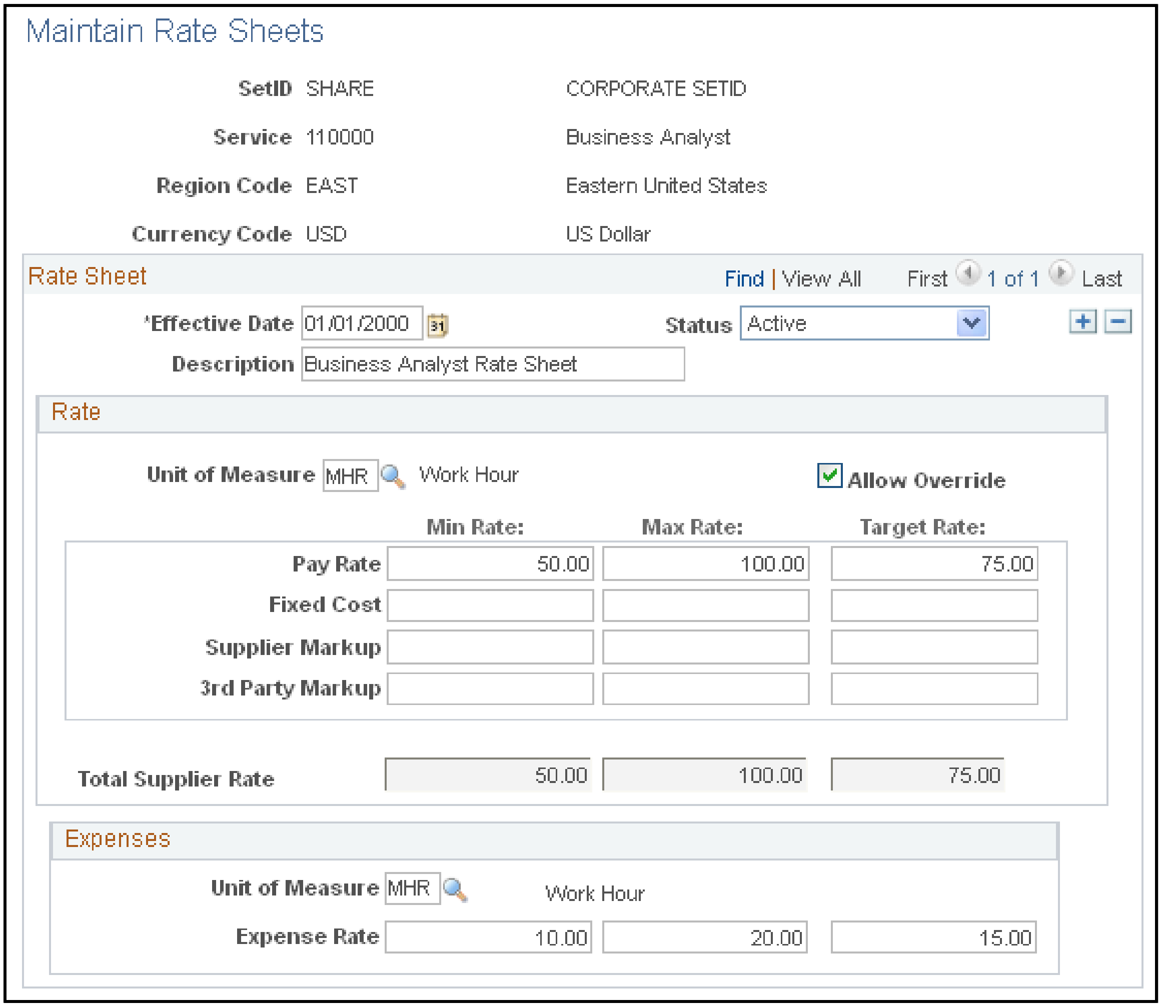
Maintain Rate Sheet Page

Use the Maintain Rate Sheets page (SPB_RATESHEET_NEW) to maintain standard rates by region and service (project role).

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Rate Sheet Setup** > **Maintain Rate Sheets**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Regions/Rate Sheets** > **Maintain Rate Sheets**

This example illustrates the fields and controls on the Maintain Rate Sheets page. You can find definitions for the fields and controls later on this page.



Maintain Rate Sheets

SetID SHARE CORPORATE SETID

Service 110000 Business Analyst

Region Code EAST Eastern United States

Currency Code USD US Dollar

Rate Sheet

***Effective Date** 01/01/2000

Status Active

Description Business Analyst Rate Sheet

Rate

Unit of Measure MHR Work Hour

☑ **Allow Override**

	Min Rate:	Max Rate:	Target Rate:
Pay Rate	50.00	100.00	75.00
Fixed Cost			
Supplier Markup			
3rd Party Markup			
Total Supplier Rate	50.00	100.00	75.00

Expenses

Unit of Measure MHR Work Hour

Expense Rate 10.00 20.00 15.00

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

Rate

Field or Control	***Description***
Allow Override	Select to override the default rate defined on the rate sheet when you create requisition or work orders.
Min Rate (minimum rate)	Enter the minimum rate amount that requesters should use when creating a requisition for the rate sheet role, region, and currency.

Field or Control	***Description***
Max Rate (maximum rate)	Enter the maximum rate amount that requesters should enter when creating a requisition for the rate sheet role, region, and currency.
Target Rate	Enter the rate that appears by default when creating a requisition for the rate sheet role, region, and currency.

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

Expenses

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

Rate Sheet List Page

Use the Rate Sheet List page (SPB_RS_LIST) to view rate sheet lists.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Rate Sheet Setup** > **Rate Sheet List**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Regions/Rate Sheets** > **Rate Sheets List**

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

Logistical Tasks Page

Use the Logistical Task page (SPB_TASK_PG) to maintain work order logistical tasks.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Tasks and Task Groups** > **Logistical Tasks**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Work Order Tasks** > **Define WO Logistical Tasks**

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

Field or Control	***Description***
Work Order Type	Select a work order type. Values are: • *Original:* Select to associate the logistical task to normal work orders. • *Extension:* Select to associate the logistical task to extended work orders. • *Reassignment* Select to associate the logistical task to reassigned work orders. • *Both:* Select to associate the logistical task to both normal and extended work orders.
Approval Type	Select work order approval type. Values are: • *Pre-approval:* Select if tasks must be completed after creating the work order and before submitting the work order for approval. For example, a pre-approval logistical task might include assigning a new badge or ordering a new laptop. • *Post-approval:* Select if tasks must be completed after the work order is approved and before a work order is released to a service provider. For example, a post-approval logistical task might include scheduling orientation or setting up the service provider email account. • *Off-board:* Select if tasks must be completed after the work order release date and before closing the work order. For example, off-board logistical tasks might include collecting the laptop or closing the email account after the service provider has quit the job. *Terminate:* Select if supplier must confirm a termination action before continuing with the work order.

Field or Control	***Description***
Execution Type	Select work order execution type. Values are: • *Automatic:* Select if tasks assigned to the work order are automatically assumed to be complete. **Note:** An email notification is automatically sent to the appropriate person. • *Mandatory:* Select if pre-approval tasks have to be completed before approving the work order or if post-approval tasks have to be completed before releasing the work order. • *Optional:* Select if it is optional to complete the tasks before approving or releasing the work order.
Assign To	Select a default assigned to person. This field dynamically generates and assigns logistical tasks to the default assigned to person. Email notification is automatically sent to this person. Values are: • *Requester* • *Service Provider Contact* • *Default*

Defining Service Supplier Setup

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

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

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

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

This topic discusses how to define service supplier set up.

Pages Used to Define Service Supplier Setup

Page Name	***Definition Name***	***Usage***
Tree Definitions and Properties	PSTREEDEFN	Build the region tree hierarchy. Building the Region Hierarchy
Region Codes Page	REGION_CD	Define procurement region codes.
Identifying Information Page	VNDR_ID1_SUM	Maintain supplier information.
Services Supplier Info Page	VENDOR_SPRO_PG	Maintain suppliers as service suppliers.
Supplier Network Setup Page	SPB_SUP_NETWORK	Maintain a network of service suppliers for each business unit.
Supplier Sourcing Setup Page	SPB_SPLR_REGION_PG	Maintain sourcing rules for suppliers by associating them with regions, service types and services.
Supplier Sourcing Setup - Service Type Page	SPB_ROLETYPEBYSUPL	Associate resource suppliers with service types. Supplier Sourcing Setup Page
Supplier Sourcing Setup - Service Type by Region Page	SPB_SPLR_REGSER_P	Associate active resource suppliers with regions and service types, and associate regions and service types with a resource supplier. Supplier Sourcing Setup Page
Supplier Sourcing Setup - Service Page	SPB_PROJROLEBYSUPL	Associate services with deliverables suppliers. Supplier Sourcing Setup Page
Supplier Sourcing Setup - Service by Region Page	SPB_SPLR_REGROL	Associate deliverables suppliers with regions and services. Supplier Sourcing Setup Page
Suppliers by Region Page	SPB_REGION_SPLR_PG	Displays suppliers by region.
Suppliers by Service Type (for resource services)	SPB_SUPLBYROLETYPE	Displays resource suppliers by service types.

Page Name	***Definition Name***	***Usage***
Suppliers by Region/Service Type (for resource services)	SPB_REGSER_SPLR_PG	Displays suppliers by regions and service types.
Suppliers by Service (for deliverable services)	SPB_SPLR_PROJROLE	Displays suppliers by service.
Suppliers by Region/Service (for deliverable services)	SPB_REGROLE_SPLR	Displays suppliers by region and service.

Building the Region Hierarchy

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

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

With the region hierarchy, you can also:

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

To build the region hierarchy:

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

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

Related Links

Defining the Region Hierarchy

Identifying Information Page

Use the Identifying Information page (VNDR_ID1_SUM) to maintain supplier information.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Services Supplier Setup** > **Supplier Information**
- **eProcurement** > **Buyer Center** > **Suppliers** > **Maintain Suppliers** > **Supplier Information**

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

Related Links

"Understanding Supplier Maintenance" (PeopleSoft Source to Settle Common Information)

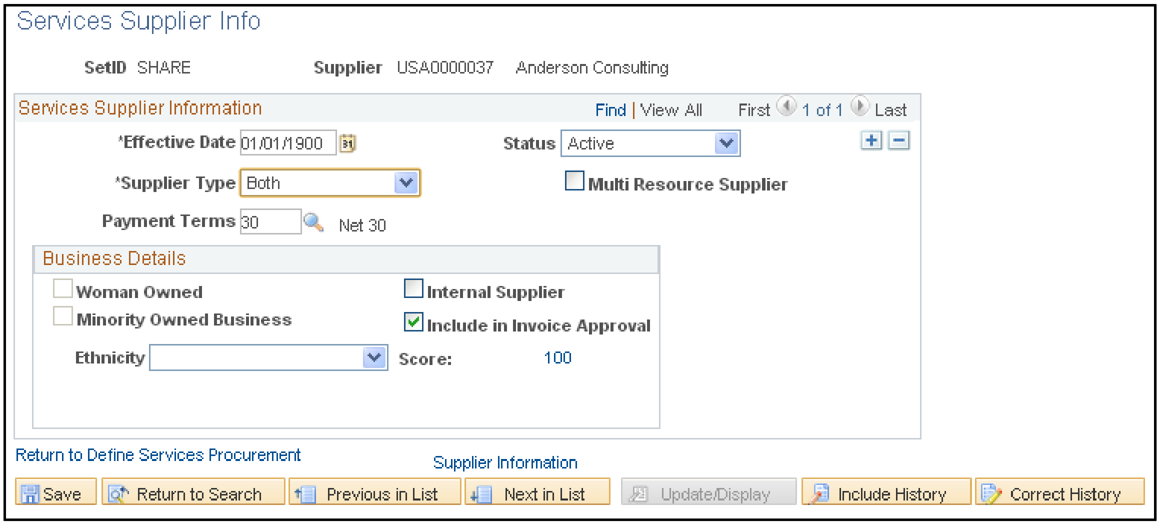
Services Supplier Info Page

Use the Services Supplier Info page (VENDOR_SPRO_PG) to maintain suppliers as service suppliers.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Services Supplier Setup** > **Service Supplier Information**
- **Services Procurement** > **Define Services Suppliers** > **Service Details**

This example illustrates the fields and controls on the Services Supplier Info Page. You can find definitions for the fields and controls later on this page.



Services Supplier Info

SetID SHARE

Supplier USA0000037 Anderson Consulting

Services Supplier Information

*Effective Date 01/01/1900

Status Active

*Supplier Type Both

☐ Multi Resource Supplier

Payment Terms 30 Net 30

Business Details

☐ Woman Owned

☐ Minority Owned Business

☐ Internal Supplier

☑ Include in Invoice Approval

Ethnicity

Score: 100

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

Field or Control	***Description***
Multi Resource Supplier	Select to indicate that this supplier can be included for multi-resource transactions. These transactions support multiple, unique services and service providers in Services Procurement requisitions, sourcing, and work orders. You must select this check box to enable this supplier to be used use multiple resource services.
Internal Supplier	Select if the supplier is internal to your organization.
Include in Invoice Approval	Select if invoices should be routed to the supplier for approval before being routed internally for approval. If this option is selected after work orders have already been opened for the supplier, then the Supplier Invoice Approver name on these work orders will be missing. Therefore, the system issues a warning whenever this option is selected to remind the user to review all open work orders for this supplier and to assign a supplier invoice approver. If the Supplier Invoice Approver is missing on any work orders, invoicing will bypass submitting the invoice to suppliers for approval even though this option is selected to Include in Invoice Approval.
Ethnicity	If the supplier is minority owned, select the ethnicity of the owner.
Score	Displays the supplier score as determined from data analysis.

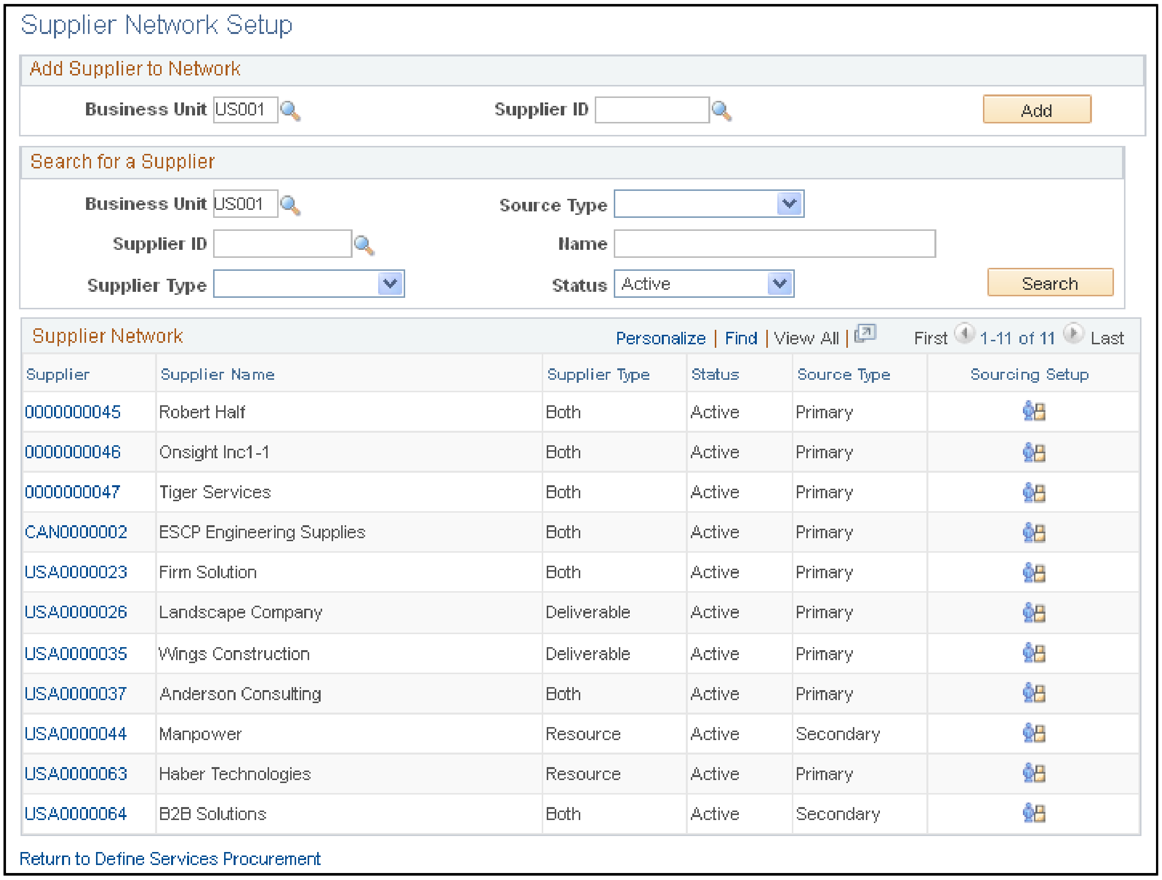
Supplier Network Setup Page

Use the Supplier Network Setup page (SPB_SUP_NETWORK) to maintain a network of service suppliers for each business unit.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Services Supplier Setup** > **Supplier Network Setup**
- **Services Procurement** > **Define Services Suppliers** > **Supplier Network Setup**

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



Supplier Network Setup

Add Supplier to Network

Business Unit: US001

Supplier ID:

Search for a Supplier

Business Unit: US001

Source Type:

Supplier ID:

Name:

Supplier Type:

Status: Active

Supplier Network

Supplier	Supplier Name	Supplier Type	Status	Source Type	Sourcing Setup
0000000045	Robert Half	Both	Active	Primary	👤
0000000046	Onsight Inc1-1	Both	Active	Primary	👤
0000000047	Tiger Services	Both	Active	Primary	👤
CAN0000002	ESCP Engineering Supplies	Both	Active	Primary	👤
USA0000023	Firm Solution	Both	Active	Primary	👤
USA0000026	Landscape Company	Deliverable	Active	Primary	👤
USA0000035	Wings Construction	Deliverable	Active	Primary	👤
USA0000037	Anderson Consulting	Both	Active	Primary	👤
USA0000044	Manpower	Resource	Active	Secondary	👤
USA0000063	Haber Technologies	Resource	Active	Primary	👤
USA0000064	B2B Solutions	Both	Active	Secondary	👤

Field or Control	***Description***
👤	Click to access the Supplier Sourcing Setup component, where you can organize service suppliers by business unit, region, service type, and service.

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

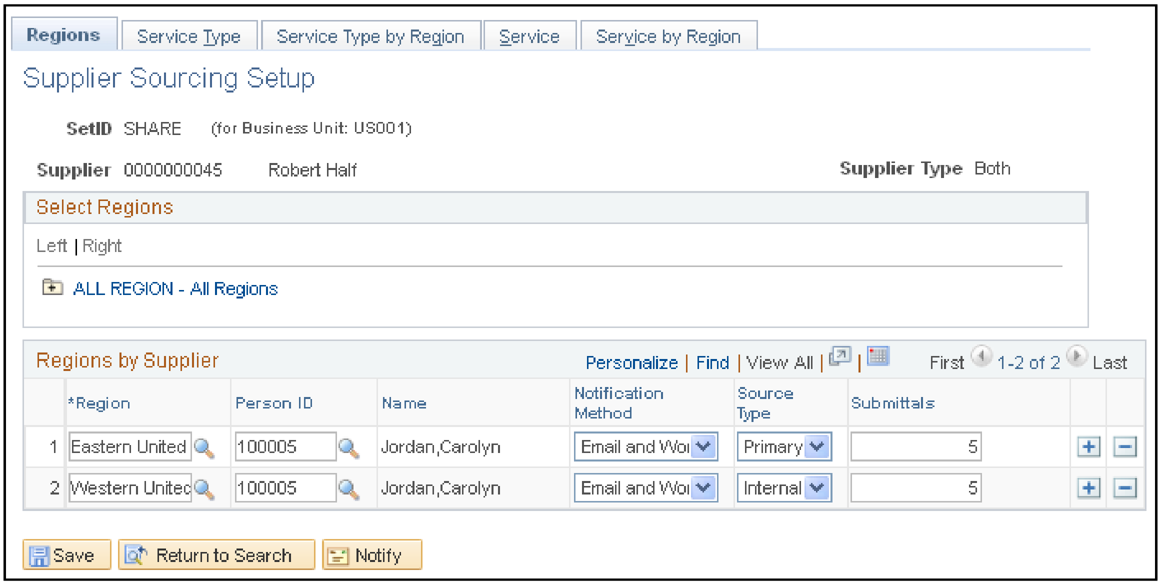
Supplier Sourcing Setup Page

Use the Supplier Sourcing Setup - Region page (SPB_SPLR_REGION_PG) to maintain sourcing rules for suppliers by associating them with regions, service types and services.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Services Supplier Setup** > **Supplier Sourcing Setup**
- **Services Procurement** > **Define Services Suppliers** > **Supplier Sourcing Setup**

This example illustrates the fields and controls on the Supplier Sourcing Setup page.



Supplier Sourcing Setup

SetID SHARE (for Business Unit: US001)

Supplier 0000000045 Robert Half **Supplier Type** Both

Select Regions

Left | Right

ALL REGION - All Regions

Regions by Supplier

	*Region	Person ID	Name	Notification Method	Source Type	Submittals
1	Eastern United	100005	Jordan,Carolyn	Email and Wor	Primary	5
2	Western Unitec	100005	Jordan,Carolyn	Email and Wor	Internal	5

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

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

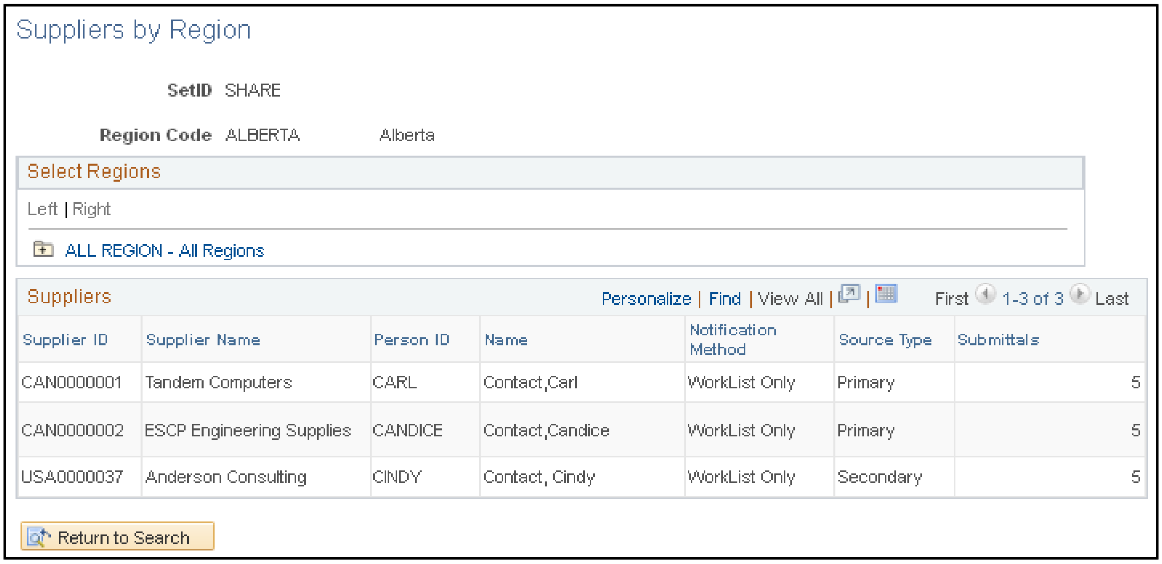
Suppliers by Region Page

Use the Suppliers by Region page (SPB_REGION_SPLR_PG) to displays suppliers by region.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Services Supplier Setup** > **Suppliers by Region**
- **Services Procurement** > **Define Services Suppliers** > **Suppliers by Region.**

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



Suppliers by Region

SetID SHARE

Region Code ALBERTA Alberta

ALL REGION - All Regions

1-3 of 3

Supplier ID	Supplier Name	Person ID	Name	Notification Method	Source Type	Submittals
CAN0000001	Tandem Computers	CARL	Contact,Carl	WorkList Only	Primary	5
CAN0000002	ESCP Engineering Supplies	CANDICE	Contact,Candice	WorkList Only	Primary	5
USA0000037	Anderson Consulting	CINDY	Contact, Cindy	WorkList Only	Secondary	5

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

Defining Sourcing Setup

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

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

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

This topic provides an overview of the bid factor processes and discusses how to define sourcing setup.

Pages Used to Define Sourcing Setup

Page Name	*Definition Name*	*Usage*
Automatic Sourcing Page	SPF_AUTOSOURCE	Define rules to automatically source upon requisition approval.
Bid Factor Setup Page	BID_FACTOR_PNL	Create bid factors.

Page Name	***Definition Name***	***Usage***
Assign Business Units and Departments to Bid Factor Page	BID_FCTR_BUDEPT	Assign business units and departments to bid factors. Bid Factor Setup Page
Assign Defaulting Rules to Bid Factor Page	BID_FACTOR_LINE	Assign defaulting rules to bid factors. Bid Factor Setup Page
Assign Response Query to Bid Factor Page	BID_FCTR_QRY	Associate response query to bid factors. Bid Factor Setup Page
Assign Contract Clauses Page	BID_FCTR_CLAUSE	Assign contract clauses to bid factors. Bid Factor Setup Page
Assign Contract Agreements Page	BID_FCTR_AGRMNT	Assign contract agreements. Bid Factor Setup Page
“Bid Factor Group Page” (PeopleSoft Strategic Sourcing)	BID_FACTOR_GRP	Group bid factors.
Bid Factor Mapping Page	SPF_BIDFCTR_MAP_PG	Map predefined attributes to bid factors in the strategic sourcing module.
Bid Factors by Category Page	SP_BDFTR_BY_CAT_PG	Associate bid factors by category.
Services Procurement Pay Types Page	SPB_PAY_TYPES	Maintain descriptive labels for each pay type.
Markup Details Page	SPB_SRVC_MRKUP	Maintain supplier markup information by service type.
Maintain Markups by Region Page	SPB_RGN_MRKUP	Maintain supplier markup information by region.
Performance Level Code Page	SPB_LVL_CD	Maintain performance level codes for a supplier.
Supplier Scoring Rule Page	SPB_SUP_SCORE_RULE	Maintain supplier scoring rules.

Understanding Bid Factors

With PeopleSoft Services Procurement bid factors, you can:

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

Bid Factors and Requisitions

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

Bid factors appear by default from several setup pages:

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

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

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

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

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

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

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

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

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

Related Links

Understanding Requisitions

Bid Factor Setup Page

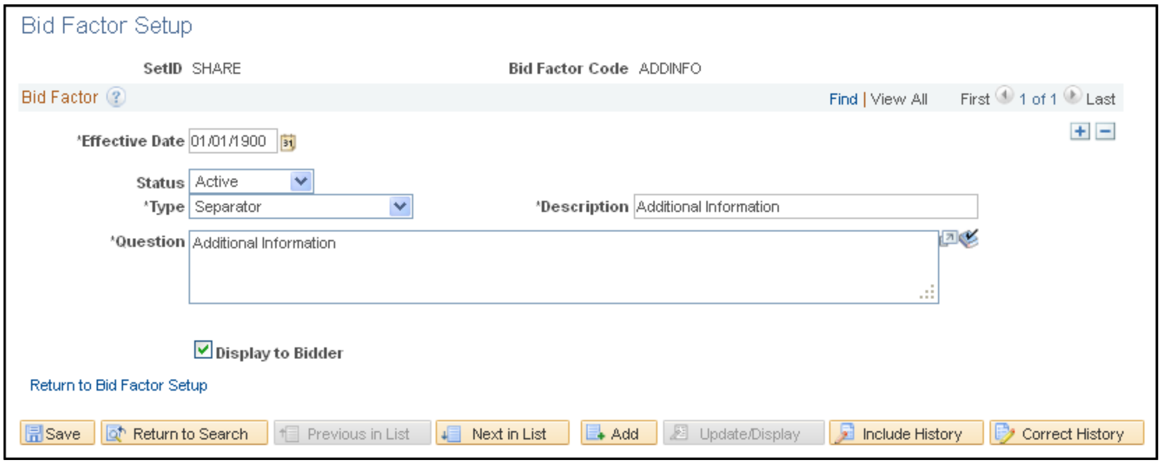
Use the Bid Factor Setup page (BID_FACTOR_PNL) to create bid factors.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Sourcing Setup** > **Bid Factor Setup** > **Bid Factor Setup**

- **Sourcing** > **Create Events** > **Bid Factor Setup**

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



SetID SHARE

Bid Factor Code ADDINFO

*Effective Date 01/01/1900

Status Active

*Type Separator

*Description Additional Information

*Question Additional Information

☑ Display to Bidder

Field or Control	***Description***
Default Weighting	Assign an ideal default weighting for the bid factor question that you create.
Type	Select the bid factor type. The bid factor type determines the bid factor questions. Values are: • *Date* • *List* • *Monetary* • *Numeric* • *Separator* • *Text* • *Yes/No* Additional fields appear, depending on the bid type selection. **Note:** The separator bid factor type is used to organize long lists of bid factors by creating headings.
Question	Enter the text of the bid factor question.
Best and **Worst**	Enter the best and worst possible scores that a supplier can bid for a particular question. For example, if you create a new bid factor with type *Date,* and the **Question** field contains *What is the end date?* the **Best** and **Worst** fields represent the best and worst dates on which the candidate can complete the job.

Field or Control	***Description***
Assign BUs and Departments	Click to access the Assign Business Units and Departments to Bid Factor page, where you can assign business units and departments to bid factors.
Assign Defaulting Rules	Click to access the Assign Defaulting Rules to Bid Factor page, where you can assign default rules to bid factors.
Assign Response Query	Click to access the Assign Response Query to Bid Factor page, where you can assign a response query to bid factors.
Assign Clauses	Click to access the Assign Contract Clauses page, where you can assign contract clauses to bid factors.
Assign Agreements	Click to access the Assign Contract Agreements page, where you can assign contract agreement to bid factors.

Cost Contributions

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

Bid Factor Mapping Page

Use the Bid Factor Mapping page (SPF_BIDFCTR_MAP_PG) to map predefined attributes to bid factors in the strategic sourcing module.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Sourcing Setup** > **Bid Factor Setup** > **Bid Factor Mapping**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Bid Factors** > **Bid Factor Mapping**

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

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

Field or Control	***Description***
Bid Factor Code	Enter the bid factor code that maps to the specified services procurement attribute.

Field or Control	***Description***
Status	Displays the status of the bid factor mapping.

Field or Control	***Description***
Comment Text	Displays the question related to the bid factor code.

Field or Control	***Description***
Resource Service type BF (resource service type bid factor)	Select this check box if the bid factor is related to resource-based requisitions. **Note:** The RATE and CANDIDATE bid factor mappings only occur on resource-based requisitions, and therefore, only have the **Resource Service type BF** check box selected.
Deliverable service type BF (deliverable service type bid factor)	Select if the bid factor is related to deliverables-based requisitions. The *AMOUNT* bid factor mappings only occurs on deliverables-based requisitions, and therefore, only have the **Deliverable service type BF** check box selected.

Note: Use ad hoc bid factors to create unique bid factor values that appear by default in requisitions. Important! Note that you must create two bid factor codes. These are Rate and Amount.

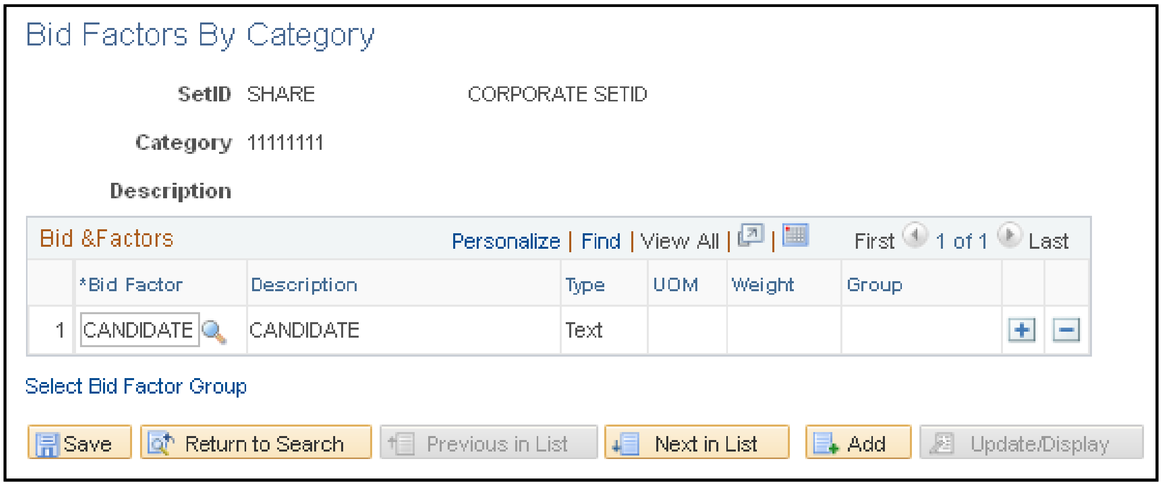
Bid Factors by Category Page

Use the Bid Factors by Category page (SP_BDFTR_BY_CAT_PG) to associate bid factors by category.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Sourcing Setup** > **Bid Factor Setup** > **Bid Factors by Category**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Bid Factors** > **Create Bid Factors by Category**

This example illustrates the fields and controls on the Bid Factor by Category page.



Bid Factors By Category

SetID SHARE CORPORATE SETID

Category 11111111

Description

Bid &Factors

	*Bid Factor	Description	Type	UOM	Weight	Group
1	CANDIDATE	CANDIDATE	Text			

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

Services Procurement Pay Types Page

Use the Services Procurement Pay Types page (SPB_PAY_TYPES) to maintain descriptive labels for each pay type.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Sourcing Setup** > **Pay Types and Markups Setup** > **Services Pay Types**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Pay Types** > **Create Service Pay Types**

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

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

Markup Details Page

Use the Markup Details page (SPB_SRVC_MRKUP) to maintain supplier markup information by service type.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Sourcing Setup** > **Pay Types and Markups Setup** > **Markups by Service Type**

- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Pay Types** > **Markups by Service Type**

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

Field or Control	***Description***
Max Supplier Markup (maximum supplier markup)	Enter the maximum supplier markup rate as percentage or as total amount.
Max Total Markup (maximum total markup)	Enter the maximum supplier tolerance rate in percentage.

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

Maintain Markups by Region Page

Use the Maintain Markups by Region page (SPB_RGN_MRKUP) to maintain supplier markup information by region.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Sourcing Setup** > **Pay Types and Markups Setup** > **Markups by Region**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Pay Types** > **Define Markups by Region**

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

Field or Control	***Description***
Max Supplier Markup (maximum supplier markup)	Enter maximum supplier markup rate as percentage or as total amount.
Max Total Markup (maximum total markup)	Enter maximum supplier tolerance rate in percentage.

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

Maintaining Users and Team Setup

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

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

This topic provides an overview of users and team setup, and discusses how to maintain users and team setup.

Pages Used to Maintain User and Team Setup

Page Name	***Definition Name***	***Usage***
User Profiles	SPB_USRPRFL_PG_SEC	Update the user profile for this services user.
User Profile Information Page	SPB_USR_PROFILE_PG	Set up user profiles.
eProcurement Role Actions Page	PV_ACTIONS	View pre-defined role actions.
Administrator Role Action Category Page	PV_ACT_CATEGORY	View the role action categories that are defined for transactions.
Assign Role Actions To Roles Page	PV_ACTIONS	Assign role names to user types.
Roles for User Setup Page	SPB_USRSTP_ROLE_PG	Assign roles to predefined user types to be used when creating a new user
User Preferences Page	PV_OPR_LINKS	Enter overall and procurement preferences.
Overall Preferences Page	OPR_DEF_TABLE_FS1	Capture the default business unit and default SetID for the requester, and add all other users. User Preferences Page
Requester Defaults Page	SPB_REQ_USR_DEF_PG	Set up preferences for requesters.
Service Coordinator Defaults Page	SPB_SRVC_USRDEF_PG	Set up preferences for service coordinators.
Services User Setup Page	SPB_USER_SETUP_PG1	Register requesters, service coordinators, service providers, service provider contacts, service administrators, and approvers.

Page Name	***Definition Name***	***Usage***
Services User Setup Page	SPB_USER_SETUP_PG2	Determine whether the new user has an existing user profile or needs a new profile, add new users as requesters, and establish security and user preferences for the new user.
"Requester Setup Page" (PeopleSoft Source to Settle Common Information)	REQUESTOR_TBL	Define requisition and catalog defaults for the requester.
Maintain Service Coordinator	SPB_PERSON_PAGE	Define personal information for the service coordinator
Maintain Service Coordinator - Service Coordinator Information	SPB_COORDINATOR_PG	Define employee and user ID information.
Maintain Service Coordinator - Phone and Email Details	SPB_USR_PH_EM_PAGE	Enter telephone and email details for the service coordinator.
User Login Information - User Profile Information	SPB_PERSLGN_SEC_PG	Define login information for the service coordinator.
Maintain Provider Contact Page	SPB_SP_PERS_PAGE	Define personal information for the provider contact. Services User Setup Page
Maintain Provider Contact - Provider Contact Information Page	SPB_PROV_CNTCT_PG	Define supplier, location code, and create user profile. Services User Setup Page
Maintain Provider Contact - Phone and Email Details Page	SPB_USR_PH_EM_PG2	Enter telephone and email details for the provider contact. Services User Setup Page
Replace Service Coordinator Page	SPB_REPLACE_SC	Use this page to replace the service coordinator. This page is used for non-VMS service coordinators.
Multi Resource Service Information Page	SPB_REPL_REQ_MRSC	View requisition details including the requisition ID, service, service type, and positions for each service. Replace Service Coordinator Page

Page Name	***Definition Name***	***Usage***
Multi Resource Service Information Page	SPB_REPL_WO_MRSC	View work order details including the work order ID, service, service type, and positions for each service. Replace Service Coordinator Page
Replace VMS Coordinator Page	SPB_REPL_VMS_SC	Use this page to replace VMS service coordinators. This page is used to replace VMS service coordinators.
Service Coordinator Replacement Log Page	SPB_REPLASC_LOG	View requisitions and work orders on which the service coordinator replaced.
Maintain Service Provider Page	SPB_PERS_PROV_PAGE	Maintain service provider information, including personal information for the provider.
Eligibility Status Confirmation Page	SP_REASONCD_DTL	Provide a reason code for making the eligibility status change if the installation options have been defined to use reason codes. In addition, if the installation options have been defined to require comments, you must enter comments for the change. Maintain Service Provider Page
Service Provider Information Page	SPB_PROVIDER_PG	Maintain service provider information. This includes defining work status, project role, supplier, years of experience, and other parameters to define the service provider. If you are maintaining an independent service supplier, a similar page is used, but a provider contact is not required.
Maintain Service Provider - Service Provider Information Page	SPB_INDP_PROVIDER_PG	Maintain independent service provider information. This page is similar to the Maintain Service Provider - Service Provider Information page except independent providers do not have provider contacts. Service Provider Information Page
Maintain Service Provider - Phone and Email Details Page	SPB_USR_PH_EM_PG3	Enter telephone and email details for the service provider. Service Provider Information Page

Page Name	***Definition Name***	***Usage***
Service Provider Skills Page	SPB_PROV_SKILL_PG	Select appropriate competencies for the service provider. Service Provider Information Page
Service Provider Identifiers Page	SPB_PRV_ID	Set up service provider identifiers. Identifiers are types of identifications that uniquely identify people, such as a social security number.
Service Provider Eligibility Review Page	SPB_SPELGBLTY_SRCH	Search for ineligible service providers.
Service Team Page	SPB_TEAM	Create service coordinator teams that can source and bid on each other's requisitions and edit each other's work orders.
Teams by Region/Service Type	SPB_TEAM_STREG	Determines which team will be defaulted to a requisition or work order. If there is no default team associated to the service requester, the system then looks for a team by region and service type.

Understanding Users and Team Setup

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

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

Understanding User Roles

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

Here are some examples of enterprise users:

- Requester.
- Service coordinator (employee).

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

Here are some examples of supplier users:

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

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

Note: An individual user may be associated with one or more of these roles.
The system uses autonumbering to generate unique person IDs while registering a service coordinator, service provider contact, and service provider. The system uses the PeopleSoft Services Procurement person ID to number type to automatically generate the person ID.

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

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

Requesters

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

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

Service Coordinators

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

Provider Contacts

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

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

Service Providers

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

Service Providers/Coordinators

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

Note that:

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

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

Independent Providers

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

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

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

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

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

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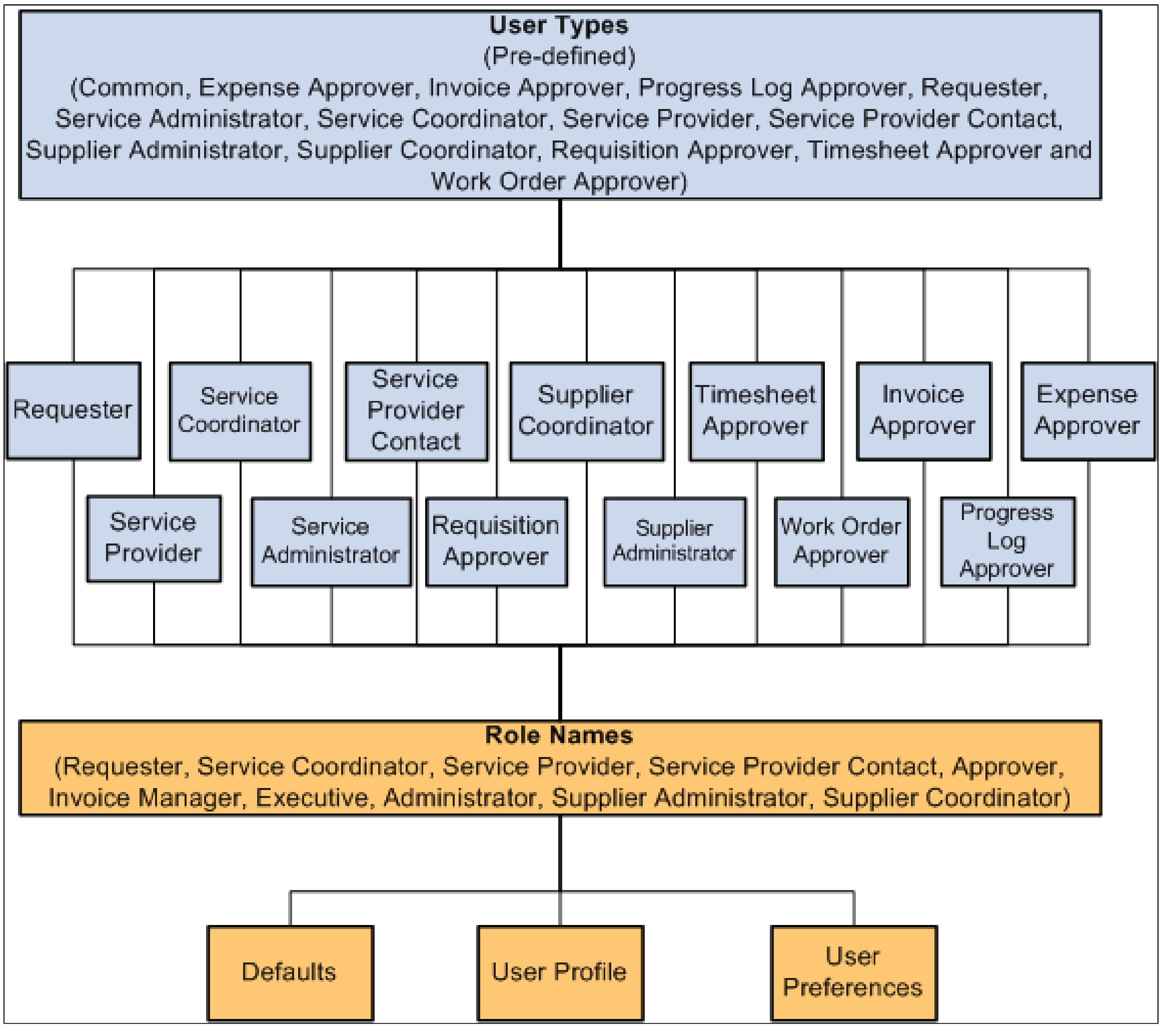
Understanding Role Names and User Types

This diagram illustrates how user types are related to role names

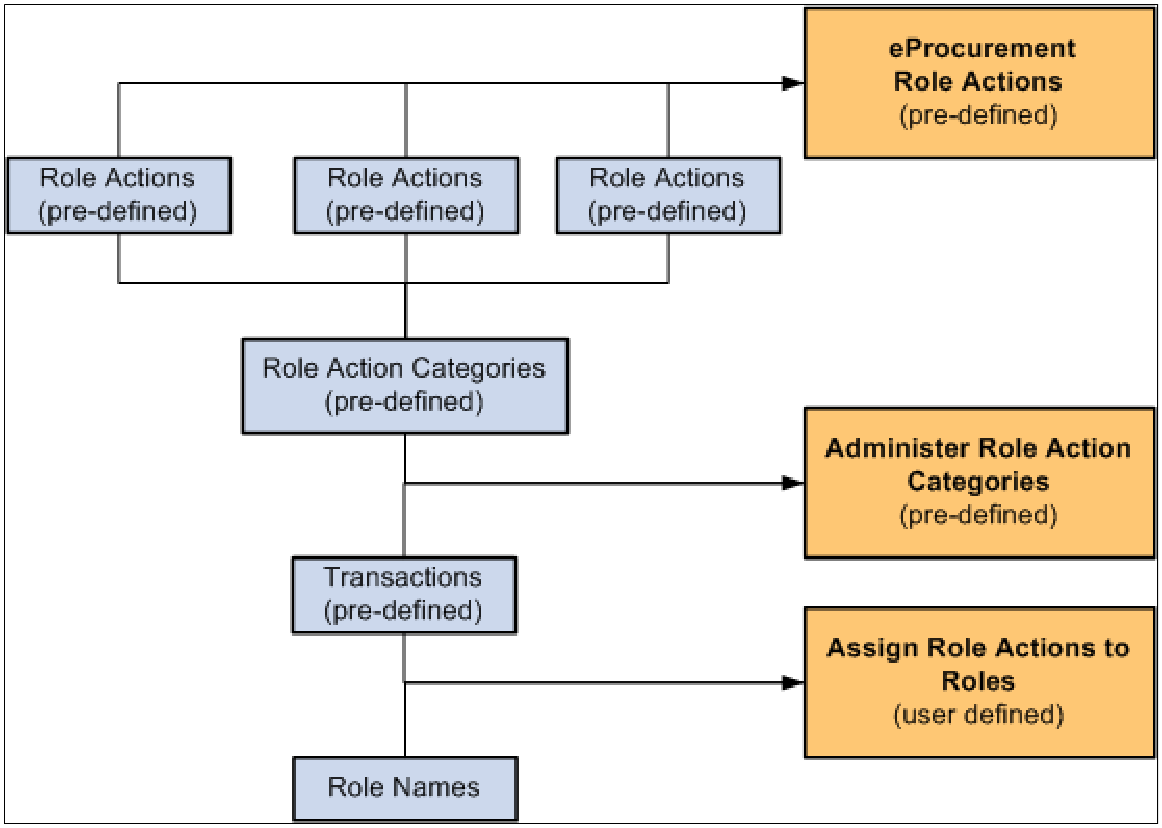


User types are predefined in the system. For PeopleSoft Services Procurement, you associate role names with one of fourteen user types by using the Roles for User Setup page.

Additional information can be defined for each role name by using the Services User Setup wizard, which provides access to the role defaults, user profile, and user preferences.

Understanding Role Names and Role Actions

This diagram illustrates how role actions are related to role names:



Role actions are pre-grouped into role action categories. Role action categories are pre-associated with transactions, which can be viewed on the Administer Role Action Categories page.

The relationship between role actions, role action categories, and transactions can be viewed on the eProcurement Role Actions page.

Transactions are associated with a role name on the Assign Role Actions to Roles page. When selecting the transaction, the system pulls all role action categories that have been associated with that transaction on the Administer Role Action Categories page. The role action category pulls the role actions. The Assign Role Actions to Roles page determines what role name can perform what action and enables you to modify the action control.

The role name is the common connection between the Role Name and User Type diagram, and the Role Name and Role Action diagram.

Common Elements Used in this Section

Field or Control	***Description***
Return to Services User Setup	Click this page to return to the Services User Setup page.

eProcurement Role Actions Page

Use the eProcurement Role Actions page (PV_ACTIONS) to view the roles that a role action has been assigned to. The actual assignment is done on the Assign Role Actions to Roles page.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Role Actions**
- **Services Procurement** > **User and Team Setup** > **Define Role Actions**

Role actions specify which roles can perform specific actions within the application. The services procurement role actions that PeopleSoft delivers begin with SP. This table provides the Services Procurement role actions:

Field or Control	***Description***
Role Action	Description
SP_ADD_SERV_PROVIDER	Enables users to add service providers from the Maintain Service Provider component on the Supplier portal. **Note:** If this role action has an active role associated to it, the **Add Service Provider** link is visible and editable. If no roles are associated to this role action, the link is hidden.
SP_ADD_WO_ADHOC_ACT	Enables you to add ad hoc work order activities.
SP_ALLOW_PASTDATE	Enables users to create service requisitions with start dates in the past for the roles to which this role action is assigned.
SP_APPROVER	Enables you to approve service requisitions.
SP_COORDINATOR_BUYER	Enables users to edit a sourced requisition, cancel a requisition, view the life cycle, view service projects and service activities, view service requisitions and lines, source requisitions, communicate with suppliers, view bid and response information, create and manage work orders, and view timesheets and expenses.
SP_ENTERPRISE_ADMIN	Identifies enterprise administrators.

Field or Control	***Description***
SP_EXP_APPROVER	Determines which user roles can approve expenses.
SP_VIEW_VENDOR_INFO	View the sourcing preferences functionality from the requisition. It enables the sourcing preferences from the PeopleSoft Services Procurement requisition page, thus, allowing the requester to specify preferred suppliers.
SP_INVOICE_APPROVER	Enables you to approve invoices.
SP_IGNORE_REAPPR	Does not initiate the re-approval process for the roles assigned to this role action, when the requisition is filled with higher rate.
SP_OVERRIDE_SUR_FLAG	Enables users to override the require survey option, which defaults from the service type of the work order.
SP_PROVCNTCT_ACTION	A Service Provider contact is a supplier user who submits candidates and manages assignments from the supplier side. Users with this role action can create progress logs and view supplier facing Work Orders, including rate information.
SP_REPLACE_SC_ACCESS	Enables users to access the Replace Coordinator and Replace VMS Coordinator components. Users with this role action can search requisitions and work orders, and replace coordinators on these transactions.
SP_REQUESTER	Enables users to create and manage service projects and service activities, create and manager service requisitions and lines, view service sourcing information, view bid and response information, view work orders, approve timesheets and expenses, and create progress logs.
SP_SERVICE_PROVIDER	Identifies service providers.
SP_SRVC_COORDINATOR	A Service Coordinator may be an internal user or a supplier user. Users with this role action are able to access coordinator related user preferences and defaults, coordinator replacement log, rate and bid factor information, and work order shifts/assignments. They can maintain distribution lines for copied/extended requisitions, edit number of positions, source work order replacements, create interviews, and trigger creation of work order from filled bids. Users with this role action can also perform various actions in an MSP environment, such as add/extend work orders, edit work order milestones/activities, and access work order pay rate information.
SP_SUPPLIER_ADMIN	Identified supplier administrators.

Field or Control	***Description***
SP_TIME_ADJUST	Enables users to adjust timesheets after the timesheet has been submitted for approval.
SP_TIME_APPROVER	Determines which user roles can approve timesheets.
SP_TIME_PROXY	Enables users to enter timesheets on behalf of a service provider
WF_REAAPR_REQUIRED	Enables you to edit a few fields (service coordinator, time approval, and competency description) on the requisition even after it's approved or sourced.
SP_EXPENSE_PROXY	Enables users to enter expenses on behalf of a service provider.
SP_PLOG_APPROVER	Determines which user roles can approve progress logs.
SP_VIEW_RT_BREAKDOWN	View the rate breakdown information on requisition and work order pages. Total supplier rate and expenses are displayed.
SP_TIME_ADJUST_TRC	Enables users to adjust time categories to a timesheet line, after the timesheet is submitted for approval.
SP_VIEW_REQ_APPROVAL	Enables users to view Requisition Approval details, when applicable, on the Requisition Summary page in Services Procurement.
SP_TIME_HIDE_TRC_SUM	Determines whether a user role can view time reporting code summaries. When you assign this role action to a user role, that role will not be able to view the summaries on the Review Timecard page.
SP_VMS_MSP_BREAKDOWN	Enables users to view the VMS and MSP rate, VMS and MSP amount, and supplier rate information on requisition, bidding, and work order pages for VMS managed lines.
SP_WRKORDER_APPROVER	Enables you to approve work orders.

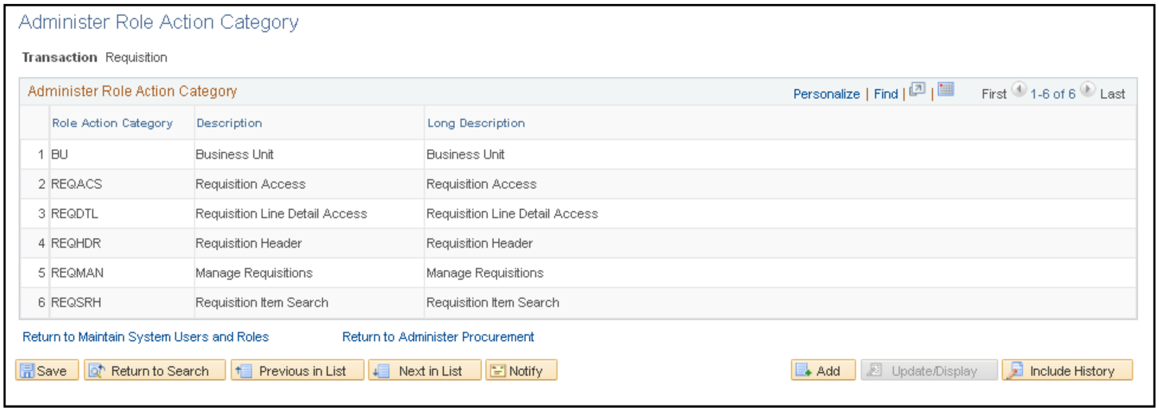
Administrator Role Action Category Page

Use the Administrator Role Action Category page (PV_ACT_CATEGORY) to assign role names to user types.

Navigation:

Services Procurement, User and Team Setup, Define Role Action Category

This example illustrates the fields and controls on the Administer Role Action Category page. You can find definitions for the fields and controls later on this page.



Administer Role Action Category

Transaction Requisition

Administer Role Action Category

	Role Action Category	Description	Long Description
1	BU	Business Unit	Business Unit
2	REQACS	Requisition Access	Requisition Access
3	REQDTL	Requisition Line Detail Access	Requisition Line Detail Access
4	REQHDR	Requisition Header	Requisition Header
5	REQMAN	Manage Requisitions	Manage Requisitions
6	REQSRH	Requisition Item Search	Requisition Item Search

Return to Maintain System Users and Roles

Return to Administer Procurement

Use this page to view the role action categories that are assigned to transactions.

This table lists the role action category and description for Services Procurement transactions:

Transaction	***Role Action Category and Description***
Common Actions	CMNACS – Common Access
Expense	EXPACS – Expense Access
Invoice	INVACS – Invoice Access
Requisition	REQACS – Requisition Access REQDTL – Requisition Line Detail Access REQHDR – Requisition Header REQMAN – Manage Requisitions REQSRH – Requisition Item Search
Work Order	WOACS – Work Order Access
Timesheet	TIMACS – Timesheet Access
Progress Log	PLACS – Progress Log Access
Supplier Administrator	SUPACS – Supplier Access
Workflow	REQWKL — Requisition Workflow

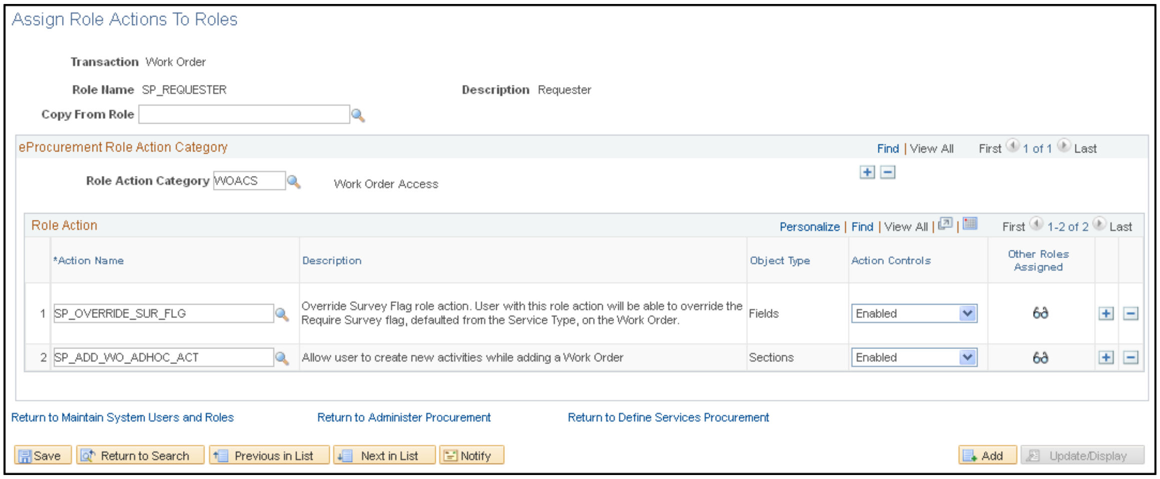
Assign Role Actions To Roles Page

Use the Assign Role Actions To Roles page (PV_ACTIONS) to assign role names to user types.

Navigation:

Services Procurement, User and Team Setup, Assign Role Actions to Roles

This example illustrates the fields and controls on the Assign Role Actions To Roles (by Role Action Category) page. You can find definitions for the fields and controls later on this page.



Transaction Work Order

Role Name SP_REQUESTER Description Requester

Copy From Role

Role Action Category WOACS Work Order Access

	*Action Name	Description	Object Type	Action Controls	Other Roles Assigned
1	SP_OVERRIDE_SUR_FLG	Override Survey Flag role action. User with this role action will be able to override the Require Survey flag, defaulted from the Service Type, on the Work Order.	Fields	Enabled	👓
2	SP_ADD_WO_ADHOC_ACT	Allow user to create new activities while adding a Work Order	Sections	Enabled	👓

Use this page to manage role actions and role action categories for each role that is associated with each transaction.

1. As you enter the page, select a transaction.
2. Select a role name that is associated with the transaction.
3. In the Role Action Category field, select from the Services Procurement categories that are pre-defined on the Administrator Role Action Category page.
4. In the Action Name field, select from the Services Procurement role action names that are pre-defined on the eProcurement Role Actions page.
5. In the Action Controls field, select how the system should display the action category.

Field	***Description***
Transaction	Select a transaction from the list of options. Services Procurement options include: Common Access, Expense, Invoice, Progress Log, Requisition, Supplier Administration, Timesheet, and Work Order.

Field	***Description***
Copy From Role	Select a role to copy from. This option enables you to populate the fields on this page, which can speed up the process of creating a new record.

Field	***Description***
Role Action Category	Select from the list of Services Procurement categories that are pre-defined on the Administrator Role Action Category page. This field indicates the type of access that the user role has such as requisition line detail access, timesheet access, and so on. The users are specified in the Role Action section of the page. These values are pre-delivered. Multiple role action categories can be added to the transaction by using the Add button.

Field	***Description***
Action Name	Displays Services Procurement role action names that are pre-defined on the eProcurement Role Actions page. This field identifies the user roles that can perform the action in the Role Action Category field, for the transaction.
Object Type	Displays the object types that can be displayed, hidden, enabled, or disabled for the combination of user role, action category, and transaction.
Action Controls	Displays the action that can be performed by the user role. Options include: Disabled, Enabled, Hide, and Show.
Other Roles Assigned	Click to access the Other Roles Assigned page. This page displays the Role Name, Object Type, and Action Control of other user roles that are assigned to the role action name.

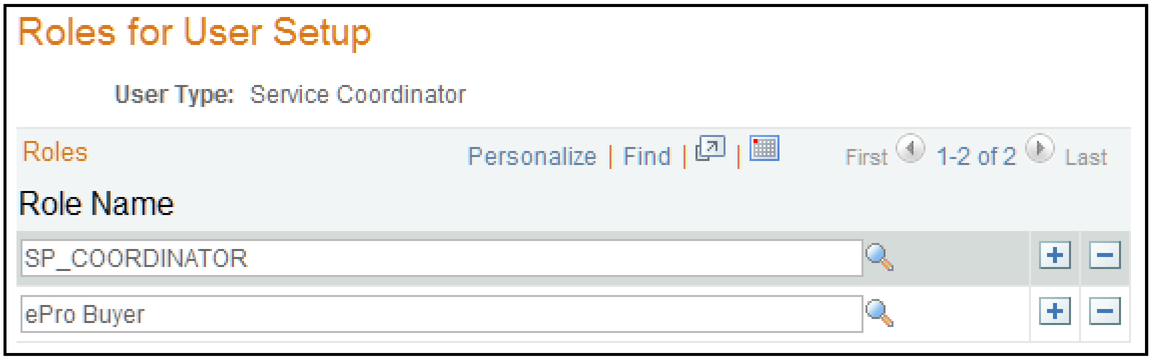
Roles for User Setup Page

Use the Roles for User Setup page (SPB_USRSTP_ROLE_PG) to assign roles to predefined user types to be used when creating a new user.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Roles for User Setup**
- **Services Procurement** > **User and Team Setup** > **Roles for User Setup**

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


Roles for User Setup

User Type: Service Coordinator

Role Name
SP_COORDINATOR
ePro Buyer

Use this page to map user roles to user types. User types are pre-defined and include: Common. Expense Approver, Invoice Approver, Progress Log Approver, Requester, Requisition Approver, Service Administrator, Service Coordinator, Service Provider, Service Provider Contact, Supplier Administrator, Timesheet Approver, Work Order Approver, and Supplier Coordinator.

User Types are created using Services User Setup component and are used on the Roles for User Setup page. Map these user types to user roles e.g. User type Requisition Approver can be mapped to the delivered role SP_APPROVER etc.

User Profile Information Page

Use the User Profile Information page (SPB_USR_PROFILE_PG) to update user profile information.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Services User Setup**

  On the Services User Setup (page 1), select **Create a new Services User** option in #1, select any type in step #2, and then click the Next button.

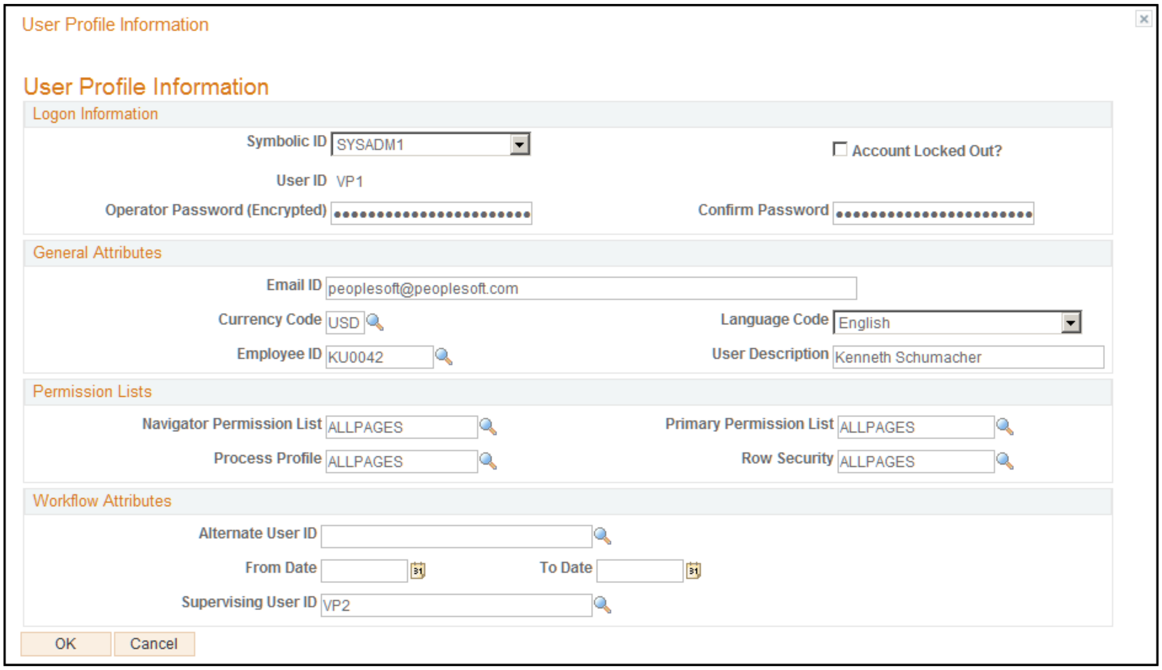
  Click No in step #3, and then click the User Profile link that appears in step #4.

- **Services Procurement** > **User and Team Setup** > **Services User Setup**

  On the Services User Setup (page 1), select **Create a new Services User** option in #1, select any type in step #2, and then click the Next button.

  Click No in step #3, and then click the User Profile link that appears in step #4.

This example illustrates the fields and controls on the User Profile Information page. You can find definitions for the fields and controls later on this page.



Symbolic ID: SYSADM1

☐ Account Locked Out?

User ID: VP1

Operator Password (Encrypted): ●●●●●●●●●●●●●●●●●●●●●●

Confirm Password: ●●●●●●●●●●●●●●●●●●●●●●

Email ID: peoplesoft@peoplesoft.com

Currency Code: USD

Language Code: English

Employee ID: KU0042

User Description: Kenneth Schumacher

Navigator Permission List: ALLPAGES

Primary Permission List: ALLPAGES

Process Profile: ALLPAGES

Row Security: ALLPAGES

Alternate User ID:

From Date:

To Date:

Supervising User ID: VP2

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

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

To set up user profiles:

1. Use the Roles for User Setup page for User Setup page (SPB_USRSTP_ROLE_PG) to assign roles to predefined role actions to be used when creating a new user.

   Navigation

   - **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Roles for User Setup**
   - **Services Procurement** > **User and Team Setup** > **Roles for User Setup**

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

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

   ---

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

   This table lists user roles and ID types:

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

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

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

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

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

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

   Enter the approver name in the **Supervising User ID** field.

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

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

User Preferences Page

Use the User Preferences page (PV_OPR_LINKS) to enter overall and procurement preferences.

Navigation:

- **Services Procurement** > **User and Team Setup** > **Maintain User Preferences**
- On the Service User Setup (page 1), choose any existing user in step #1, select any type in step #2, and enter person ID in step #3, and then click the User Preferences link in step #5.

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

To set up user preferences:

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

   Enter the required values, particularly the requester name. The selected requester has full authorization for creating, updating, and canceling requisitions.
4. Click the **Requisition Authorizations** link to define a requester's access to requisitions or to add multiple requesters to authorizations.

   The entry in the requisition authorization overrides the requester selected in the **Requester** field on the Procurement page.
5. Click the **Supplier Processing Authority** link to enable administrator access to enter, approve, and deactivate Suppliers.

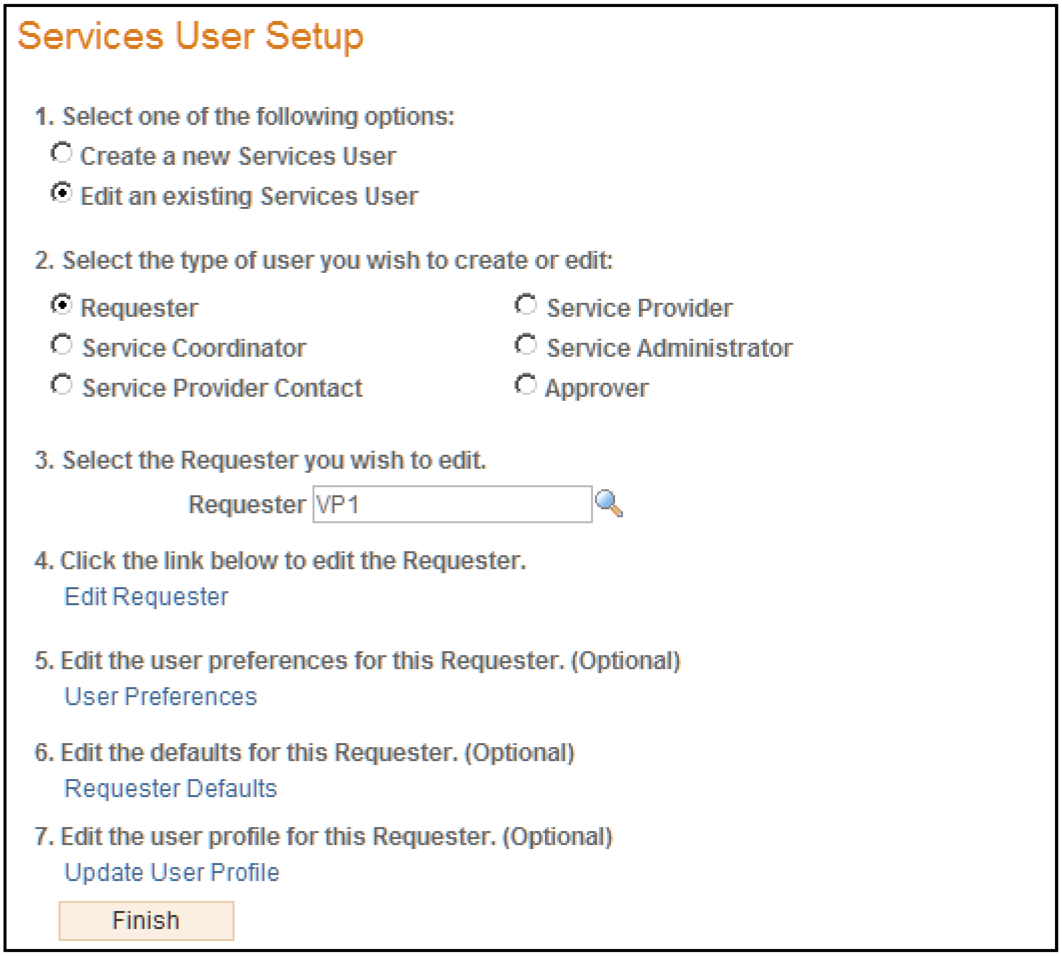
Creating and Editing Services Procurement Users

Use this page to create a new or edit an existing user for Services Procurement. There are six user types that include: Approvers, Requester, Service Administrator, Service Coordinator, Service Provider, and Service Provider Contact.

Navigation:

Services Procurement > **User and Team Setup** > **Services User Setup**

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



Services User Setup

1. Select one of the following options:
○ Create a new Services User
● Edit an existing Services User

2. Select the type of user you wish to create or edit:
● Requester
○ Service Coordinator
○ Service Provider Contact
○ Service Provider
○ Service Administrator
○ Approver

3. Select the Requester you wish to edit.
Requester VP1

4. Click the link below to edit the Requester.
Edit Requester

5. Edit the user preferences for this Requester. (Optional)
User Preferences

6. Edit the defaults for this Requester. (Optional)
Requester Defaults

7. Edit the user profile for this Requester. (Optional)
Update User Profile

Note: This page changes depending on the options you select for numbers one, two, and three.

Selection in option #2	***Page Links Available***
Requester	• Requester Setup • Service Requester Defaults • User Preferences • User Profile Information (page)
Service Provider	• Advance Search • Maintain Service Provider • User Preferences • User Profile Information (page)

Selection in option #2	***Page Links Available***
Service Coordinator	• Maintain Service Coordinator • Service Coordinator Defaults • User Preferences • User Profile Information (page)
Service Administrator	• User Preferences • User Profile Information (page)
Service Provider Contact	• Maintain Provider Contact • User Preferences • User Profile Information (page)
Approver	• User Preferences • User Profile Information (page)

Requester Defaults Page

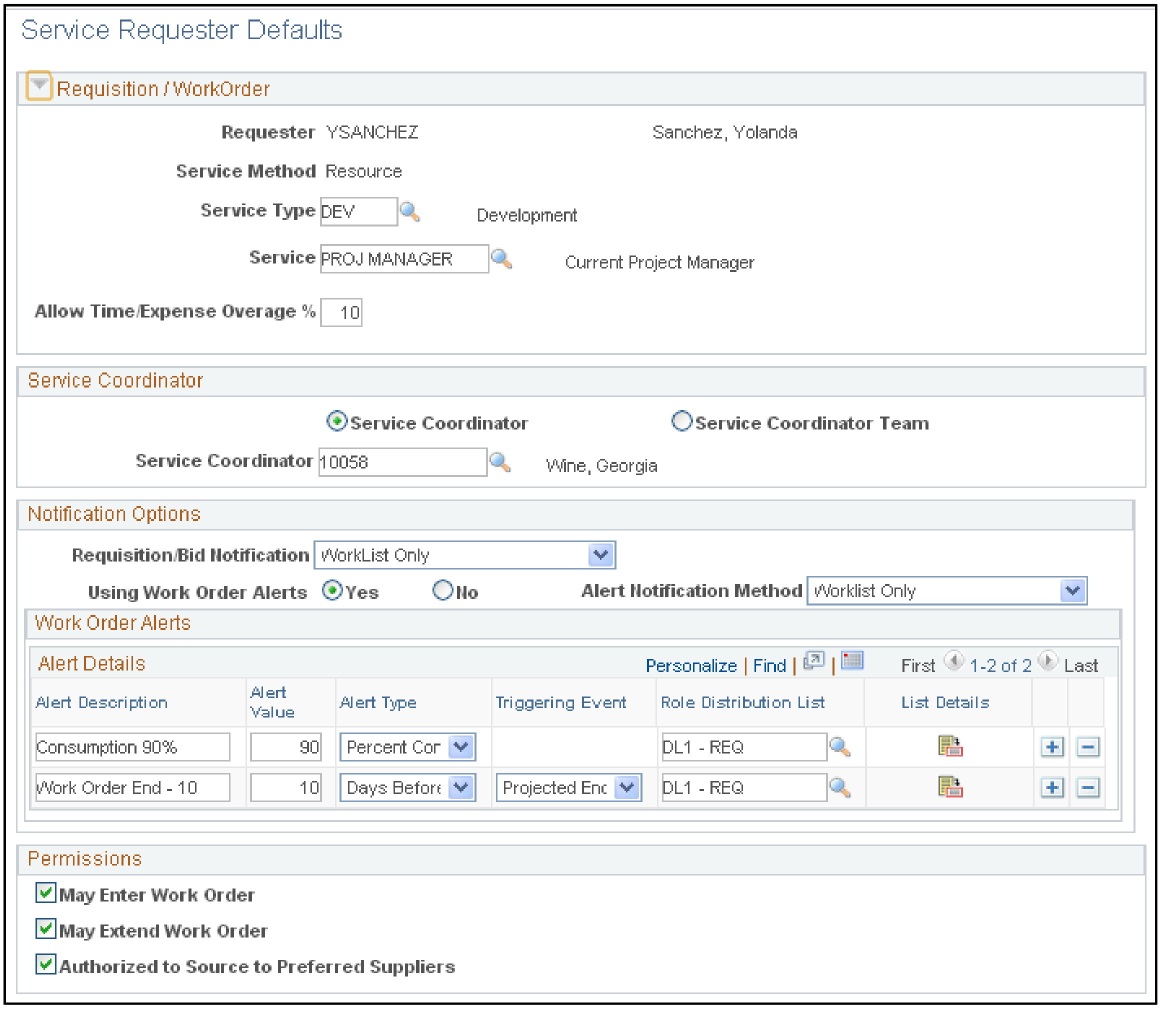
Service requester defaults make service requisition entry easier. The defaults that you define on this page are used on the requisition, simplifying the requisition entry process.

Use the Requester Defaults page (SPB_REQ_USR_DEF_PG) to set up preferences for requesters.

Navigation:

- **Services Procurement** > **User and Team Setup** > **Service Requester Defaults**
- On Service User Setup (page 1) select the 'existing' option in step #1 and in step #2, select **Requester,** and click the Requester Default link.

This example illustrates the fields and controls on the Service Requester Defaults page. You can find definitions for the fields and controls later on this page.



Service Requester Defaults

Requisition / WorkOrder

Requester YSANCHEZ Sanchez, Yolanda

Service Method Resource

Service Type DEV Development

Service PROJ MANAGER Current Project Manager

Allow Time/Expense Overage % 10

Service Coordinator

● Service Coordinator ○ Service Coordinator Team

Service Coordinator 10058 Wine, Georgia

Notification Options

Requisition/Bid Notification WorkList Only

Using Work Order Alerts ● Yes ○ No Alert Notification Method Worklist Only

Work Order Alerts

Alert Details Personalize | Find | First 1-2 of 2 Last

Alert Description	Alert Value	Alert Type	Triggering Event	Role Distribution List	List Details
Consumption 90%	90	Percent Cor		DL1 - REQ	
Work Order End - 10	10	Days Before	Projected Enc	DL1 - REQ	

Permissions

☑ May Enter Work Order

☑ May Extend Work Order

☑ Authorized to Source to Preferred Suppliers

Requisition / Work Order

Field or Control	***Description***
Service Method	Indicates whether the requisition is a *Multi Resource, Resource,* or *Deliverable* service method
Service Type	Select the default service type.
Service (Project Role)	Select the default service (project role).
Allow Time/Expense Overage % (allow time and expense overage percent)	Select the default tolerance for time and expense.

Service Coordinator

Field or Control	***Description***
Service Coordinator	Click to add a default service coordinator who will source the requisition.
Service Team	Click to add a default service coordinator team for the service coordinator. The system uses this default if the service requester does not have a default team, and the requisition region/service type does not have a team defined. The service team is not required. **Note:** You can select a default Service Coordinator or Service Coordinator Team for the selected requester. If a default Service Coordinator team is specified, it will be the first selection for defaulting. If a default Service Coordinator is specified, it will only be used if no team is found on the Service Teams by Region/Service Type or Business Unit.

Notification Options

Field or Control	***Description***
Requisition Notification Method	Select the notification method for requisitions.

See Work Order Settings Page.

Permissions

Field or Control	***Description***
May Enter Work Order	Select this option so that the user can add new work orders.
May Extend Work Order	Select this option so that the user can extend the duration of the work order contract. **Note:** Select this check box to enable users to extend work order agreements.

Field or Control	*Description*
Authorized to Source to Preferred Suppliers	Select this option so that the user can source requisitions to preferred suppliers. **Note:** Select this check box to enable users to source requisitions to preferred suppliers in the sourcing details section of the requisition.

Service Coordinator Defaults Page

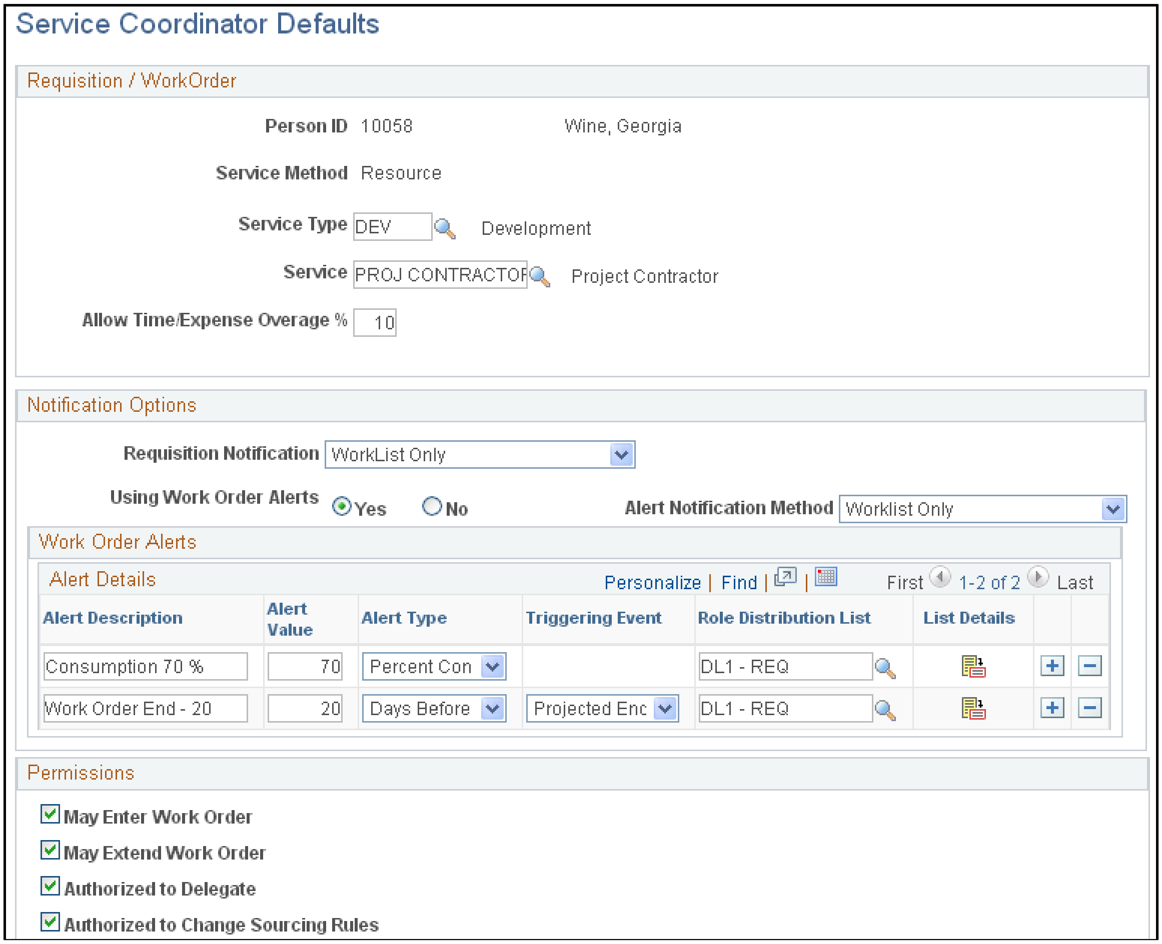
Use the Service Coordinator Defaults page (SPB_SRVC_USRDEF_PG) to set up preferences for service coordinators.

Navigation:

- **Services Procurement** > **User and Team Setup** > **Svc Coordinator Defaults**
- On Service User Setup (page 1) select the 'existing' option in step #1, and select **Service Coordinator** in step #2, and then click the Service Coordinator Defaults link.

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

This example illustrates the fields and controls on the Service Coordinator Defaults page. You can find definitions for the fields and controls later on this page.



Service Coordinator Defaults

Requisition / WorkOrder

Person ID 10058 Wine, Georgia

Service Method Resource

Service Type DEV Development

Service PROJ CONTRACTOF Project Contractor

Allow Time/Expense Overage % 10

Notification Options

Requisition Notification WorkList Only

Using Work Order Alerts ● Yes ○ No **Alert Notification Method** Worklist Only

Work Order Alerts

Alert Details

Alert Description	Alert Value	Alert Type	Triggering Event	Role Distribution List	List Details
Consumption 70 %	70	Percent Con		DL1 - REQ	
Work Order End - 20	20	Days Before	Projected Enc	DL1 - REQ	

Permissions

☑ May Enter Work Order

☑ May Extend Work Order

☑ Authorized to Delegate

☑ Authorized to Change Sourcing Rules

Requisition/Work Order

Field or Control	***Description***
Service Method	Indicates whether the requisition is a *Multi Resource, Resource,* or *Deliverable* service method
Service Type	Select the default service type.
Service (Project Role)	Select the default service (project role).
Allow Time/Expense Overage %	Select the default tolerance for time and expense.

Notification Options

Field or Control	***Description***
Requisition Notification Method	Select the notification method for requisitions.

See Work Order Settings Page.

Permissions

Field or Control	***Description***
May Enter Work Order	Select this option so that the user can add new work orders.
May Extend Work Order	Select this option so that the user can extend the duration of the work order contract. **Note:** Select this check box to enable users to extend work order agreements.
Authorized to Delegate	Select this option so that the user can delegate another service coordinator to source a requisition.
Authorized to Change Sourcing Rules	Select this option so that the user can update the sourcing rules defined on the requisition when sourcing.

User Setup Page

To create and edit requesters:

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

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

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

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

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

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

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

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

   See Understanding PeopleSoft Services Procurement and Human Capital Management Integration.

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

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

   ---

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

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

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

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

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

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

Services User Setup Page

To create and edit service coordinators:

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

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

Field or Control	***Description***
Person ID	Use this field to search for a Person ID to associate with the new service coordinator. **Note:** If you do not have a pre-existing person ID to associate with the new service coordinator, click the **Add** button to add a new person ID.

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

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

Field or Control	***Description***
Person Type	Select to indicate whether the service coordinator is acting in the role of a Coordinator/Provider Contact or Service Coordinator. **Note:** If this person has a role of Service Provider/ Coordinator, the field is display-only. **Note:** If you select the Coordinator/Provider Contact as the person type, the system automatically changes the Personnel Status field to a display-only status of Non-Employee, and you are unable to change the status of the field. Changing the **Person Type** field to *Coordinator/Provider Contact* also enables the Create User Profile button on the Service Coordinator Information page. Use this button to access the User Profile Information page, where you can provide the user ID, password, and other information to create a user profile for the non-employee service coordinator.
Person Status	Select a value to indicate the status of the service coordinator. Values are *Active, Inactive,* and *Pending Registration.* When the value is *Inactive,* the Coordinator Status field on the Service Coordinator Information page is also set to *Inactive.* **Note:** If there are open transactions for this service coordinator, you cannot change the status to Inactive. **Note:** In addition, if the service coordinator with the person type of service provider/coordinator is the only active member of a team, you cannot change the status to Inactive. You will receive an error message indicating that another active member must be assigned to the team.

Field or Control	***Description***
Personnel Status	Select to indicate if the service coordinator is an *Employee* or *Non-Emple* (non-employee). **Note:** If you select *Employee,* the system will enable you to search for a pre-existing user and employee ID on the Service Coordinator Information page. If you select *Non-Emple,* you can create a new user profile for the non-employee.

3. Access the Service Coordinator Information page.

Field or Control	***Description***
Supplier Administrator	Selecting the Supplier Administrator check box enables the coordinator and provider contact users to register other provider contacts for the same supplier. **Note:** This check box appears if you select Coordinator/Provider Contact as the person type on the Maintain Service Coordinator page. Users that are defined with this person type can access to the Maintain Provider Contact and Manage Service Provider functionality from the Supplier portal for the related supplier organization.
Create User Profile	Click to access the User Profile Information page, where you can provider a user ID, password, and other information for creating a user profile for the non-employee service coordinator.
Replace Service Coordinator	Click this link to access the Replace Service Coordinator page. This link appears if there are any non-VMS transactions for the service coordinator. See Replace Service Coordinator Page.
Replace VMS Coordinator	Click this link to access the Replace VMS Service Coordinator page. This link appears if there are any VMS transactions for the service coordinator. See Replace VMS Coordinator Page.

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

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

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

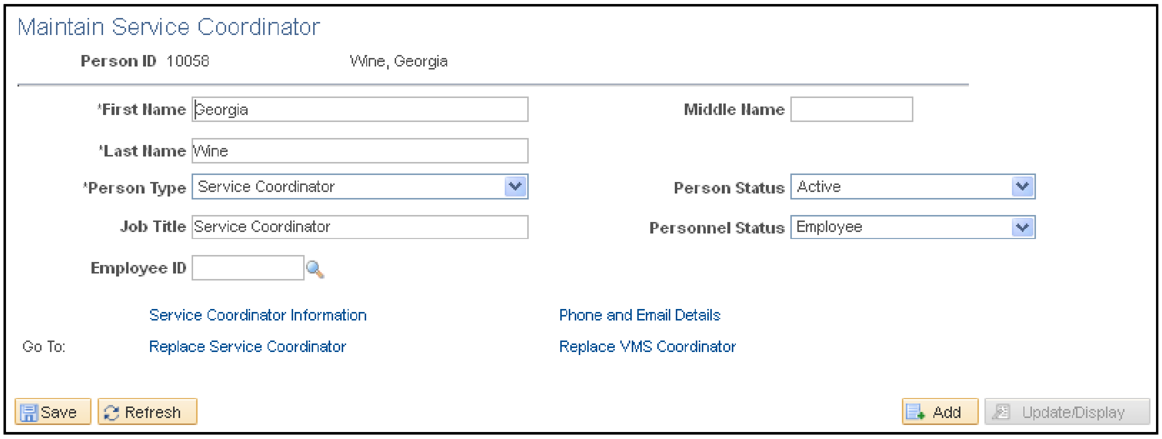
Service Coordinator Information Page

Use the Maintain Service Coordinator - Service Coordinator Information page (SPB_COORDINATOR_PG) to define employee and user ID information.

Navigation:

Click the Service Coordinator Information link on the Maintain Service Coordinator page.

This example illustrates the fields and controls on the Service Coordinator Information page.



Maintain Service Coordinator

Person ID 10058 Wine, Georgia

*First Name: Georgia

Middle Name:

*Last Name: Wine

*Person Type: Service Coordinator

Person Status: Active

Job Title: Service Coordinator

Personnel Status: Employee

Employee ID:

Field or Control	***Description***
Coordinator Status	This field is display-only. If the service provider/coordinator role is revoked, the status is set to Inactive. **Important!** The coordinator status on this page should not be confused with the higher level person status of the person as a whole. The higher level person status can also be set to Inactive. If this occurs, it would inactivate both the Service Provider and the Service Coordinator roles for same person. Consequently, the status on the Service Coordinator Information page would then reflect the inactive status of the higher level person status. In summary, the Coordinator Status could be set to Inactive while the higher level person status may still be set to Active.

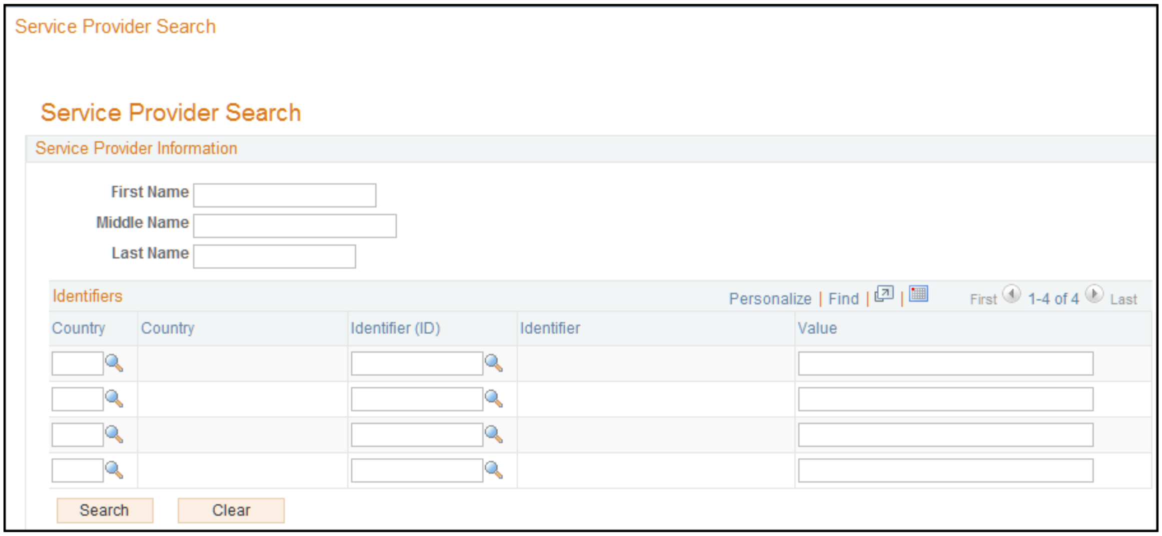
Service Provider Search Page

Use the Service Provider Search page to display a list of service providers.

Navigation:

Services Procurement > **User and Team Setup** > **Services User Setup. For option 1, select Edit an existing Services User. For option 2, select Service Provider. For option 3, click the Advance Search link**. Clicking on the Advance Search link launches a page where you can enter search criteria and trigger the Search Framework.

This example illustrates the fields and controls on the Service Provider Search page. You can find definitions for the fields and controls later on this page.



Field	*Description*
Country	Select the country for which you want to search. You can enter up to four country codes and their associated identifier IDs and ID values.
Identifier (ID)	Select the identifier ID. You can search on a single ID or use any other ID that has been defined for the service provider.
Value	Displays the value assigned to the service provider for this country and identifier ID combination.

Services User Setup Page

Use the Services User Setup page to create and edit service provider contacts:

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

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

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

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

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

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

Maintain Service Provider Page

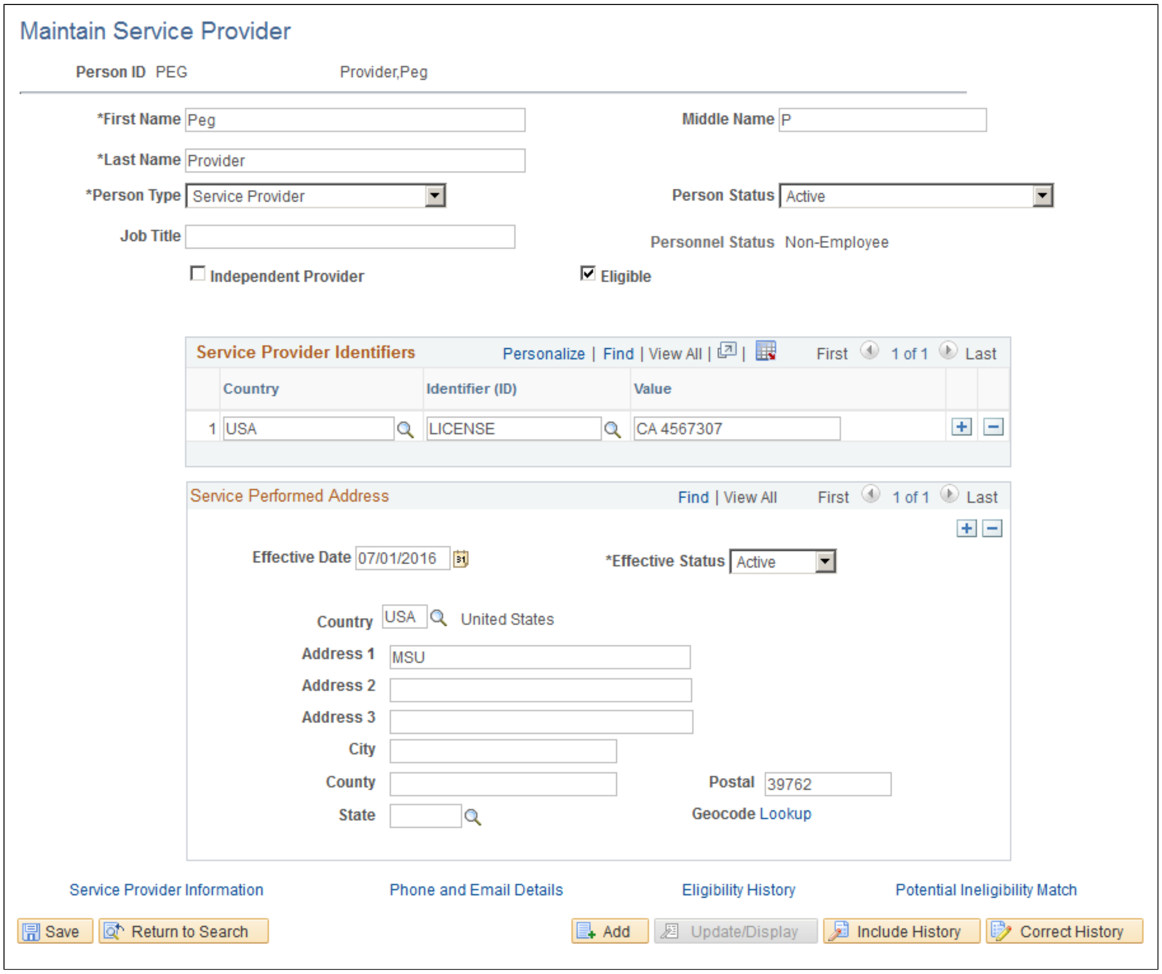
Use the Maintain Service Provider page (SPB_PERS_PROV_PAGE) to maintain service provider information, including personal information for the provider.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Services User Setup**

  Click the **Add** button to add a new Person ID or click the **Edit Service Provider** link to edit an existing service provider for the selected Person ID.
- **Services Procurement** > **User and Team Setup** > **Maintain Provider Information**

This example illustrates the fields and controls on the Maintain Service Provider page. You can find definitions for the fields and controls later on this page.



Maintain Service Provider

Person ID PEG Provider,Peg

*First Name Peg

Middle Name P

*Last Name Provider

*Person Type Service Provider

Person Status Active

Job Title

Personnel Status Non-Employee

☐ Independent Provider

☑ Eligible

Service Provider Identifiers

	Country	Identifier (ID)	Value
1	USA	LICENSE	CA 4567307

Service Performed Address

Effective Date 07/01/2016

*Effective Status Active

Country USA United States

Address 1 MSU

Address 2

Address 3

City

County

Postal 39762

State

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

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

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

Field or Control	***Description***
Person Type	Select the type of user for this person. Values include: *Service Provider:* This person records and views time and expense information. Service providers are those supplier users that perform the needed service. *Service Provider/Coordinator:* This person sources and bids for service providers and also performs the duties of a service coordinator (recruiter).
Person Status	Select the person's status. Values include: *Active, Inactive,* and *Pending Registration.* See Services User Setup Page.
Job Title	Enter the job that the person performs for the organization.
Independent Provider	Select to indicate that this service provider or service provider/ coordinator does not have any provider contacts that represent them.
Eligible	Click to either indicate that the service provider is eligible or ineligible for new assignments. If the check box is selected, the provider is eligible for assignments. If the check box is deselected, the provider is ineligible for new assignments. When you select or deselect the check box, the system displays the Eligibility Status Confirmation page. You use the page to assign a reason code for the eligibility change and if required enter comments for the change. The system tracks the changes made to a service provider's eligibility. Administrators and service coordinators can view the history by clicking the **Eligibility History** link.
Country	Select the country or countries in which you want to use this service provider identifier. The country that you select must have had at least one identifier ID assigned to it using the Service Provider Identifiers page. If IDs have not been assigned, the system cannot populate the **Identifier ID** field.
Identifier ID	Enter the type of identifier that you want to use to uniquely identify service providers. An identifier ID might be, for example, a US social security number. You must assign an identifier ID to a country to make it available for selection.
Value	Enter the value for the corresponding identifier ID. This value should be unique to the service provider. For example, if the ID is a social security number, the number should belong to the service provider. The system uses this value to match potential ineligible providers.

Field or Control	***Description***
Effective Date	Select a date for which you want this service provider to become available for actions.
Effective Status	Select *Active* (default) or *Inactive*. Only Addresses with a status of Active will be available for use.
Service Performed Address	Enter the address where the service provider will perform the service.
Service Provider Information	Select to access the Service Provider Information page. See Service Provider Information Page.
Phone and Email Details	Click to access the Phone and Email Details page where you define phone and email information for the service provider.
Eligible History	Click to view updates that have been made for this service provider. The system displays the reason code for the update and any comments that were made in conjunction with the update. This link is not available for the service provider contact administrator.

Service Provider Information Page

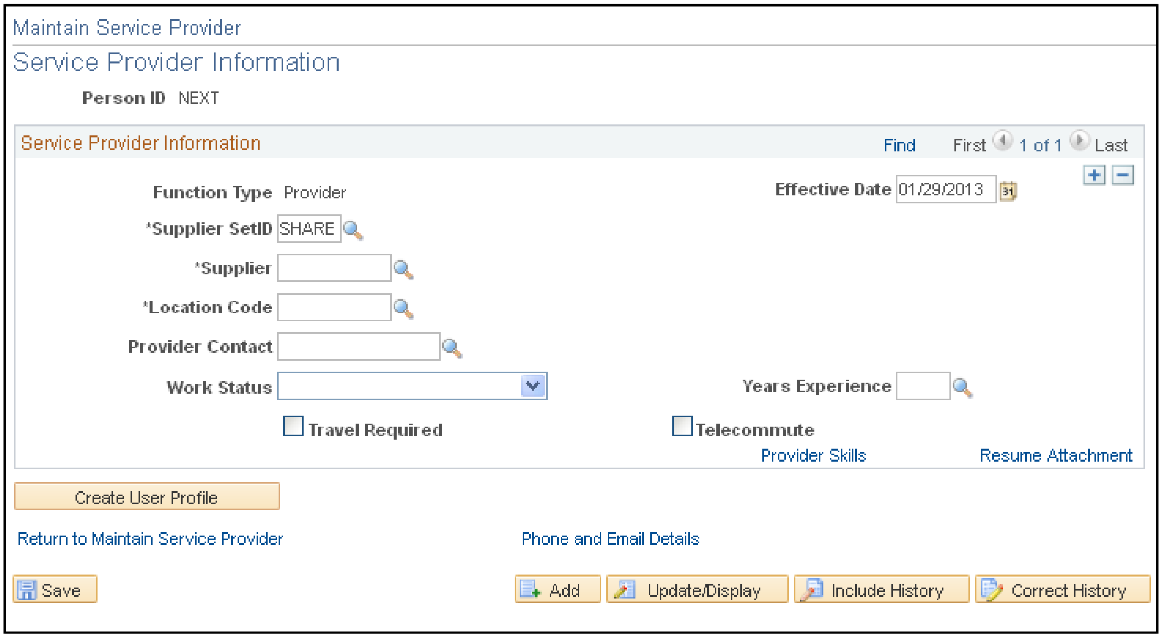
Use the Maintain Service Provider - Service Provider Information page (SPB_PROVIDER_PG) to maintain service provider information.

This includes defining work status, project role, supplier, years of experience, and other parameters to define the service provider.

Navigation:

Click the **Service Provider Information** link on the Maintain Service Provider page.

This example illustrates the fields and controls on the Service Provider Information page. You can find definitions for the fields and controls later on this page.



Person ID NEXT

Function Type Provider

*Supplier SetID SHARE

Effective Date 01/29/2013

Along with maintaining service provider information, you can click the **Provider Skills** link to maintain skills, and click the **Resume Attachment** link, to upload and attach a resume.

Note: This page displays fields that you use to define supplier user service providers. If you are defining information for an independent provider, the page provides a **Supplier SetID** field instead of a **Supplier SetID** field.

Field or Control	***Description***
Function Type	Indicates if a service provider is an independent provider. Independent providers do not require provider contact information as do supplier providers. This is a display-only field.
Effective Date	Select a date for which you want this service provider to become available for actions. The date determines when you can view and change information for the provider.
Supplier SetID	Select a supplier SetID. A SetID enables the sharing of control data among business units. This value determines the values available for the **Supplier** field.
Supplier	Select a supplier. Only values for the selected supplier SetID are available. This field also determines the values that are available for the **Location Code** field.
Location Code	Select a supplier location code. This defines the address for the supplier.

Field or Control	***Description***
Provider Contact	Select a provider contact. A service provider contact is a supplier who can manage a service provider roster, view service requisitions, submit bids, communicate with service coordinators, view bid and response information, enter progress logs, and view timesheets and expenses. **Note:** If you are defining an independent service provider this field is not available.
Work Status	Select a status that indicates the work status for the service provider. These statuses provide the conditions under which a service provider can be employed and include: *GC Holder:* (green card holder) *H-1 Visa:*A nonimmigrant visa category in the United States under the Immigration and Nationality Act. *NAFTA:* (North America Free Trade Agreement) *Other* *U.S Citizen*
Years Experience	Select a value that best describes the service provider's experience.
Travel Required	Select to indicate that the service provider is required to travel.
Telecommute	Select to indicate that the job allows the service provider to work from home.

Service Provider Identifiers Page

Use the Service Provider Identifiers page (SPB_PRV_ID) to set up service provider identifiers.

Identifiers are types of identifications that uniquely identify people, such as a social security number.

Navigation:

Services Procurement, Define Services Procurement, User and Team Setup, Service Provider Identifiers

A service provider identifier ID is high-level, unique global information, such as social security, passport, or tax ID numbers. You use this ID to help uniquely identify service providers. You set up identifier IDs by country using this page, and can define as many IDs as you need for any country.

After establishing the country and identifier ID, you can use the information when you create or edit service provider information. The system makes the country and identifier IDs available for individual service provider pages where you can add identifier ID values for each service provider. These values then make unique cross references for the service provider which the system uses for searching and matching when the provider eligibility feature is activated for a business unit.

You use identifier IDs in the bidding process and work order creation processes to help determine eligibility for providers. Any match or potential matches of an identifier ID against a service provider produces a system warning for administrators and service coordinators.

Field or Control	***Description***
Identifier (ID)	Enter the type of identifier that you want to use to uniquely identify service providers. A type of identifier might be, for example, a US social security number. Because a social security number is assigned to a specific individual, then as an identifier, the value of that number can be used as a cross reference to uniquely identify the service provider. Other identifiers can include such things as drivers license or passport numbers.
Description	Enter a short description for the identifier ID.
Long Description	Enter an extended description for the identifier ID.
Hide Fields	Select to indicate that you don't want to display the values for this identifier on the list of potential matches to the service coordinator or requester.
Country Code (Optional)	Select the country or countries in which you will use this identifier ID. The identifier code is only available with the country codes you select. If a country code is not selected, the identifier ID is available for all countries.

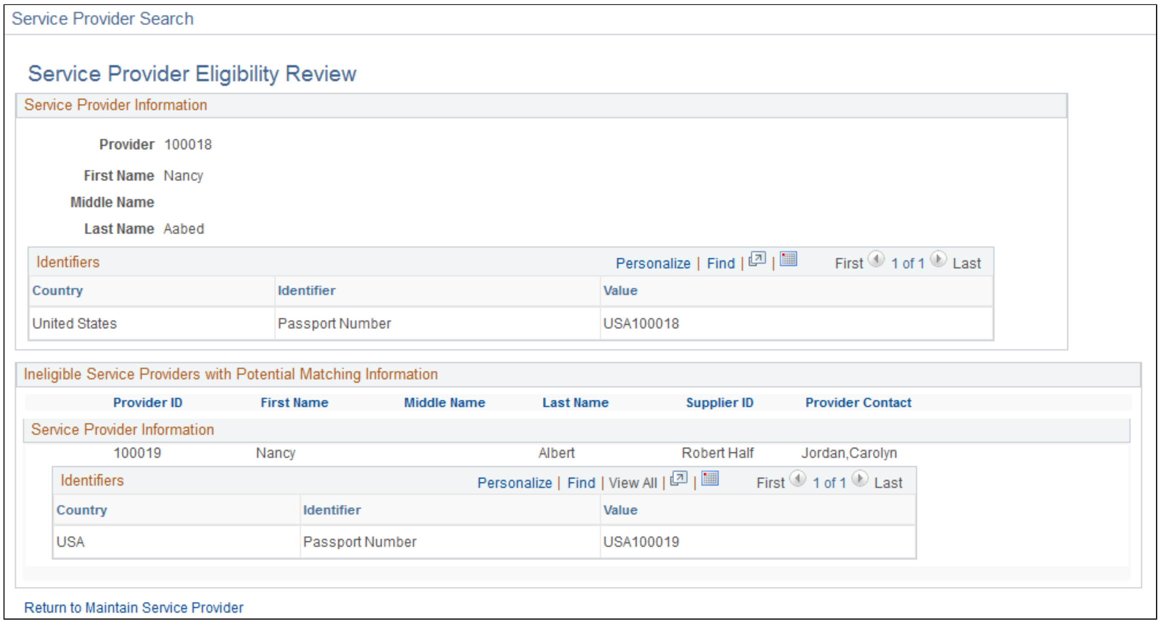
Service Provider Eligibility Review Page

Use the Service Provider Eligibility Review page (SPB_SPELGBLTY_SRCH) to search for ineligible service providers.

Navigation:

Services Procurement, Define Services Procurement, User and Team Setup, Provider Eligibility Search

This example illustrates the fields and controls on the Service Provider Eligibility Review page.



Service Provider Eligibility Review

Service Provider Information

Provider 100018

First Name Nancy

Middle Name

Last Name Aabed

Identifiers

Country	Identifier	Value
United States	Passport Number	USA100018

Ineligible Service Providers with Potential Matching Information

Provider ID	First Name	Middle Name	Last Name	Supplier ID	Provider Contact
100019	Nancy		Albert	Robert Half	Jordan,Carolyn

Service Provider Information

Identifiers

Country	Identifier	Value
USA	Passport Number	USA100019

Use this page to display a list of service providers that have been identified as not currently eligible to fill work orders and are a potential match to the specified service provider. The system tracks service providers that have been identified as not eligible for new assignments. Along with using the Provider Eligibility Search menu option, you can access this page from the Maintain Service Provider, Bid Response, and Work Order pages. Contents on the page vary depending on the navigation and role of the user accessing the page

The Service Provider Eligibility Review page uses search criteria and when you perform a search, provides the results of the search. The Service Provider Details group box displays identifiers that have been created for the service provider on which the search is based. If you determine there is a match, you can mark the specified provider as not currently eligible.

Note: Only service providers that have the Eligible check box deselected will display on the list of potential matches to the service coordinator or requester.

See Maintain Service Provider Page .

Field or Control	***Description***
Person ID	Select the person ID for the service provider. The system displays the service provider's name.
Country	Select the country for which you want to search. You can enter up to four country codes and their associated identifier IDs and ID values.
Identifier	Select the identifier ID. You can search on a single ID or use any other ID that has been defined for the service provider.

Field or Control	***Description***
Value	Displays the value assigned to the service provider for this country and identifier ID combination.
Select	Select when you want to indicate that the corresponding service provider's status should be set to Unacceptable. After you make the selection, click the **Potential Match Found** button to notify the administrator. If you are the service coordinator or requester, you need to cancel the work order or select a new service provider.
Match Found	Click to indicate that there is a potential match for an ineligible service provider. If a listed service provider is identified as an actual match, you should select the **Select** check box for that provider before clicking the **Match Found** button. When the administrator clicks the **Match Found** button, the system updates the eligibility status of the provider to indicate that the provider is not eligible. If a service coordinator or requester clicks the **Match Found** button, the system sends a notification to the administrator to change the service provider on the bid or work order to an Ineligible status. At this point, the service coordinator or requester can only cancel the work order or select a new service provider. The system uses a system-supplied generic email template (INEB_PROV) to notify the administrator. You can update the template.
Match Not Found	Click to indicate that there are no potential search results that match the service provider. When you click the button, the system returns you to the page from which you launched the search. When there are no matches, the bid response and work order submission processes can continue.

Services User Setup Page

To create and edit service provider/coordinators:

1. Access the Services User Setup page (Services Procurement, User and Team Setup, Services User Setup).
2. Select the **Edit an existing Services User** option from step #1.
3. Select the **Service Provider** option from step #2.
4. Select the **Person ID** that you want to change to a service provider/coordinator user.

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

5. Click the **Edit Service Provider** link from step #4 to access the Maintain Service Provider page.

6. Select *Service Provider/Coordinator* in the Person Type field.

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

7. Click **Save** button to assign this role.

8. Click the **Return to Services Setup** link.

9. (optional) Click the **User Preferences** link from step #5, and then click the Service Coordinator Defaults link to add any specific defaults such as the time approver and any permissions that you may want this person to have.

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

10. (optional) Click the Update User Profile link to make changes to the existing user profile, and then click the **OK** button to return to the Services Setup page.

11. Click the **Finish** button.

Note: A service provider can be associated to multiple suppliers with the service provider becoming effective for the new supplier on a designated effective date. For a user with the combined role of service provider/coordinator, the supplier information for the service coordinator should be in sync. An email notification is sent to the service administrator making the change when the service provider gets associated to a different supplier. The service administrator will have to manually change the supplier information for the coordinator when the associated service provider becomes effective for the new supplier.
For the combined service provider/coordinator role, the supplier information from the Maintain Service Coordinator page cannot be changed. An error message will be displayed if the supplier information is changed on the Maintain Service Coordinator page for a Service Provider/Coordinator role user. For this user, the supplier information can be changed only on the Service Provider Information page.

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

Revoking Service Provider and Coordinator Roles

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

1. Service administrator accesses the Maintain Service Provider page (Services Procurement, User and Team Setup, Services User Setup).

2. Service administrator changes the person type from *Service Provider/Coordinator* to *Service Provider.*

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

   If the service provider/coordinator is associated to any active work orders, an error message displays and the system will direct the service administrator to identify a replacement service coordinator for all active work orders for this Service Coordinator before attempting to revoke the coordinator role again.

3. If the service provider/coordinator is the only active team member, an error message displays and the system and will direct the service administrator to assign another active member to the team before attempting to revoke the coordinator role.
4. Upon confirmation, the system revokes all the service coordinator roles that were granted to the service provider.

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

   The system sets the service coordinator status to Inactive.

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

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

Replace Service Coordinator Page

Use the Replace Service Coordinator page (SPB_REPLACE_SC) to use this page to replace the service coordinator.

This page is used for non-VMS service coordinators.

Navigation:

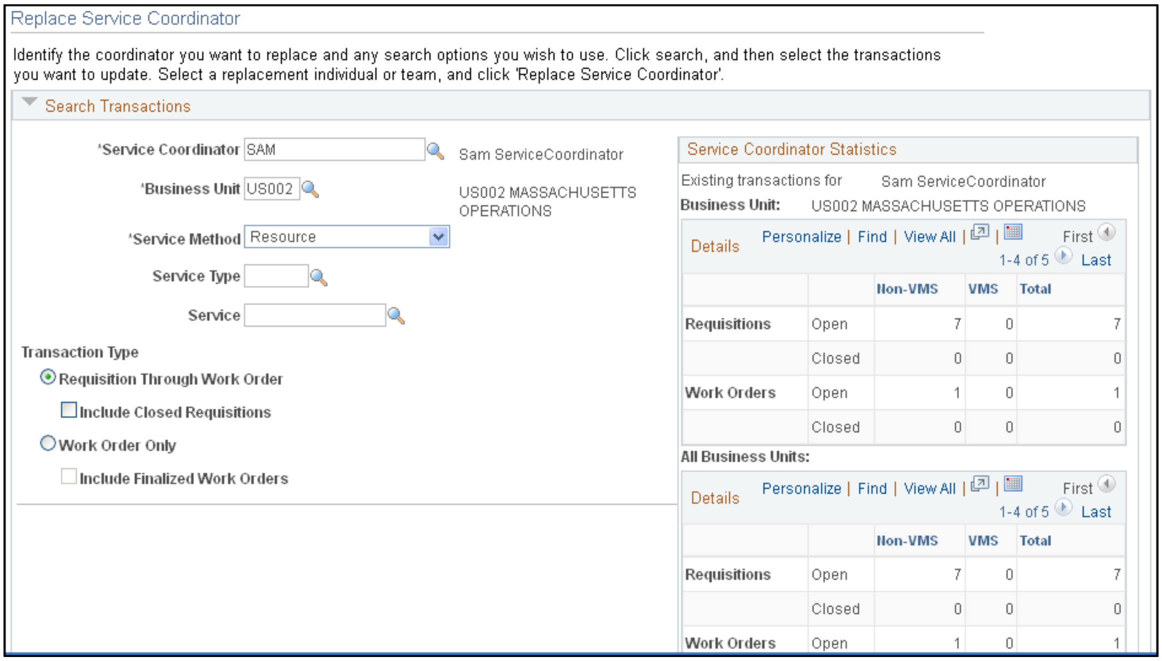
- **Services Procurement** > **Maintain User** > **Replace Coordinator**
- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Replace Coordinator**
- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Services User Setup**

  Select a person ID in step #3, and then click the Edit Service Provider link in step #4.

  Change the Person Type to *Service Provider/Coordinator* and then click the **Save** button.

  Click the Replace Service Coordinator link.

This example illustrates the fields and controls on the Replace Service Coordinator page.



Replace Service Coordinator

Identify the coordinator you want to replace and any search options you wish to use. Click search, and then select the transactions you want to update. Select a replacement individual or team, and click 'Replace Service Coordinator'.

Search Transactions

*Service Coordinator: SAM — Sam ServiceCoordinator

*Business Unit: US002 — US002 MASSACHUSETTS OPERATIONS

*Service Method: Resource

Service Type:

Service:

Transaction Type

● Requisition Through Work Order

☐ Include Closed Requisitions

○ Work Order Only

☐ Include Finalized Work Orders

Service Coordinator Statistics

Existing transactions for Sam ServiceCoordinator

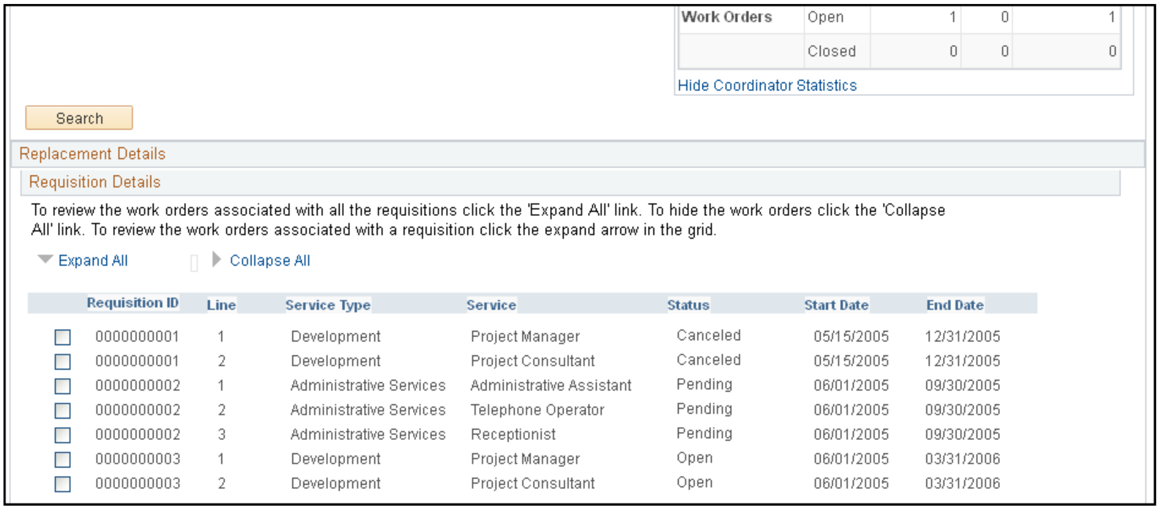
Business Unit: US002 MASSACHUSETTS OPERATIONS

		Non-VMS	VMS	Total
Requisitions	Open	7	0	7
	Closed	0	0	0
Work Orders	Open	1	0	1
	Closed	0	0	0

All Business Units:

		Non-VMS	VMS	Total
Requisitions	Open	7	0	7
	Closed	0	0	0
Work Orders	Open	1	0	1

This example illustrates the fields and controls on the Replace Service Coordinator page.



Work Orders	Open	1	0	1
	Closed	0	0	0

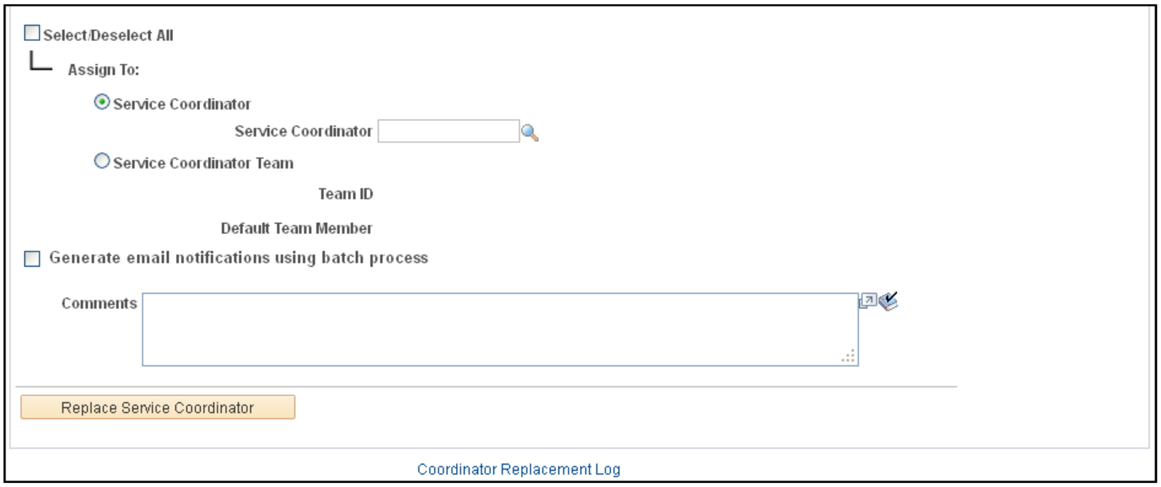
Replacement Details

Requisition Details

To review the work orders associated with all the requisitions click the 'Expand All' link. To hide the work orders click the 'Collapse All' link. To review the work orders associated with a requisition click the expand arrow in the grid.

	Requisition ID	Line	Service Type	Service	Status	Start Date	End Date
☐	0000000001	1	Development	Project Manager	Canceled	05/15/2005	12/31/2005
☐	0000000001	2	Development	Project Consultant	Canceled	05/15/2005	12/31/2005
☐	0000000002	1	Administrative Services	Administrative Assistant	Pending	06/01/2005	09/30/2005
☐	0000000002	2	Administrative Services	Telephone Operator	Pending	06/01/2005	09/30/2005
☐	0000000002	3	Administrative Services	Receptionist	Pending	06/01/2005	09/30/2005
☐	0000000003	1	Development	Project Manager	Open	06/01/2005	03/31/2006
☐	0000000003	2	Development	Project Consultant	Open	06/01/2005	03/31/2006

This example illustrates the fields and controls on the Replace Service Coordinator page.



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

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

Note: When the Replace Service Coordinator utility is used to change the assigned service coordinator for requisitions, the change tracking rules are followed. Thus, the change tracking template is checked to determine whether the **Service Coordinator** field is being tracked, and if so a change tracking record is created.

Search Transactions

Field or Control	***Description***
Service Coordinator	Select the service coordinator that you want to replace. This is a required field.
Business Unit	Select the business unit for the service coordinator. This is a required field.

Field or Control	***Description***
Service Method	Select a method on which to base a search. This is a required field. Methods include: *Deliverable:* Select to search for services that are generally performed by an entire work force, such as a requisition or work order for an entire project, not just the hours worked by a single service provider. *Multi Resource:* Select to search for requisition or work order services that support multiple, unique services and service providers. *Resource:* Select to search for requisition or work order services of an individual service provider.
Service Type	Select a value for the service coordinator. If you want to retrieve all service types, leave this field blank. **Note:** If the Use HCM Terminology? option is selected on the Services Procurement Installation Options page, the label for this field is **Job Family.** See “Services Procurement Installation Options Page” (Application Fundamentals).
Service	Select a project role for the service coordinator. If you want to retrieve all project roles, leave this field blank. **Note:** If the Use HCM Terminology? option is selected on the Services Procurement Installation Options page, the label for this field is **Job Code.**

Field or Control	***Description***
Transaction Type	Select a value to determine the types of transactions to be retrieved. Values are: • **Requisition Through Work Order:** Select this option to retrieve all associated services requisitions and work orders. **Include Closed Requisitions:** Select this option if you want to include all closed services requisitions. • **Work Order Only:** Select this option if you want to retrieve work orders only. **Include Finalized Work Orders:** Select this option if you want to include any work orders that have been finalized.
View Coordinator Statistics	Click this link to display the number of transactions associated to the selected service coordinator. The statistics information includes only the top-line, multi-resource transaction information, and does not provide lower-level services information.
Hide Coordinator Statistics	Click this link if you do not want the system to display the coordinator statistics. **Note:** This link is available only after you have clicked the View Coordinator Statistics link.
Search	Click to retrieve transactions based on the search criteria.

Service Coordinator Statistics

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

You can view information such as the:

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

Requisition Details and Work Order

This section displays either requisition or work order details such as requisition ID, service type, service, supplier, provider contacts, work order type and status, and start and end dates. If the search criteria is for **Work Order Only,** the name of this step box would be **Services Work Orders.** Any differences in information displayed are noted.

Field or Control	***Description***
Expand All and Collapse All	These options appear when the transaction type of Requisition Through Work Orders is selected. Click to expand or collapse the grid to view any work orders associated with requisitions.
▶	Click the arrow toggle switch button to display associated work orders for a single requisition line. If there are no associated work orders for the requisition line, this button is hidden.
☐	Click the **Selection** check box next to the requisitions or work orders where you want to replace the services coordinator.
Positions	Click to view lower-level services associated with either the requisition or work order. When you access this page, the system displays the top-line service coordinator for the requisition or work order. When you replace the top-line requisition or work order coordinator, the system also replaces the corresponding lower-line coordinators for the requisition or work order. When you click this link, you access the Multi Resource Service Information page. This page displays the service and service type, as well as the number of positions for the each service type. This link is available when a multi-resource requisition or work order has more than one service position.
Select/Deselect All	Click to automatically select or deselect all the check boxes in the search results grid.

Field or Control	***Description***

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

Generate email notifications using batch process	Select this option to run the email notifications as a batch process rather than including them as part of the online processing. The service coordinator or team receives an email that includes a link to the Coordinator Replacement Log for the transactions that have been reassigned. **Note:** A URL must be defined for the replacement email notification. Define this URL using the URL Maintenance page **(PeopleTools > Utilities > Administration > URLs)** for the *SP_REPLACESC_EM* and *SP_REPLACETEAM_EM* URL identifiers.
Comments	Enter any applicable free-form text related to the reassignment.
Replace Service Coordinator	Click to replace the service coordinator on all selected transactions. A confirmation page displays, and you must click the **OK** button to confirm the replacement process. In addition, upon clicking the **OK** button, email notifications will be generated either online or in batch if the Generate email notifications using batch process option has been selected.
Coordinator Replacement Log	Click this link to access the Coordinator Replacement Log to view transactions associated with the reassignment.

Replace VMS Coordinator Page

Use the Replace VMS Service Coordinator page (SPB_REPL_VMS_SC) to use this page to replace VMS service coordinators.

This page is used to replace VMS service coordinators.

Navigation:

- **Services Procurement** > **User and Team Setup** > **Replace VMS Coordinator**
- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Replace VMS Coordinator**

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

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

Field or Control	***Description***
VMS Supplier	Select the VMS supplier for which transactions are to be reassigned. If there is only one VMS supplier, then it appears as a default value in this field. This is a required field.
Service Method	Select a method on which to base a search. This is a required field. Methods include: *Deliverable:* Select to search for services that are generally performed by an entire work force, such as a requisition or work order for an entire project, not just the hours worked by a single service provider. *Multi Resource:* Select to search for requisition or work order services that support multiple, unique services and service providers. *Resource:* Select to search for requisition or work order services of an individual service provider.

Field or Control	***Description***
Replacement Method	Select a value to indicate the method to use for replacement. Values are: • **Use Transaction's Current VMS Relationship Definition:** Select this option to indicate that the selected transactions will be assigned to the VMS coordinator or team that is currently effective for the related service type or business unit and VMS supplier. This is the default value for the field. If the check boxes next to the transactions in the Requisition Details group box are display only, one of the following scenarios may be occurring: - The service coordinator associated with the current VMS definition is the same as the service coordinator that you are trying to replace. - If the VMS definition uses a service coordinator team, then the current VMS definition shows a team that is different from the transaction selected. **Note:** You will not be able to select this replacement method if the service coordinator, team, or if the service coordinator is the only member of the VMS supplier team. For example, if the VMS transactions are being handled by only one VMS service coordinator team, then you cannot use this replacement method. In addition, if the service coordinator is the only member of the VMS team, then you cannot use this replacement method. **Note:** Once a VMS service coordinator has been replaced on a requisition, the replacement service coordinator takes precedence over any *other* service coordinator changes made to the VMS setup definition. For example, when a requester creates a VMS-managed service requisition, the VMS supplier, location and service coordinator are assigned to the VMS requisition from the VMS setup definition. Then, when the requester edits the requisition, the system checks for more recent changes to the VMS supplier, location, and service coordinator defined in the VMS setup definition. If the system finds more recent changes to these fields, it refreshes the requisition with the most recent VMS setup information. However, if the requisition's VMS Service Coordinator has been replaced by the Replace VMS Coordinator function, then the system applies the change made by the replacement feature as taking precedence, and the system *will not* refresh the VMS Service Coordinator on the requisition, even if there has been a more recent change in the VMS setup definition. • **Specify Replacement Coordinator/Team:** Select this option to indicate that all selected transactions will be assigned to a single VMS team or service coordinator.

Field or Control	*Description*
	If you select this option, the Service Coordinator and Service Coordinator Team fields become available where you can assign the transactions. See Replace VMS Coordinator Page.

Requisition Details and Work Order

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

If the search criteria is for **Work Order Only,** the name of this step box is **Services Work Orders.**

Field or Control	*Description*
Service Coordinator from VMS Definition	This column displays the VMS service coordinator that is defined for this VMS supplier.
Service Team from VMS Definition	This column displays the VMS service team that is defined for this VMS supplier.
Positions	Click to view lower-level services associated with either the requisition or work order. When you access the Replace VMS Coordinator page, the system displays the top-line VMS coordinator for the requisition or work order. When you replace the top-line requisition or work order VMS coordinator, the system also replaces the corresponding lower-line VMS coordinators for the requisition or work order. When you click the **Positions** link, you access the Multi Resource Service Information page. The page displays the service and service type and the number of positions for the each service type. This link is available when a multi-resource requisition or work order has more than one service position.

Confirmation Message for VMS Coordinator Replacement

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

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

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

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

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

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

Service Coordinator Replacement Log Page

Use the Service Coordinator Replacement Log page (SPB_REPLASC_LOG) to view requisitions and work orders on which the service coordinator replaced.

Navigation:

- **Services Procurement** > **User and Team Setup** > **Coordinator Replacement Log**
- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Services User Setup** > **Coordinator Replacement Log**

The service coordinator will receive an email which contains a link to the Coordinator Replacement Log page. The email includes a list of all requisitions and work orders that have been reassigned to the service coordinator. The replacement log displays the top-line requisition or work order information along with lower-line service requisition or work orders derived from multi-resource requisitions or work orders. The system also provides lower-level services replacement information for individual transaction history pages.

Search Service Coordinator

Field or Control	***Description***
From Service Coordinator	Select the service coordinator that was replaced.
To	Select a value to indicate the role that was replaced: Values are *Service Coordinator* and *Service Coordinator Team.* Select the service coordinator or service coordinator team in the adjacent field that is available.
Business Unit	Select the specific business unit associated with the service coordinator. If you want to see all business units to which the service coordinator is associated, leave this field blank.
Requisition ID	(Optional) Select a specific requisition or leave this field blank if you'd like to retrieve all requisitions associated with the service coordinator.

Field or Control	***Description***
Work Order ID	(Optional) Select a specific work order or leave this field blank if you'd like to retrieve all work orders associated with the service coordinator.
Date From and Date To	(Optional) Enter the beginning and ending dates to narrow the results that are retrieved.

Service Coordinator Logs

Field or Control	***Description***
Requisition ID and **Work Order ID**	Click a link to access information related to the requisition or work order.
Return to Replace Coordinator	Click this link to access the Replace Coordinator page. **Note:** If you are reviewing VMS service coordinators, the link will read **Return to Replace VMS Coordinator.**

Services User Setup Page

To create and edit service administrators:

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

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

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

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

3. Click the **Add** button on the Services User Setup page to access the User Profile Information page, where you can enter passwords, general attributes, permission lists, and workflow attributes.

4. Once you finish entering information on the User Profile Information page, click the **OK** button to return to the Services User Setup page.

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

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

Services User Setup Page

To create and edit approvers:

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

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

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

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

3. Click the **Add** button on the Services User Setup page to access the User Profile Information page, where you can enter passwords, general attributes, permission lists, workflow attributes, and approver authorizations.

4. Once you finish entering information on the User Profile Information page, click the **OK** button to return to the Services User Setup page.

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

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

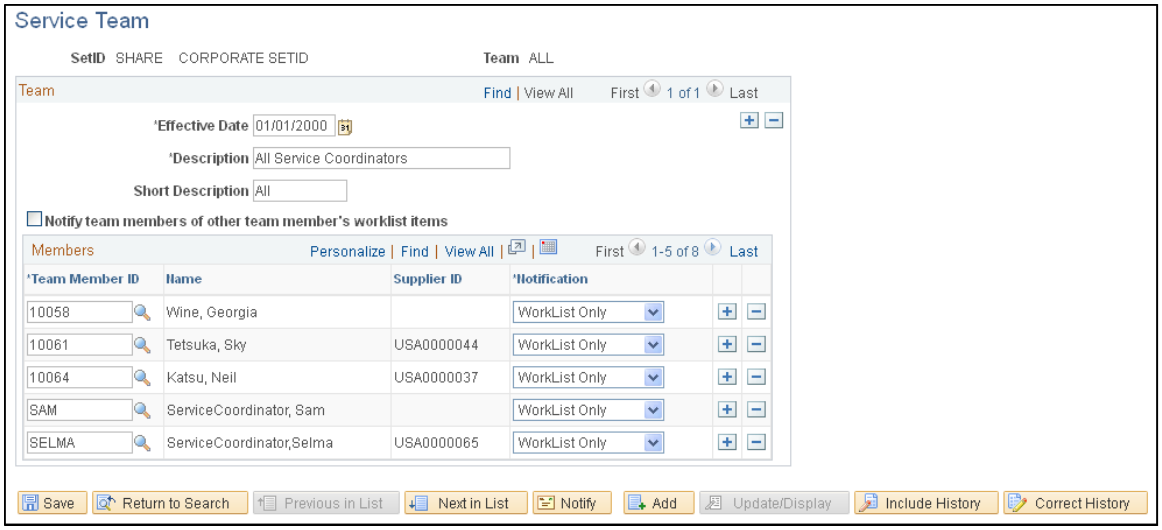
Service Team Page

Use the Service Team page (SPB_TEAM) to create service coordinator teams that can source and bid on each other's requisitions and edit each other's work orders.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **User and Team Setup** > **Service Team**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Teams** > **Create a Service Team**

This example illustrates the fields and controls on the Service Team page.



Service Team

SetID SHARE CORPORATE SETID Team ALL

Team

*Effective Date 01/01/2000

*Description All Service Coordinators

Short Description All

☐ Notify team members of other team member's worklist items

Members

*Team Member ID	Name	Supplier ID	*Notification
10058	Wine, Georgia		WorkList Only
10061	Tetsuka, Sky	USA0000044	WorkList Only
10064	Katsu, Neil	USA0000037	WorkList Only
SAM	ServiceCoordinator, Sam		WorkList Only
SELMA	ServiceCoordinator,Selma	USA0000065	WorkList Only

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

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

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

Maintaining Workflow Setup

This topic discusses how to set up workflow.

See Understanding PeopleSoft Services Procurement Workflow.

Maintaining Settlement Setup

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

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

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

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

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

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

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

This topic discusses how to maintain settlement setup.

Pages Used to Maintain Settlement Setup

Page Name	***Definition Name***	***Usage***
Shift Page	SPB_SHIFT	Define shifts to be used on timesheets. This page appears only if the Enable Shifts check box is selected on the Services Procurement Business Unit Definition page.
Assignment Page	SPB_ASSIGNMENT	Define assignments to be used on timesheets. This page appears only if the Enable Assignments check box is selected on the Services Procurement Business Unit Definition page.
Services Procurement Bus Def (business unit definition) Page	BUS_UNIT_TBL_SP	Select the check boxes to enable the business units to use shifts, assignments, and time category overrides.

Page Name	***Definition Name***	***Usage***
Shifts by Service Page	SPB_SHFT_BY_SRV	View and modify valid shifts that are associated with a specific service.
Assignments by Service Page	SPB_ASGN_BY_SRV	View or modify assignments that are associated with a specific service.
Shifts by Service Page Service by Shift Assignments by Service Page Service by Assignment	QRY_QUERY	Use this page to select the query name for which you want to run these PSQUERY reports: • Shift by Service • Service by Shift • Assignment by Service • Service by Assignment
Service Time/Progress Template Page	SPA_TIME_TMPL_PG	Create services templates. Enter or modify options used in a timesheet to enter time and expense information and progress information.
Select ChartFields Page	SPA_TIME_TMPL_DIST	Select the ChartFields to display on the Timesheet. The values from the selected ChartFields will be used to allocate time on Distribution lines. This option is only available when you select **Actual Allocation** as your time reporting option. Service Time/Progress Template Page
Services Time Reporting Codes Page	SPA_TRC_CODE	Define time reporting codes.
Pay Types by Time Reporting Codes Page	SPA_TRC_PAYTYPE	Enter and view pay types that are associated with time reporting codes. Use this page to indicate the pay rate and mark up rates that are used on the work order. This option is only available when pay types are used. Services Time Reporting Codes Page
Time Reporting Rule Page	SPA_TIMERPT_RUL	Define rules for reporting time.

Page Name	***Definition Name***	***Usage***
"Business Purpose Page" (PeopleSoft Expenses)	EX_PURPOSE	Use business purposes to justify a business expense as a corporate tax deduction.
Distance Rate Page	EX_AUTO_RT_TBL	Define expense distance rates.
Expense Types1 Page	SPA_EXPENSE_TYPES1	Define expense types.
Expense Types2 Page	SPA_EXPENSE_TYPES3	Define expense types.
Expense Payment Type Page	SPA_EXPEND_MTHD	Create payment types that show (on an expense sheet) how an expense item was paid. "Payment Type Page" (PeopleSoft Expenses)
"Expense Location Page" (PeopleSoft Expenses)	EX_LOCATION	Create an expense location that can be required on an expense sheet. When you define an expense type, you can require a service provider to enter the location for the transaction to ensure that the cost accurately reflects prevailing prices for that region.
Preferred Merchant	EX_MERCHANT	Define a preferred merchant that you can include in an expense type. When you define an expense type, you can require a service provider to enter the preferred merchant for that transaction to ensure that the cost accurately reflects prevailing prices for that region.
Payment Terms Timing Codes Page	PYMT_TERMS_TIMING	Define payment terms timing for each period that you reference in your payments.
Payment Terms - Single Payments Page	PYMT_TERMS_SINGLE	Define valid payment terms for single payments.
Search Where Used Page	SNGL_TRMS_WHR_USED	View where payment terms are used.
Calculate Example Payment Data (single payment terms) Page	SNG_TR_CLC_PAY_DTA	Calculate example data for single payment terms.
Payment Terms - Multi Payment Page	PYMT_TERMS_MULTI	Define valid payment terms for multiple payments.

Page Name	***Definition Name***	***Usage***
Calculate Example Payment Data (multiple payment terms) Page	MLT_TR_CLC_PAY_DTA	Calculate example data for multiple payment terms.
Accounts Payable Interface Page	SPA_AP_INTRFACE	Define accounts payable application interface information.

Common Elements Used in this Section

Field or Control	***Description***
Return to Time and Expense Setup	Click this link to return to the Time and Expense home page.

Services Time Reporting Codes Page

Use the Services Time Reporting Codes page (SPA_TRC_CODE) to define time reporting codes.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Services Time Reporting Codes**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Time and Expense** > **Services Time Reporting Codes**

Field or Control	***Description***
Multiplication Factor	Define the multiplication factor for the TRC. The system uses the value that you enter when calculating time and expense amounts. **Note:** This factor is applied in addition to any applicable shift or assignment pay rate. In addition, for assignment pay, the assignment pay rate must be Based on Time.
Pay Types	Associate pay types with time reporting codes. Available only if pay types are enabled on the Services Procurement Installation Options page.

Pay Types by TRC

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

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

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

Field or Control	***Description***
Pay Type	Select the pay type you are to pay to the supplier

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

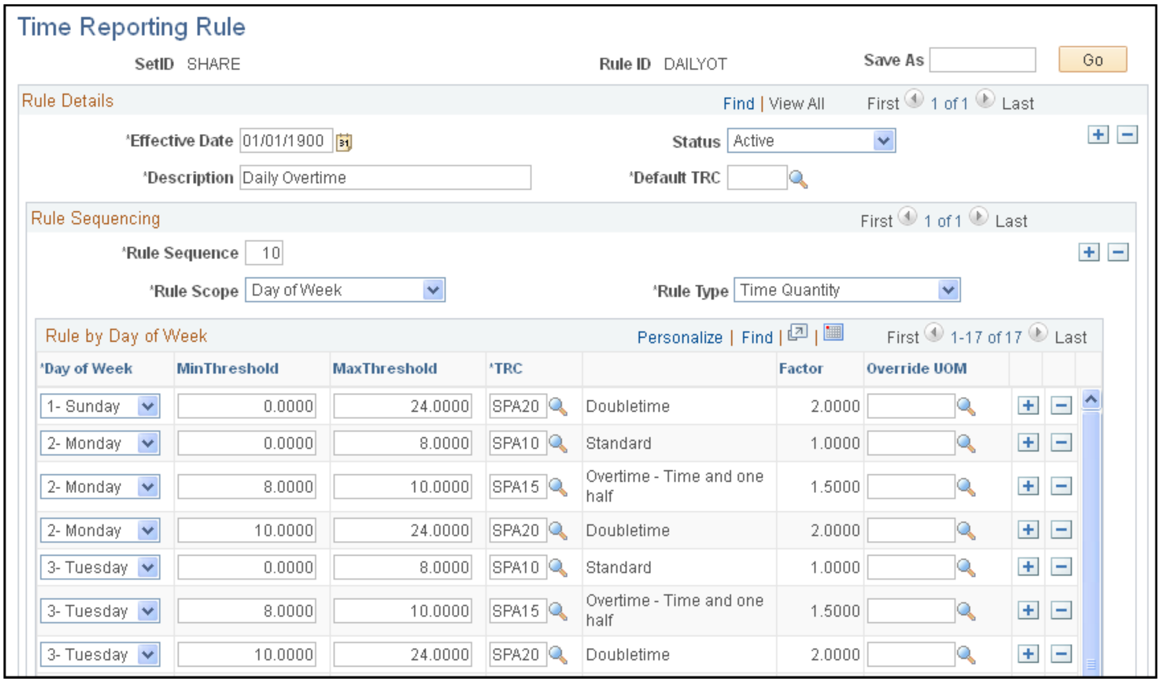
Time Reporting Rule Page

Use the Time Reporting Rule page (SPA_TIMERPT_RUL) to define rules for reporting time.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Time Reporting Rule**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Time and Expense** > **Time Reporting Rule**

This example illustrates the fields and controls on the Time Reporting Rule page.



SetID SHARE

Rule ID DAILYOT

*Effective Date 01/01/1900

Status Active

*Description Daily Overtime

*Default TRC

*Rule Sequence 10

*Rule Scope Day of Week

*Rule Type Time Quantity

*Day of Week	MinThreshold	MaxThreshold	*TRC		Factor	Override UOM
1- Sunday	0.0000	24.0000	SPA20	Doubletime	2.0000	
2- Monday	0.0000	8.0000	SPA10	Standard	1.0000	
2- Monday	8.0000	10.0000	SPA15	Overtime - Time and one half	1.5000	
2- Monday	10.0000	24.0000	SPA20	Doubletime	2.0000	
3- Tuesday	0.0000	8.0000	SPA10	Standard	1.0000	
3- Tuesday	8.0000	10.0000	SPA15	Overtime - Time and one half	1.5000	
3- Tuesday	10.0000	24.0000	SPA20	Doubletime	2.0000	

Rule Details

Field or Control	***Description***
Description	Enter a long description to identify the time reporting rule.
Default TRC (default time reporting code)	Select a default TRC to use when the time reporting rule does not meet the rule criteria.

Rule Sequence

Field or Control	*Description*
Rule Sequence	Enter a rule sequence number. This value is used to determine the order the system validates and applies the rule criteria to a timesheet. Since the rule sequence numbers are incremental, be sure to prioritize the rule in the order in which you want the system to evaluate and validate the TRC codes to use for time reporting. **Note:** Always identify the most important rules at the lowest rule sequence to ensure that the system picks up those rules first. If you define a priority rule at higher sequence number and the system validates another rule that qualifies at a lower sequence number, the system uses the lowest rule sequence to populate the timesheet. For example, if you create a rule with specific capture dates (as in the case of holidays), always be sure to define those dates first. The system starts at the most current rule sequence and works its way down the list. Also, if you want to be sure that there is always a valid rule in place, identify the "catch-all" rule as the last rule in the sequence. That way, you are always sure that there is a valid rule in the sequence.
Rule Scope	Select the time scope that this rule sequence covers. Values include *Date, Day of the Week,* and *Time Period.*
Rule Type	Select the type for this rule sequence. Values include *Time Quantity* and *TRC List.*

Rules by Date

Field or Control	*Description*
Date	Enter the date for which this rule applies.
Min Threshold (minimum threshold)	Enter minimum quantity of hours for this rule.
Max Threshold (maximum threshold)	Enter the maximum quantity of hours fro this rule.
TRC (time reporting code)	Select a value to use with this time reporting rule.

Field or Control	***Description***
Override UOM (override unit of measure)	Select an alternative UOM to use as an override on the work order. Use this UOM to calculate a different rate on the work order.
Blackout	Select to prevent time from being entered for the specified day. **Note:** This option is only available for the rule type of TRC List.

Rules by Day of the Week

Field or Control	***Description***
Day of Week	Enter a day of the week to create a time reporting rule. Values include: • *Sunday* • *Monday* • *Tuesday* • *Wednesday* • *Thursday* • *Friday* • *Saturday*

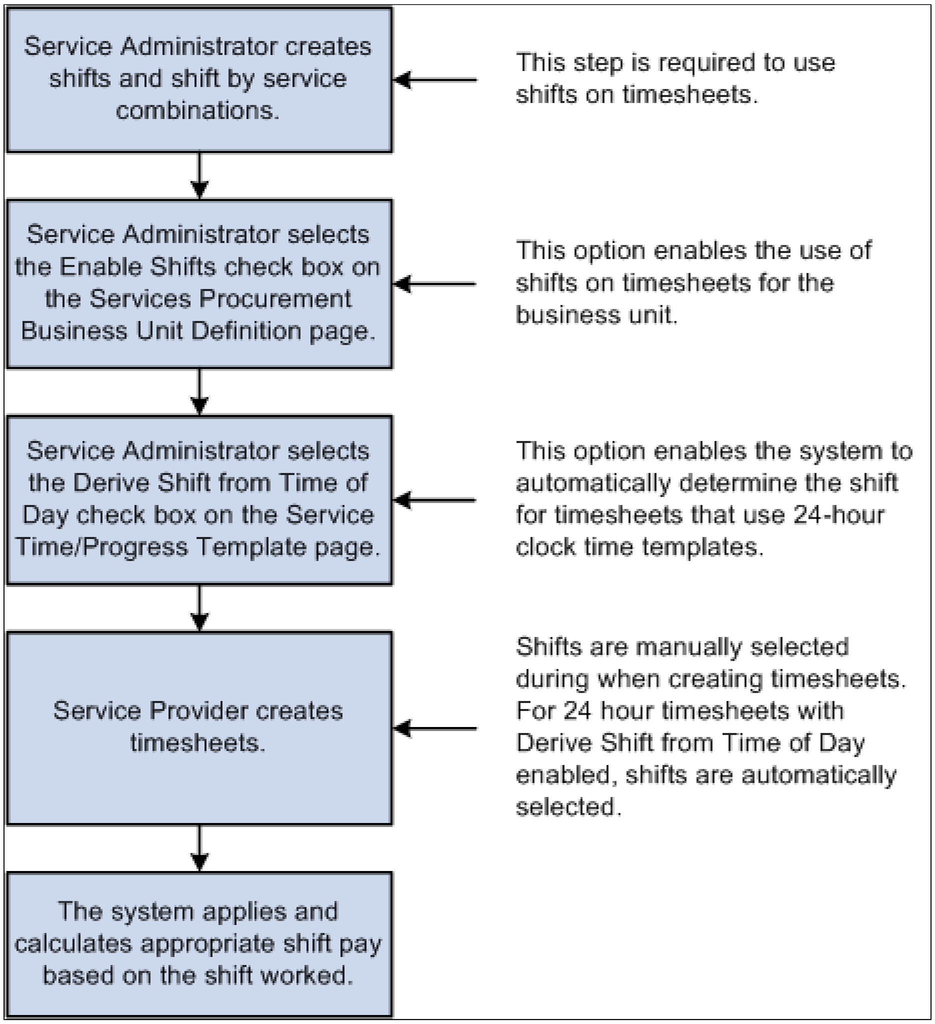
Rules by Time Period

Field or Control	***Description***
Time Period	Enter a time period to create a time reporting rule. Values include *Bi-Monthly, Daily, Monthly, Semi-Monthly,* and *Weekly.*

Using Shifts on Timesheets

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

Steps to define shifts that can be used on timesheets



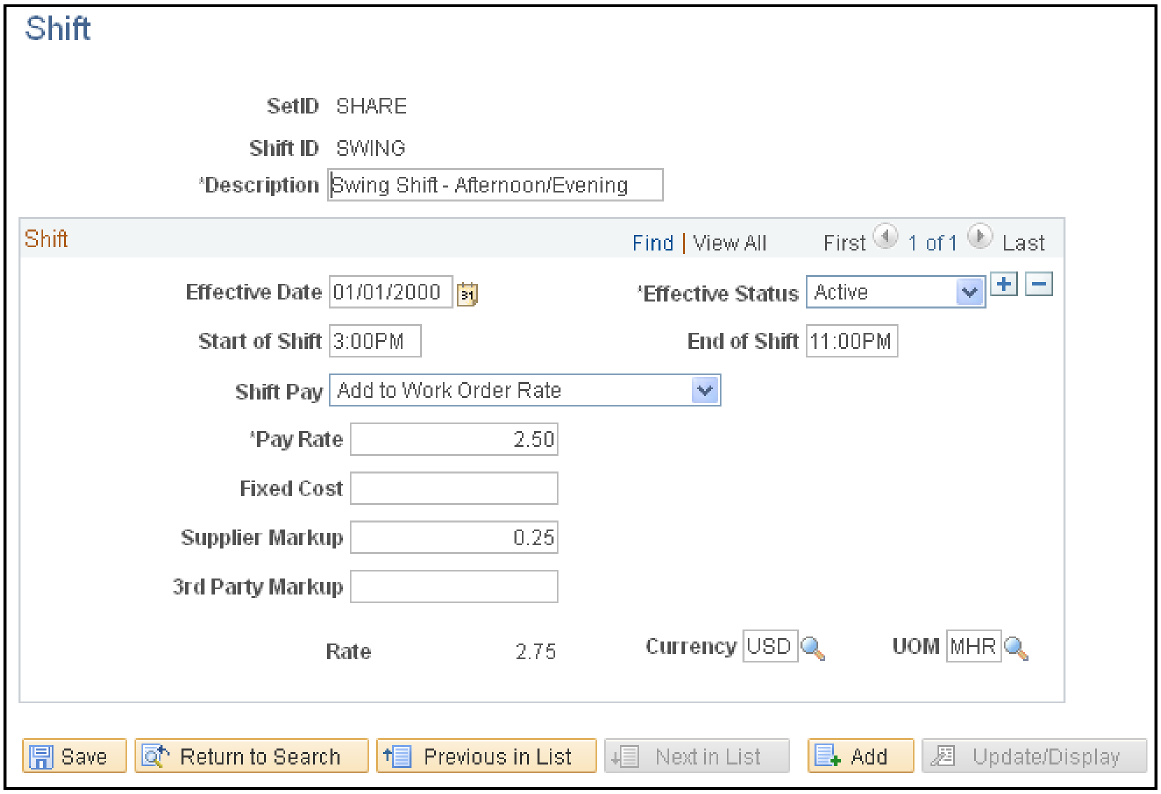
Shift Page

Use the Shift page (SPB_SHIFT) to define shifts to be used on timesheets.

Navigation:

Services Procurement > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Shifts**

This example illustrates the fields and controls on the Shift page.



Shift

SetID SHARE

Shift ID SWING

*Description Swing Shift - Afternoon/Evening

Shift

Effective Date 01/01/2000

*Effective Status Active

Start of Shift 3:00PM

End of Shift 11:00PM

Shift Pay Add to Work Order Rate

*Pay Rate 2.50

Fixed Cost

Supplier Markup 0.25

3rd Party Markup

Rate 2.75

Currency USD

UOM MHR

Note: These settings are defined at the SetID level.

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

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

Field or Control	***Description***
SetID	Select the SetID that will be able to use this shift.
Shift ID	Enter a name for the shift.
Description	Enter a description for the shift. This is a required field.
Effective Date	Enter the date that the shift will become effective. The current date is the default value. This is a required field. Add effective-dated rows for each Shift Pay type as required.

Field or Control	***Description***
Effective Status	Select *Active* (default) or *Inactive.* This determines if this shift will be available for use on timesheets. Only shifts with a status of Active will be available for use. This is a required field. **Note:** If you change an Active shift to Inactive, the system will issue a warning message if there are any existing shift and service combinations for the effective-dated shift.
Shift Start Time and **Shift End Time**	(Optional) Enter the start and end times for the shift. Shift pay is paid for work performed during this time period. You can leave this blank and the system will automatically select the shift based on the start and end times entered on the timesheet. **Note:** Start and stop times are for informational purposes only. If the 24-hour clock time template is used and the Derive Shift Based From Time of Day option is selected, then the system automatically populates the default time values in this fields. However, these start and stop times can still be modified at the template definition level.
Shift Pay	Select a value to indicate the basis for the shift pay calculation: • *Add to Work Order Rate:* Shift pay is added to the work order rate for this shift. • *Add % of Work Order Rate:* Shift pay is defined as a percentage of the work order rate. You must enter percentage rate in the Shift Percent field. • *Substitute Work Order Rate:* Shift pay rate will replace the work order rate for this shift. This is a required field.
Shift Pay Rate Percentage	Enter a negative or positive percent value for the shift pay rate. This is a required field and is used with the *Add % of Work Order Rate* value.
Shift Pay Rate Amount	Enter a negative or positive amount. If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Supplier Markup, and Third-Party Markup fields that appear. This is a required field and is used with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.
Shift Pay Rate Currency	Enter the currency code for this shift pay rate. This field works with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

Field or Control	***Description***
Shift Pay Rate UOM (unit of measure)	Enter the unit of measure for this shift pay rate. This field works with the *Add to Work Order Rate* or *Substitute Work Order Rate* values.

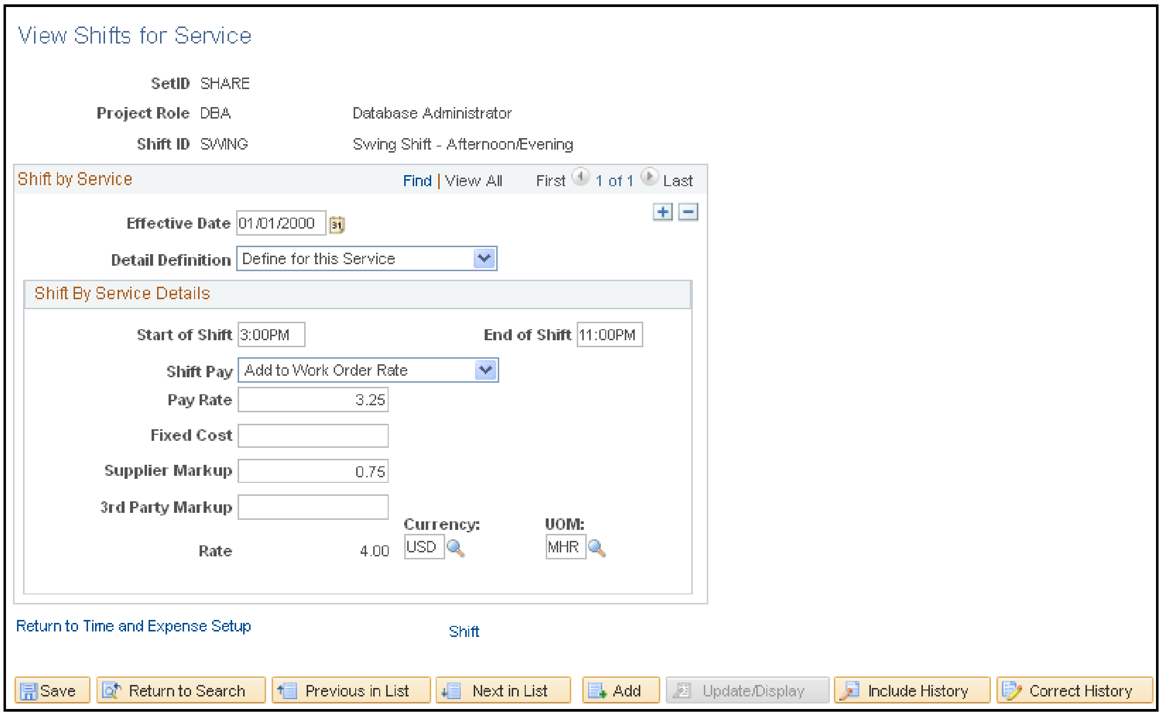
Shifts by Service Page

Use the Shifts by Service page (SPB_SHFT_BY_SRV) to view and modify valid shifts that are associated with a specific service.

Navigation:

Services Procurement > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Shifts by Service**

This example illustrates the fields and controls on the Shifts for Service page.



View Shifts for Service

SetID SHARE

Project Role DBA Database Administrator

Shift ID SWING Swing Shift - Afternoon/Evening

Shift by Service

Effective Date 01/01/2000

Detail Definition Define for this Service

Shift By Service Details

Start of Shift 3:00PM

End of Shift 11:00PM

Shift Pay Add to Work Order Rate

Pay Rate 3.25

Fixed Cost

Supplier Markup 0.75

3rd Party Markup

Rate 4.00

Currency: USD

UOM: MHR

Note: These settings are defined at the SetID level.

This page identifies the shifts that are valid for a particular service. Only shifts associated to the service can be associated to time reported against a work order for that service. In addition, for 24-hour clock time entry, only shifts that are associated to the time template can be associated to the time reported.

Shift by Service Details

Field or Control	*Description*
Project Role	Select a value for this service (job) code.
Shift ID	Select the shift to be associated with this service.
Effective Date	Enter the effective date for this service. This is a required field.
Detail Definition	Select a method to use for defining details of the shift. Values are: • *Define for Service:* Indicates that the shift is available for use with this service as of the effective date. The service and shift combination will have specific times and rates defined. **Note:** The Description group box appears when you select this option. • *No Longer Valid for Service:* Indicates that the shift is no longer available for use as of the effective date. • *Use Shift Definition:* Indicates that the shift is available for use with the service as of the effective date. The shift times and rates from the Shift Definition will be used for this service.

Description

Field or Control	*Description*
Start of Shift and End of Shift	(Optional) Enter the beginning and ending times for the shift. **Note:** Start and stop times are for informational purposes only. If the 24-hour clock time plate is used and the Derive Shift Based From Time of Day option is selected, then the system automatically places default time values on this fields. However, these start and stop times can still be modified at the template definition level.

Field or Control	***Description***
Shift Pay	The default values come from the Shift definition page but you can modify it here. Values are: • *Add to Work Order Rate:* Shift pay rate will be added to the work order rate for this shift by service. • *Add % of Work Order Rate:* Shift pay is defined as a percentage of the work order rate. • *Substitute Work Order Rate:* Shift pay rate is substituted for the work order rate. If you select this option, can only enter a positive amount in the Pay Rate field.
Pay Rate	This required field is available if you select *Add to Work Order Rate* or *Substitute Work Order Rate.*If you selected the Add to Work Order Rate, you must enter a positive or a negative amount in this field, If you selected the Substitute Work Order Rate value, you must enter a positive amount. If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Supplier Markup, and Third-Party Markup fields that appear.
Shift Percent	You must enter a positive or a negative percent in this field if you selected the *Add % of Work Order Rate* value. This is a required field.
Currency	You must enter a value in this field if you selected the *Add to Work Order Rate* or *Substitute Work Order Rate* option.
UOM (unit of measure)	This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* value. This is a required field.
Shift	Click this link to access the Shift definition page for this specific shift.

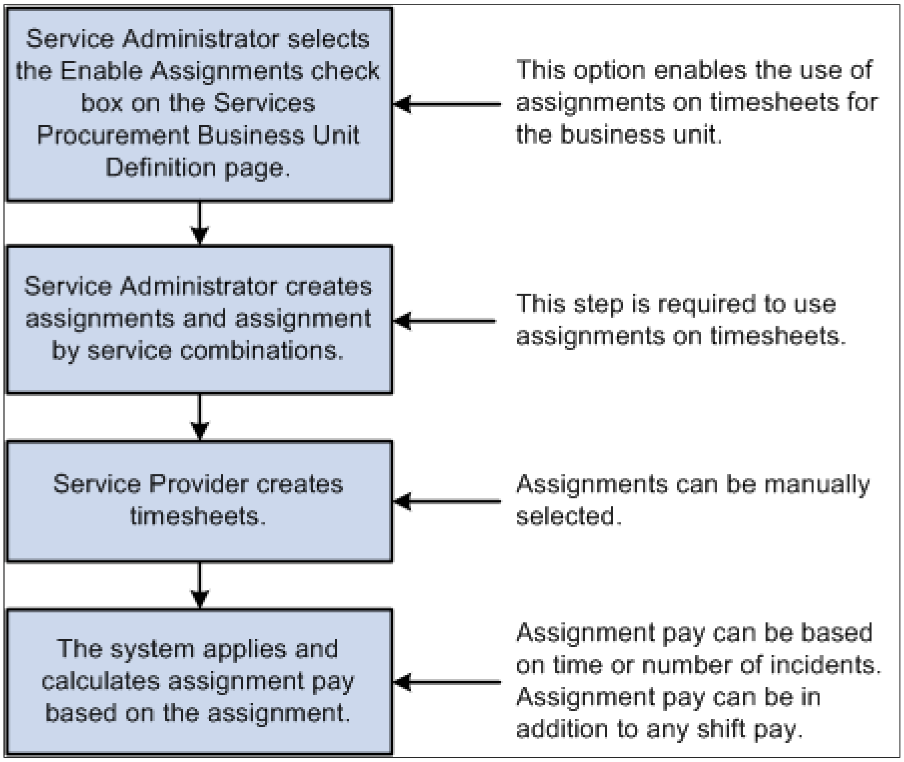
Related Links

PeopleSoft Services Procurement Reports: General Description

Using Assignments on Timesheets

The following diagram illustrates the steps involved to define assignments that can be used on timesheets:

Define assignments that can be used on timesheets



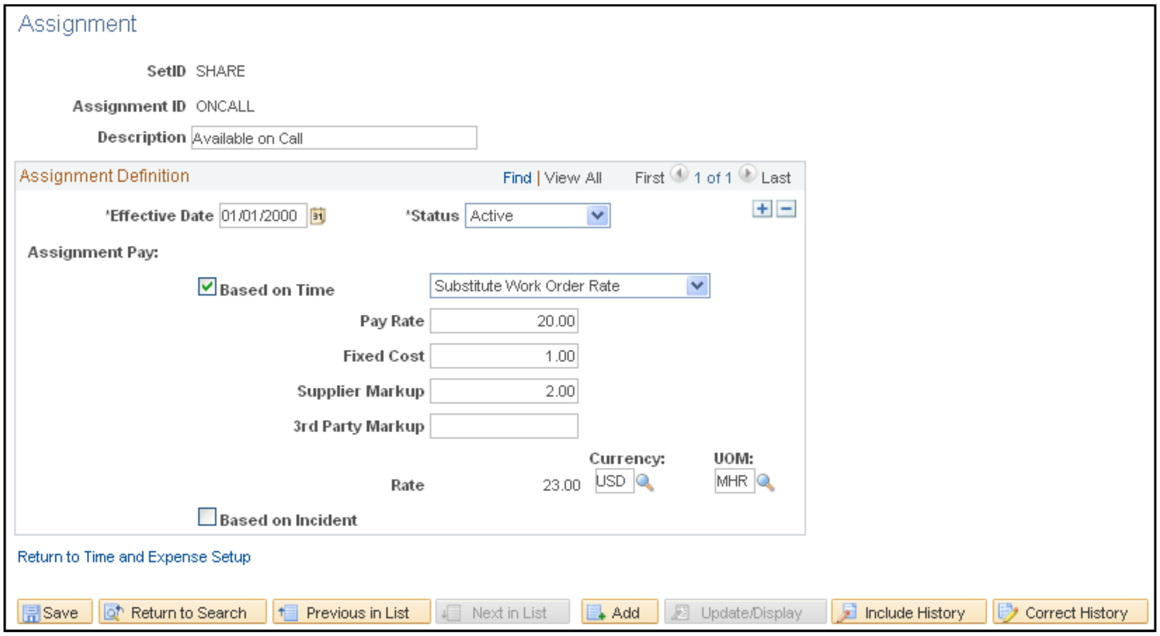
Assignment Page

Use the Assignment page (SPB_ASSIGNMENT) to define assignments to be used on timesheets.

Navigation:

Services Procurement > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Assignments**

This example illustrates the fields and controls on the Assignment page.



Assignment

SetID SHARE

Assignment ID ONCALL

Description Available on Call

Assignment Definition

*Effective Date 01/01/2000

*Status Active

Assignment Pay:

☑ Based on Time

Substitute Work Order Rate

Pay Rate 20.00

Fixed Cost 1.00

Supplier Markup 2.00

3rd Party Markup

Currency: USD

UOM: MHR

Rate 23.00

☐ Based on Incident

Note: These settings are defined at the SetID level.

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

Field or Control	***Description***
SetID	Select the SetID that will be able to use this assignment.
Assignment ID	Enter a name for the assignment.
Description	Enter a description for the assignment.

Assignment Definition

Field or Control	***Description***
Effective Date	Enter the date that the assignment will become effective. The current date is the default value. This is a required field. Add effective-dated rows for each Assignment Pay type as required.

Field or Control	***Description***
Status	Select *Active* (default) or *Inactive.* This determines if this assignment will be available for use on timesheets. Only assignments with a status of Active will be available to associate with services or on timesheets. This is a required field. **Note:** If you change an Active assignment to Inactive, the system will issue a warning message if there are any existing assignment and service combinations for the effective-dated assignment.

Field or Control	***Description***
Assignment Pay	Select the value on which the assignment pay calculation should be based. Values are **Based on Time** or **Based on Incident.** • **Based on Time:** This option indicates that some or all of the assignment rate is based on the time spent on the assignment. • **Based on Incident:** This option indicates that some or all of the assignment rate is based on the number of incidents for the assignment. If you select Based on Time, select a value as the basis for time associated with the assignment: • *Add to Work Order Rate:* The assignment rate will be added to the work order rate. If you select this option, you must enter a negative or a positive value in the **Pay Rate** field that appears. **Note:** If pay types are not enabled, this is a single rate. If pay types are enabled, the Pay Rate must be broken out into the Pay Rate, Fixed Cost, Supplier Markup, and 3rd Party Markup fields that appear on the page. • *Add % of Work Order Rate:* The assignment rate is a percent of the work order rate. If you select this option, you must enter a negative or positive value in the **Percent** field. • *Substitute Work Order Rate:* The assignment rate will replace the work order rate. If you select this option, you must enter a positive value in the **Pay Rate** field. **Note:** If pay types are not enabled, this is a single rate. If pay types are enabled, the Pay Rate must be broken out into the Pay Rate, Fixed Cost, Supplier Markup, and 3rd Party Markup fields that appear on the page.
Rate	This display-only field shows the total of the Pay Rate, Fixed Cost, Supplier Markup, and 3rd Party Markup fields.

Field or Control	***Description***
Currency	Enter the currency associated with the assignment pay rate. This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* option.
UOM (unit of measure)	Enter the unit of measure associated with the assignment pay rate. This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

If you select Based on Incident, you must break down the assignment pay amount into these fields.

Note: The total of these fields should add up to the total assignment pay amount.

- **Pay Rate**
- **Fixed Cost**
- **Supplier Markup**
- **3rd Party Markup**

Field or Control	***Description***
Rate	This display-only field shows the total of the Pay Rate, Fixed Cost, Supplier Markup, and 3rd Party Markup fields.
Currency	The value in this display-only field comes from the assignment currency.

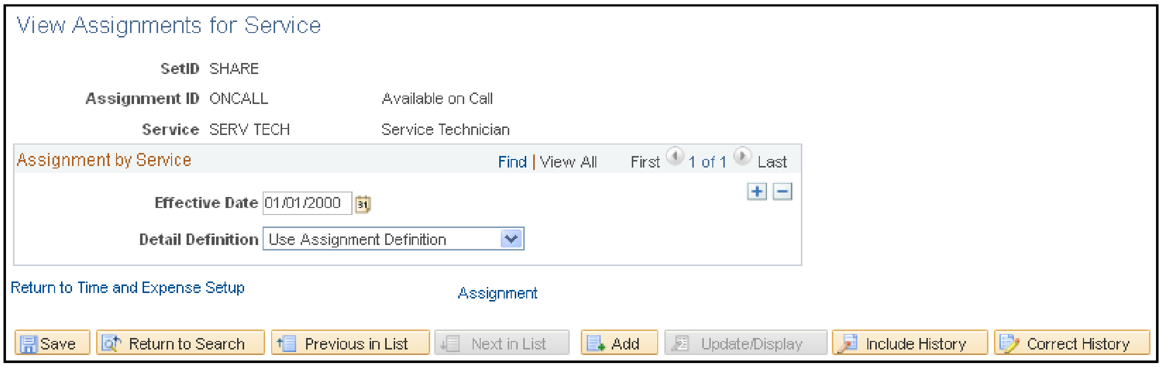
Assignments by Service Page

Use the Assignments by Service page (SPB_ASGN_BY_SRV) to view or modify assignments that are associated with a specific service.

Navigation:

Services Procurement > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Assignments by Service**

This example illustrates the fields and controls on the Assignments by Service page.



View Assignments for Service

SetID SHARE

Assignment ID ONCALL Available on Call

Service SERV TECH Service Technician

Assignment by Service

Effective Date 01/01/2000

Detail Definition Use Assignment Definition

Note: These settings are defined at the SetID level.

Field or Control	***Description***
Assignment ID	Enter a description for this assignment by service.
Service	Enter the service code.

Assignment by Service

Field or Control	***Description***
Effective Date	Enter the effective date for this service. This is a required field.

Field or Control	***Description***
Detail Definition	Select a method to use for defining details of the assignment by service combination. Values are: • *Define for Service:* Indicates that the assignment is available for use with this service as of the effective date. The service and assignment combination will have specific times and rates defined. **Note:** The Description group box appears when you select this option. • *No Longer Valid for Service:* Indicates that the assignment is no longer available for use as of the effective date. • *Use Assignment Definition:* Indicates that the assignment is available for use with the service as of the effective date. The shift times and rates from the Assignment definition page will be used for this service.

Description

Field or Control	***Description***
Assignment Pay	Select the method on which to base the assignment pay. Values are: • **Based on Time:** Assignment pay will be based on the beginning and end times of the assignment. You can select one of these values to calculate the assignment pay: • *Add to Work Order Rate:* Assignment pay rate will be added to the work order rate for this assignment by service combination. • *Add % of Work Order Rate:* Assignment pay is defined as a percentage of the work order rate. • *Substitute Work Order Rate:* Assignment pay rate is substituted for the work order rate. If you select this option, can only enter a positive amount in the Pay Rate field. • **Based on Incident:** The assignment pay will be based on the number of incidents. If you select this option, you must enter values for the Pay Rate, Fixed Cost, Supplier Markup, and Third-Party Markup fields.
Pay Rate	This required field is available if you select *Add to Work Order Rate* or *Substitute Work Order Rate.* If you selected the Add to Work Order Rate, you must enter a positive or a negative amount in this field, If you selected *Substitute Work Order Rate,* you must enter a positive amount. If pay types are not selected, then this is a single rate. If pay types are selected, this rate must be broken out into the Pay Rate, Fixed Cost, Supplier Markup, and Third-Party Markup fields that appear.
Percent	You must enter a positive or a negative percent in this field if you selected the *Add % of Work Order Rate* value. This is a required field.
Currency	You must enter a value in this field if you selected the *Add to Work Order Rate* or *Substitute Work Order Rate* option.

Field or Control	***Description***
UOM (unit of measure)	This field is available if you select the *Add to Work Order Rate* or *Substitute Work Order Rate* value. This is a required field.
Assignment	Click this link to access the Assignment definition page for this specific assignment.

Services Procurement Bus Def (business unit definition) Page

Use the Services Procurement Business Unit Definition page (BUS_UNIT_TBL_SP) to select the check boxes to enable the business units to use shifts, assignments, and time category overrides.

Navigation:

- **Set Up Financials/Supply Chain** > **Business Unit Related** > **Services Procurement** > **Services Procurement Options**
- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Services Procurement Defn**

Time and Expense Settings

Field or Control	***Description***
Enable Shifts	Select this check box if you want to use shifts on timesheets.
Enable Assignments	Select this check box if you want to use assignments on timesheets.
Enable Time Category Override	Select this check box if you want to enable time category overrides.

Related Links

Shift Page
Assignment Page
Edit Time Categories Page

Service Time/Progress Template Page

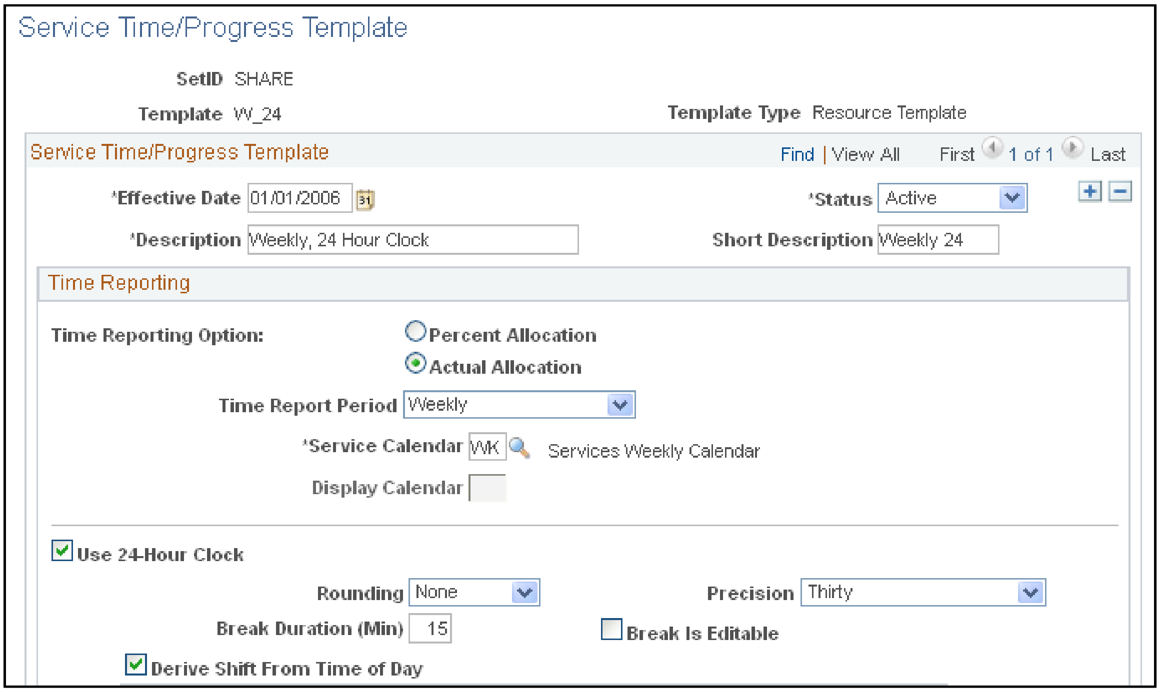
Use the Service Time/Progress Template page (SPA_TIME_TMPL_PG) to create services templates.

Enter or modify options used in a timesheet to enter time and expense information and progress information.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Service Time/Progress Template**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Time and Expense** > **Service Time/Progress Template**

This example illustrates the fields and controls on the Service Time/Progress Template page.



Service Time/Progress Template

SetID SHARE

Template W_24

Template Type Resource Template

Service Time/Progress Template

*Effective Date 01/01/2006

*Status Active

*Description Weekly, 24 Hour Clock

Short Description Weekly 24

Time Reporting

Time Reporting Option: ○ Percent Allocation ● Actual Allocation

Time Report Period Weekly

*Service Calendar WK Services Weekly Calendar

Display Calendar

☑ Use 24-Hour Clock

Rounding None

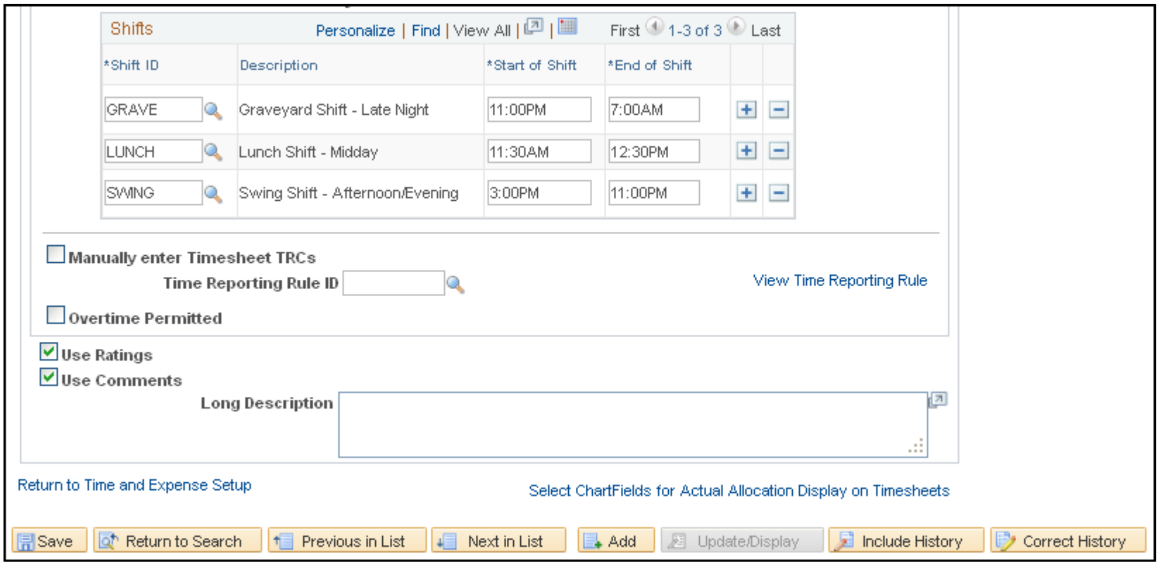
Precision Thirty

Break Duration (Min) 15

☐ Break Is Editable

☑ Derive Shift From Time of Day

This example illustrates the fields and controls on the Service Time/Progress Template page.



Shifts

*Shift ID	Description	*Start of Shift	*End of Shift
GRAVE	Graveyard Shift - Late Night	11:00PM	7:00AM
LUNCH	Lunch Shift - Midday	11:30AM	12:30PM
SWING	Swing Shift - Afternoon/Evening	3:00PM	11:00PM

☐ Manually enter Timesheet TRCs

Time Reporting Rule ID

☐ Overtime Permitted

☑ Use Ratings

☑ Use Comments

Long Description

If a timesheet has been created using a service time/progress template, the system displays a message on the template page. The message indicates that the template has been used in the creation of a timesheet and that some fields for effective-dated rows have been disabled. The system also makes the **Status** and

Time Reporting Option fields unavailable on the page when a work order has been created against the time template.

Time Reporting

Field or Control	***Description***
Time Reporting Option	Use this option to determine whether a resource based work order requires the service provider to report time against specific ChartFields, or whether the total time is entered and distribution percentages automatically split time or progress according to the ChartField distribution defined for the work order. Values are: • *Actual Allocation:* Select to enable the service provider to report actual time against each ChartField distribution line defined on the work order. • *Percent Allocation:* Select to enable the service provider or service provider contact to report total time or progress against a work order. The distribution percentage is used to automatically allocate time or progress across the predefined ChartField distribution lines.
Time Reporting Period	Select a period that indicates how often service providers enter their work hours. The default value is *Weekly.* Other values are *Daily, Bi-Weekly, Semi-Monthly,* and *Monthly.* **Note:** When you select a the monthly time reporting option, the **Display Calendar** field is editable. You must select a display calendar to chunk monthly reporting properly.
Service Calendar	Select a service calendar for the time reporting period. Use this calendar as a detail for how the organization reports time during the calendar year. Values are: • *Bi-Weekly* • *Daily* • *Monthly* • *Semi-Monthly* • *Weekly*

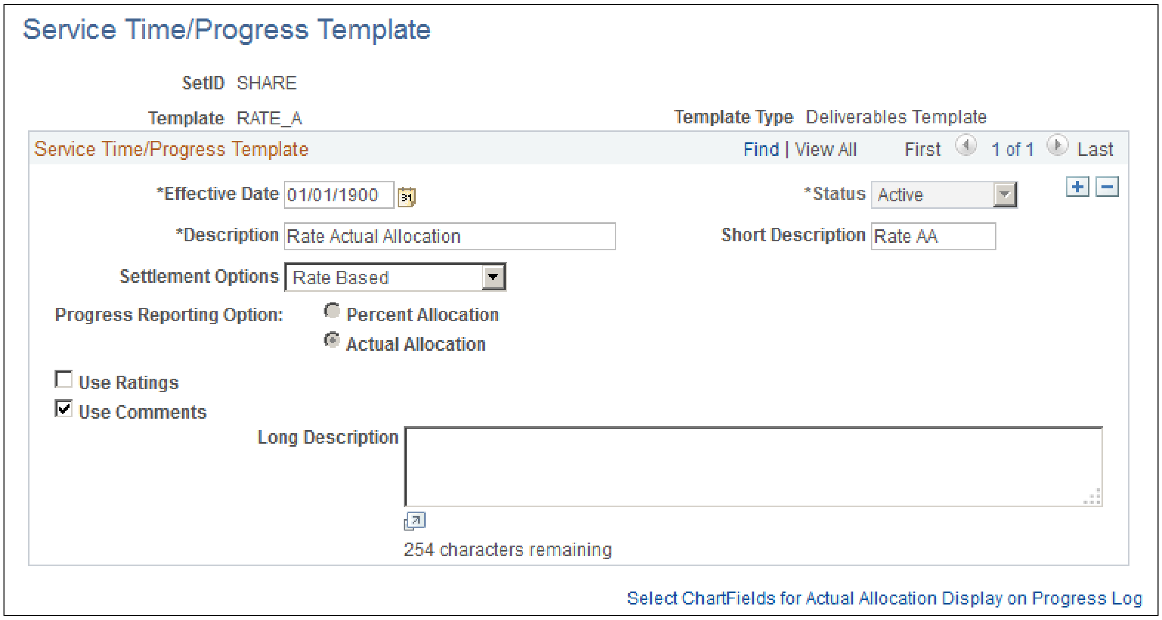
Field or Control	***Description***
Display Calendar	Select an appropriate calendar display option. Use this option to determine how the calendar is displayed for the time reporting period. For example, if you select Monthly as the time reporting option, you may want to display the calendar on a weekly basis.
Use 24-Hour Clock	Select this option if you want time logged using the 24-hour clock. You select this check box if you want to pay providers shift differential using shifts. If you select to use a 24-hour clock, the system disables other entry fields.
Rounding	Select whether you want to round up or down to the hour. Select *None* if you do not want to round the minutes.
Precision	Select the number of precise minutes for rounding. Values are *Six, Twelve, Fifteen, Twenty,* and *Thirty.*
Break Duration (Mins) (break duration - minutes)	Enter the break duration in number of minutes. The break duration is subtracted from the total time difference between the start and end dates. For example, if you have a start time of 8:00 a.m. and end time of 5:00 p.m. with a 30-minute break duration, 8.5 hours are recorded for the day.
Break is Editable	Select to indicate that the break is not mandatory.
Derive Shift From Time of Day	Select this option if you want the system to automatically derive the shift depending upon the time of day. This option is used with 24-hour clocks only. You use the **Derive Shift From Time of Day** check box in conjunction with the shift and assignments functionality.
Shifts	This group box appears when you select Derive Shift From Time of Day. Use this group box to associate specific shifts with this time service template. **Note:** Start and stop times are for informational purposes only. If the 24-hour clock time plate is used and the Derive Shift Based From Time of Day option is selected, then the system automatically places default time values on this fields. However, these start and stop times can still be modified at the template definition level.

Field or Control	***Description***
Start of Shift and End of Shift	These default values come from the Shift definition page, but you can override the values here. These are required fields. **Note:** Start and end times cannot fall within the ranges for another shift for the sample template.
Allow for more than 24 hours	Select if a service provider is enabled to enter more than 24 hours for a single project, work order, activity, and day. You can use this option for team reporting instead of individual reporting. **Note:** When you select this option, the *Rounding, Default Start Time, Default Stop Time, Break Duration, Precision,* and *Break is Editable* fields are available.
Manually enter TimeSheet TRCs(manually enter timesheet time reporting codes)	Select this check box to indicate that you want to manually enter TRCs for timesheets. The check box controls whether time reporting codes are assigned manually by the service provider during time entry or automatically assigned by the system based on predefined rules. You cannot assign a time-reporting rule to a template if this check box is selected. The **Derive Shift From Time of Day** check box is available if you do not select to manually enter timesheet TRCs. If you select to manually enter timesheet TRCs, the check box is not available. **Note:** When editing an existing time template, you cannot change the setting of the **Manually enter Timesheet TRCs** check box if there are already timesheets associated to the template. When a template is already in use, the system low-lights entry fields.
Time Reporting Rule ID	Select a time reporting rule to use for calculating different payouts. This field is not available if you select the **Manually enter Timesheet TRCs** check box. **Note:** To use this feature, you must first define the time reporting rules on the Time Reporting Rules page.
View Time Reporting Rules	Click to view the time reporting rule associated with this service template.

Field or Control	***Description***
Overtime Permitted	Select to indicate if a requisition allows overtime. This is an informational field only.
Use Ratings	Select if the performance of a service provider during the time period is to be rated. **Note:** This check box is only accessible if the **Use Ratings** check box on the Services Procurement Business Unit Definition page is selected.
Use Comments	Select to enable service providers and provider contacts to enter comments or concerns on the timesheet and progress log.
Select ChartFields for Actual Allocation Display on Timesheets	Select the ChartFields to display on the timesheet. The values from the selected ChartFields will be used to allocate time on distribution lines. **Note:** This option is only available when you select **Actual Allocation** as the time reporting option.

Service Time/Progress Template

This example illustrates the fields and controls on the Service Time/Progress Template page. You can find definitions for the fields and controls later on this page.



Service Time/Progress Template

SetID SHARE

Template RATE_A

Template Type Deliverables Template

Service Time/Progress Template

*Effective Date 01/01/1900

*Status Active

*Description Rate Actual Allocation

Short Description Rate AA

Settlement Options Rate Based

Progress Reporting Option: ○ Percent Allocation ● Actual Allocation

☐ Use Ratings

☑ Use Comments

Long Description

254 characters remaining

Field or Control	***Description***
Settlement Options	View the settlement method for a work order, which is based on the service selected. Progress will be recorded based on the method defined. Values include: • *Fixed Amount*: Progress payments are made against milestone activities where the supplier enters the amount to be paid on the progress logs. You can record progress multiple times against the same milestone for work order to allow payment upon partial completion of a activity. • *Milestone*: Payments are made when agreed upon milestones are met. For example, you could agree to pay the construction company 25 percent of the total fee when the foundation is complete. The supplier can only select each milestone activity once for completion. • *Percentage*: Payments are made based on the percentage of completion for the total work order amount entered on the progress log. • *Rate Based*: Payments are based on an agreed upon rate for service activities. For example, you could agree to pay a contractor pouring concrete a specific rate per cubic foot. For this example, the actual cubic feet poured is entered in the progress log and the payment is based on that agreed rate. **Note:** This field applies to deliverable-based work orders only.
Progress Reporting Option	Use this option to associate the reporting options (Percentage/ Actual) with Progress templates for each Settlement Option . This field is available only for Deliverable template type. The reporting options selected here controls the Template you select in a Work order.

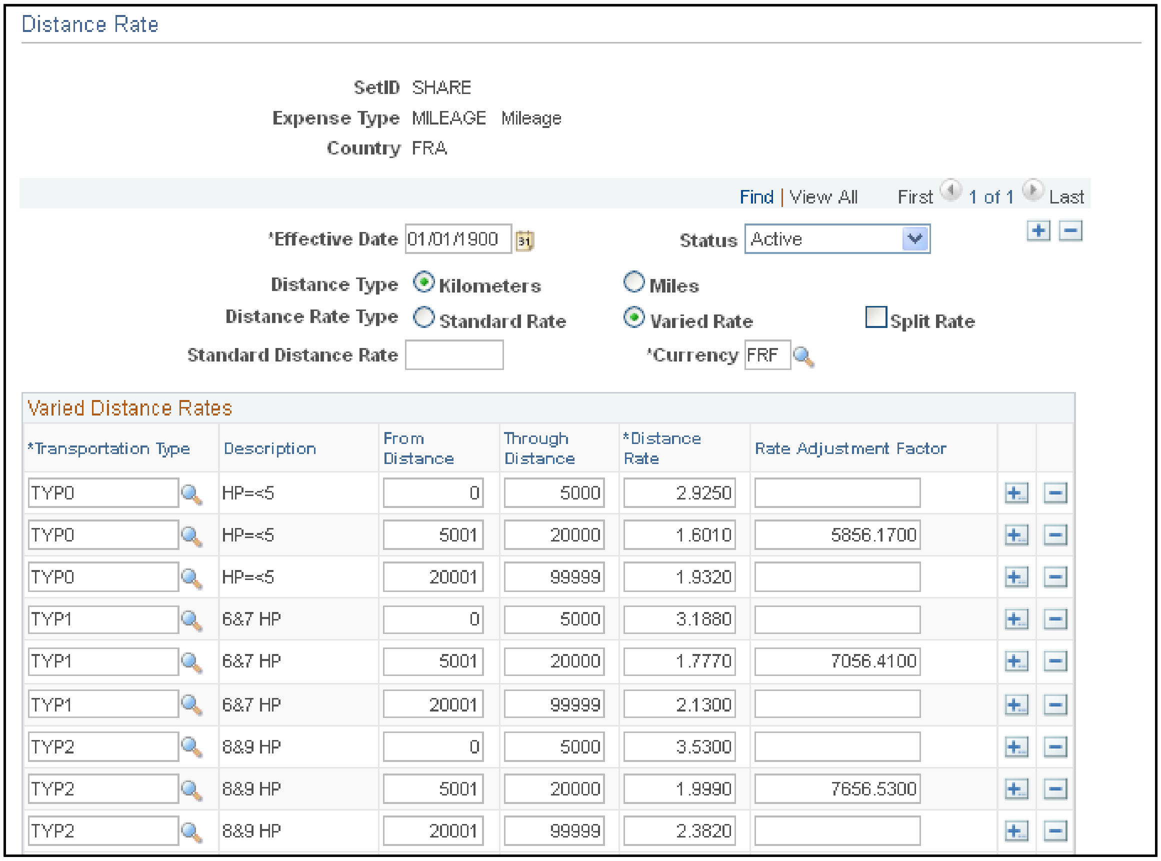
Distance Rate Page

Use the Distance Rate page (EX_AUTO_RT_TBL) to define expense distance rates.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Expense Distance Rate**
- **Set Up Financials/Supply Chain** > **Product Related** > **Expenses** > **Management** > **Establish Mileage Rate**

This example illustrates the fields and controls on the Distance Rate page.


Distance Rate

SetID SHARE
Expense Type MILEAGE Mileage
Country FRA

*Effective Date 01/01/1900
Status Active
Distance Type ● Kilometers ○ Miles
Distance Rate Type ○ Standard Rate ● Varied Rate ☐ Split Rate
Standard Distance Rate
*Currency FRF

Varied Distance Rates

*Transportation Type	Description	From Distance	Through Distance	*Distance Rate	Rate Adjustment Factor
TYP0	HP=<5	0	5000	2.9250	
TYP0	HP=<5	5001	20000	1.6010	5856.1700
TYP0	HP=<5	20001	99999	1.9320	
TYP1	6&7 HP	0	5000	3.1880	
TYP1	6&7 HP	5001	20000	1.7770	7056.4100
TYP1	6&7 HP	20001	99999	2.1300	
TYP2	8&9 HP	0	5000	3.5300	
TYP2	8&9 HP	5001	20000	1.9990	7656.5300
TYP2	8&9 HP	20001	99999	2.3820	

You can set up standard and varied distance rates in different base currencies with each combination tied to an expense type. When service providers use their automobiles for business purposes, you can reimburse them based on how far they must drive.

Field or Control	***Description***
Distance Rate Type	Select **Standard Rate** to indicate a uniform reimbursement rate regardless of transportation type. Select **Varied Rate** to indicate reimbursement rates that depend on the transportation type.
Standard Distance Rate	Enter the monetary amount that is to be reimbursed per unit driven, if you selected **Standard Rate.**

Varied Distance Rates

Field or Control	*Description*
Transportation Type and **Distance Rate**	If you selected **Varied Rate,** enter a distance rate to define the monetary amount that is reimbursed for the transportation type per unit driven.
Rate Adjustment Factor	Enter an adjustment factor that the system applies for the transportation type.

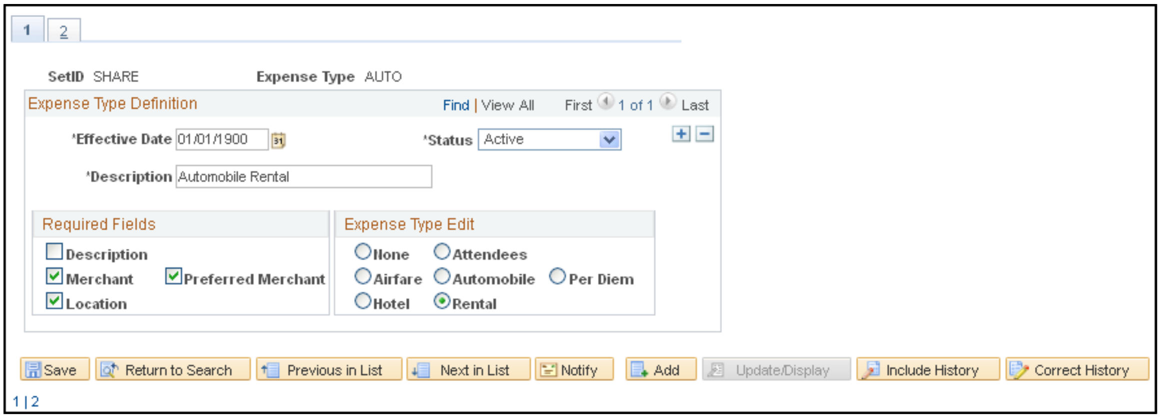
Expense Types1 Page

Use the Expense Types - Expense Types1 page (SPA_EXPENSE_TYPES1) to define expense types.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Time and Expense Setup** > **Expense Type**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Time and Expense** > **Define Expense Types**

This example illustrates the fields and controls on the Expense Types1 page.



SetID SHARE

Expense Type AUTO

Expense Type Definition

*Effective Date 01/01/1900

*Status Active

*Description Automobile Rental

Required Fields

☐ Description

☑ Merchant

☑ Preferred Merchant

☑ Location

Expense Type Edit

○ None ○ Attendees

○ Airfare ○ Automobile ○ Per Diem

○ Hotel ● Rental

Required Fields

Field or Control	*Description*
Description, Merchant, Preferred Merchant, and **Location**	Select each option to appear as a required field on the expense sheet that a service provider completes for the expense type. To define an expense location amount for this expense type, select the **Location** check box to make it a required field on the expense sheet.

Expense Types2 Page

Use the Expense Types - Expense Types2 page (SPA_EXPENSE_TYPES3) to define expense types.

Navigation:

Click the **Expense Types2** tab from the Expense Types1 page.

Field or Control	***Description***
Per Diem Amount	Enter the amount that is authorized for this expense type. In the column that appears to the right of this field, select the per diem's currency.
Deduct For Breakfast, Deduct For Lunch, and **Deduct For Dinner**	Enter deduction amounts. The currencies for these amounts appear by default from the currency that you selected for the per diem.
Preferred Merchant	You can add more rows to create a list of merchants that service providers must use. If the expense type appears in an expense sheet and the service provider did not use a preferred merchant, the line item requires an explanation.

Payment Terms Timing Codes Page

Use the Payment Terms Timing Codes page (PYMT_TERMS_TIMING) to define payment terms timing for each period that you reference in your payments.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Invoicing Setup** > **Payment Terms Timing Codes**
- **Set Up Financials/Supply Chain** > **Product Related** > **Procurement Options** > **Payments** > **Payment Terms Timing Codes**

Payment terms are stored in separate tables and form the basis of net due date, discount due date, and discount amount calculations. You define the payment terms and timing methods that the system uses for supplier payments. The system supports percentage and fixed amount discount calculations. PeopleSoft Payables uses these payment terms and timing methods to schedule payments for invoices and to calculate amounts remitted to suppliers.

Payment Terms - Single Payments Page

Use the Payment Terms - Single Payments page (PYMT_TERMS_SINGLE) to define valid payment terms for single payments.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Invoicing Setup** > **Payment Terms - Single Payment**

- **Set Up Financials/Supply Chain > Product Related > Procurement Options > Payments > Payment Terms - Single Payment**

Field or Control	***Description***
🔄	Click the **Refresh Display** button if you modified an existing term definition and want to display the original, saved terms definition.
Search Where Used	Click to access the Search Where Used page to view where this payment term ID is used.
Calculate Example Payment Data	Click to calculate example payment data for the payment terms ID, based on currency, gross amount, and basis date values provided as input variables. This enables you to perform a *what if* analysis regarding the effect of various parameter settings on the calculated result, before choosing to save a particular term's definition.

Payment Terms Control

Field or Control	***Description***
Terms Applicability	Displays *Supplier-Only Terms.*
Split Net Terms	Select to enable a definition of payment terms that contain multiple net terms and any associated discounts. For example, select this option to use one timing ID if the basis date is between the 1st and 15th, and another timing ID if the basis date is between the 16th and end of the month. Split terms definitions enable you to set up *variable net due date* terms. There are terms that, depending on the basis date, result in more than one possible set of net or discount due dates.

Net Due Terms

Field or Control	***Description***
Basis From Day	Enter the beginning day of the basis day range. The basis date's day value must be equal to or greater than this day or else the terms definition does not apply. This field is available for entry when the **Split Net Terms** check box is selected.

Field or Control	***Description***
Basis To Day	Enter the ending day of the basis day range. The basis date's day value must be equal to or less than this day or else the terms definition does not apply. This field is available for entry when the **Split Net Terms** check box is selected.
Timing ID	Select to calculate the net payment due date for this day range within the single payment term.
Discount Terms Available	Select if the terms that you are defining include discount terms.

Note: All available days, 1 to 31, must be accounted for in the basis from day and basis to day ranges.

Discount Terms

Field or Control	***Description***
Timing ID	Select to specify the discount portion of this single payment term.
Adjustment Days	Enter the number of days used to adjust the discount due date for this single payment term. Define flexible discount terms by entering either *basis date relative* or *due date relative* discount due dates. This is useful if the discount terms are often calculated as, for example, 2 percent for the first 10 days following the start-of-terms (basis) date, or 2 percent up to 10 days before the payment due date.
Discount Terms Percent	Enter the discount percent that is applied to the invoice gross amount to calculate the discount amount.
Discount Terms Amount	Enter the flat amount discount that is applied to the invoice regardless of the invoice amount. **Note:** This value is applied using the transaction currency units defined for the voucher. The particular currency to use is not defined here but is determined by context.

Search Where Used Page

Use the Search Where Used page (SNGL_TRMS_WHR_USED) to view where payment terms are used.

Navigation:

Click the **Search Where Used** link on the Payment Terms - Single Payments page.

Field or Control	*Description*
Multi-Payment Terms ID	Displays the multipayment terms ID that uses this single payment terms ID.
Number of Terms	Indicates the number of installments contained within the displayed multipayment terms ID that appears.
Number of Occurrences	Indicates the number of times that this payment terms ID is used within the multipayment terms.

Calculate Example Payment Data (single payment terms) Page

Use the Calculate Example Payment Data (single payment terms) page (SNG_TR_CLC_PAY_DTA) to calculate example data for single payment terms.

Navigation:

Click the **Calculate Example Payment Data** link on the Payment Terms - Single Payments page.

Field or Control	*Description*
Gross Invoice Amount, Terms Basis Amount, and **Use Basis Amount**	Enter a value to use as the terms basis amount for the example discount calculation. To use a different amount, select the **Use Basis Amount** check box, which enables the **Terms Basis Amount** field, and enter a different value. **Note:** The terms basis amount value must be less than the gross invoice amount value.
Basis Date	The system populates this field with the current date by default.
Calculate Example Payment Data	Click the **Calculate Example Payment Data** button to calculate the payment data based on the values entered on the page.

Payment Terms - Multi Payment Page

Use the Payment Terms - Multi Payment page (PYMT_TERMS_MULTI) to define valid payment terms for multiple payments.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Invoicing Setup** > **Payment Terms - Multi Payment**
- **Set Up Financials/Supply Chain** > **Product Related** > **Procurement Options** > **Payments** > **Payment Terms - Multi Payment**

Group single payment terms for payments split into multiple payments or installments.

Calculate Example Payment Data (multiple payment terms) Page

Use the Calculate Example Payment Data (multiple payment terms) page (MLT_TR_CLC_PAY_DTA) to calculate example data for multiple payment terms.

Navigation:

Click the **Calculate Example Payment Data** link on the Payment Terms - Multi Payment page.

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

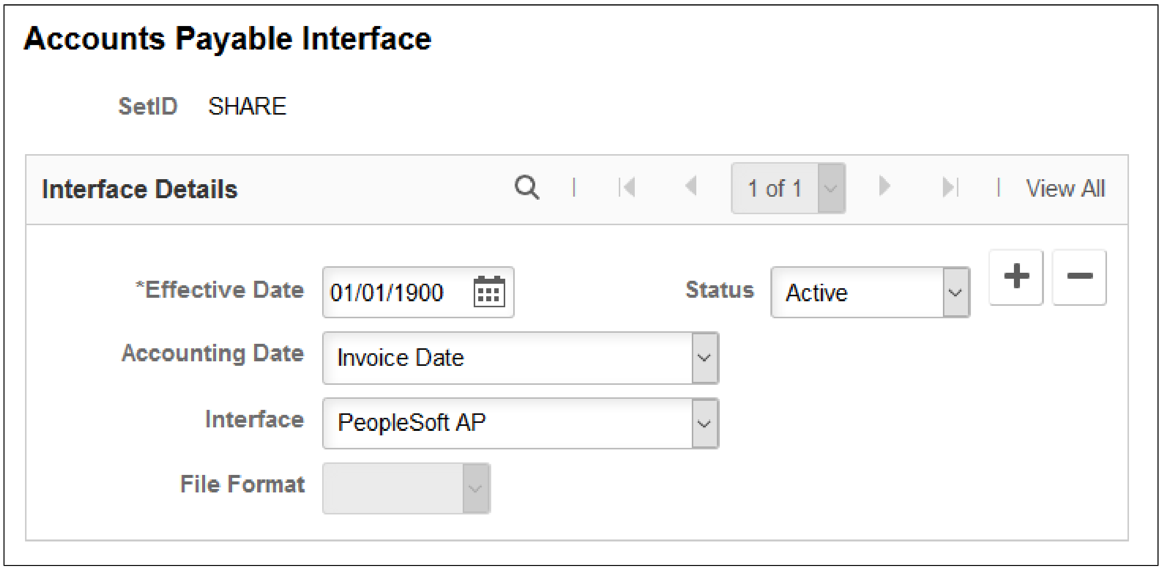
Accounts Payable Interface Page

Use the Accounts Payables Interface page (SPA_AP_INTRFACE) to define accounts payable application interface information.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **Settlement Setup** > **Invoicing Setup** > **Accounts Payables Interface**
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **AP Interface**

This example illustrates the fields and controls on the Accounts Payable Interface page. You can find definitions for the fields and controls later on this page.



Accounts Payable Interface

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Interface Details

*Effective Date 01/01/1900

Status Active

Accounting Date Invoice Date

Interface PeopleSoft AP

File Format

Field or Control	***Description***
Accounting Date	Select an Accounting Date. • Invoice Date: If you select this option, the Accounting Date displayed on the voucher will be the date on which the invoice was created. • Approval Date: If you select this option, the Accounting Date displayed on the voucher will be the date on which the invoice was approved.
Interface	Select *Other* to indicate a third-party application. Select *PeopleSoft AP* to indicate that you use PeopleSoft Payables.
File Format	PeopleSoft Services Procurement uses comma-separated values as its only file format. If you select *Other* as the interface, the system exports invoice data to a flat file using this format, which you can use to export to your accounts payable system for invoice voucher generation. If you select *PeopleSoft AP* as the interface, this field is disabled, because it is not applicable.

Setting Up Multi-Resource Services

This topic provides an overview of multi-resource services and discusses how to assign individual services to multi-resource services.

Pages Used to Set Up Multi-Resource Services

Page Name	***Definition Name***	***Usage***
Service Types Page	SPB_ROLE_TYPE	Assign a service type that uses the multi-resource method.
Service/Project Role	SPB_PROJ_ROLE	Assign a service/project role that uses the multi-resource method.
Services Supplier Info Page	VENDOR_SPRO_PG	Define a supplier as a multi-resource supplier. Select the **Multi Resource Supplier** check box to indicate that the supplier can be used with multi-resource services. If the check box is deselected, the supplier cannot be used with multi-resource services.
Supplier Sourcing Setup Page	SPB_SPLR_REGION_PG	Assign suppliers for use with multi-resource work orders.

Page Name	***Definition Name***	***Usage***
Assign Individual Services to Multi-Resource Service Page	SPB_MULTI_SRVC	Assign individual services to multi-resource service.

Understanding Multi-Resource Services

The multi-resource services feature supports a grouping of multiple unique services and service providers for Services Procurement requisitions, sourcing, and work orders. Each individual service represents a part of the overall multi-resource service. Multi-resource services provide an overall agreed upon amount that is not to be exceeded. This overall amount for a service or set of services is independent of the number of service providers associated to the service.

The feature enables you to manage complex work at a more granular level by assigning individual services to a multi-resource requisition with multiple unique-service providers to be sourced to that requisition to fill the required services. After you fill the requisition, the system allows multiple unique-service providers to report time against an individual work order while consuming against a single overall amount on the multi-resource work order.

The feature also enables service providers to enter time against an individual work order and have the related consumption recorded against the parent multi-resource work order total, and produce a consolidated invoice based on the reported time. Multi-resource services also enable service providers to enter time against a single work order strictly for tracking purposes.

To support multi-resource services, the system provides multi-resource service method for requisitions, sourcing, and work orders. You can use the multi-resource method to:

- Create a requisition with multiple unique services and an overall not to exceed amount.

  See Understanding Requisitions.

- Source multi-resource requisitions with multiple, unique services
- Create a work order with multiple unique services and an overall not to exceed amount

  See "Managing Work Orders," Understanding Multi-Resource Work Orders

- Multiple service providers report time against a single multi resource work order
- Multiple service providers report expenses against a single multi resource work order

  See "Managing Settlements," Understanding Multi-Resource Settlements

You use the basic setup steps for the PeopleSoft Services Procurement system to use multi-resource services. For example, after a multi-resource service is available, you can define surveys, logistical tasks, activities, sourcing rules, and bid factor mappings for use with the service.

Several tasks make a multi-resource service method available for use with other basic setup features. You complete these tasks to implement multi-resource services:

- Define a service type that uses the Multi Resource service type method.

The Services Procurement system provides the Multi Resource method as an option when you create a service type. After creating this service type, you can then associate it to services for use with multi-resource services.

- Define services for project roles to use with multi-resource service types.

  This enables you to apply services/projects for use with multi-resource services types.

- Define suppliers for use with multi-resource services.

  The supplier type determines what type of requisitions the supplier can fill. Select the **Multi Resource Supplier** check box to enable the supplier to be setup for use with multi-resource services.

- Set up supplier networks and supplier sourcing for use with multi-resource service suppliers.

  You use the Supplier Sourcing Setup component to add suppliers to the supplier network in one central location. When a supplier is both resource- and deliverable-based, and the supplier is a multi-resource supplier, then the only difference in page values is that the **Service Type** field list of values would also contain multi-resource service types.

  When a supplier is just resource-based and is a multi-resource service supplier, you can select multi-resource services types from the list of values. If a supplier is delivery-based and is also a multi-resource services supplier, all five tabs would appear for the supplier, but you can only select multi-resource service types from the **Service Type** field list of values.

- Add individual services to multi-resource service.

Note: Some differences in information exists within services methods and in invoicing that depend on which service you use. The behavior, settings, limitations, and capabilities for multi-resource services are basically consistent with services in a resource-based service. Exceptions to any differences are described throughout this documentation.

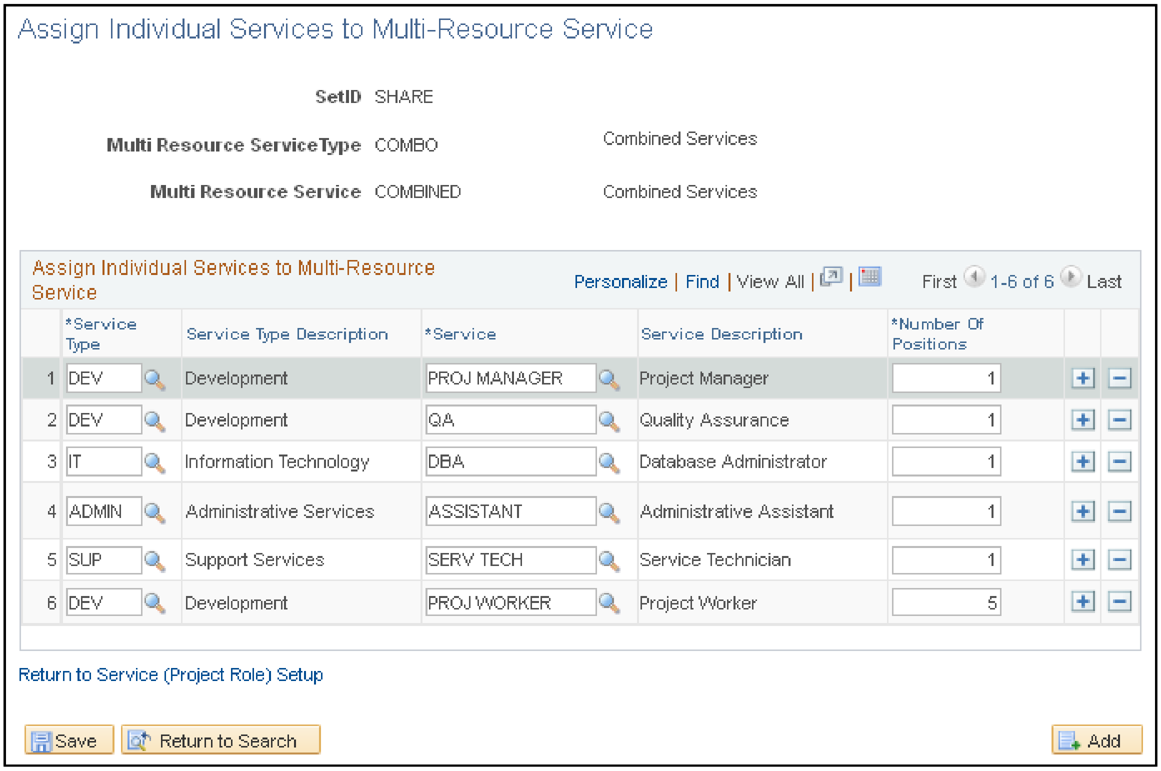
Assign Individual Services to Multi-Resource Service Page

Use the Assign Individual Services to Multi-Resource Service page (SPB_MULTI_SRVC) to assign individual services to multi-resource service.

Navigation:

Services Procurement, Define Services Procurement, Service Setup, Service (Project Role) Setup, Multi Resource Assignment

This example illustrates the fields and controls on the Assign Individual Services to Multi-Resource Service page.



Assign Individual Services to Multi-Resource Service

SetID SHARE

Multi Resource ServiceType COMBO Combined Services

Multi Resource Service COMBINED Combined Services

Assign Individual Services to Multi-Resource Service

	*Service Type	Service Type Description	*Service	Service Description	*Number Of Positions
1	DEV	Development	PROJ MANAGER	Project Manager	1
2	DEV	Development	QA	Quality Assurance	1
3	IT	Information Technology	DBA	Database Administrator	1
4	ADMIN	Administrative Services	ASSISTANT	Administrative Assistant	1
5	SUP	Support Services	SERV TECH	Service Technician	1
6	DEV	Development	PROJ WORKER	Project Worker	5

Return to Service (Project Role) Setup

The header information on this page displays the multi-resource service type and service. The system uses the information you define on this page as default values when you create requisitions and work orders. You can associate only resource-based service type/services to multi-resource service types/services.

Note: If you are using PeopleSoft Human Capital Management, the Service Type and Service fields titles appear as **Job Family** and **Job Code.**

Field or Control	***Description***
Service Type	Select a service type from which you want to use to add a service to a multi-resource service. **Note:** Only Resource based Service Type/Services can be associated to a multi-resource service type/services.
Service Type Description	Displays the service type description when you select a service type.
Service	Select a service that you want to add to the multi-resource service.
Service Description	Displays the service description when you add the service.

Field or Control	***Description***
Number of Positions	Enter the number of positions that you want to include for this service.

Chapter 6

Using Default Hierarchies

Understanding PeopleSoft Services Procurement Default Hierarchy

PeopleSoft Services Procurement enables you to set up several default hierarchy structures to use throughout your transaction processing. By setting up defaults, data entry is more consistent, saves time, and cuts down on redundancy and user error. Default values enable an Enterprise to predefine key values that automatically default onto requisitions and work orders.

The most common defaults for requisitions and work orders come from the requester or service coordinator user defaults or from the service type and the business unit. When requesters or service coordinators create requisitions or work orders, the system first determines whether there is default information available for requester, then the service coordinator, then the service type, in that order respectively. If there are no default values defined at the service type level, the system then uses defaults that are defined at the business unit level.

PeopleSoft Services Procurement provides default capability for those values that are relatively static in nature (values that remain the same in everyday operations and would become repetitive to enter for every transaction). For example, if you set up your ChartField defaults with the most appropriate values for your service request, you have little need to drill down to the requisition's distribution level to enter any values. The ChartField values at that level are set by default.

Note: Although it is possible to establish several defaults for your requisition and work orders, you can override most values at the requisition and work order component levels.

Understanding Transaction Defaults

This table details the levels in the transaction default hierarchy from which the selected transaction values can appear by default. The Default Source indicates where the Transaction Field Value comes from. If there is more than one default source listed, then follow this order: review from left to right, with the left-most source taking precedence, and continues from left to right in that order.

The default values listed default onto requisitions, work orders, timesheets, and progress logs.

Transaction Field Value	***Default Source***
Service Method	Service Method field on the Service Types page.

Transaction Field Value	***Default Source***
Category	Category field on the Category Definition page, where Category is the item category defined for the service type on the Service Types page.
Score	Score field on the Service Types and Services Procurement Bus Unit pages.
Allow Multicurrency Reqs (allow multicurrency requisitions)	Allow Multicurrency Reqs field on the Services Procurement Bus Unit page.
Currency	Currency field on the Services Procurement Bus Unit page.
Location	Location field on the Services Procurement Bus Unit page.

Requisition Defaults

The following table lists values that default onto requisitions.

See Understanding Requisitions.

Transaction Field Value	***Default Source***
Business Unit	Business Unit field from the Requester's Overall Preferences page.
Requester	Requester field from the Requester's Procurement user preferences page.
Currency	Currency field from the Requester Setup page; Currency field from the Purchasing Business Unit Definition page.
Service Type	Service Type field from the Service Requester Defaults page.
Service	Service field from the Service Requester Defaults page.
Requesting Dept	Department field from the Requester's Procurement user preferences page.
Job Title	Description field from the Service/Project Role Attributes page.
Location	Ship To field from the Requester Setup page; Ship To Location field from the Requester's Procurement user preferences page.

Transaction Field Value	***Default Source***
Allow Expenses	Allow Expenses field from the Service Type page; Allow Expenses field from the Services Procurement Bus Unit page.
Time Reporting Option	Time Reporting Option field from the Service Type page; Time Reporting Option field from the Services Procurement Bus Unit page.
Scope of Work	Comments field from the Service/Project Role Attributes page.
Rate and Unit of Measure (Resource Only)	Rate and Unit of Measure fields from the Maintain Rate Sheets page.
Unit of Measure (Resource Only)	If no rate sheet exists for the service and region, then the value comes from the Days or Hours Unit of Measure field on the Services Procurement Installation Options page.
Competencies (Resource Only)	Competencies field from the Service/Project Role Attributes page.
Other Skills (Deliverable Only)	Competencies field from the Service/Project Role Attributes page are concatenated into the Other Skills field.
Education Level (Resource Only)	Education Level field from the field Service/Project Role Attributes page.
Experience (Resource Only)	Experience field from the Service/Project Role Attributes page.
Interview Required (Resource Only)	Interview Required field from the Service/Project Role Attributes page.
Track Resources(s) (Deliverable Only)	Track Resource(s) field from the Service Types and Services Procurement Bus Unit pages (Work Order Settings tab).
Service Coordinator and Service Team (non-VMS)	Service Coordinator or Service Team field from the Service Requester Defaults page.
Service Coordinator and Service Team (VMS)	Service Coordinator or Service Team field on the VMS Details by Supplier and Business Unit page. See Understanding VMS.
Individual Services (Multi Resource Only)	Individual service information is defaulted from the Assign Individual Services to Multi Resource Service page when you click the **Use Default Services** button.

ChartFields

This table details the default values for various ChartFields used on requisitions.

ChartField	***Default Source***
Dept (department)	ChartField Dept field from the Requester's Setup page; Department field from the requester's Procurement user preferences page.
Location	Ship To field from the Requester Setup page; Ship To Location field from the requester's Procurement user preferences page.
GL Unit	ChartFields GL Unit field from the Requester Setup page; GLUnit field on the Purchasing Business Unit Definition page.
Account (Labor)	Account field from the Category Definition page, where Category is the item category defined for the service type.
Account (Expense Distrib.Type)	Default Expense Account field from Services Procurement Bus Unit page. If not found, then the Account associated to the category for the service type.

Sourcing Defaults

The following table list values that default onto sourcing pages.

See Sourcing Requisitions.

Transaction Field Value	***Default Source***
Supplier Information - Sent To, Provider Contact, Notification Method, Maximum Submittals	Various fields from Region/Service Type combination for resource based or Region/Service combination for deliverable based, Region only or Service/Service Type only (order determined by sourcing preference defined on Business Unit); Services Procurement Bus Unit page.

Work Order Defaults

The following table lists values that default onto work orders.

See Understanding Services Work Orders.

Note: If you create a work order that is linked to a requisition, many of the values that automatically default onto the requisition will also default onto the work order.

This table represents default values for work orders that are not linked to requisitions.

The Default Source indicates where the Transaction Field Value comes from. If there is more than one default source listed, then follow this order: review from left to right, with the left-most source taking precedence, and continues from left to right in that order.

Transaction Field Value	***Default Source***
Business Unit	If the service coordinator creates a work order, then Business Unit value defaults from the Business Unit field on the Service Coordinator's Overall Preferences page, otherwise it comes from the Business Unit field on the Requester's Overall Preferences page.
Service Type	If the service coordinator creates a work order, then the Service Type value defaults from the Service Type field on the Service Coordinator Defaults page, otherwise it comes from the Service Type field on the Service Requester Defaults page.
Service	If the service coordinator creates a work order, then the Service value defaults from the Service field on the Service Coordinator's Defaults page, otherwise it comes from the Service field on the Service Requester Defaults.
Requesting Dept	Department field from the requester's Procurement user preferences page.
Job Title	Description field from the Service/Project Role Attributes page
Location	Ship To field from the Requester Setup page; Ship To Location field on the requester's Procurement preferences page; Ship To Location field from the Service Coordinator's Procurement user preferences page.
Allow Expenses	Allow Expenses field on the Service Type page; Allow Expenses field from the Services Procurement Bus Unit page.
Time Reporting Option	Time Reporting Option field from the Service Type; Time Reporting Option field from the Services Procurement Bus Unit page.
Scope of Work	Comments field from the Service/Project Role Attributes page.
Currency	Currency field from the Requester Setup page; Currency field from the Purchasing Business Unit Definition page.
Rate and Unit of Measure (Resource Only)	Rate and Unit of Measure fields from the Maintain Rate Sheets page.
Unit of Measure (Resource Only)	If no rate sheet exists for the service and region, then the value comes from the Days or Hours Unit of Measure field on the Services Procurement Installation Options page.

Transaction Field Value	***Default Source***
Competencies (Resource Only)	Competencies field from the Service/Project Role Attributes page.
Other Skills (Deliverable Only	Competencies from the Service/Project Role Attributes page are concatenated into the Other Skills field.
Education Level (Resource Only)	Education Level field from the Service/Project Role Attributes page.
Experience (Resource Only)	Experience field from the Service/Project Role Attributes page.
Track Resources (Deliverable Only)	Track Resource(s) field from the Service Type page; Track Resource(s) field from the Services Procurement Bus Unit page (Work Order Settings tab).
Work Order Alerts	Work Order Alerts values from the Service Requester Defaults page; Service Coordinator Defaults page; Service Type page; Services Procurement Bus Unit page (Work Order Settings tab).
Survey ID	Survey ID field from the Surveys by Service Types page.
Require Survey	Require Survey field form the Service Types page.
Automatically Send Survey	Automatically Send Survey field from the Service Types page.
Survey Role Distribution List	Role Distribution List field from the Setup Survey page.
Service Coordinator and Service Team (non-VMS)	Service Coordinator or Service Team field on the Service Requester Defaults page. When the service coordinator creates a work order, the service coordinator who creates the work order is defaulted into the field.
Service Coordinator and Service Team (VMS)	Service Coordinator or Service Team field on the VMS Details by Supplier and Business Unit page. See I'll add the link to the section in the VMS set of topics
Individual Services (Multi Resource Only)	Individual Service information is defaulted from the Assign Individual Services to Multi Resource Service page when you click the **Use Default Services** button.

ChartFields

This table details the default values for various ChartFields used on work orders.

See Requisition Defaults.

Understanding Service Requester Defaults

This topic discusses how to define service requester defaults.

Service Requester Defaults

Use the Service Requester Defaults page to simplify the requisition and work order data entry process for requesters. When you define service requester default values, requesters can use those values when creating multiple requisitions and work orders. This streamlines data entry for each requester, because default information appears on requisitions and work orders automatically. You can then authorize established purchasing users to enter and process requisitions for all or specific requesters.

Service requester default values include, but are not limited to the following fields:

- Service Type
- Service (Project Role)
- Service Coordinator/Team
- Allow Time/Expense Overage %
- Alerts Notification Method
- Work Order Alerts

In addition, the following values are defaulted from the requesters Procurement User Preferences

- Location
- Ship To

Related Links

Requester Defaults Page

Understanding Service Coordinator Defaults

This topic discusses how to define service coordinator defaults.

Service Coordinator Defaults

Use the Service Coordinator Defaults page to simplify the work order data entry process for service coordinators.

Service coordinator default values include, but are not limited to the following fields:

- Service Type

- Service (Project Role)
- Authorized to Delegate
- Authorized to Change Sourcing Rules
- Allow Time/Expense Overage %
- Alert Notification Method
- Work Order Alerts
- Expense Approver

In addition, the following values are defaulted from the service coordinators Procurement User Preferences:

- Location
- Ship To

Related Links

Service Coordinator Defaults Page

Defining the Region Hierarchy

Use the region hierarchy to determine the best suppliers to source the requisition request. Use the Region Codes and Tree Manager pages to build the region default structure and associate locations to the regions.

Once you establish the region hierarchy, use it to define rates and valid suppliers for sourcing.

The location specified on a requisition or work order is used to determine the related region for identification of associated rates.

Note: If the **Use Region Tree Structure** option is not selected on the Services Procurement Installation Options page, the Locations by Region page is used instead of the Region Tree to associate locations to regions for purposes of determining rates.

Related Links

Building the Region Hierarchy

Chapter 7

Integrating with Other PeopleSoft and Third-Party Applications

Integrating with Accounts Payables Applications

This topic discusses how to export approved PeopleSoft Services Procurement transactions to PeopleSoft Payables or to a third-party accounts payable application to create invoices.

Here are the steps to export services transactions:

1. If you are using PeopleSoft Payables, use the Voucher Batch Req page to run the Voucher Build Application Engine process to generate the voucher.
2. If you are not using PeopleSoft Payables, use the Export To Payables Application Engine process to export invoice data to a flat file.

Note: You specify the accounts payable application interface using the Accounts Payable Interface page. If the currency on the invoice is different from the currency defined for the supplier, the system uses the rate type on the Services Procurement Business Unit Options page to convert the invoice amount into the supplier's currency.

Page Used to Integrate with Accounts Payables Applications

Page Name	***Definition Name***	***Usage***
Export To Payables Page	SPA_GEN_INV_EXPORT	Export invoicing data to a PeopleSoft Payables staging table or to a flat file.

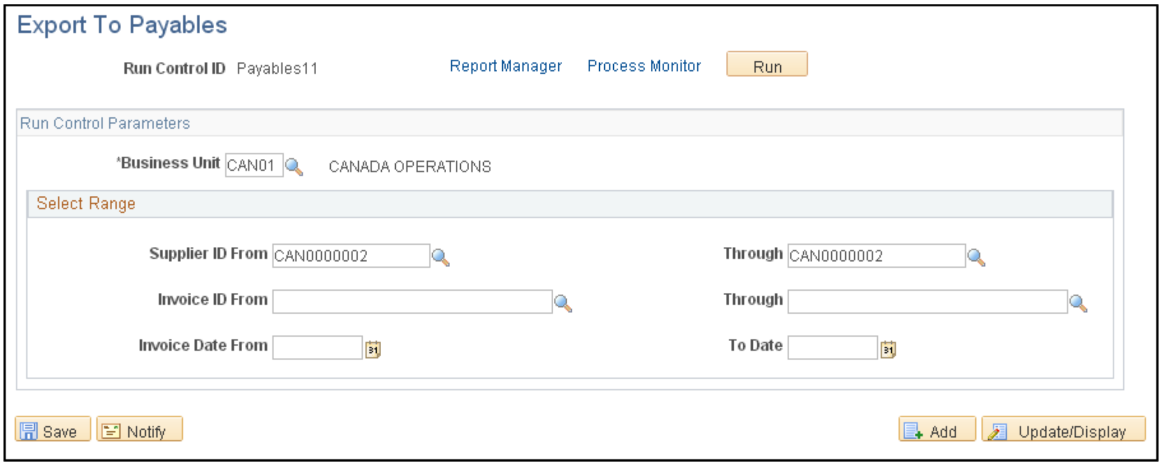
Export To Payables Page

Use the Export To Payables page (SPA_GEN_INV_EXPORT) to export invoicing data to a PeopleSoft Payables staging table or to a flat file.

Navigation:

Services Procurement > **Services Settlement** > **Export to Payables**

This example illustrates the fields and controls on the Export To Payables page.



Run Control ID Payables11

*Business Unit CAN01 CANADA OPERATIONS

Supplier ID From CAN0000002 Through CAN0000002

Invoice ID From Through

Invoice Date From To Date

Enter the run control parameters for exporting invoicing data.

Process Results

The Export To Payables process writes to PeopleSoft Payables staging tables or a flat file based on the PeopleSoft Accounts Payable interface defined for the SetID.

If you selected *PeopleSoft AP* as the accounts payable application interface using the Accounts Payable Interface page, the PeopleSoft Application Engine (SPF_IEXPMAIN) exports invoicing data approved in PeopleSoft Services Procurement to staging tables (VCHR_HDR_STG, VCHR_LINE_STG, and VCHR_DIST_STG) in PeopleSoft Payables.

Note: For individual service work orders associated to a multi-resource parent, the systems sends the parent work order ID and sequence number to Accounts Payable to aid in matching to the related purchase order.

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

If you selected *Other* as the accounts payable application interface using the Accounts Payable Interface page, the process exports invoicing data approved in PeopleSoft Services Procurement to a fixed format, comma-separated values (CSV) flat file, which you can use to import data into an accounts payable application and generate invoices.

Integrating with PeopleSoft Project Costing

This topic lists a prerequisite and discusses how to export approved time (resource-based), expense (resource-based and deliverables-based), and progress log (deliverable-based) information to PeopleSoft Project Costing.

Here are the steps:

1. Export approved time, expense, and progress log information to a staging table.

2. In PeopleSoft Project Costing, run the process to import staging table data into PeopleSoft Project Costing tables.

Note: When you run the SPA_PROJ_EXP process, the system processes and populates the Project Resource integration staging table (SP_PROJ_RES_STG) with only those work order distribution rows that have a Project Costing business unit, project ID, and activity ID.

Pages Used to Integrate with PeopleSoft Project Costing

Page Name	***Definition Name***	***Usage***
Export Services to Projects Page	SPF_PROJ_EXP	Define run control parameters for exporting time, expense, and progress log data to a staging table.
"Services Procurement Page" (PeopleSoft Project Costing)	PC_SP_TO_PC	Load PeopleSoft Services Procurement staged data into PeopleSoft Project Costing.

Prerequisite

Before exporting time, expense, and progress log information to Project Costing, ensure that the following fields are set as you want them in the **System Analysis Types** group box on the Project Costing Integration page (Set Up Financials/Supply Chain, Install, Installation Options and select **Project Costing Integration). The system is delivered with default settings, but you can change them.**

- **Expenses**
- **Mobile Time / Expense**
- **sPro Assignment Incident**
- **sPro Progress Log**

See "Installation Options - Project Costing Integration Page" (Application Fundamentals).

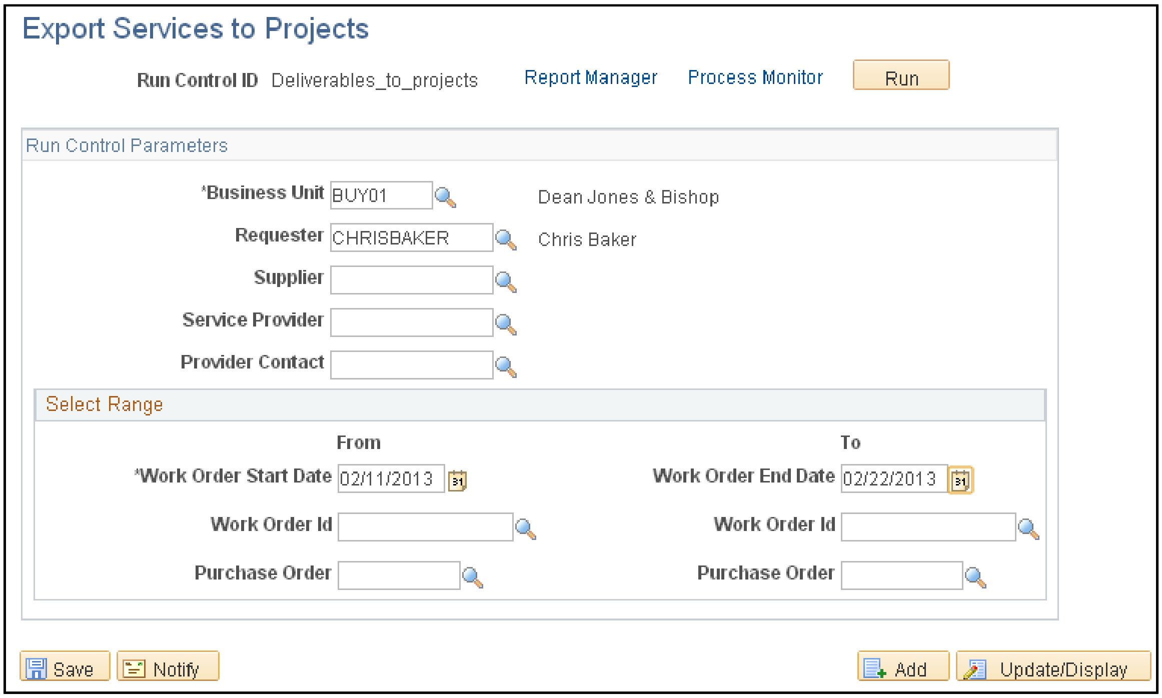
Export Services to Projects Page

Use the Export Services to Projects page (SPF_PROJ_EXP) to define run control parameters for exporting time, expense, and progress log data to a staging table.

Navigation:

Services Procurement > **Manage Projects and Activities** > **Export Services to Projects**

This example illustrates the fields and controls on the Export Services to Projects page.



Export Services to Projects

Run Control ID Deliverables_to_projects

Run Control Parameters

*Business Unit BUY01 Dean Jones & Bishop

Requester CHRISBAKER Chris Baker

Supplier

Service Provider

Provider Contact

Select Range

From

*Work Order Start Date 02/11/2013

Work Order Id

Purchase Order

To

Work Order End Date 02/22/2013

Work Order Id

Purchase Order

Define the parameters to use to export the time, expense, and progress log information.

Field or Control	***Description***
Business Unit	Enter the Services Procurement business unit to select the work orders that you want to send to Project Costing.

Field or Control	***Description***
Provider Contact	Select a provider contact to export progress log information. You must also select a business unit and supplier prior to selecting a provider contact.

Field or Control	***Description***
Work Order ID	Select a work order ID to send a specific work order to Project Costing. Multi-resource service work orders along with their lower-level service work orders appear in the Work Order ID field list of values on this page. If a multi-resource work order is included in the work order selection range, the system processes all the lower-level service work orders for that multi-resource work order. If you select a lower-level service work order, then the system processes only that work order. If you select both multi-resource and lower-level service work orders in the same range, the SPA_PROJ_EXP process ignores duplicates and processes the lower-level service work orders only once.

Process Results

The PeopleSoft Application Engine process (SPA_PROJ_EXP) exports this information to the Project Resource staging table (SP_PROJ_RES_STG):

- Approved time transaction data from PeopleSoft Services Procurement time and expense tables.

  Services Procurement sends time data to Project Costing using an analysis type of TLX for time based labor and an analysis type of INC for incident based assignments. Project Costing can then use these analysis types to process transactions.

- Approved progress log data from PeopleSoft Services Procurement tables.

  Services Procurement sends progress log data to Project Costing using an analysis type of SPL. Project Costing can then use the analysis type to process the transactions.

- Approved expense data from PeopleSoft Services Procurement tables.

  Services Procurement sends expense data to Project Costing using an analysis type of ACT. Project Costing can then use the analysis type to process the transactions.

When you run this process, the system processes and populates the staging table with only those work order distribution rows that have a Project Costing business unit, project ID, and activity ID.

Note: Run the Cost Collection process in PeopleSoft Project Costing for Services Procurement Application Engine process (PC_SP_TO_PC) to load the staged data into PeopleSoft Project Costing.

Related Links

“Importing Time, Expense, and Progress Log Data into PeopleSoft Project Costing” (PeopleSoft Project Costing)

Integrating with PeopleSoft Purchasing

This topic discusses how to pass approved service work orders information to the PeopleSoft Purchasing application.

Here are the steps:

- The requester or service coordinator clicks the Process Purchase Order button at the bottom of the Work Order page to submit the work order details to the purchase order staging table PO_ITM_STG.
- After you click the Process Purchase Order button, a link to the quick source application engine appear at the bottom of the Work Order - Cost page.

  Use the quick source process to create purchase orders from data in the staging table.

  Note: This process occurs regardless if a requisition is associated to a work order.

Note: If a new resource is assigned to the work order from a different supplier or for a different currency, a new purchase order will be created. The original work order amount will be broken out between the original work order and the replacement work order.

Related Links

Understanding Services Work Orders

Integrating With PeopleSoft HCM

When you implement both PeopleSoft Services Procurement and HCM applications, you can configure HCM as the system of record to maintain user details. When the HCM Person Integration installation option is enabled on the Services Procurement Installation Options page, the enterprise administrators can register a PeopleSoft Services Procurement user as an HCM person with a unique employee ID and create unique operator login profiles within the HCM database.

The following six users are either registered in the HCM database with a unique Person ID, or they are created in the SCM database without a Person ID. Each user has a specific role that enables them to perform specific tasks within the application:

- *Service Procurement Administrator:* This user can register all other users in the Services Procurement system, as well as perform basic application setup.

  This user is created in the HCM database and has a unique person ID.
- *Approver:* This enterprise user may be designated as requisition, work order, or time and progress log approver.

  This user is created in the HCM database and has a unique person ID.
- *Requester:* This enterprise user determines specific requirements for a resource and creates a requisition listing those requirements.

The requester might designate a service coordinator to source the requisition and handle the fulfillment process. This user is created in the HCM database and has a unique person ID.

- *Service Coordinator:* This user may work for the enterprise or the supplier.

  The user who handles the sourcing of requisitions to different suppliers and also handles supplier bids to ensure that the request is filled with the most qualified resource.

  The service coordinator must have a unique service procurement person ID.

- *Service Provider Contact:* This is a non-enterprise user who manages a team of service providers and handles bidding with the service coordinator.

  This user is registered in the SCM database and has a unique service procurement person ID.

- *Service Provider:* This supplier resource is submitted as a potential candidate for a sourced requisition.

  The service provider is registered in the SCM database and has a unique services procurement person ID. Once this user is registered in the SCM database, personal data is sent back to the HCM database, where a new person entry and operator login profile is created for the service provider.

Related Links

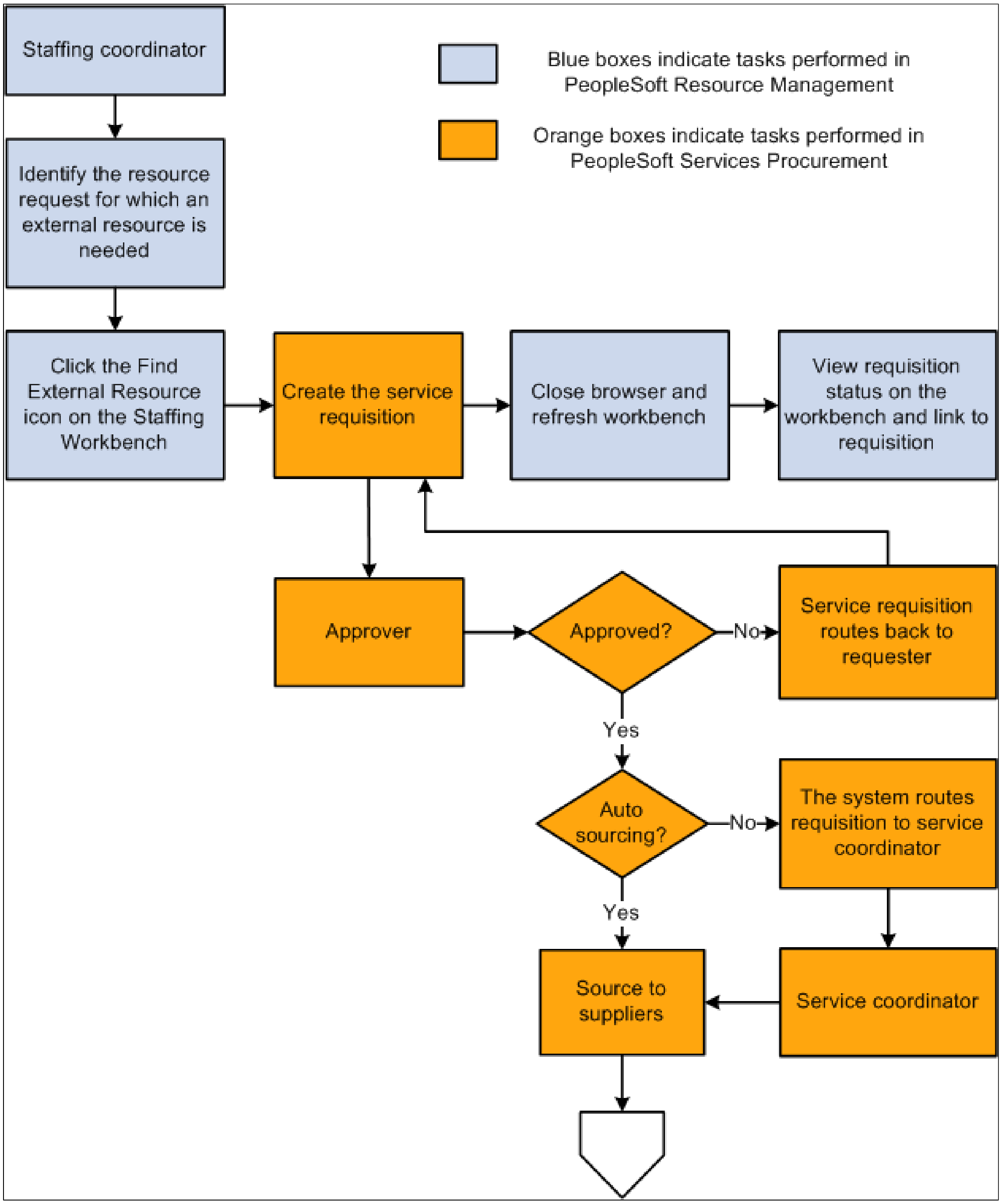
Understanding PeopleSoft Services Procurement and Human Capital Management Integration

Integrating With PeopleSoft Resource Management

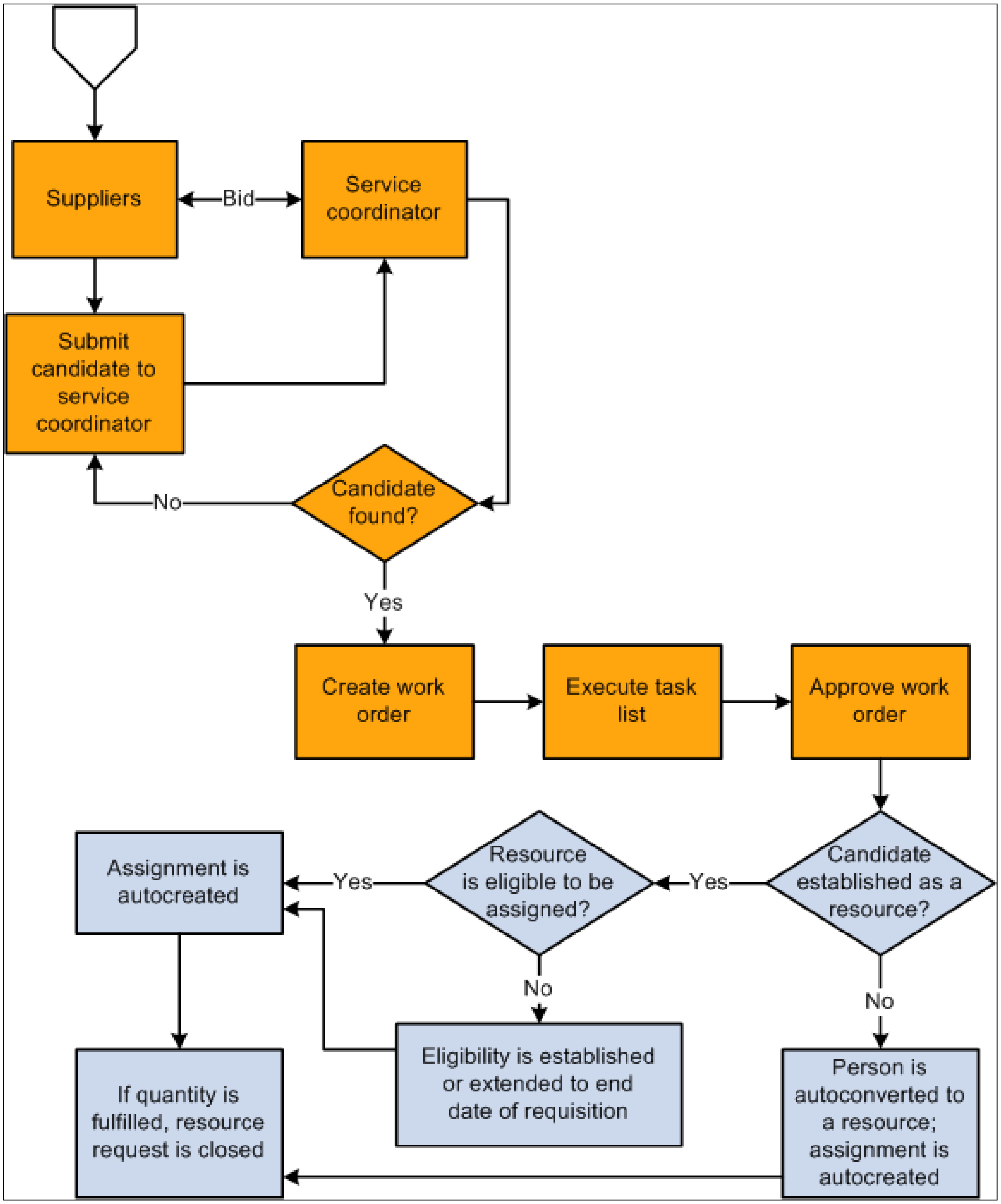
PeopleSoft Resource Management provides an end-to-end solution for managing services spend and for maximizing the value obtained from those services. PeopleSoft Services Procurement integrates with PeopleSoft Resource Management, enabling internal services orders to become a valid external service purchasing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

The following diagram illustrates the integration between PeopleSoft Services Procurement and PeopleSoft Resource Management:

Integration between PeopleSoft Services Procurement and PeopleSoft Resource Management part 1



Integration between PeopleSoft Services Procurement and PeopleSoft Resource Management part 2



Service orders that are created in Resource Management are sent to Services Procurement for fulfillment by way of the Staffing Workbench. The user transfers directly to the Service Procurement requisition pages with populated data from the Resource Management system. The normal requisition process flow is followed, which includes updates to Resources Management upon filling the requisition and submitting and releasing the work order. The work order process creates an assignment and establishes the candidate as a resource on the Resource Management side.

Note: If your Services Procurement application is also integrated with PeopleSoft Human Capital Management, then when Services Procurement initiates a resource request, it requests Human Capital Management to provide a person or job before requesting Resource Management to create a resource and assignment. Services Procurement then passes the employee ID provided by Human Capital Management to Resource Management. If Resource Management already has the service provider as a resource, then an assignment is created. If Resource Management does not have the service provider as a resource, it creates a resource using the employee ID passed by Services Procurement and then creates an assignment. This prevents multiple employee IDs being generated for the same person.

Related Links

“Understanding Integration with PeopleSoft Services Procurement” (PeopleSoft Resource Management)

Integrating With PeopleSoft Recruiting Solutions

PeopleSoft Recruiting Solutions provides a single point of entry for both permanent and contingent worker requests. Requests for contingent workers that are created in Recruiting Solutions may be routed to Services Procurement for fulfillment. If the Recruiting Solutions users chooses to post the job to Services Procurement, the user transfers directly to the Services Procurement requisition pages. Data from the Recruiting Solutions job posting is transferred to the Services Procurement requisition by way of an XML message in the HR-XML consortium standard "Position Opening" message format. Standard requisition defaulting logic is used to fill in any data used by Services Procurement that is not provided from Recruiting Solutions where available, and all remaining data must be defined manually.

The requisition then undergoes the normal workflow path for approval and sourcing within Services Procurement. Once the requisition is filled and the related work order is approved, Recruiting Solutions is updated with information about the worker by way of an XML message in the HR-XML consortium standard "Candidate" message format.

Note: Cancellation of a requisition created by Recruiting Solutions must be initiated from the Recruiting Solutions system.

Note: All Recruiting Solutions requesters in the HCM database must have a user profile defined in the SCM database and they must also be set up as Services Procurement requesters.

Setting Up Integration for Work Order Logistical Tasks with Microsoft Outlook

This topic provides an overview of how Desktop Integration can be used to integrate work order logistical tasks with Microsoft Outlook.

Note: The Desktop Integration feature is no longer supported in PeopleSoft Update Image 31.

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

Page Name	***Definition Name***	***Usage***
Services Procurement Installation Options Page	INSTALLATION_SP	Enable task integration.
Desktop Integration - System Setup Page	EODI_SYSTEM_SETUP	Assign a system ID.
Desktop Integration - Task Registration search Page	EODI_TSK_REG	Register Services Procurement logistical tasks for Desktop Integration.
Permission Lists	ACL_MENU2	Define permission lists.

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

This section discusses:

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

Desktop Integration and PeopleSoft Services Procurement

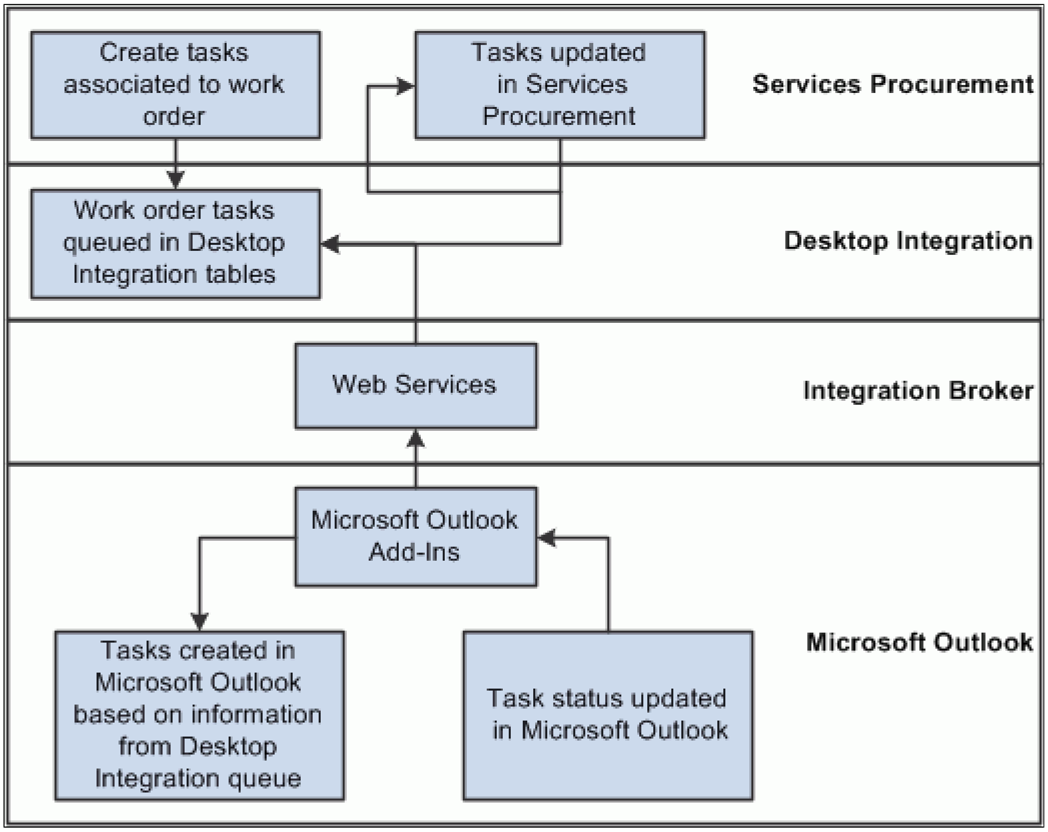
Desktop Integration framework provides integration between Microsoft Outlook and PeopleSoft applications, enabling you to schedule and track appointments, meetings, tasks, and corresponding documentation with Microsoft 2007 Outlook and later versions. You can set up Desktop Integration to share PeopleSoft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

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

Desktop Integration Process Flow

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

Desktop Integration process flow



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

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

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

Four types of work order tasks exist:

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

- Terminate

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

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

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

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

Email Workflow

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

Related Links

Understanding the Work Order Process Flow

View Task Checklist Page

Prerequisites

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

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

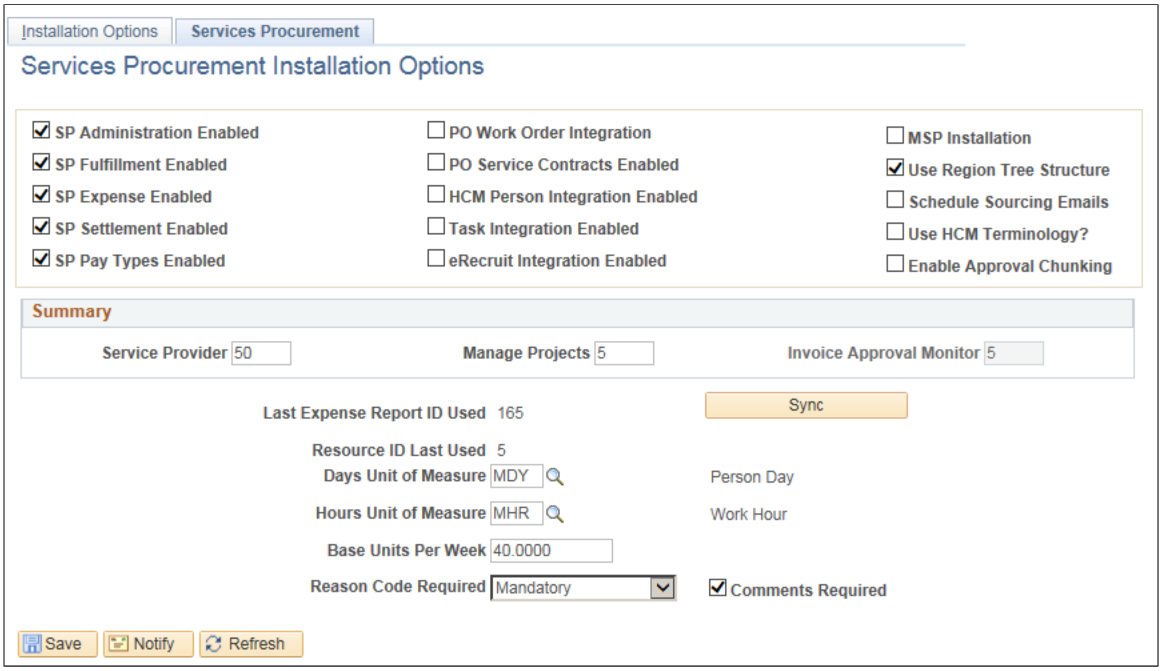
Services Procurement Installation Options Page

Use the Services Procurement Installation Options page (Installation_SP) to enable task integration.

Navigation:

Services Procurement > **General Setup** > **Installation Options**

This example illustrates the fields and controls on the Services Procurement Installation Options page.



Services Procurement Installation Options

☑ SP Administration Enabled
☑ SP Fulfillment Enabled
☑ SP Expense Enabled
☑ SP Settlement Enabled
☑ SP Pay Types Enabled
☐ PO Work Order Integration
☐ PO Service Contracts Enabled
☐ HCM Person Integration Enabled
☐ Task Integration Enabled
☐ eRecruit Integration Enabled
☐ MSP Installation
☑ Use Region Tree Structure
☐ Schedule Sourcing Emails
☐ Use HCM Terminology?
☐ Enable Approval Chunking

Summary

Service Provider 50
Manage Projects 5
Invoice Approval Monitor 5

Last Expense Report ID Used 165
Resource ID Last Used 5
Days Unit of Measure MDY Person Day
Hours Unit of Measure MHR Work Hour
Base Units Per Week 40.0000
Reason Code Required Mandatory
☑ Comments Required

Field or Control	***Description***
Task Integration Enabled	Select to enable Services Procurement to share work order tasks.

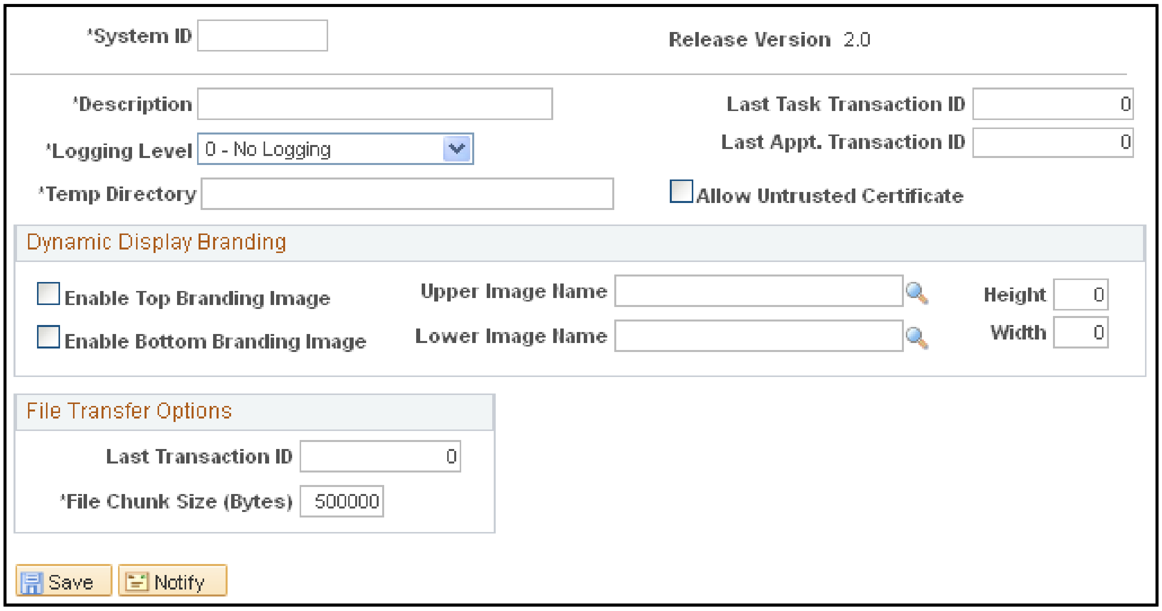
Desktop Integration - System Setup Page

Use the Desktop Integration - System Setup page (EODI_SYSTEM_SETUP) to assign a system ID.

Navigation:

Enterprise Components > **Desktop Integration** > **System Setup**

This example illustrates the fields and controls on the Desktop Integration — System ID page. You can find definitions for the fields and controls later on this page.



*System ID

Release Version 2.0

*Description

*Logging Level 0 - No Logging

*Temp Directory

Last Task Transaction ID 0

Last Appt. Transaction ID 0

☐ Allow Untrusted Certificate

Dynamic Display Branding

☐ Enable Top Branding Image

☐ Enable Bottom Branding Image

Upper Image Name

Lower Image Name

Height 0

Width 0

File Transfer Options

Last Transaction ID 0

*File Chunk Size (Bytes) 500000

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

Desktop Integration - Task Registration search Page

Use the Desktop Integration - Task Registration page (EODI_TSK_REG) to register Services Procurement logistical tasks for Desktop Integration.

Navigation:

Enterprise Components > **Desktop Integration** > **Task Registration**

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

To determine whether it is available:

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

If no values are found:

1. Select the Add a New Value tab.

2. Enter *SPRO_TASKS* in the **Task Process ID** field.
3. Click **Add.**

This example illustrates the fields and controls on the Desktop Integration — Task Registration page. You can find definitions for the fields and controls later on this page.

Task Process ID SPRO_TASKS

*Description sPro Tasks Integration

Owner ID Services Procurement

*Source Queue

*Package Name ACTUAL_TIME_ADD

*Path

*Class ID

Authorized Users *Source User ID

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

Field or Control	***Description***
Task Process ID	SPRO_TASKS is the ID that identifies the Services Procurement task integration process.
Description	Enter a description for the task registration, for example, *sPro Task Integration.*
Object Owner ID	Select *Services Procurement.*
Source	Select *Queue.*
Package Name	Select *SPF_EODI.*
Path	Select *LogisticalTasks.*
Class ID	Select *TaskHandler.*

Dynamic Displays

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

Authorized Users

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

Assigned Users

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

Setting Up Microsoft Outlook to Share Work Order Tasks

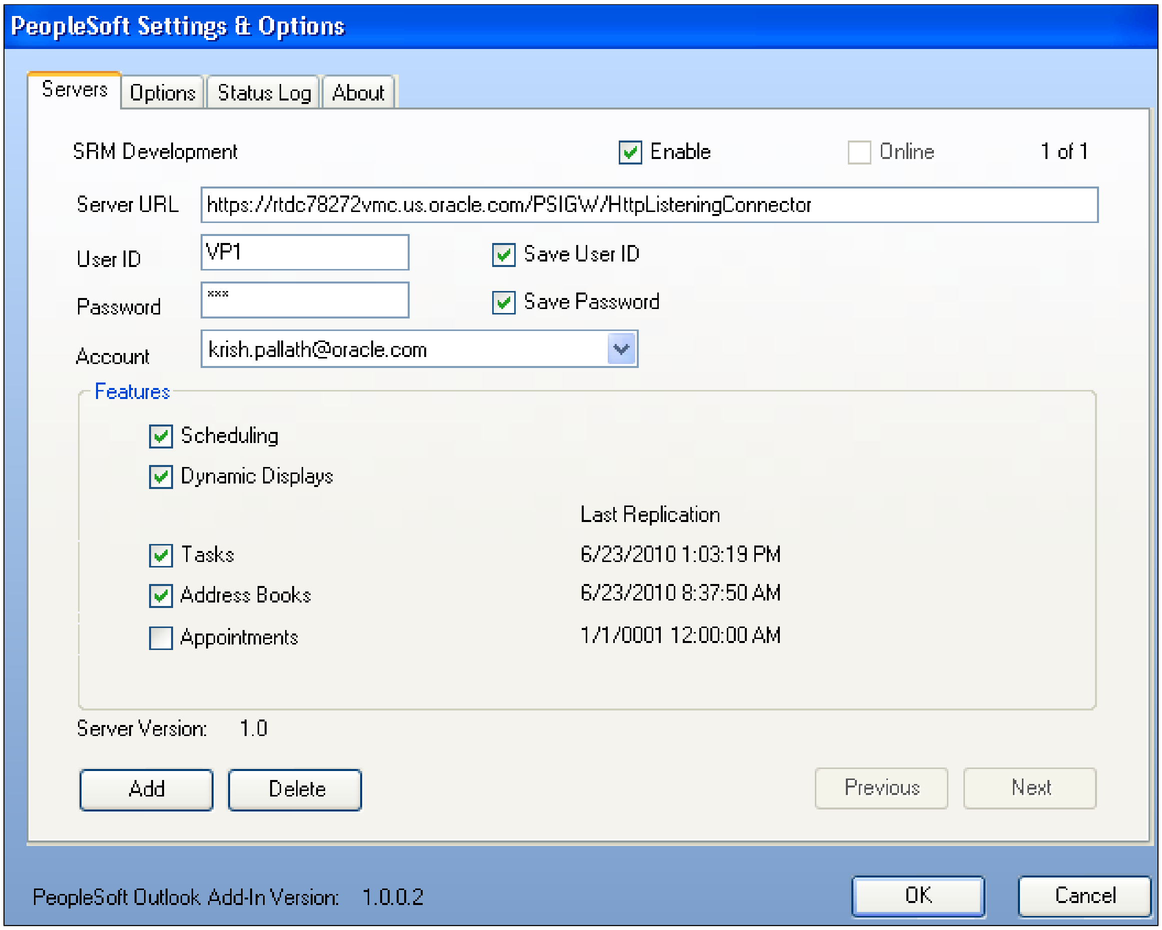
For PeopleSoft Services Procurement to share work order tasks with Microsoft Outlook, you need to install Microsoft Office Outlook 2007 or a later version.

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

To set up the Outlook client:

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

This example illustrates the fields and controls on the PeopleSoft Settings & Options page.



SRM Development ☑ Enable ☐ Online 1 of 1

Server URL https://rtdc78272vmc.us.oracle.com/PSIGW/HttpListeningConnector

User ID VP1 ☑ Save User ID

Password *** ☑ Save Password

Account krish.pallath@oracle.com

Features

☑ Scheduling

☑ Dynamic Displays

	Last Replication
☑ Tasks	6/23/2010 1:03:19 PM
☑ Address Books	6/23/2010 8:37:50 AM
☐ Appointments	1/1/0001 12:00:00 AM

Server Version: 1.0

PeopleSoft Outlook Add-In Version: 1.0.0.2

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

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

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

Chapter 8

Setting Up PeopleSoft Services Procurement Workflow

Understanding PeopleSoft Services Procurement Workflow

Approval workflow management is the process of taking a transaction through the organization until it is accomplished or stopped. PeopleSoft Services Procurement uses the PeopleSoft Approval Framework for approving requisitions, work orders, timesheets, expenses, progress logs and invoices when you select to require approvals for the transaction using the Services Procurement Bus Unit page. The complete setup and use of the approval framework is described in the documentation *PeopleSoft : Approval Framework.*

When you are not using the approval framework, in Service Procurement, the system automatically sets a transaction to the Approved status when a user submits it.

PeopleSoft Services Procurement workflow provides mass approval, denial, hold capability and reason codes for denying workflow components. However, hold capability is not available for invoice approval.

The steps for approving PeopleSoft Services Procurement workflow transactions, such as expenses, requisitions, or work orders, are described in set of topics for each transaction.

PeopleTools Workflow Technology

You can use email notifications and worklists for all activities in a transaction's workflow technology process. With workflow notifications, you can:

- Enable or disable notifications on the Workflow Notifications page.
- Define email notifications that are sent as part of workflow process.
- Automate parts of the sourcing process by defining sourcing rules on the Automatic Sourcing page.

Note: To work with multiple approvals, you can select multiple transactions by selecting multiple check boxes and then approve them all at once.

See the product documentation for *PeopleTools: Workflow Technology* and *PeopleTools: Security Administration*

PeopleSoft Approval Framework Processing

This set of topics provides a brief overview of setting up each component that uses approval workflow.

The PeopleSoft Approval Framework requires less technical skills than PeopleTools workflow technology. For example, all of the steps in approval workflow are defined using PeopleSoft pages rather than the underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages instead of requiring technical developers to create workflow rules. In addition, the approval workflow framework enables you to approve transactions at the line level and use several additional approval features.

Approvals can be role-based or driven by views. For more information about the detailed process of setting up approval workflow:

See documentation *PeopleSoft : Approval Framework*

The procedures for setting up each workflow transaction in PeopleSoft Services Procurement are basically the same. PeopleSoft Services Procurement delivers standard transaction registries, process definitions, email templates, and user definitions that you can use for approval processes. You can also use them as a template to define a new approval workflow process.

You can set up the approval framework process to streamline the approval of these PeopleSoft Services Procurement components:

- Requisitions
- Work orders
- Timesheets
- Expenses
- Progress logs
- Invoices

After you create a transaction, such as a services work order or requisition, the system routes it to the Manage Approval component. The system also sends a message to the approver's worklist along with the transaction for which the approver must take action. Approvers can take action from the worklist or by using the Monitor Approval feature. In either case, they can preview, in a graphical format, the path a transaction approval will take and who has already approved the transaction, and see any comments previous approvers have entered.

Note: The worklist item is not removed from the reviewer's worklist until it is marked as worked.

While the system awaits approval action, the approval workflow engine maintains the overall state of the transactions approval status, invokes routings, and interacts with the application classes.

During the approval process these actions take place:

- The system notifies approvers and reviewers that there is a pending transaction that needs their attention.
- Approvers and reviewers access the transaction details, provide comments, and take action (approve, deny, or hold) for the transaction.
- The system checks for additional routings in the same routing path.

  If all routing paths have been completed for the stage then the next routing path is started in the next stage. If there are multiple routing paths, the system routes them in parallel.
- After all approvers on a transaction have approved, the approval framework notifies the Services Procurement application.

The system then prepares the transaction for the next stage of its life cycle.

Approval Workflow Setup Steps

Before you can send a transaction approval for review, such as an expense or progress log, you need to set up the transaction for use with approval workflow. The system provides the basic templates and processes for approvals that system administrators can use to set up approval workflows.

Configuring the Workflow System

To set up workflow notifications, use the Workflow Notification (SPB_WF_NOTIFY) component. To set up automatic sourcing, use the Automatic Sourcing (SPF_AUTOSOURCE) component.

This topic discusses how to configure the workflow system.

Pages Used to Configure PeopleSoft Services Procurement Workflow System

Page Name	***Definition Name***	***Usage***
Maintain Workflow Page	PV_ADM_WORKFLOW	Configure a workflow system.
Workflow Notifications Page	SPB_WF_NOTIFY	Enable or disable notifications for activities in the requisition fulfillment process.
Automatic Sourcing Page	SPF_AUTOSOURCE	Specify the rules for automatic sourcing.
Define Template Page	WL_TEMPLATE	Specify the content of email notifications that are used in PeopleSoft Services Procurement workflow. See*PeopleTools: Workflow Technology* “Defining Component Notification Templates”
Blackberry Email Responses Page	WL_TEMPL_RESP	Create email responses. See*PeopleTools: Workflow Technology* “Defining BlackBerry Email Responses”
Generic Template Definition Page	WL_TEMPLATE_GEN	Enter generic template definitions.

Page Name	***Definition Name***	***Usage***
URL Maintenance Page	URL_TABLE	Use this page to identify the URL that the notification process places within the email. This URL is then used to navigate the user back into their system to perform the required task. An example of the format to use is *http://servername/psp/employeeportaldomain/*. See *PeopleTools: System and Server Administration* "URL Maintenance"
Services Procurement Installation Options Page	INSTALLATION_SP	Set up PeopleSoft Services Procurement installation options.
Permission List - Pages	ACL_MENU2	Create and maintain permission lists. See *PeopleTools: Security Administration* "Creating New Permission Lists"
Process Definitions Page	PRCSDEFN	Define each specific run request by identifying a variety of variables. See *PeopleTools: Application Engine* "Creating Process Definitions"

Maintain Workflow Page

Use the Maintain Workflow page (PV_ADM_WORKFLOW) to configure a workflow system.

Navigation:

Services Procurement > **Define Services Procurement** > **Workflow Setup** > **Maintain Service Workflows**

You begin configuring PeopleSoft Services Procurement workflow options on the Maintain Workflow page. The Maintain Workflow page is the focal point for configuring the PeopleSoft Services Procurement workflow system. Using the page you can access all workflow setup components for Service Procurement. You can also access workflow setup components by selecting: **Enterprise Components** > **Approvals.**

Workflow Notifications Page

Use the Workflow Notifications page (SPB_WF_NOTIFY) to enable or disable notifications for activities in the requisition fulfillment process.

Navigation:

Services Procurement > **Define Services Procurement** > **Workflow Setup** > **Workflow Notifications**

Use this page to define the workflow notifications that you want to use with PeopleSoft Services Procurement. Select the check box for the workflow activity that you want to set up for email or worklist notification.

Note: In PeopleSoft Services Procurement, notification settings can take precedence over other notification settings.

Note: You cannot configure source notification on this page. The system obtains the notification method for sourcing activity from the Sourcing Selection page when a requisition is sourced.

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

Note: The settings on this page are used in conjunction with the notification settings on the user profile. Only those users who are set up to receive email notifications will be notified by email when the Services Procurement transaction indicates that notification should be sent.

Note: URLs should be defined in the EMP_SERVLET and SUP_SERVLET (PeopleTools, Utilities, Administration, URLs) for generating email notifications from Services Procurement transactions to ensure that the correct URLs are included in the emails for situations in which the customer has separate web servers for the employee and supplier portals.

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

Setting Up Sourcing Emails

Use these steps to schedule sourcing emails:

1. Enable the **Schedule Sourcing Emails** option on the Services Procurement Installation Options page.
2. Add APPLICATION_ENGINE Component Permissions to EPSP4000 Permission List.

   Give Full Access to AE_REQUEST page only.
3. Create a new URL identifier named as SP_SRC_EM.

   Use the URL Maintenance page to create the identifier.
4. Create a generic email template named as SP_SRC_EM.

   Use the Generic Template Definition page to create the template.

   The system provides sample values for the sample template. You can use the value or override them with new values to create a new template of update the sample template. Template values include:

   - **Instructional Text:** Type names or email addresses in the To, CC, or BCC fields using semi-colons as separators.
   - **Sender:** User
   - **Subject:** %5 requisition %2 has been approved and is ready to be filled.

- **Message Text:** %5 requisition %2 has been approved and is ready to be filled. To review the requisition and submit candidates click %10.

  Requisition/Line: %2/%3.

  Project: %4.

  Job Title: %5.

  Service Type: %6.

  Role: %7.

  Location: %8.

  Start Date: %9.

- Set up the Process Scheduler Job.

  Use the Process Scheduler page to schedule a job and source the email notifications.

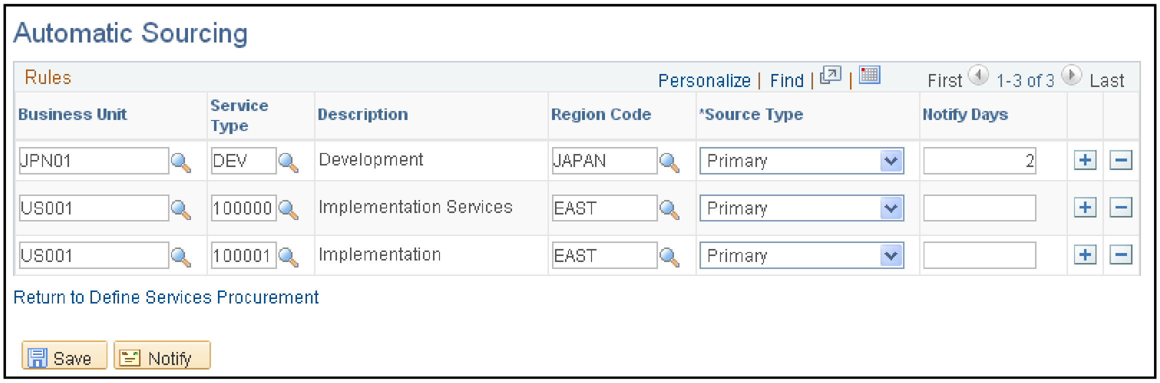
Automatic Sourcing Page

Use the Automatic Sourcing page (SPF_AUTOSOURCE) to specify the rules for automatic sourcing.

Navigation:

Services Procurement > **Define Services Procurement** > **Sourcing Setup** > **Automatic Sourcing**

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



Business Unit	Service Type	Description	Region Code	*Source Type	Notify Days
JPN01	DEV	Development	JAPAN	Primary	2
US001	100000	Implementation Services	EAST	Primary	
US001	100001	Implementation	EAST	Primary	

Enter a value into the **Service Type** field to define sourcing rules for specific service types (per business unit), or leave the **Service Type** field blank to define sourcing rules for all service types.

If you specify a number in the **Notify Days** field, you postpone automatic sourcing until the specified numbers of days have passed since the approval date. In this case, the PeopleSoft Application Engine process (SP_WF_SRC) checks requisitions that are approved but not yet filled within the notification days. Once the notification days are reached, the system automatically sources the requisition.

If you leave the **Notify Days** field blank, requisitions are sourced after approval, and you do not need to run the SP_WF_SRC application engine.

After the requisition is approved, the system automatically sources it based on the selections on this page. If you select a source type of *Primary* and a region code of *Bay Area,* when the requisition is approved, the system automatically sources the requisition to whichever supplier is listed as a primary source type and from the Bay Area region.

This prevents you from having to source each requisition manually.

- If service type and region code have values, the system looks for suppliers by service type and region and matches the source type.
- If only the service type has a value, the system looks for supplies by service type and source type.
- If only region code has a value, the system looks for supplies by region that also match the source type and requisition business unit.

The system searches for the business unit, then service type, then region, and then finds a supplier with a primary source code to match it; where it looks depends on how much information you included.

Note: If a requisition was sourced in the preceding 24-hours, the Application Engine process does not source it again. If a supplier already submitted a candidate for the requisition, that supplier is excluded from automatic sourcing.

Defining Basic Workflow Settings for Services Procurement

This topic discusses how to set up Basic Workflow Settings for Services Procurement.

Note: Setting up PeopleSoft Services Procurement varies from component to component. This section provides a high-level overview of setting up each component and any special considerations for each component.

Pages Used to Define Workflow

Page Name	***Definition Name***	***Usage***
Services Procurement Bus Definition	BUS_UNIT_TBL_SP	Select PeopleSoft Services Procurement components that you want to include the workflow approval functionality. Setting Up Business Unit Definitions
Approval Transaction Registry Page	EOAW_AW_TXN	Set up the transaction registry. Maintain Workflow Page

Page Name	***Definition Name***	***Usage***
Configuration Options Page	EOAW_AW_TXN_NOTIFY	Define workflow configuration options. Maintain Workflow Page
User List Definition Page	EOAW_USER_LIST	Set up user list definitions. Maintain Workflow Page
Approval Process Definition Page	EOAW_AW_PRCS_MAIN	Define workflow approval process stages. Maintain Workflow Page

Setting Up Requisition Workflow

Requisition workflow approval enables you to approve requisition information relating to a service. Requisition approvals are available when you select the **Requisition** check box on the Services Procurement Bus Definition page.

Note: If you are using both PeopleSoft eProcurement and Services Procurement, this setting is set on the eProcurement Business Unit page and is not editable on the Services Procurement Business Unit page.

Approval definition criteria determines the goods or service requisition through the application class based on the SetID and runs the appropriate process definition.

Note: PeopleSoft Services Procurement requisitions use the same workflow setup as the PeopleSoft eProcurement requisition, but if you are using both applications, you can set up different workflow rules for each type of requisition line.

PeopleSoft Services Procurement requisition lines have a category of services, and they route differently than the PeopleSoft eProcurement lines. You can also approve at the line level for requisitions rather than just the requisition header level.

The next table describes the delivered workflow values for requisitions:

Transaction Registry ID	***Process Definition ID***	***User List Definition ID***	***Email Notification Template ID***
Requisition	Requisition	Req-Dept Mgr-Line Level Req-Project Mgr-Line Level Requisitions-Department Mgrs Requisitions-Project Managers	ReqChangeRequest ApprRouting ReqChangeRqst ApprovalRouting ReqChngRqstApproved ReqChngRqstDenied Requisition Approval Requisition Approved Requisition Cancelled Requisition Denied Requisition Escalation Requisition Line Approval Requisition Line Approved Requisition Line Denied

Related Links

Approving and Denying Requisitions

Setting Up Work Order Workflow

Work order workflow approval enables you to approve work orders, including both the parent and child work orders for multi resource services. Work order approvals are available when you select the **Work Order** check box on the Services Procurement Bus Definition page.

PeopleSoft Services Procurement delivers a preconfigured work order workflow. You can use the delivered workflow configuration as is or you can make minor adjustments to meet business practices. You should understand the workflow technology before making any changes. For work order approvals, the system checks the work order requester's supervisor ID on the User Profile - Workflow page to send the approval.

The next table describes the delivered workflow values for work orders:

Transaction Registry ID	***Process Definition ID***	***User List Definition ID***	***Email Notification Template ID***
SP_WORKORDER	SP_WORKORDER	Work Order Original Requestor WorkOrder Approver	WO_On_Error WO_On_Escalation WO_On_Final_Approval WO_On_Final_Denial WO_On_Integration_Cancel WO_On_Review WO_Route_For_Approval Work Order General 1 Work Order General 2 Work Order General 3

Related Links

Submitting and Approving Work Orders

Setting Up Expense Workflow

Expenses workflow approval enables you to approve travel and expense information relating to a work order. Expense approvals are available when you select the **Expenses** check box on the Services Procurement Bus Definition page.

The next table describes the delivered workflow values for expenses:

Transaction Registry ID	***Process Definition ID***	***User List Definition ID***	***Email Notification Template ID***
SP_EXPENSE	US001	SP_EX_PROVIDER SP_EX_WO_APPROVAL SP_EX_WO_REQUESTER	SP_Exp_Final_Approval SP_Exp_Final_Denial SP_Exp_On_Error SP_Exp_Rt_Approval SP_Exp_Request_Info SP_Exp_Request_Info_Added

Setting Up Progress Log Workflow

Progress log workflow approval enables you to approve progress on deliverable work orders to the project manager. Progress log approvals are available when you select the **Progress Log** check box on the Services Procurement Bus Definition page.

The next table describes the delivered workflow values for progress logs:

Transaction Registry ID	***Process Definition ID***	***User List Definition ID***	***Email Notification Template ID***
SP_PLOG	US001	SP_PLOG_WO_APPROVAL SP_PLOG_WO_REQUESTER SP_PL_PROVIDER	SP_Plog_Escalation SP_Plog_Line_Approved SP_Plog_Line_Denied SP_Plog_On_Error SP_Plog_Rt_Approval SP_Plog_Line_Req_Info SP_Plog_Line_Info_Added SP_Plog_Request_Info SP_Plog_Request_Info_Added

Related Links

Maintain Progress Logs Page

Setting Up Timesheet Workflow

Timesheet workflow approval enables you to submit individual timesheets or incident lines for approval. Approvers can also adjust the timesheet, deny the approval of the timesheet, or place the approval on hold. After the timesheet is approved, you can create an invoice for it.

Timesheet approvals are available when you select the **Timesheet** check box on the Services Procurement Bus Definition page.

The next table describes the delivered workflow values for timesheets:

Transaction Registry ID	***Process Definition ID***	***User List Definition ID***	***Email Notification Template ID***
SP_TIMESHEET	SP_TIMESHEET	SP_TIME_PROVIDER SP_TIME_WO_APPROVAL SP_TIME_WO_REQUESTER	SP_Time_Escalation SP_Time_Final_Approval SP_Time_Final_Denial SP_Time_Line_Approval SP_Time_Line_Denied SP_Time_Line_Info_Added SP_Time_Line_Req_Info SP_Time_Line_Approved SP_Time_Line_Review SP_Time_On_Error SP_Time_PushedBack SP_Time_Request_Info SP_Time_Request_Info_Added SP_Time_Rt_Approval SP_Time_Rt_Review

Related Links

Submitting and Approving Timesheets

Setting Up Invoice Approval Workflow

Invoice approval enables you to approve invoice line details, make adjustments to time line amounts, expenses, tax percentages, and enter comments before approving or denying invoice lines .In addition to line level approvals, header level approvals can also be done when all lines are approved together (by setting up the Approval Process as Header Level process).

Setting Up Invoice Approval Workflow

Invoice approvals are available when you select the Invoice check box on the *Services Procurement Bus Definition* page.

Transaction Registry ID	***Process Definition ID***	***User List Definition ID***	***Email Notification Template ID***
SP_INVOICE	SP_INVOICE	SP_IN_SUPPLIER_APPROVER SP_IN_ENT_APPROVER	SP_IVABS_HDR SP_IVABS_LINE SP_IVAPR_HDR SP_IVAPR_LINE SP_IVREJ_HDR SP_IVREJ_LINE SP_IVS2E_HDR SP_IVS2E_LINE SP_IVSUB_HDR SP_IVSUB_LINE

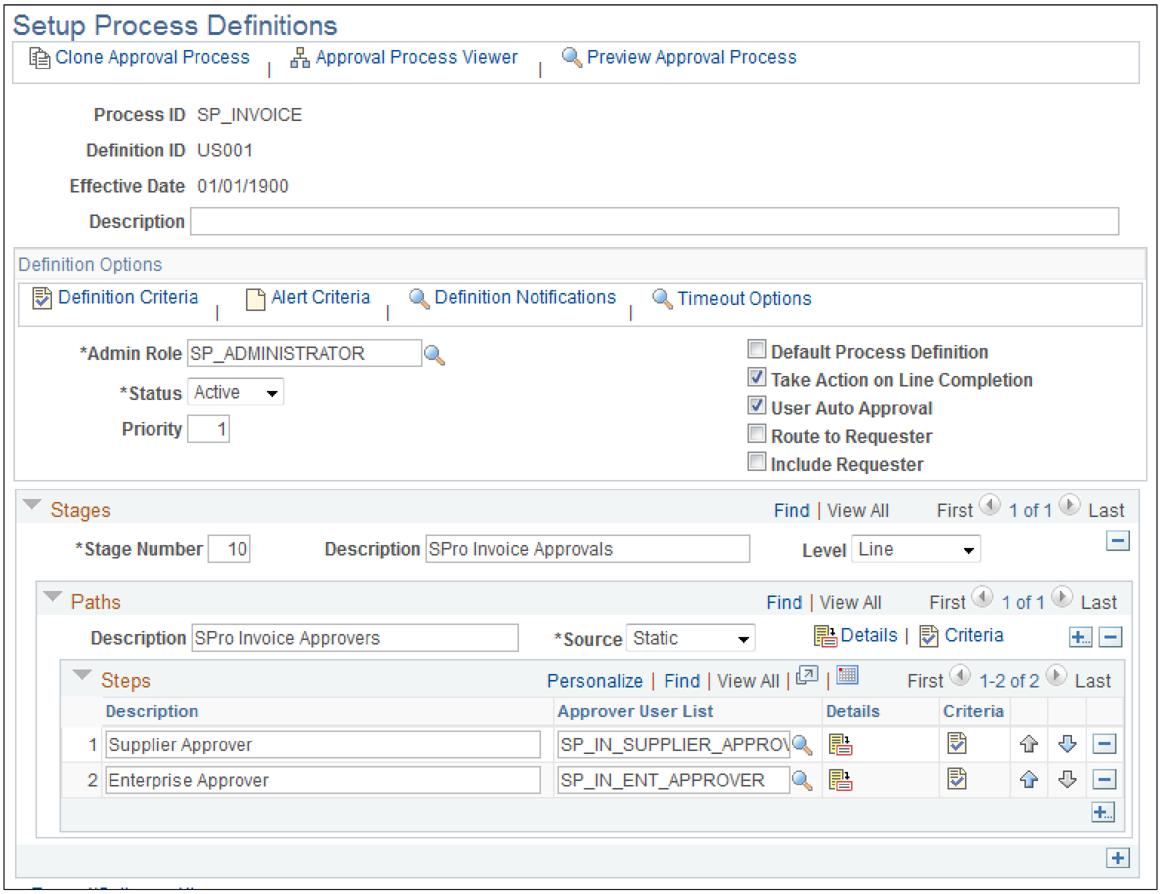
Note: The User List SP_IN_SUPPLIER_APPROVER is for Supplier approval and is based on SQL Object Identifiers and needs to be mapped as follows:
1. When using Line Level Approvals, SQL Object Id SP_IN_SUP_APPROVER is to be used
2. When using Header Level Approvals, a New User List must be created using SQL Object Id SP_IN_SUP_APPR_HDR (new user list for Header Level can then be used in setup of Approval Process Definition - Steps)

The User List SP_IN_ENT_APPROVER is for Enterprise approval and is mapped to the system delivered Role SP_INVOICE_MANAGER. It remains unchanged for Header and Line Level Approvals.

Note: You can include suppliers in the workflow based on your arrangement with each individual supplier. In such cases, Approval Process has to include two steps (one for the Supplier Approver and the other for the Enterprise Approver). Approval will be routed to the Supplier approver first. Once approved, it will then be routed to the Enterprise Invoice approver. The screen shots below illustrate an example on how to setup Approval Process when Supplier is included in the Invoice Approvals. In such a case, the following minimum steps can be supplemented with your own additional setup to meet your organization's workflow requirements. Also, note that the system routes a submitted invoice to the supplier invoice approver only if **Include Supplier in Invoice Approval** check box is selected on the **Services Supplier Info** page.

Approval Process Setup for Invoices

This example illustrates the fields and controls on the Setup Process Definitions page.



Process ID SP_INVOICE

Definition ID US001

Effective Date 01/01/1900

Description

*Admin Role SP_ADMINISTRATOR

*Status Active

Priority 1

☐ Default Process Definition

☑ Take Action on Line Completion

☑ User Auto Approval

☐ Route to Requester

☐ Include Requester

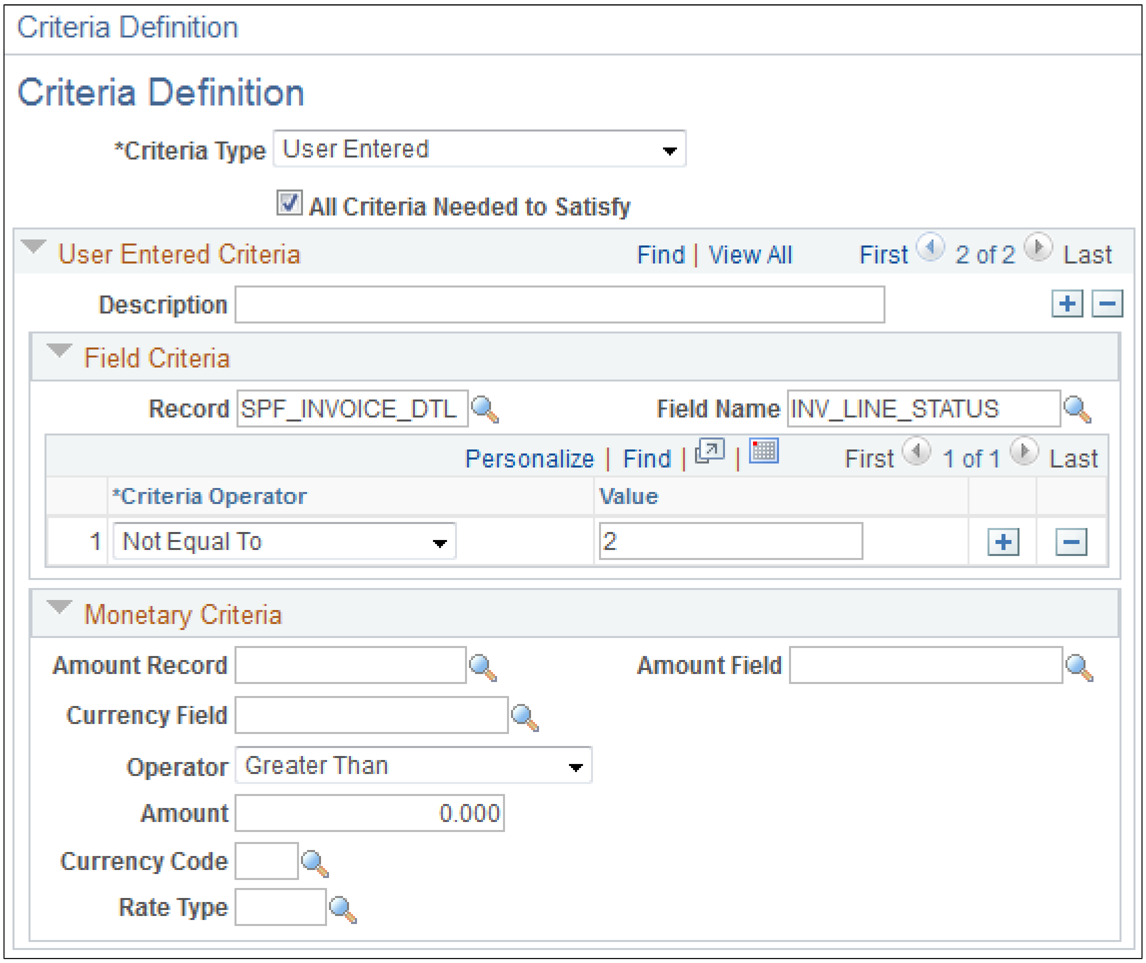
*Stage Number 10 Description SPro Invoice Approvals Level Line

Description SPro Invoice Approvers *Source Static

	Description	Approver User List	Details	Criteria
1	Supplier Approver	SP_IN_SUPPLIER_APPROV		
2	Enterprise Approver	SP_IN_ENT_APPROVER		

Path Criteria Setup

This example illustrates the fields and controls on the Criteria Definition Page.



Criteria Definition

Criteria Definition

*Criteria Type: User Entered

☑ All Criteria Needed to Satisfy

User Entered Criteria — Find | View All — First 2 of 2 Last

Description:

Field Criteria

Record: SPF_INVOICE_DTL

Field Name: INV_LINE_STATUS

	*Criteria Operator	Value
1	Not Equal To	2

Monetary Criteria

Amount Record:

Amount Field:

Currency Field:

Operator: Greater Than

Amount: 0.000

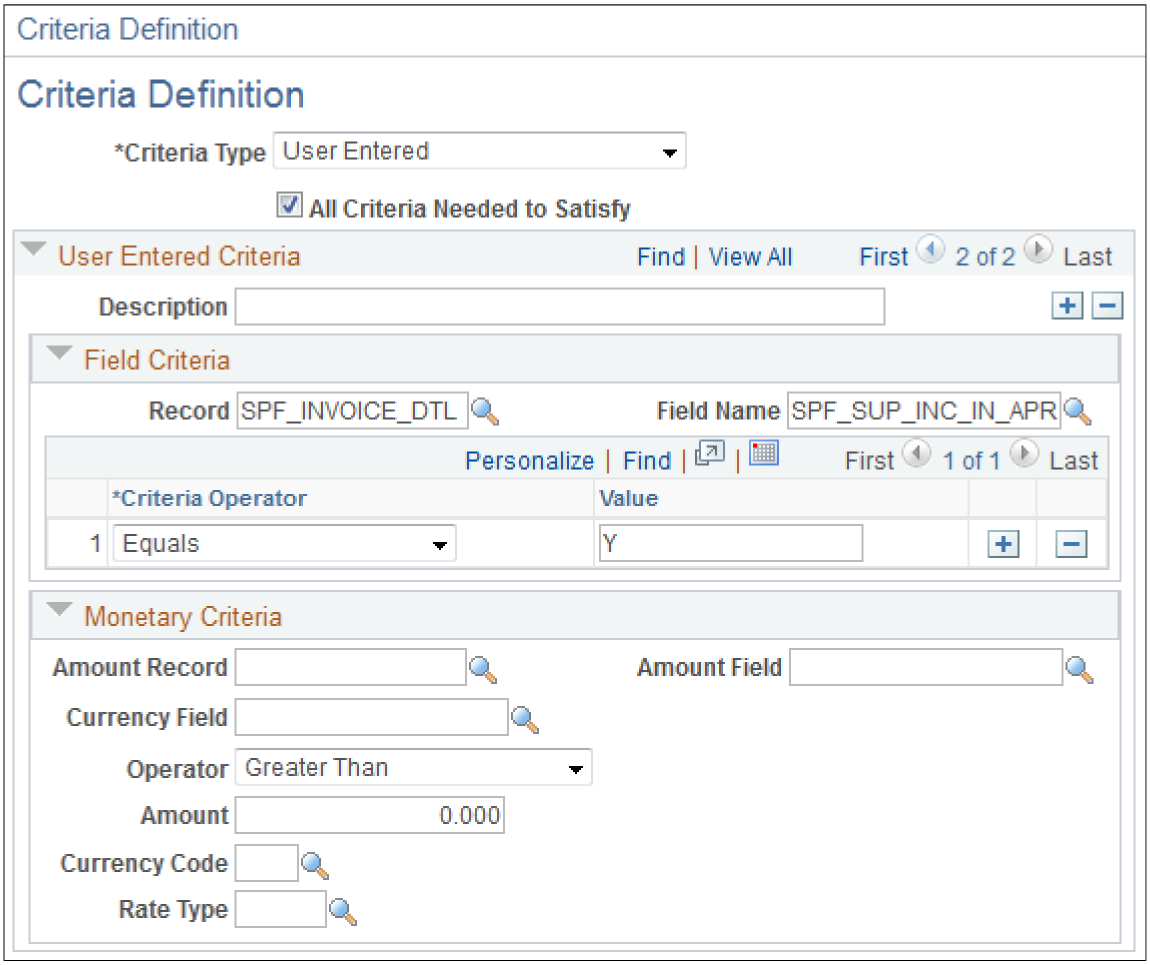
Currency Code:

Rate Type:

Note: Important! In all cases (even when Supplier Approvals are Off), the Approval Criteria definition has to be Setup for a value of Invoice Line Status not equal to '2' in order to restrict already approved Lines being resubmitted for Approvals.

Step Criteria Setup for Supplier Approval

This example illustrates the fields and controls on the Criteria Definition for Supplier Approval page.



*Criteria Type: User Entered

☑ All Criteria Needed to Satisfy

Record: SPF_INVOICE_DTL

Field Name: SPF_SUP_INC_IN_APR

1 Equals Y

Operator: Greater Than

Amount: 0.000

Related Links

Approving Invoices

Modifying Services Procurement Workflow Settings

This topic discusses how to modify services procurement workflow settings.

Approval Process Definition Page

To change workflow approval criteria:

1. Access the Approval Process Definition page using the process ID value that you want to change.
2. Click **Criteria** to access the Criteria Definition page.

   For each path and step, you can set up criteria that the system uses to determine whether you go down that path or perform that step.

For example, if you have an approval path that requires approval for work orders over 10,000 USD, the system looks at submitted work order, and compares the amount to the criteria on the Criteria page. If it is under 10,000, the system automatically approves it. If it is over 10,000, the system determines which step to perform.

3. Access the Approval Step Definition - Step page.

   Set the number of approvers needed. This determines how many levels or approval or number of approvers are required for the approval.

User List Definition Page

To update approvers:

1. Access the User List Definition page using the user list value that you want to update.
2. The system is set up to use the value for the **Supervisor** field that appears on the User Profile - Workflow page.

   If you want the workflow to select an approver by role, you can change the User List Source to Role, and select a role from the prompt table.

Generic Templates Page

To change a delivered workflow template:

1. Access the Generic Templates page.

   You can modify existing templates or create new ones using this page.

2. Add the new or revised template to the appropriate workflow action on the Approval Transaction Registry page using the **Template Name** field in the **Notifications** group box.

Reassigning Workflow Tasks

You can reassign tasks along the workflow process to other users, either temporarily or indefinitely. This enables a requester, approver or service coordinator to reassign a single task or all tasks during a specific date range. The system administrator can also assign user tasks either during a specific date range or indefinitely to another user.

This topic discusses how to reassign workflow tasks.

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

Pages Used to Reassign Tasks

Page Name	***Definition Name***	***Usage***
General Profile Information Page	USER_SELF_SERVICE	Reassign all tasks temporarily.
Workflow Page	USER_WORKFLOW	Reassign all tasks either temporarily or indefinitely.
Worklist Page	WORKLIST_REASSIGN	Reassign a specific task.

General Profile Information Page

Use the General Profile Information page (USER_SELF_SERVICE) to reassign all tasks temporarily.

Navigation:

My System Profile

Select the alternate user ID for the individual to whom you want to reassign your tasks during a specified duration of time.

Field or Control	***Description***
Alternate User ID	Select the user ID for the alternate user.

Workflow Page

Use the Workflow page (USER_WORKFLOW) to reassign all tasks either temporarily or indefinitely.

Navigation:

PeopleTools > **Security** > **User Profiles** > **User Profiles** > **Workflow**

Use this page to reassign tasks to another user for an indefinite period of time.

Field or Control	***Description***
Alternate User ID	Enter the alternate user ID for the user to whom the work is to be reassigned. Normally, you use this field to specify another user to receive new worklist items while the user is temporarily away. The field is used in conjunction with the **From Date** and **To Date** fields.
Supervising User ID	Enter the supervisor user ID for the user to whom the task is to be reassigned.

Field or Control	Description
Reassign Work To	Select the check box and select the user to whom the all current and future tasks are indefinitely reassigned. This field is meant to move existing worklist items to another user.

Worklist Page

Use the Worklist page (WORKLIST_REASSIGN) to reassign a specific task.

Navigation:

Worklist > **Worklist Details** > **Reassign**

Field or Control	Description
User ID	Enter the user ID.

Chapter 9

Establishing and Managing the MSP Environment

Understanding the MSP Environment

In an MSP environment, the MSP manages requisitions from customers, and also takes on the role of service coordinator by sourcing requisitions to their own staff or third-party service providers. A markup is charged by the MSP for this service. In addition, the MSP may "host" external suppliers acting as service coordinators for their customers.

In order to support this business process, the concept of MSP markups is supported in the PeopleSoft Services Procurement product. MSP markup functionality is only active when the installation is set for an MSP environment. Suppliers that are part of the MSP's internal organization are identified when setting their source type to *Internal* in the supplier network.

Warning! If you set the installation options to an MSP environment, you will experience implications in the way rates are displayed and calculated throughout the system. Therefore this should only be done if the organization operates in an MSP environment.

Markups

When the MSP acquires resources, an additional markup is applied on top of the supplier's rate in order to cover the MSP cost for managing the process. You define the MSP fee at the business unit level, with override available at the service type level. The MSP fee is effective-dated, which indicates that the rate in effect at the time services are performed is the rate that is used for work order consumption and invoicing purposes.

The list below indicates the various ways in which MSP information is displayed to services coordinators, internal provider contacts, requesters, requisitions approvers, and external providers.

- Service coordinators and internal provider contacts view amounts that include MSP markup fees, as well as view the breakdown between supplier rate and MSP rate, which makes up the total amount shown.
- Requesters, requisition approvers, and work order approvers view amounts that include MSP markup fees, but they do not have visibility of the MSP markup amount that is included in the total amount shown unless they have been given a role associated with the role action for viewing the MSP breakdown.
- External provider contacts view amounts that do not include MSP markup.

  MSP markup fees are also included on the supplier invoice when the service provider is from an internal supplier.

Note: In the MSP environment, the filled amount for a requisition may not match the work order amount. This will occur if the MSP rate changes between creation of the requisition line and creation of the work order.

Common Element Used to Understand the MSP Environment

The following definitions are used throughout these topics.

Term	*Definition*
Managed Services Provider (MSP)	An organization that manages the sourcing and filling of service requisitions on behalf of their customers.

Setting Up the MSP Environment

To define MSP percentage, use the MSP Fees by Business Unit (SPB_MSP_BY_BU) component. To define MSP percentage or rate, use the MSP Fee by Service Type (SPB_MSP_BY_SRVC) component.

To set up supplier by business unit, use the Supplier by Business Unit (SPM_SPLR_BY_BU) component.

This topic discusses how to set up the MSP environment.

Pages Used to Set Up the MSP Environment

Page Name	*Definition Name*	*Usage*
Services Procurement Installation Options Page	INSTALLATION_SP	Define PeopleSoft Services Procurement installation options.
Services Procurement Business Unit Definition Page	BUS_UNIT_TBL_SP	Define PeopleSoft Services Procurement business units.
Service Types Page	SPB_ROLE_TYPE	Define service types.
MSP Fee by Service Type Page	SPB_MSP_BY_SRVC	Define the MSP fee percentage or rate.
MSP Fees by Business Unit Page	SPB_MSP_BY_BU	Define MSP fees percentage.
Networked Supplier Details Page	SPM_SPLR_BY_BU_PG	Create the supplier network. Associate suppliers with PeopleSoft Services Procurement business units.

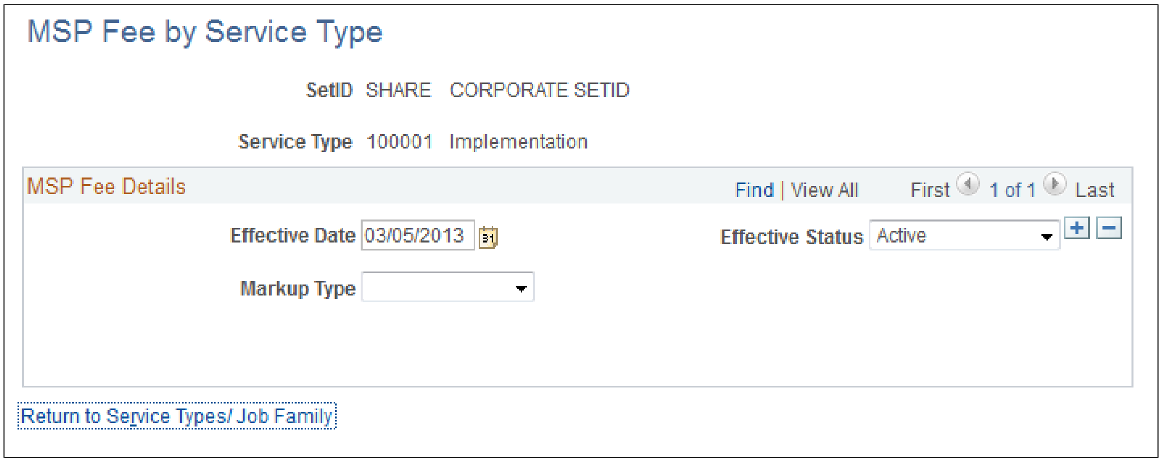
MSP Fee by Service Type Page

Use the MSP Fee by Service Type page (SPB_MSP_BY_SRVC) to define the MSP fee percentage or rate.

Navigation:

Click the **Manage MSP Fees** button on the Service Types page.

This example illustrates the fields and controls on the MSP Fee by Service Type page. You can find definitions for the fields and controls later on this page.



SetID SHARE CORPORATE SETID

Service Type 100001 Implementation

Effective Date 03/05/2013

Effective Status Active

Markup Type

Field or Control	***Description***
Markup Type	For service types with a service method of *Resource,* select the markup type of *Percentage* or *Rate.* **Note:** It is not possible to select **Markup Type** for service types with a service method of Deliverable. In this case only percentage markups are available.
Managed Services Provider Fee %	If the markup type is **Percentage,** enter a percentage by which the managed services provider will mark up the supplier rate for performing the service coordinator function. **Note:** The MSP fee that you define on the Service Type page will override the business unit MSP and default onto requisitions, work orders, and timesheets. If there is no fee defined for the service type, the MSP fee defined at the business unit level will be used.

Field or Control	***Description***
Rate	If the markup type is **Rate,** enter a rate by which the managed services provider will mark up the supplier rate for performing the service coordinator function. **Note:** The MSP fee that you define on the Service Type page will override the business unit MSP and default onto requisitions and work orders. And, for individual child services associated to a multi-resource service, an MSP fee defined on the Service Type page will override the default MSP fee from the parent service timesheets. If there is no fee defined for the service type, the MSP fee defined at the business unit level will be used.
Unit of Measure	If the markup type is **Rate,** enter a unit of measure for the specified markup rate.

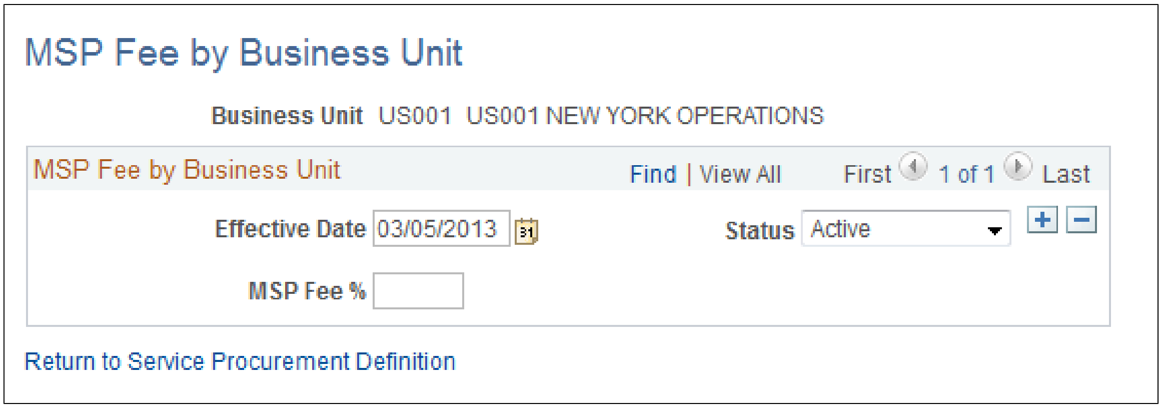
MSP Fees by Business Unit Page

Use the MSP Fees by Business Unit page (SPB_MSP_BY_BU) to define MSP fees percentage.

Navigation:

Click the **Manage by MSP Fees** button on the Services Procurement Business Unit Definition page.

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



Business Unit US001 US001 NEW YORK OPERATIONS

Effective Date 03/05/2013

Status Active

MSP Fee %

The **Manage by MSP Fees** link will appear only when you select the Managed Services Provider Installation check box on the Services Procurement Installation Options page.

Field or Control	***Description***
MSP Fee %	Enter a percentage by which the managed services provider will mark up the supplier rate for performing the service coordinator function.

Related Links

Setting Up Business Unit Definitions

Networked Supplier Details Page

Use the Networked Supplier Details page (SPM_SPLR_BY_BU_PG) to create the supplier network.

Associate suppliers with PeopleSoft Services Procurement business units.

Navigation:

- **Services Procurement** > **Define Service Suppliers** > **Define Suppliers by BU**
- **Services Procurement** > **Define Services Procurement** > **Service Supplier Setup** > **Supplier Network Setup**

  Click the **Supplier** link in the Supplier Network Setup page or select a new supplier and click the **Add** button.

Field or Control	***Description***
Source Type	Select *Internal* to indicate that the supplier is part of the MSP organization for this business unit. If the service provider is internal, the supplier providing the services will view and be paid the fully loaded rates.

Related Links

Supplier Network Setup Page

Processing MSP Transactions

This topic discusses how to process MSP Transactions.

Pages Used to Process MSP Transactions

Page Name	***Definition Name***	***Usage***
Create Requisition Page	SPF_REQ_INFO_PG	Enter basic service requisition information.
Manage Requisitions Page	PV_REQ_STATUS	Manage requisitions that are entered by the requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.

Page Name	***Definition Name***	***Usage***
Manage Sourcing Page	SPF_SRC_MANAGE_PG	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Selection Page	SPR_SOURCE_SELECT	Enter sourcing requirements.
Incoming Bids	SPF_SUP_COM_IN	View incoming bids.
Requisition Sourcing Review Page	SPF_SOUR_REVIEW_SP	Review requisitions sourced to the supplier.
Submit Bid Page	SPF_SUBMITAL_PAGE	Submit bids.
Supplier Bid Response Page	SPF_SUP_BIDRSP1	Reply to bids.
Work Order - Details Page	SPF_WO_REQ_VEN_DT	Enter work order detail information.
Work Order - Cost Page	SPF_WO_COST_PO_PG	Enter cost information for the work order.
Create Batch Invoice Page	SPF_GEN_CLINV	Generate and print invoices.
Create Manual Invoice Page	SPF_INV_HDR_ADD	Create invoice header information.
Manage Invoices - Line Summary Page	SPF_INV_LN_DTLS	Modify the selected invoice.
Manage Invoices - Line Detail Page	SPF_INV_TIME_DTL	View invoice line details or make adjustments.

Create Requisition Page

Use the Create Requisition page (SPF_REQ_INFO_PG) to enter basic service requisition information.

Navigation:

Services Procurement > **Create Requisition**

Field or Control	***Description***
Supplier Rate	The portion of the total rate that will be paid to the end supplier, the sum of the supplier rate and the MSP rate equals the total rate. This field is displayed to users who have the SP _VMS_MSP_BREAKDOWN role action. The field does not display to requesters or approvers.

Field or Control	***Description***
MSP Rate	Displays the MSP rate for this requisition. This field displays to users having the SP_VMS_MSP_BREAKDOWN role action. The system provides this value from the MSP fee by service type, or if not present there, the MSP by business unit definition.
Rate	The total rate for this requisition. If you are using a rate sheet, the system provides the default value from the rate sheet If there is a rate sheet, the system adds the MSP rate to the Supplier Rate to calculate the rate.
MSP Fee % (managed services provider fee percentage)	Displays the MSP fee percentage for this requisition. This field displays to service coordinators only.

Related Links

Understanding Requisitions

Sourcing Selection Page

Use the Sourcing Selection page (SPR_SOURCE_SELECT) to enter sourcing requirements.

Navigation:

Click the Sourcing Select button on the Manage Sourcing page.

Field or Control	***Description***
MSP Rate	Displays the MSP rate for this requisition. This field displays to Service Coordinators and MSP supplier contacts only. The system provides this value from the MSP fee by service type, or if not present there, from the MSP by business unit definition.
Loaded Rate	Displays the total rate for this requisition, supplier rate plus MSP Rate.

Related Links

Sourcing Requisitions

Submit Bid Page

Use the Submit Bid page (SPF_SUBMITAL_PAGE) to submit bids.

Navigation:

Click the **Submit Bid** button on the Supplier Sourcing Review page.

Note: Only internal suppliers will be able to view the MSP rates and amounts during bid negotiations.

Related Links

Understanding the Requisition and Work Order Bidding Process

Create Batch Invoice Page

Use the Create Batch Invoice page (SPF_GEN_CLINV) to generate and print invoices.

Navigation:

Service Procurement > Services Settlement > Create Batch Invoices

Field or Control	***Description***
Internal Supplier	Select to indicate that the supplier is internal and that the MSP markup will be included in the invoice amount.

Related Links

Understanding Settlements in PeopleSoft Services Procurement

Manage Invoices - Line Summary Page

Use the Manage Invoice - Line Summary page (SPF_INV_LN_DTLS) to modify the selected invoice.

Navigation:

Click the **Edit** button for an invoice on the Manage Invoice page.

Field or Control	***Description***
Estimated Tax	The MSP fee is not included in the tax calculation for external suppliers, but is for internal suppliers.
Estimated Total	The MSP fee is included in the totals for internal suppliers.

Related Links

Understanding Settlements in PeopleSoft Services Procurement

Chapter 10

Establishing and Managing VMS

Understanding VMS

The VMS provider manages enterprise service requests, and also takes on the role of service coordinator by routing service requests to multiple staffing suppliers. VMS providers manage the fulfillment process by maintaining work orders, time reports, and invoicing for the enterprise. VMS providers are paid for all services performed by the suppliers in their network at a rate that includes the VMS markup rate or percentage.

In order to support this business process, the concept of VMS is supported in the PeopleSoft Services Procurement product. VMS functionality is only active when you select the **Enable VMS** option for a Services Procurement business unit or service type. The service type level is an override to the business unit. Once you enable the VMS option, you must specify a VMS supplier and location, as well as a rate and supplier service coordinator or service team that correspond to the VMS provider in order to create VMS managed requisitions and work orders for the business unit.

Note: A service team must have a least one coordinator associated with the VMS supplier to be available for selection as a VMS team.

Markups

When the VMS provider acquires resources, an additional markup is applied on top of the supplier's rate in order to cover the VMS cost for managing the process. You define the VMS fee at the business unit level, with override available at the service type level. For individual child services, VMS fees defined at the service type overrides the VMS fees defaulting from the related multi-resource parent. The VMS fee is effective-dated, which indicates that the rate in effect at the time services are performed is the rate that is used for work order consumption and invoicing purposes.

The list below indicates the various ways in which VMS information is displayed to services coordinators, requesters, approvers, supplier service coordinator and service coordinator teams.

- Service coordinators and provider contacts internal to the VMS can view amounts that include VMS markup fees, as well as view the breakdown between supplier rate and VMS rate, which makes up the fully loaded rate.
- Requesters, requisition approvers, and work order approvers view amounts that include VMS markup fees, but they do not have visibility of the VMS markup amount that is included in the total amount shown unless they have been given a role associated with the SP_VMS_MSP_BREAKDOWN role action.
- Sourcing notification routes to the supplier service coordinator or service coordinator team defined for the VMS.

The service coordinator or team then sources the requisition to suppliers in the VMS supplier network. The VMS markup information is visible to the VMS Service Coordinators and suppliers internal to the VMS.

Note: VMS rates are not visible to external suppliers.

- External provider contacts view amounts that do not include VMS markup.

  VMS markup fees are included on all supplier invoices for VMS managed work orders. These invoices are generated for the VMS supplier rather than the end supplier.

Common Elements Used to Understand VMS

Field or Control	***Description***
VMS (vendor managed services)	Provides a single point of contact for an enterprise for their services needs. A VMS provider can route approved service requests to multiple staffing services suppliers for fulfillment and then manage the work order, time reporting, and invoice settlement processes for those service companies.
Third Party Supplier	The service provider who performs the service works for a third party supplier.
Fully Loaded Rates	Includes both the supplier rate and the VMS markup rate.

Setting Up VMS

To define VMS by business unit and service type, use the VMS by Business Unit and Service Type (SPB_VMS_BUSRVC_LST) component.

To define VMS by business unit, use the VMS by Business Unit (SPB_VMS_BY_BU) component. To define VMS percent by business unit, use the VMS Percent by Business Unit (SPB_VMS_INFO_BU) component.

To define VMS details by supplier, business unit, and service type, use the VMS Details by Supplier, Business Unit, and Service Type (SPB_VMS_INFO_SRV) component.

To change the VMS service coordinator, use the Replace VMS Coordinator component (SPB_REPL_VMS_SC).

This topic discusses how to set up VMS.

Pages Used to Set Up VMS

Page Name	***Definition Name***	***Usage***
Services Procurement Bus Unit Page	BUS_UNIT_TBL_SP	Define PeopleSoft Services Procurement business units. Define your own consolidation structures for accounting and reporting purposes.
VMS Supplier by Business Unit Page	SPB_VMS_BY_BU	Define the effective-dated VMS supplier and supplier location information. Services Procurement Bus Unit Page
VMS Details by Supplier and Business Unit Page	SPB_VMS_INFO_BU	Define effective-dated fees by percentage and assign related service coordinator or coordinator team for VMS by business unit.
VMS Supplier by Business Unit and Service Type Page	SPB_VMS_BU_SRVC	Use this page to indicate whether there is an override of the business unit VMS settings for this service type and view the current VMS supplier and location.
VMS Details by Supplier, Business Unit, and Service Type Page	SPB_VMS_INFO_SRVC	Use this page to define effective-dated VMS markups and assign related service coordinator or team by business unit and service type.

Services Procurement Bus Unit Page

Use the Services Procurement Bus Unit page (BUS_UNIT_TBL_SP) to define PeopleSoft Services Procurement business units.

Define your own consolidation structures for accounting and reporting purposes.

Navigation:

- **Services Procurement** > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Services Procurement Defn**
- **Set Up Financials/Supply Chain** > **Business Unit Related** > **Services Procurement** > **Services Procurement Options**

Field or Control	***Description***
Enable VMS	Select to determine whether requisitions or work orders are under VMS management by default. If you select this option, you can define markup costs that are charged by the VMS for service that do not have a service type level VMS override defined.

If you disable this option and there are existing VMS rows, the system populates a warning message to inform you that the VMS rows are ignored when creating new requisitions and work orders.

Note: VMS functionality is not available if you have selected the MSP installation option on the Services Procurement Installation Options page.

Note: If you select this option, you must define at least one VMS supplier and VMS fee for the designated business unit.

VMS Details by Supplier and Business Unit Page

Use the VMS Details by Supplier and Business Unit page (SPB_VMS_INFO_BU) to define effective-dated fees by percentage and assign related service coordinator or coordinator team for VMS by business unit.

Navigation:

Click the **Manage VMS Details** button on the VMS Suppliers by Business Unit page.

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

VMS Details by Supplier and Business Unit

Business Unit US001 US001 NEW YORK OPERATIONS

VMS Supplier

VMS Location

VMS Details

*Effective Date 02/04/2013

VMS Percent

● Service Coordinator ○ Service Coordinator Team

Coordinator

Field or Control	***Description***
VMS Percent	Enter VMS fee percentage.
Service Coordinator	Select to identify a specific service coordinator as the VMS provider.

Field or Control	***Description***
Service Coordinator Team	Select to identify an entire service coordinator team as the VMS team.
Coordinator	Select a specific service coordinator. **Note:** This option only appears when the **Service Coordinator** option is selected.
Service Team	Select a specific team of service coordinators. **Note:** This option only appears when the **Service Coordinator Team** option is selected.

Note: Rate based VMS fees are defined at the Service Type level only.

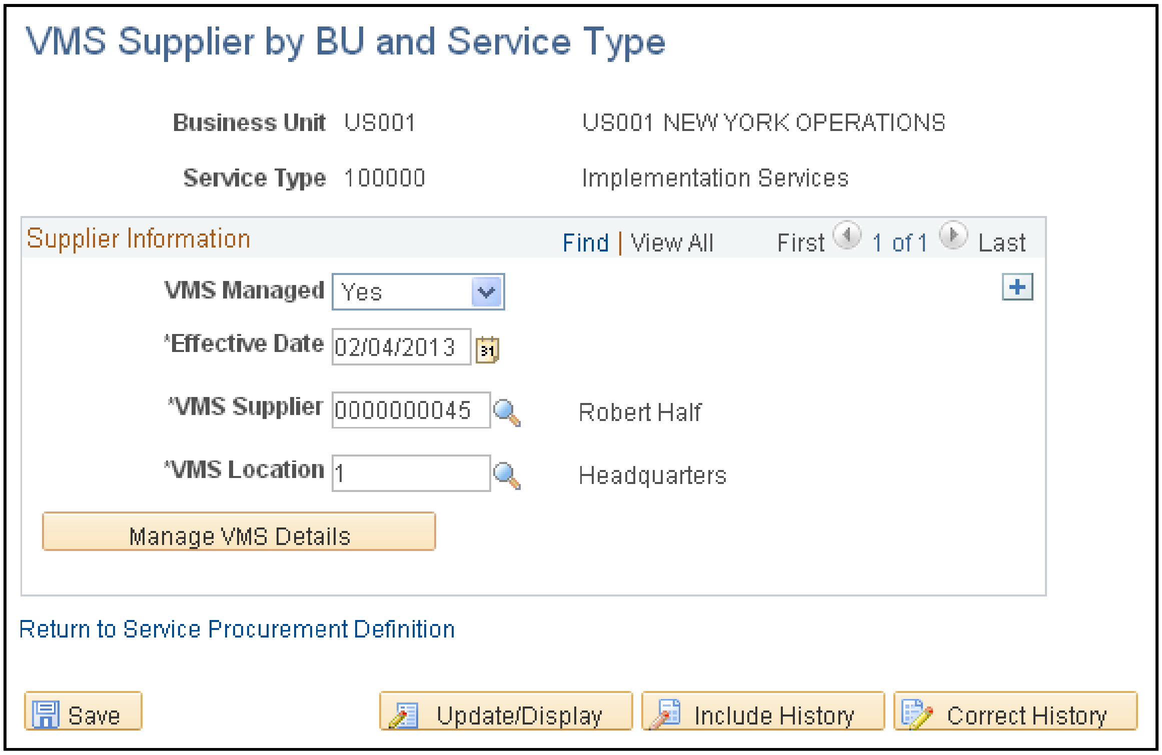
VMS Supplier by Business Unit and Service Type Page

Use the VMS Supplier by Business Unit and Service Type page (SPB_VMS_BU_SRVC) to use this page to indicate whether there is an override of the business unit VMS settings for this service type and view the current VMS supplier and location.

Navigation:

- Click the **VMS by BU and Service Type** link on the Services Procurement Bus Unit page.
- Services Procurement, Define Services Procurement, Service Type Setup, VMS by BU and Serv Type

This example illustrates the fields and controls on the VMS Supplier by BU and Service Type page. You can find definitions for the fields and controls later on this page.



VMS Supplier by BU and Service Type

Business Unit US001 US001 NEW YORK OPERATIONS

Service Type 100000 Implementation Services

Supplier Information

VMS Managed Yes

*Effective Date 02/04/2013

*VMS Supplier 0000000045 Robert Half

*VMS Location 1 Headquarters

Field or Control	***Description***
VMS Managed	Select an available effective-dated VMS managed option: Values include Yes, No, and BU (business unit). *Yes*: If you select this option, the **VMS Supplier** and **VMS Location** fields, and the **Manage VMS Details** button is available. **Note:** You must associate a VMS supplier and location, and related VMS details for the supplier, business unit, and service type when you select this option. *No*: If you select this option, requisitions created for this effective date will not be VMS Managed. *BU*: If you select this option, requisitions or work orders created for this effective date will follow the VMS setup defined at the Business Unit level.

Field or Control	***Description***
Manage VMS Details	Click to access the VMS Details by Supplier, Business Unit, and Service Type page, where you can define rates and service coordinator or team for the VMS.

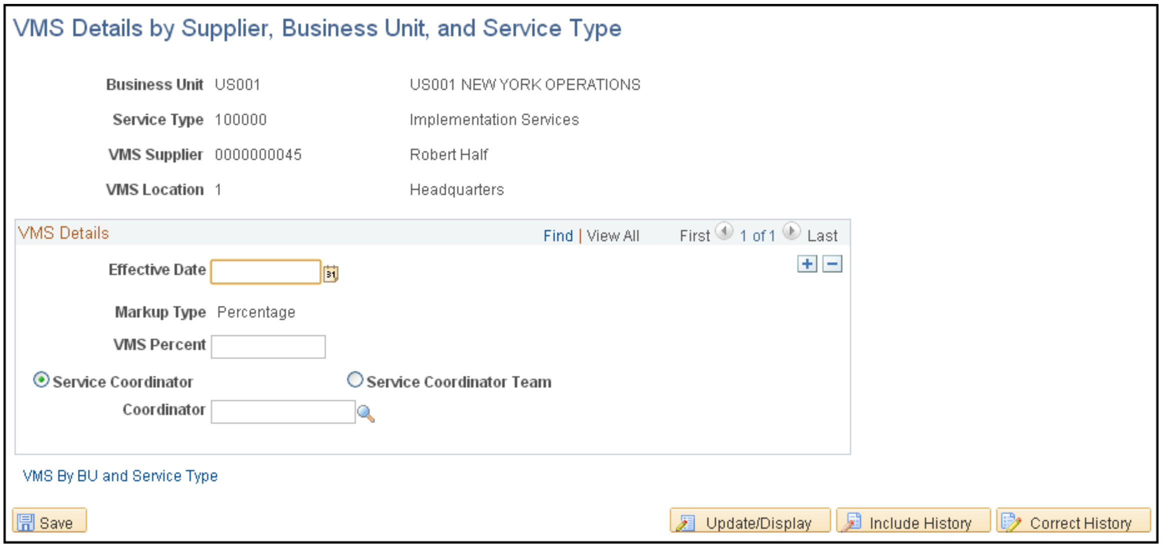
VMS Details by Supplier, Business Unit, and Service Type Page

Use the VMS Details by Supplier, Business Unit, and Service Type page (SPB_VMS_INFO_SRVC) to use this page to define effective-dated VMS markups and assign related service coordinator or team by business unit and service type.

Navigation:

Click the **Manage VMS Details** button on the VMS Supplier by BU and Service Type page.

This example illustrates the fields and controls on the VMS Details by Supplier, Business Unit, and Service Type page. You can find definitions for the fields and controls later on this page.



VMS Details by Supplier, Business Unit, and Service Type

Business Unit US001 US001 NEW YORK OPERATIONS
Service Type 100000 Implementation Services
VMS Supplier 0000000045 Robert Half
VMS Location 1 Headquarters

VMS Details

Effective Date
Markup Type Percentage
VMS Percent
● Service Coordinator ○ Service Coordinator Team
Coordinator

The markup types available depends on the selected service type. Deliverable and Multi Resource service types must have a markup type of *Percentage,* but resource service types can have a markup type of either *Percentage* or *Rate.* The other fields on the page vary based on the selected markup type. When the markup type is *Percentage,* the *VMS Percent* field appears on this page. However, when the markup type is *Rate,* the **VMS Rate, Currency,** and **UOM** (unit of measure) fields appear on this page.

Field or Control	***Description***
Markup Type	For service types with a service method of *Resource,* select the markup type of *Percentage* or *Rate.* **Note:** It is not possible to select **Markup Type** of Rate for service types with a service method of Deliverable or Multi Resource. In this case, only percentage markups are available.

Processing VMS Transactions

This topic discusses how to process VMS transactions.

Pages Used to Process VMS Transactions

Page Name	***Definition Name***	***Usage***
Create Requisition Page	SPF_REQ_INFO_PG	Enter basic service requisition information.
Manage Requisitions Page	PV_REQ_STATUS	Manage requisitions that are entered by the requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.
Manage Sourcing Page	SPF_SRC_MANAGE_PG	View all the suppliers to whom a requisition was sourced; source a requisition to multiple suppliers.
Sourcing Selection Page	SPR_SOURCE_SELECT	Enter sourcing requirements.
Incoming Bids	SPF_SUP_COM_IN	View incoming bids.
Requisition Sourcing Review Page	SPF_SOUR_REVIEW_SP	Review requisitions sourced to the supplier.
Submit Bid Page	SPF_SUBMITAL_PAGE	Submit bids.
Supplier Bid Response Page	SPF_SUP_BIDRSP1	Reply to bids.
Work Order - Details Page.	SPF_WO_REQ_VEN_DT	Enter work order detail information.
Work Order - Cost Page	SPF_WO_COST_PO_PG	Enter cost information for the work order.
Create Batch Invoice Page	SPF_GEN_CLINV	Generate and print invoice.
Create Manual Invoice Page	SPF_INV_HDR_ADD	Create invoice header information.
Manage Invoices - Line Summary Page	SPF_INV_LN_DTLS	Modify the selected invoice.
Manage Invoices - Line Detail Page	SPF_INV_TIME_DTL	View invoice line details and/or make adjustments.
Replace VMS Coordinator Page	SPB_REPL_VMS_SC	Use this page to replace VMS service coordinators.

Create Requisition Page

Use the Create Requisition page (SPF_REQ_INFO_PG) to enter basic service requisition information.

Navigation:

Services Procurement > Create Requisition

If a requisition is under VMS management, the VMS rate, service coordinator or team ID, percentage information, and VMS supplier and supplier location fields appears on the requisition page. The system checks to ensure that the VMS option is specified at the BU or BU and Service type level.

Note: When the requisition is under VMS management, the fully loaded rate that displays on the requisitions includes VMS markups.

Related Links

Understanding Requisitions

Manage Requisitions Page

Use the Manage Requisition page (PV_REQ_STATUS) to manage requisitions that are entered by the requester.

You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.

Navigation:

Services Procurement > Manage Requisitions

This page displays fully loaded prices that include the VMS markup for requisition lines that are VMS managed.

Note: If a user has the role action to view the breakdown of VMS rates, the supplier rate, the VMS markup rate, and the fully loaded rate appear on the requisition.

Related Links

Managing Service Requisitions

Sourcing Selection Page

Use the Sourcing Selection page (SPR_SOURCE_SELECT) to enter sourcing requirements.

Navigation:

Click the Sourcing Select button on the Manage Sourcing page.

This page displays fully loaded prices that include the VMS markup for requisition lines that are VMS Managed, as well as the breakdown between supplier rate and VMS markup.

The VMS breakdown also appears on the bid management pages for service coordinators and service provider contacts associated with the VMS supplier. Service provider contacts not associated with the VMS supplier only see the rate before VMS.

Related Links

Sourcing Requisitions

Work Order - Details Page.

Use the Work Order - Service page (SPF_WO_REQ_VEN_DT) to enter work order detail information.

Navigation:

Services Procurement > **Manage Services Work Orders**

Click the **Add** button or select an existing work order link on the Manage Services Work Order page.

This page displays VMS Managed information such as VMS supplier and supplier location. If the work order is not under VMS management, no VMS information appears on the work order. If a work order is linked to a requisition, all VMS information defaults onto the work order.

The rate that displays on the work order includes the VMS markup. The VMS markup calculation is based on the markup type defined for the business unit or service type and business unit.

Note: When the markup type is defined as percentage, the system fetches the effective-dated VMS percentage from the setup tables and overrides the requisition VMS percentage with the new effective date percentage on work order.
When the markup type is defined as rate, the system fetches the effective-dated VMS rate, currency, and unit of measure information from the setup tables and overrides the requisition VMS rate with the new effective date VMS rate on work order.

Related Links

Understanding Services Work Orders

Create Manual Invoice Page

Use the Create Manual Invoice page (SPF_INV_HDR_ADD) to create invoice header information.

Navigation:

Services Procurement > **Manage Invoices**

Enter Business Unit and/or Invoice ID and click the Add button on the Manage Invoices page.

Field or Control	***Description***
VMS Managed	Select to view VMS managed work order time and progress logs that are available for selection. All invoices for VMS managed work orders are consolidated for end suppliers under the same VMS supplier. Invoices are paid to the VMS supplier for all suppliers under their management.

Note: This option is only available if there is a VMS supplier selected.

Related Links

Create Invoice Page

Chapter 11

Using Service Contracts

Understanding Service Contracts

You must have PeopleSoft Purchasing installed to take advantage of service contracts. Service contracts are used to secure standard rates with suppliers to hire service providers at specific rates.

When service coordinators source a requisition and include contract suppliers, the system finds all the contract suppliers that match the role and unit-of-measure combination. Service contracts are only applicable to resource-based roles that have a rate associated with them or to category contracts for a category associated to a Services Procurement service type. Category adjustments are only applied when a rate sheet is available to use as the base rate from applying the adjustment. For example, if the rate sheet is for 45 USD an hour and a category-based contract exists for a reduction of 10%, the contract rate will be considered as 40.50 USD an hour and that rate will be compared to the bid or work order rate.

When suppliers bid on a requisition, the system checks for the category or the role, unit of measure, and supplier location to verify whether they match a current contract. If a match is found, the system enforces that the bid rate is less than or equal to the contract rate. You are not required to award bidders with a contract; they are treated as just another bidder. When the requisition is filled, the system uses the lower rate from the **Filled Rate** field to create the work order. The system takes the currency from the contract header and the merchandise amount is the rate-per-hour.

If PeopleSoft Purchasing is installed and you are integrating work orders with purchase orders, then when the work order is released, the system verifies against the contract again and overrides the work order rate with the contract rate if necessary. If a new contract becomes active between the time that the supplier bids on the requisition and the time that the purchase order was created, the purchase order uses the most current contract price and the work order is updated to match that price upon its release.

For example, you could have a contract with a supplier to provide construction services at the rate of 45 USD an hour. You source a requisition for a contracting job, and the supplier attempts to bid 48 USD an hour for the job. The system enforces the contract rate and requires the supplier to bid at or below the contract rate. The bid would be filled and the work order created for the rate of 45 USD an hour. If a new contract is subsequently negotiated for a rate of $42 USD an hour prior to creation of the purchase order and release of work order, the system adjusts the work order rate down to the 42 USD an hour rate during the work order release.

Creating Service Contracts

This topic discusses how to create service contracts.

Pages Used to Create Service Contracts

Page Name	***Definition Name***	***Usage***
Contracts Page	CNTRCT_HDR	Use to create service contracts.
Maintain Details - Details for Line Page	CNTRCT_PRC_UOM_SEC	Enter rates for service contracts. Contracts Page

Contracts Page

Use the Contract page (CNTRCT_HDR) to use to create service contracts.

Navigation:

- **Services Procurement** > **Requisition Fulfillment** > **Maintain Contracts**
- **Procurement Contracts** > **Add/Update Contracts**
- **Supplier Contracts** > **Create Contracts and Documents** > **Contract Entry**

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

See “Services Procurement Installation Options Page” (Application Fundamentals).

To create a service contract:

1. Create a new contract.

   You can select *General Contract,Purchase Order,* or *Release to Single PO Only* types to use for purchase orders. For more information about contract types, see the *PeopleSoft Source to Settle documentation*

   See “Contract Process Options” (PeopleSoft Source to Settle Common Information).

2. Select *Role* as the type.
3. Enter the resource-based project role as the type ID.
4. Use the Maintain Details - Details for Line page (CNTRCT_PRC_UOM_SEC) to enter rates for service contracts.

   Navigation

   Click the **Line Details** button on the Contract page.

5. Add the negotiated rate for the supplier location in the **Base Price** field.
6. Approve the contract by changing the contract status to *Approved.*

Related Links

"Understanding Voucher and Order Contracts" (PeopleSoft Source to Settle Common Information)
"Understanding How to Apply Procurement Contract Prices to Transactions" (PeopleSoft Purchasing)

Using Service Contracts in Bidding

To check for contract rates on bids:

1. Enter and source a requisition.

   Service coordinators have visibility into those suppliers who have contracts.

2. Suppliers bid on the requisition.
3. If the supplier, role, unit of measure, and location match the contract, the system prevents the service provider contact from submitting a rate greater than the contract rate.

Using Service Contracts with Work Orders

To check for contract rates with work orders:

1. Create a work order.
2. Once the work order is approved, create a purchase order.

If the supplier, role, currency, and location match the contract, the system uses the contract rate if it is less than the work order rate. The system overrides the work order rate with the contract rate when the work order is released.

For multi-resource services, the link to purchase orders is at the parent, multi-resource service level; however, contract rates will be enforced for the lower-level individual child service bids and work orders.

Note: Contracts are verified during the work order creation process as well as the sourcing process.

Chapter 12

Managing Services Projects

Understanding Services Projects

PeopleSoft Services Procurement facilitates managing projects by enabling service providers to log time directly against work orders and activities that are associated with projects.

When you use projects in PeopleSoft Services Procurement, you can enter and modify project details. You can search or sort projects by different criteria, and you can access the Project Activities page to define activities by project when Project Costing is installed.

Note: Service Projects are only associated to requisitions and work orders through the ChartField distribution. Projects are only available in PeopleSoft Services Procurement if the ChartField configuration is defined with the project ChartField set to a status of **Active.**

Related Links

Defining Project and Activities Definitions

Prerequisites

Set up the following attributes before entering project information when the Project Costing product has been installed:

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

Related Links

Defining Project and Activities Definitions
Setting Up Business Unit Definitions

Creating Services Projects

To create services projects, use the Services Projects (SPA_PROJECT) component.

Pages Used to Create a Service Project

Page Name	***Definition Name***	***Usage***
Manage Services Projects	SPA_MANAGE_PROJ	View, search, and sort the list of available projects. Access the project that you want to modify.
Maintain Services Projects	SPA_PROJECT	Enter general project information.

Managing Services Projects

This topic discusses how to view, search, and sort projects.

Pages Used to Manage Services Projects

Page Name	***Definition Name***	***Usage***
Manage Services Projects	SPA_MANAGE_PROJ	View, search, and sort the list of available projects. Access the project that you want to modify.
Maintain Services Projects Page	SPA_PROJECT	Enter general project information.

Chapter 13

Managing Services Activities

Understanding Activities in PeopleSoft Services Procurement

Activities are specific tasks that you allocate time or progress against. When Project Costing is not installed, activities are generic, not related to projects, and are associated to work orders based on service type or service. Use activities to further define the work order scope.

Understanding Activities When PeopleSoft Project Costing is Installed

When Project Costing is installed, activities are associated to specific projects. This is typically used when service providers are assigned to work on multiple projects in multiple departments concurrently. Use activities on timesheets to break down the various costs that are associated with a project or work orders. In this scenario, any project for which you incur costs directly must contain at least one activity.

Note: When you associate a project to an activity, you must have a project business unit and project defined as a ChartField in order to charge time or progress against it.

Understanding ChartFields When PeopleSoft Project Costing is Installed

Use the Standard ChartField Configuration page to determine which ChartFields are available to use on requisitions and work orders. The values that default onto each ChartField on a requisition line or manual work order come from the business unit or user defaults. You can specify multiple ChartField combinations on a requisition. Those combinations are editable until the requisition line is submitted for approval. ChartField combinations are carried over when a work order is created from a requisition. Whether a work order is created manually or is linked to a requisition line, the ChartField combinations specified on the work order may only be modified until a certain point, depending on whether there are related purchase orders or existing time sheets.

When purchase order integration is enabled, you cannot make changes to the distribution after the purchase order has been created. When purchase order integration is not enabled, it is possible to modify the distributions until a time sheet has been created. If the actual allocation method is used for the work order, new distributions may be added even after a time sheet has been created, but existing distribution lines may not be deleted or changed. The ChartField combinations from the work order are subsequently used in the integration with PeopleSoft Purchasing and Accounts Payables.

Prerequisite

When Project Costing is installed, you must create a project in PeopleSoft Project Costing or PeopleSoft Services Procurement before you can assign activities to it.

Managing Activities When Project Costing is Not Installed

This topic discusses how to manage activities when Project Costing is not Installed.

You can also associate activities by service type.

Pages Used to Manage Activities When Project Costing is Not Installed

Page Name	***Definition Name***	***Usage***
Service Activities page	SPB_SETID_ACTIVITY	Add or Modify service activities. Service activities are used to indicate how time is spent
Activities by Service Type Page	SP_ACT_BY_SVTYP	Select a service type and associate activities to it. The activities will be available for selection on Work Orders for the related service type.
Activities by Service Page	SPB_SRC_ACT	Select a service and associate activities to it.The activities will be available for selection on Work Orders for the related service.
Work Order Activities Page	SPF_WO_ACTIVITY (resource based), SPF_PRLOG_MS_PG (deliverable-fixed) SPF_WO_RATE_ACT (deliverable-rate based), SPF_PRGLOG_MS_PG (deliverable-fixed price and milestone)	Select activities to associate with the work order. If you have the SP_ADD_WO_ADHOC_ACT role action, then the Add Ad Hoc Activities button is displayed on this page. When adding ad hoc activities to the Work Order Activities page, the system automatically adds the new activity to setup tables. After the activity is added to setup tables, the activity is considered as predefined and can be used for future work orders. Creating and Managing Work Orders

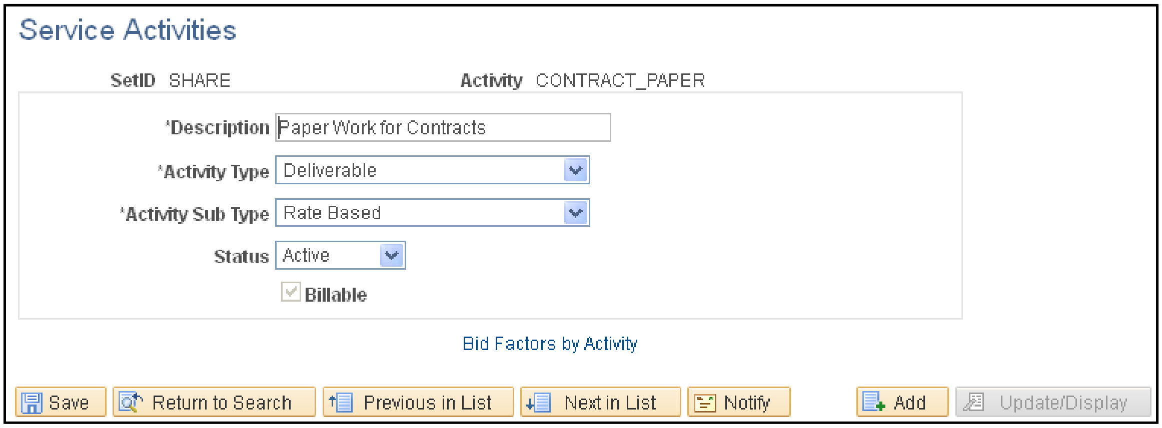
Service Activities page

Use the Service Activities page (SPB_SETID_ACTIVITY) to define service activities.

Navigation:

Services Procurement > **Define Services Procurement** > **General Setup** > **Project/Activity Definitions** > **Service Activities**

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



Service Activities

SetID SHARE

Activity CONTRACT_PAPER

*Description: Paper Work for Contracts

*Activity Type: Deliverable

*Activity Sub Type: Rate Based

Status: Active

☑ Billable

Field or Control	***Description***
Description	Enter the activity description.
Activity Type	Select to indicate whether the activity is resource or deliverable-based.
Activity Sub Type	Depending on the value that you select in the **Activity Type** field, the system dynamically displays values. If you select *Resource* as the activity type, the system returns values of *Generic Activity* and *Specific Activity.* If you select *Deliverable* as the activity type, the system returns values of *Milestone* and *Rate Based.*
Status	Select the activity status. Values are *Active* or *Inactive.*
Billable	Select if the activity is billable.

Field or Control	***Description***
Bid Factors by Activity	Click to access the Bid Factors by Activity page. You use the page to view or add bid factors to an activity.

Managing Activities when Project Costing is Installed

This topic discusses how to modify an activity.

Page Used to Manage Activities when Project Costing is Installed

Page Name	***Definition Name***	***Usage***
Project Activities Page	SPA_PROJ_ACT	Add or Modify project activities. Project activities are used to indicate time spent related work on specific projects Project activities are used to indicate the amount of time spent on specific projects.
Service Activities Page	SPB_SETID_ACTIVITY	Add or Modify service activities. Service activities are used to indicate the amount of time spent on non project activities, such as sick time, meetings, and so on.
Activities by Service Page	SPB_SRC_ACT	Select a service and associate activities to it. The activities will be available for selection on Work Orders for the related service.
Work Order Activities Page	SPF_WO_RATE_ACT (deliverable services -rate based), SPF_PRGLOG_MS_PG (deliverable services – fixed price and milestone)	Select activities to associate with the work order. For deliverable services that are rate based, fixed price, or milestone, the Add Ad Hoc Activities button is displayed for users who have the SP_ADD_WO_ ADHOC_ACT role action. When adding ad hoc activities to the Work Order Activities page, the system automatically adds the new activity to setup tables. After the activity is added to setup tables, the activity is considered as predefined and can be used for future work orders. Understanding the Work Order Process Flow

Project Activities Page

Use the Project Activities page (SPA_PROJ_ACT) to modify project activities.

Navigation:

Services Procurement, Define Services Procurement, General Setup, Project /Activity Definitions, Project Activities

Modify the **Description, Status,** and **Visibility** fields as required.

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

Chapter 14

Creating and Managing Services Procurement Requisitions

Understanding Requisitions

This section lists prerequisites and discusses:

- Requisitions
- Multicurrency requisitions

Prerequisites

Before you enter requisitions into the system, you must:

- Have authorization to process requisitions on the Requisition Authorizations of the Procurement User Preferences page.
- Identify the user ID as a requester on the Requester Setup page, where you add defaults for requisitions.
- Have a role action of SP_REQUESTER.

Related Links

Requester Defaults Page
eProcurement Role Actions Page

Requisitions

Requesters can use PeopleSoft Services Procurement to create and maintain service requisitions. After you enter and submit a requisition, send it to the approver for approval. Approved requisitions are then sourced to qualified suppliers that meet the requisition requirements. Use tools such as bid factors and supplier scores to rate the best candidates.

On the same requisition, you can add lines for service items using PeopleSoft Services Procurement and commodity items using PeopleSoft eProcurement.

Requisition Lines

A service requisition is made up of multiple lines. These lines can be either a mixture of resource and deliverable services or a single multi-resource service. Requesters can use PeopleSoft Services Procurement to create, edit, cancel, or extend requisition lines. Use PeopleSoft Purchasing to close services requisitions. Lines associated to a resource service method may be created for multiple positions.

See “Understanding the Requisition Business Process” (PeopleSoft Purchasing).

Resource-Based Requisition Lines

Requisition lines for resource-based services enable you to request the services of an individual service provider. Upon awarding the requisition line to the supplier, the service coordinator or requester generates a services work order and memorializes the attributes as terms and conditions. Upon the work order release, the service provider may create timesheets to record hours worked.

Timesheet information subsequently triggers self billed invoicing functionality for payment to the supplier.

A resource based requisition line may have multiple positions, issue a single sourcing notification to suppliers, and create work orders for each position. The Service Coordinator can fill the requisition line with multiple bids, up the total position quantity. Position information appears on the requisition, approval, sourcing, and bid pages so the requester, service coordinator, and service provider contact can track how many positions are filled or available, as well as obtain average fill rates and amounts for the requisition line.

You can reduce the number of positions on a requisition line that is not already filled. The requester can perform this action as long as the line is not sourced. After sourcing, only the service coordinator can perform this action.

Note: You cannot reduce the number of positions under the number of positions that are already filled. If the number of positions is reduced to equal the number of positions that are already filled, the requisition line status is changed to *Filled* and an email notification is sent to all sourced suppliers having a notification method of *email and worklist.*

Deliverable-Based Requisition Lines

Deliverables-based requisition lines reflect requirements generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider. There is no specific service provider in mind for the deliverables-based requisitions, so a statement of work defines the requirements.

Note: Although no specific service provider is assigned initially, it is possible to track individuals on the related work order for security purposes.

You can define a deliverables-based requisition with its unique attributes. These attributes carry over into the sourcing event to analyze and score supplier submittals in accord with the requisition requirements. Upon awarding the requisition line to the supplier, the service coordinator or requester generates a services work order and memorializes these attributes as terms and conditions. Upon the work order release, the service provider contact records progress against a progress log, and you pay the supplier based on milestones, percentages, a fixed amount, or rates.

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

The progress log becomes the basis of the self-billed invoicing functionality for payment to the supplier.

Multi-Resource Requisition Lines

Multi-resource requisition lines support multiple unique services and service providers for PeopleSoft Services Procurement requisitions. Multi-resource services are services provided for an overall agreed upon amount. The overall agreed upon amount for a service or set of services is independent of the number of service providers associated to the service.

When you select the Multi-Resource service method, the system displays a page that is similar to deliverables-based requisitions, where you can define the multi-resource service top line overall amount for labor and expense. Multi-resource services supports multiple unique services and service providers for requisitions, sourcing, and work orders. Multi-resource services enable you to manage complex services at a granular level.

Each requisition is limited to only one multi-resource requisition service, and when a multi-resource service is selected, then no other service lines are allowed on the requisition. The system bases default values for multi-resource services on the multi-resource service type and service, and it populates the requisition fields with the default values. Any related individual services that were defined as default values for the specified multi-resource service will be used as default values. You can use the **Add Service** button to add more related individual services. The system does not enable multi-resource services on the resource-based, deliverables-based, or goods requisition.

Deliverables-based and multi-resource services have the same bid factor mapping. Default values also exist for multi-resource service attributes, including the skills matrix. The system performs supplier-managed services and managed-services provider calculations, expense calculations, and rate access logic for the multi-resource service.

Fiscal approval for multi-resource services is based on the top-line, overall not to exceed amounts and not on the individual service level. Requisition line-level information includes service method, service type, service, requesting department, location, request type, scope of work, duration information, labor and expense amounts, accounting distribution information, supplier information, and service coordinator information.

You can add multiple unique individual services under a multi-resource requisition line. For each individual service related to a multi-resource requisition line, you can include service type, service, labor rate and unit of measure, title, start date, end date, expense rate and unit of measure, quantity, location, utilization, competencies, education level, experience, telecommute, travel required, travel frequency, scoring criteria, and whether an interview is required.

For more information about preparing the PeopleSoft Services Procurement system for use with multi-resource services, see the "Setting Up Application Specific Options for PeopleSoft Services Procurement" set of topics.

Requisition Line Cancellation

Requesters can cancel individual or multiple requisition lines. When a requester cancels a requisition, the system automatically sends cancellation notifications to all affected parties, including all sourced suppliers.

Depending on the business unit settings, reason codes may be required when canceling a line.

Note: If all requisition lines are canceled, the requisition header status is automatically set to Canceled. Affected budget distribution amounts are immediately adjusted to reflect canceled amounts.

Note: If a work order is already created for a requisition line, the line cannot be canceled.

Services Requisition Closure

Use PeopleSoft Purchasing to close Services Procurement requisitions.

See “Understanding the Close Requisitions Process” (PeopleSoft Purchasing).

Supplier Rate Breakdown and Resource Requisitions

When you create a service requisition, depending on the business unit settings, the requester may or may not have the authority to enter a bill rate, which is the rate paid to the supplier. If they do have the authority to enter a rate, the installation options setting for Pay Types Enabled and the role actions of the requester will determine whether they enter only a total rate or the individual components of that rate. When pay types are enabled, the suppliers enter as many as four types of pay rates when they bid on the requisition line: the service provider pay rate, any additional incurred costs, and standard and third-party markup rates, if applicable. The sum of these rates is the bid rate. This functionality enables service coordinators to track the rate breakdown and set limits on the supplier markup rates.

After you fill a service requisition with the negotiated bill rate, the system generates a work order that shows the rate breakdown. You cannot edit the rates if the work order is linked to a requisition, although you can enter new effective-dated rates after the work order is released.

Rate Sheet Breakdown for Rates and Expenses

You can define default rates and expenses for contingent labor on the rate sheet. The rate breakdown structure on the rate sheet includes pay rate, supplier markup, third-party markup, fixed costs, and expenses. The rate breakdown that you define prepopulates requisitions and work orders based on the related region and service type. You can define minimum, maximum, and target levels on the rate sheet for each of the rate elements, including expenses. Tolerance checking on the requisition validates pay rate, total rate, and expenses at the beginning to help companies ensure compliance with negotiated or standardized rates. In this way, services costs are closely monitored.

If a requester has access to view the rate breakdown information on the requisition, all rates will be visible to that requester. The requester may also have the ability to edit the requisition rate, depending on the business unit settings. However, if the requester has a role action to hide the rate breakdown information, he will not be able to view rate breakdown information.

In addition to configuring the system to show or hide rates for a requester, you can also configure the system to enable service coordinators to define the rate information for a requisition line or manual work order before it is submitted for approval.

Post Approval Edits to Requisitions

If a requisition line is not yet sourced, you can change it. All fields are available for edit. Changes can trigger another approval, depending on how the change tracking setup is defined. If so, the system sets the requisition status back to Pending. The service coordinator or team cannot source the requisition until it is successfully approved again unless the business unit allows pre-approval sourcing. In that situation, you can source the requisition as soon as it is submitted for approval. The sourcing worklist entries remain in the worklist throughout each approval process and are replaced by new worklist entries upon approval. If the requisition is denied, then the original worklist entries remain until the requisition is either resubmitted and approved or canceled.

See Tracking Requisition Changes.

Requisition Extensions

Requesters can extend completed service requisition lines. If you need to extend a requisition, you must go to the latest extension of the requisition to extend it further. When you extend from the requisition, the system creates a new Requisition ID and line by transferring the requester to the Create Services requisition page.

The system populates values from the original requisition to the new requisition line as a default. The start date of the new requisition is equal to the end date of original requisition plus one day. The status of the new requisition is pending approval. Once the requisition is approved, you can source the extended requisition to the supplier for confirmation of availability and rates.

The new requisition references the Requisition ID and line number of the original requisition line. The system also marks the original requisition as extended. You can edit the reference, request type, department, time approver, end date, rate, and service coordinator/team of the new requisition. The remaining fields are not editable.

Note: Currency conversion calculations are based on the date that the requisition was extended.

Note: If you extend a requisition, you cannot extend the associated work order directly. You must perform subsequent extensions from the extended requisition. Likewise, if the work order related to a requisition line has already been extended, then you cannot extend it further from the requisition.

Related Links

User Preferences Page

Bid Factor Setup Page

Understanding Supplier Scoring for PeopleSoft Services Procurement

Multicurrency Requisitions

If the purchasing business unit has multicurrency enabled for requisitions, the requester can change the currency on the service requisition. Rate sheet validation can occur in either the requisition currency or the base currency. After the requisition is approved and sourced, suppliers enter bids in the requisition currency, but they can see amounts in their location currency, which can be different than the requisition currency.

With multicurrency, you can:

- Support global customers by enabling services procurement transaction processes to occur in multiple currencies.
- Enable rate sheet validation to occur in the requisition base currency or the transaction currency.
- Enable users to create expense sheets in a currency different from the requisition currency.
- Create invoices in the supplier location currency, even if it is different from the requisition currency.

If multicurrency requisitions are enabled, the requester's currency appears by default. The requester can change this currency until the requisition is submitted for approval. Each requisition line that you add for the same requisition header must use the same currency.

If multicurrency requisitions are disabled, the purchasing business unit currency is used and cannot be changed.

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

Common Elements Used to Understand Requisitions

Field or Control	***Description***
Average Filled Amount	The average of the individual estimated total amounts for which each position was filled.
Average Filled Rate	The average of the individual rates agreed to for each person filling a position for the requisition line.
Line Total	The total estimated cost for all positions on the line (position cost × total positions). **Note:** Any additional costs, such as shift pay or assignment pay, are not included in the calculation of the line total.
Number of Filled Positions	The number of people already selected to fill positions for the service. This field increments each time a position is filled through bid management and decrements each time a related work order is canceled.
Position	Individual instance of a resource-based service. The number of positions for a service line determines the number of service providers who will fill the requisition line.
Position Cost	The estimated cost for one individual to perform the specified service for the duration indicated. This cost includes both the service rate and expense rate for the duration.
Total Positions	The number of people needed for the service defined on a requisition line.
Total Filled Amount	The sum of all filled amounts for each position filled.

Creating Requisition Lines for Resource-Based Services

This topic provides an overview of creating a services resource requisition line.

Pages Used to Create Requisition Lines for Resource-Based Services

Page Name	***Definition Name***	***Usage***
Requisition Information Page	SPF_REQ_INFO_PG	Enter basic Service Requisition information. Service Requisitions from Resource Management
Location Address Page	SPF_ADDRESS_LOC	View the location address. Service Requisitions from Resource Management
Currency Information Page	EXCH_RT_DTL_INQ	View the currency information and exchange rate. Service Requisitions from Resource Management
Bid Factors by Requisition Line Page	SPF_BDFTR_REQ_PG	Adjust the weightings of each bid factor to determine its level of importance.
Bid Factor List Items Page	SPF_BDFTR_LST	Enter bid factors where the bidder selects from a list. Bid Factors by Requisition Line Page
Suggest a Supplier Page	SPF_SUG_VENDOR	Enter supplier information for a new supplier that is not in the system yet.
Requisition Checkout Page	PV_REQ_CHECKOUT	Save the requisition and submit for approval. Service Requisitions from Resource Management
Line Comments Page	PV_REQ_COMMENTS_NW	Enter line comments. Service Requisitions from Resource Management
Replace Engagement Manager Page	SPB_REPLACE_EM	Change the engagement manager after creating a requisition or work order.
Engagement Manager Replacement Log Page	SPB_REPLAEM_LOG	View the details of reassigned transactions.

Understanding How to Create a Services Resource Requisition Line

This section discusses how to create a Services Resource requisition line. To complete the service requisition process, follow these steps:

1. Access the Requisition page.
2. Select a Service method or Service type on the Requisition browse page (SP_REQ_BROWSE). After selecting, the search results will display the available services that can be added to the Requisition.
3. On the Requisition Search Results page (PV_REQ_SRCH_RES), select a service and provide number of positions next to the service. Click **Add** and the service is added to the Requisition and the Service Requisition Information page opens.
4. Access the Service Details on the Requisition Information page (SPF_REQ_INFO_PG). The service type, service, and service coordinator appear by default from the service requester defaults. The location appears by default from the requester setup ship-to location. The system displays the job title, scope of work, competencies, education level, experience, telecommute, and travel required values by default, based on attributes associated with the service.
5. As this is a resource-based requisition line, you must enter a rate and unit of measure for the service.
6. If expenses are allowed for the requisition line, then enter the expense rate and unit of measure or just the expense amount.
7. Click the **Scoring Criteria** link on the Requisition Information page to access the Bid Factors by Requisition Line page.

   Use this page to adjust the weighting of each bid factor to determine its level of importance.
8. Service coordinator values appear by default from requester defaults.
9. After all data is defined, click the **Checkout** button at the top of the page to access the Checkout – Review and Submit page.

   Use this page to update the requisition name or to add comments.
10. Expand the requisition line to view or edit accounting lines.

    Use this page to enter distribution information for the requisition.
11. Click the **Save for Later** button to save the requisition. Click the **Preview Approvals** link to preview the approval routings. Alternatively, click the **Save & Submit** button to save the requisition and submit it for approval.

Note: Click the **Requisition Settings** link to specify the Header, Line, Shipping, and Accounting default values. You can also select the default option, which must apply in the Service requisition — Default or Override page.

Related Links

Maintaining Service Setup

Creating Requisitions

This section discusses how to create requisitions with Services Procurement. The left-hand side navigation panel of the Requisition page includes a section for Services Procurement. This section includes Resource, Deliverable, and Multi Resource options.

On selecting the Services Procurement on the left navigation menu, the right-hand side of the page displays a list of available services with a breakdown of three service methods mentioned. A list of services appears for each service method. Users can click the service method to display the search results using the service method as the search text. Clicking on the service also displays the search results, but the service is used as the search text.

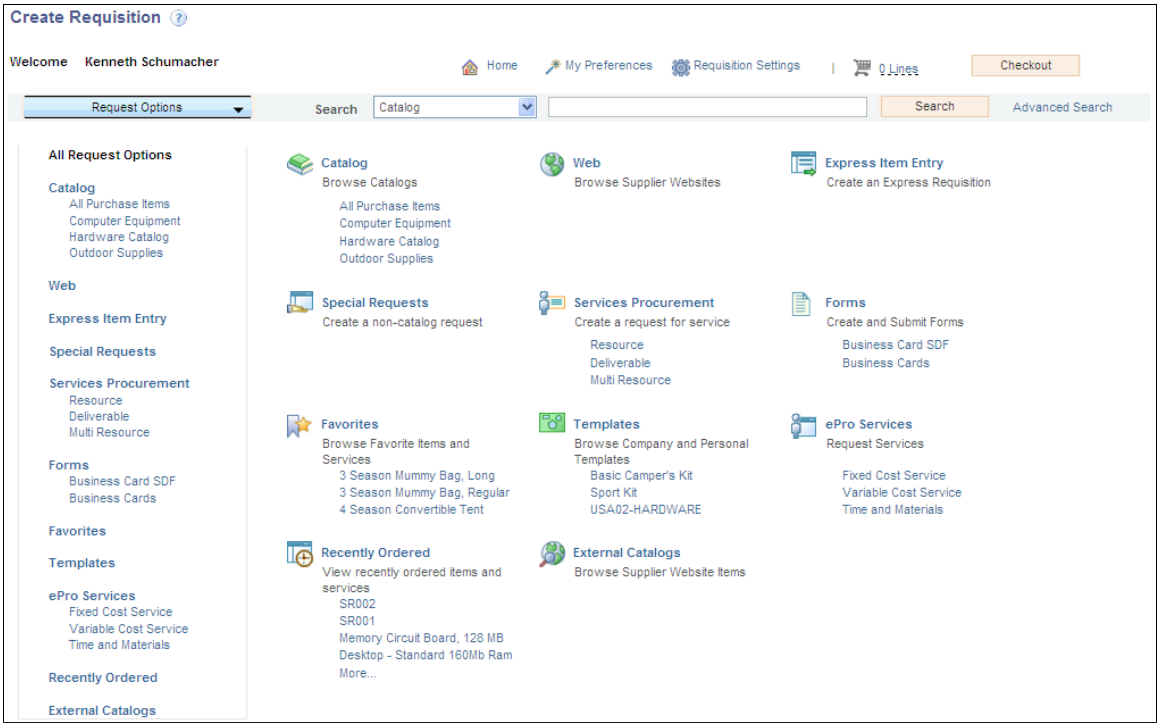
Requisitions Page

Use the Requisitions page (PV_ALL_RQST_OPTION) to create requisitions.

Navigation:

Services Procurement > **Create a Service Requisition**

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



Note: You can add additional services to a requisition by returning to the home page and using the left navigation to locate and select the additional services.

Service Requisitions Using Favorites

Service requisitions can be a part of Favorites and are displayed in search results. For Service lines, the system displays the following information: Service ID, Service Description, Service Type, and UOM. Fields have appropriate Hide/Unhide features for Service lines.

Service Requisitions Using Templates

Service requisitions can be a part of Templates and are displayed in search results. For Service lines, the system displays the following information: Service Description, Service ID, and Status. Fields have appropriate Hide/Unhide features for Service lines.

Service Requisitions from Resource Management

PeopleSoft Services Procurement integrates with PeopleSoft Resource Management, enabling internal services orders to become a valid external service purchasing request in Services Procurement. Service orders that are created in Resource Management are sent to Services Procurement for fulfillment by way of the Staffing Workbench from Resource Management. The user transfers directly to the Service Procurement requisition pages with populated data from the Resource Management system. In Services Procurement the normal requisition process flow is followed, which includes additional updates to Resources Management upon filling the requisition and submitting and releasing the work order. Also, the work order process creates an assignment and establishes the candidate as a resource on the Resource Management side.

Understanding Population of Competency Fields from Resource Management

PeopleSoft interface for Resource Management to Services Procurement populates competencies into Services Procurement from Resource Management if the Service Order is from Resource Management. Services Procurement receives all competencies along with their details such as proficiency and years of experience. Once a service requisition is created in services procurement, the competencies for the SO line are allowed to be modified, but they are not automatically synchronized to the RM Service Order. The system displays a warning message indicating that a Service Order is associated to the Requisition. Also, an email notification is sent to the user who creates the Service Order so that the Service Order can be manually edited. You can create a new Service Order line and source a resource internally if required, although a service requisition is created for the Service Order.

Transferring the number of resources required to Service Requisition

The number of unfulfilled positions or quantity of Service Order lines is transferred to the **Positions** field on the service requisition in Services Procurement. You can decrease the Quantity value for a Service Order in Resource Management, which is outsourced as a service requisition in sPro.

The system triggers a notification to the Requester or Service Coordinator to indicate the changes made to the Service Order **Start Date**, **End Date**, and **QTY** fields. The Requester or Service Coordinator manually makes this change in order to be in sync with the values in the Service Order. If the QTY value decreases to 0, the service requisition is closed in sPro. At the same time, a user cannot increase the QTY value on a Service Order in Resource Management after it comes to Services Procurement.

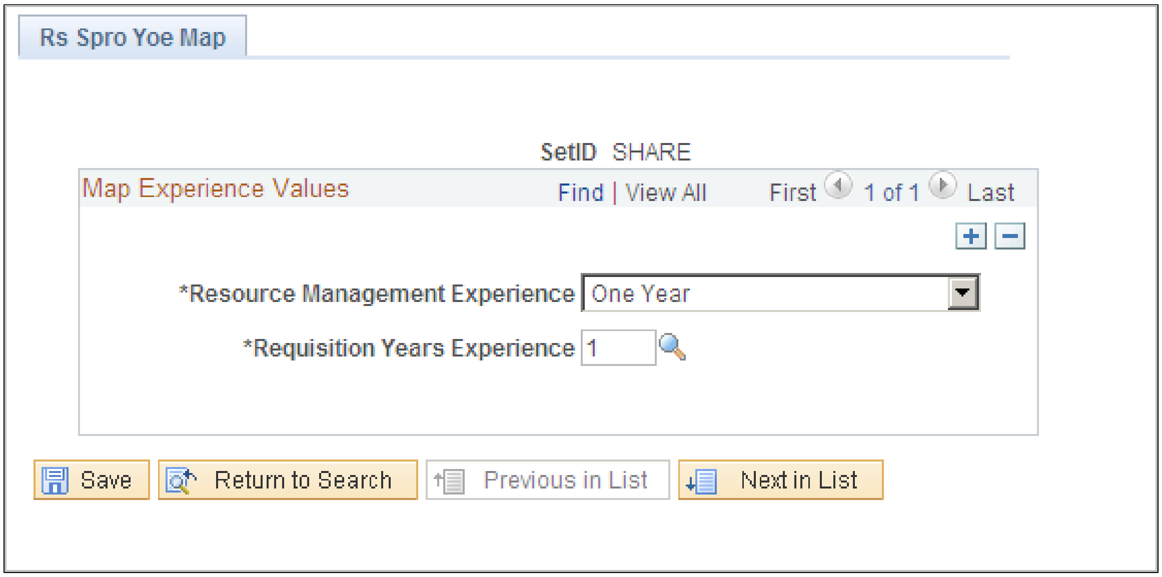
sPro uses Years of Experience defined in Resource Management. However, the setup used to define Years of Experience is different in Resource Management and in sPro. While the value of the **Years of Experience** field in sPro is governed by SetID, in Resource Management it is governed by the translate value defined in the YearsOfExp field. The values are defined in the setup level for sPro.

Use the RM to sPro Experience Map page to map the experiences in the Resource Management experience table with the experience table in sPro. The mapping occurs between Resource Management Experience fields and Years Experience field in sPro.

Navigation:

Services Procurement > **Services Setup** > **Competency Setup** > **RM to Spro Experience Map**

RM to sPro Years of Experience mapping



SetID SHARE

*Resource Management Experience One Year

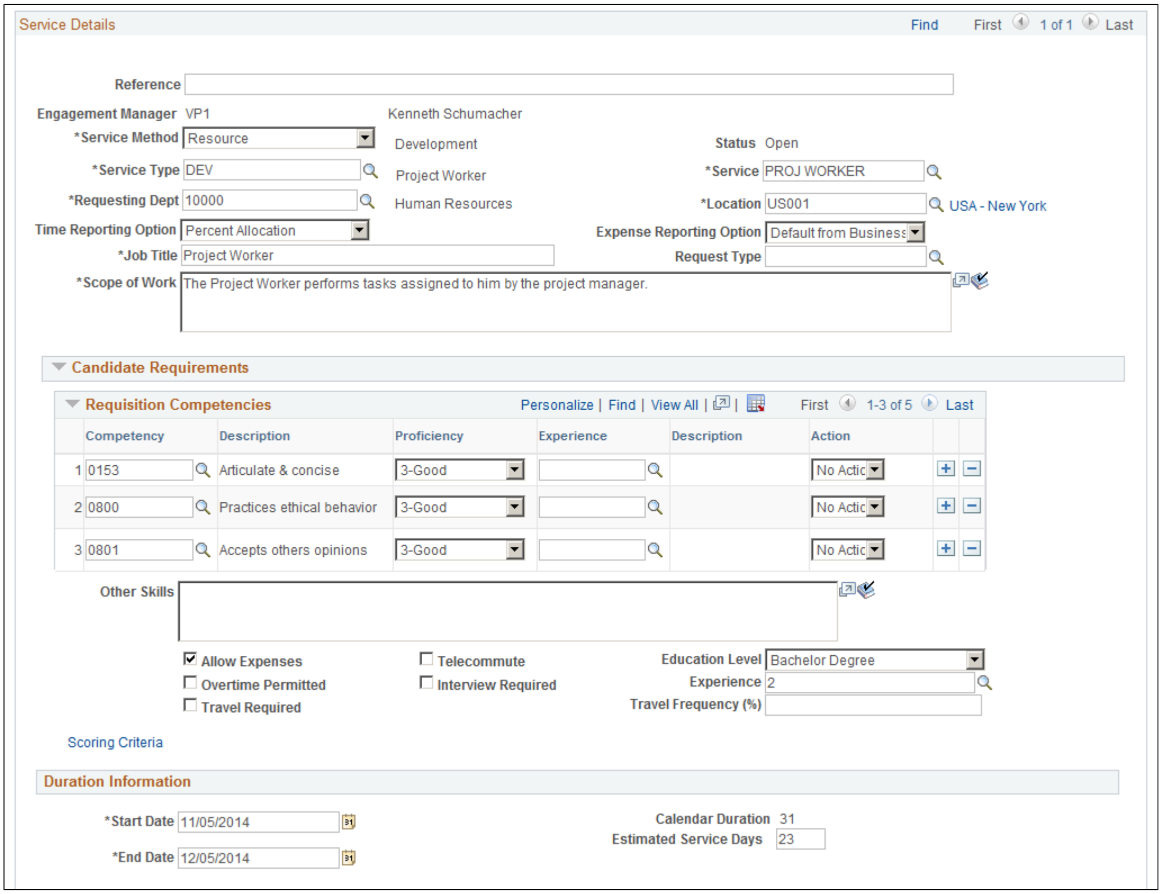
*Requisition Years Experience 1

Use the Requisition page (SPF_REQ_INFO_PG) to enter basic service requisition information.

Navigation:

Services Procurement > **Create a Service Requisition**

This example illustrates the fields and controls on the Requisition page (1 of 3). You can find definitions for the fields and controls later on this page.



Service Details

Reference

Engagement Manager VP1 Kenneth Schumacher

*Service Method Resource Development

Status Open

*Service Type DEV Project Worker

*Service PROJ WORKER

*Requesting Dept 10000 Human Resources

*Location US001 USA - New York

Time Reporting Option Percent Allocation

Expense Reporting Option Default from Business

*Job Title Project Worker

Request Type

*Scope of Work The Project Worker performs tasks assigned to him by the project manager.

Candidate Requirements

Requisition Competencies

	Competency	Description	Proficiency	Experience	Description	Action
1	0153	Articulate & concise	3-Good			No Actic
2	0800	Practices ethical behavior	3-Good			No Actic
3	0801	Accepts others opinions	3-Good			No Actic

Other Skills

☑ Allow Expenses

☐ Overtime Permitted

☐ Travel Required

☐ Telecommute

☐ Interview Required

Education Level Bachelor Degree

Experience 2

Travel Frequency (%)

Scoring Criteria

Duration Information

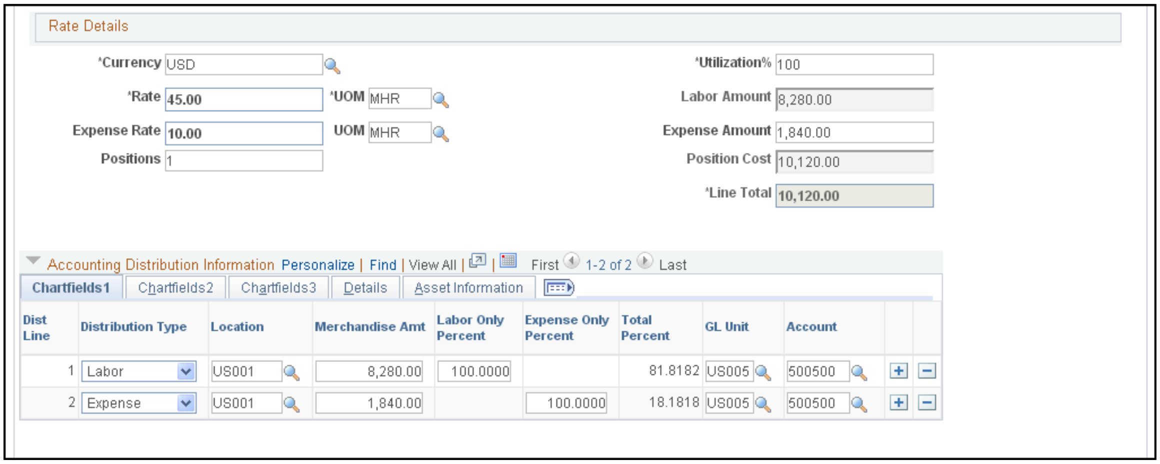
*Start Date 11/05/2014

*End Date 12/05/2014

Calendar Duration 31

Estimated Service Days 23

This example illustrates the fields and controls on the Requisition page (2 of 3). You can find definitions for the fields and controls later on this page.



Rate Details

*Currency USD

*Rate 45.00

*UOM MHR

Expense Rate 10.00

UOM MHR

Positions 1

*Utilization% 100

Labor Amount 8,280.00

Expense Amount 1,840.00

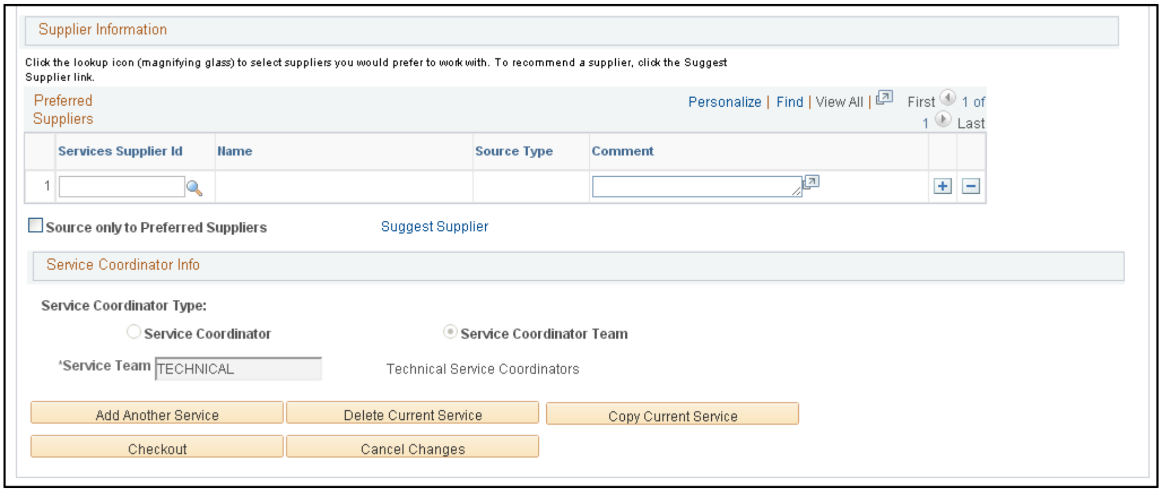
Position Cost 10,120.00

*Line Total 10,120.00

Accounting Distribution Information

Dist Line	Distribution Type	Location	Merchandise Amt	Labor Only Percent	Expense Only Percent	Total Percent	GL Unit	Account
1	Labor	US001	8,280.00	100.0000		81.8182	US005	500500
2	Expense	US001	1,840.00		100.0000	18.1818	US005	500500

This example illustrates the fields and controls on the Requisition page (3 of 3). You can find definitions for the fields and controls later on this page.



Click the lookup icon (magnifying glass) to select suppliers you would prefer to work with. To recommend a supplier, click the Suggest Supplier link.

☐ Source only to Preferred Suppliers

Service Coordinator Type:

○ Service Coordinator ● Service Coordinator Team

*Service Team TECHNICAL Technical Service Coordinators

Note: If you defined the service attributes, the system populates many of the fields in the Service Details section of the Requisition page automatically. If you defined a rate sheet for the service region currency combination, the system automatically populates the rate with the default rate that you defined on the rate sheet.
If you defined defaults on the Requester User Defaults page, many of the fields on the requisition appear by default from that page.

Note: If the HCM integration option is selected on the Services Procurement installation options page, you will see the HCM Fields section on the Requisition page.

See Understanding PeopleSoft Services Procurement and Human Capital Management Integration.

Service Information

Field or Control	***Description***
Engagement Manager	The field is available for all service methods, and is included at the child service level for Multi Resource services. The value for the Engagement Manager will be the same as the Requester upon initial creation for resource, deliverable, and parent multi resource services. For multi resource child services, the value will default from the parent service. You can change the Engagement Manager after creating a requisition. The requisitions will be reassigned when you change the Engagement Manager. For more information, see Replace Engagement Manager Page.

Field or Control	***Description***
Service Method	Review the service method for this requisition. If you defined a default service method using the Requester Defaults page, that method appears as a default value when you initially access this page. You can also select an alternate value other than the default value. Available values include: *Deliverable:* Select to request services that are generally performed by an entire work force, such as a requisition for an entire project, not just the hours worked by a single service provider. *Multi Resource:* Select to request services that support multiple unique services and service providers. When you select this value and enter a service type, the system displays the **Multi Services Information** grid box when you enter a service type. *Resource:* Select to request the services of an individual service provider.
Service Type	Review the service type for this requisition, for example, information technology, professional, or hardware engineering. Initially, this value appears by default from the service requester defaults, if they are defined. You can also select an alternate value other than the default value. Available service types depend on the service method that you select.
Service	Review the specific service or role that is to be performed, for example, Java developer. You can only select services linked to the service type specified. Initially, this value appears by default from the service requester defaults, if they are defined. You can also select an alternate value other than the default value. For example, if you select *Resource* in the **Service Method** field, the system provides only services types that are defined as resource service types. The system also filters the content of the **Service** field based on the service method.
Requesting Dept (requesting department)	Select the requesting department. **Note:** When PeopleSoft Human Capital Management (HCM) integration is enabled, the values are based on the HCM departments.

Field or Control	***Description***
Location	Select the location where the job is to be performed. Initially, this value appears by default from the requester defaults. **Note:** The region for rate sheet selection is automatically derived based on the location specified.
Job Title	Enter the internal classification of the position. This value appears by default from the service attributes, if it is defined.
Request Type	Select an appropriate request type. Values are defined by the Service Administrator. **Note:** This field is not required.
Positions	Enter the number of service providers who will fill the requisition line. However, if the service requisition comes from Resource Management, the system populates values from Resource Management. You can modify the value. **Note:** If you modify the value and save, a notification is sent to the Request Manager to indicate the changes made. The Request Manager has to manually update the Service Order to synchronize with the service requisition. **Note:** You can specify up to 999 positions for a requisition line.
Scope of Work	Enter the scope of the engagement in this free-form field. This value appears by default from the comments field on the service attributes.

Candidate Requirements

Requesters can use this section to enter desired candidate competencies that relate to the service requisition. When candidate skills are deemed insufficient, a configurable rule is initiated to block, warn, or take no action.

Once candidate competencies are defined, service coordinators can view the competencies before sourcing the request to suppliers. This enables the service coordinator to source requisitions to the most appropriate suppliers.

If a service order is created in Resource Management, the system populates Requisition Competencies from Resource Management.

Field or Control	***Description***
Competency	Select a competency to quantify and compare skills. Default values are provided from the service attributes.
Proficiency	Select a proficiency for the competency. The rating model associated to the competency determines the available values.
Experience	Select the years of experience required for the competency.
Action	Select an action for each competency Values include *Block, No Action,* and *Warn.* *Block*: The provider contact is not allowed to submit a candidate if a candidate does not possess the required skill. *No Action*: No action is taken if a candidate does not possess the required skill. *Warn*: A warning message appears to the provider contact and the service coordinator if the candidate does not possess a required skill. The default is *No Action* if service requisition is from Resource Management. **Note:** The action will designate the appropriate message when a requisition competency does not match a provider's competency.
Other Skills	Enter a brief description of any additional skills that a candidate should possess to fill the position. If the Service Order has competencies that are not defined in sPro, they are passed to the **Other Skills** field.
Education Level	Select the education level that a candidate must possess to fill the position. This value appears by default from the competencies defined in the service attributes.
Experience	Enter the number of years of experience that a candidate must possess for the service. This value appears by default from the competencies defined in the service attributes.
Telecommute	Select when the job allows candidates to work from home.
Travel Required	Select when the job requires a candidate to travel.

Field or Control	*Description*
Travel Frequency	If travel is required, enter the percentage of time required for travel.
Interview Required	Select this check box if a candidate interview is required. This option appears by default from the service attributes. When you select this option, you must record interview information prior to offering the position.
Scoring Criteria	Click to access the Bid Factors by Requisition Line page, where you can adjust the weighting of each bid factor to determine its level of importance. **Note:** Bid factor elements are used to evaluate candidate submittals to determine which candidate is the best match for the requisition. The total of the bid factor weightings must add up to 100 before you can leave the page. If you do not visit this page, the system evenly weights each of the bid factors to reach a total of 100. The service coordinator can update the bid factor weightings at sourcing time.

Duration Information

Field or Control	*Description*
Start Date and **End Date**	Enter the dates on which the job begins and ends. **Note:** A message appears to the user and a notification is sent to indicate that the Requisition that was created from a Service Order is modified.
Calendar Duration	Displays the number of days between the start and end dates.
Estimated Service Days	A value appears by default after you enter the start and end dates. This value is used for calculating the quantity based on units of measure. The unit of measure that signifies a day is defined in the installation parameters.
Utilization % (utilization percent)	Enter the percentage of time that the candidate will spend during the engagement. For example, if the candidate typically works a half-day, then utilization is 50 percent. If the candidate typically works 3 days per week, then utilization is 60 percent.

Field or Control	*Description*
Overtime Permitted	Select this check box if overtime is permitted for this requisition. **Note:** This check box is for informational purposes only. Any premiums paid for overtime will depend on the predefined time reporting rules.

Rate Details

Field or Control	*Description*
Rate	Enter the rate of pay that is associated with the service requisition. Modifications to the rate amount are validated against rate sheets that you define for the service and region. The tolerance amount for the rate sheet is verified by using base currency values that are stored at the requisition level. The currency values are not validated if rate sheets are not defined for the project role and region. If you enter a rate amount that is out of tolerance with the rate sheet, then you receive either an error or a warning message. If you select **SP Pay Types Enabled**on the Services Procurement Installation Options page and the requester does not have the *Hide Rate Breakdown* role action, then rates are defined separately for each component of the rate breakdown.
Allow Expenses	Select to allow the entry of expenses on requisitions and work orders. The Allow Expenses setting is derived from the BSetup and Service Type Setup pages. When you select to allow expenses, you must enter an expense rate and amount. The system provides an error message if the **Allow Expenses** check box is selected but an expense-related rate and amount were not entered. **Note:** This check box is only available if **SP Expenses Enabled** is selected on the Services Procurement Installation Options page. Although this setting appears by default from the Services Procurement Business Unit page, you can override it here.
UOM (unit of measure)	Select the unit of measure associated with the labor rate entered.

Field or Control	***Description***
Expense Rate	Enter the expense rate that is associated with the service requisition. The system uses the duration to calculate an expense amount using the expense rate and unit of measure. You must enter a rate if the **Allow Expenses** check box is selected. **Note:** If you enter a value in the **Expense Amount** field, the expense rate is refreshed based on the amount entered. This field is not available when the **Allow Expenses** check box is deselected.
UOM (unit of measure)	Select the unit of measure associated to the expense rate entered.
Labor Amount	Displays the total labor amount calculation, which is based the rate, unit of measure, and service days specified.
Expense Amount	Enter the total expense amount for the requisition. The system calculates the value using the expense rate and unit of measure, but you can override the value. **Note:** This field is not available when the **Allow Expenses** check box is not selected.
Currency	Enter the currency that is associated with the rate. **Note:** You can change the currency only on the first requisition line and only if multicurrency requisitions are allowed. The value from that line appears by default in all subsequent requisition lines. All new currency field values and the base and transaction currency values that you create in a PeopleSoft Services Procurement requisition are passed to the requisition records that are created in the PeopleSoft eProcurement tables.
Position Cost	Displays the estimated cost for one individual to perform the specified service for the duration indicated. This cost includes both the service rate and expense rate for the duration. **Note:** This field is available when the **Override Position Cost** check box is selected.

Field or Control	*Description*
Line Total	Displays the total for labor and expense for all positions for the duration of the requisition.

See Maintain Rate Sheet Page.

Time and Expense Reporting Options

Field or Control	*Description*
Time Reporting Option	Select an option that appears on the Requisition page. Options include: *Actuals*: Select to indicate that the service provider will report actual time against each ChartField distribution line defined on the work order. This option only applies to resource-based requisitions and work orders. *Default from Business Unit*: Select to indicate that the default reporting option defined for the business unit is used for the requisition. *Percent Allocation*: Select to indicate that the service provider or service provider contact will report total time or progress against the work order. This option also indicates that the distribution percentage is used to automatically allocate time or progress across the predefined ChartFields for accounting.

Field or Control	***Description***
Expense Reporting Option	Select an option that appears on the Requisition page. The value for this field is provided by default from the associated business unit or service type. Options include: *Actual Allocation*: Select to indicate that the service provider or service provider contact will report actual expense amounts against each ChartField distribution line defined on the work order. *Default from Business Unit*: Select to indicate that the default expense reporting option that is defined for the business unit is used for allocating expense amounts. *Percent Allocation*: Select to indicate that the service provider or service provider contact will report total expenses or progress on the work order. This option also indicates that the distribution percent is used to automatically allocate expense or progress across the predefined ChartFields for accounting. **Note:** This field is only available when the **Expenses Allowed** check box is selected on the Requisition page.

See Understanding Time Management in PeopleSoft Services Procurement.

See Maintaining Settlement Setup.

Accounting Distribution Information

Use this section to charge funds to the appropriate department or project.

Note: If you create a requisition with multiple positions, all positions share the same ChartField distribution fields.

Field or Control	***Description***
Distribution Type	Select *Labor* or *Expense*.
Merchandise Amt	Enter an amount for labor or expense distribution types.

Field or Control	***Description***
Amount	Enter the amount that is to be charged to a particular ChartField combination. **Note:** Changes to the labor percentage or total percentage trigger an automatic recalculation of the distribution line amount.
Labor Only Percent	Enter the labor percent allocation for the requisition line that is charged to a ChartField combination. **Note:** Changes to the total percentage or amount trigger an automatic recalculation of the labor percentage for the distribution line. This column is available only when the distribution type is Labor.
Expense Only Percent	Enter the expense percent allocation for requisition lines that are charged to a ChartField combination. **Note:** If the amount is changed, then the system automatically recalculates the expense percent for the distribution line. This column is available only when the distribution type is Expense.
Total Percent	Displays the percent of the distribution lines if there is more than one line. If there is one line, then this field equals 100.
Account	Enter the account that is to be charged to a particular ChartField combination.
Budget Status	Displays whether the distribution has been budget checked when commitment control is selected. Values for this field include *Not Chekd* and *Valid.*
Budget Date	Displays the date used by commitment control to determine the budget period to which this item cost belongs.

Field or Control	***Description***
Pre-Encumbrance Balance	Displays the pre-encumbrance balance. Pre-encumbrance is created in your budget records by the budget checking process when you generate a requisition. Pre-Encumbrance Balance will appear only when commitment control is selected and if budget checking has been run at least once for the requisition.

Note: The sum of the expense percentage for all expense lines must equal 100 percent to save the requisition. Defaulting logic for the account ChartField value on expense distribution lines will remain unchanged.

See “Understanding PeopleSoft ChartFields” (Application Fundamentals).

Supplier Information

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

Field or Control	***Description***
Services Supplier ID	Select the preferred service supplier to whom you want to source the requisition, if known. This is an instruction for the service coordinator, it will not be enforced by the system.
Source Type	Displays the source type. Values are *Primary*, *Secondary*, and *Tertiary.*
Source only to Preferred Suppliers	Select to indicate that the service coordinator should source this requisition only to the suppliers defined on the requisition. **Note:** This check box is only available if the requester is authorized to source to preferred suppliers on the service requester defaults.
Suggest Supplier	Click to access the Suggest Supplier page, where you can suggest a supplier who does not yet exist in the system.

Service Coordinator Information

Field or Control	***Description***
Service Coordinator	Select this button to specify the service coordinator who will source this requisition line to service suppliers.
Coordinator	Enter the name of the person who is responsible for filling the requisition line. Initially, this value appears by default from the service requester defaults, if they exist. **Note:** This field is only available when you select the **Service Coordinator** option. **Note:** The service coordinator must have one of the roles defined in the *SP_SRVC_COORDINATOR* role action.
Service Coordinator Team	Select this button to specify a service team that will source this requisition line to service suppliers. **Note:** When creating a requisition, the default service coordinator or team is assigned in this order: first, the system checks for a default team on the service requester; next, it checks for a team by region and service type; last, the system checks in the business unit.
Service Team	Enter the service team that is responsible for filling the requisition request. **Note:** This field is only available when you select the **Service Coordinator Team** option.

HCM Fields

This section displays the PeopleSoft Human Capital Management field names that you use when PeopleSoft Services Procurement is set up to integrate with Human Capital Management.

Field or Control	*Description*
Regulatory Region	Select a regulatory region. The regulatory region functionality is for use in performing regulatory and regional edits. You use the regulatory region for PeopleCode edits, set processing, and to control what codes and values are available to users. PeopleSoft Human Capital Management is delivered with defined regulatory regions that correspond to regions within countries, such as states or provinces, that impact the way your company does business.
Company	Select a company.
Business Unit HR	Select the human resource business unit.
Job Location	Select a location code that indicates where the job is.
HCM Job Code	Select a job code. In HCM, jobs are identified by job codes. You use job codes to maintain information about jobs independent of the person or group performing that job. For example, salary grades and standard hours are assigned to a job regardless of who holds that job.
Establishment ID	Select an establishment defined in PeopleSoft Human Capital Management. Establishments define distinct physical places of business within a company. This option is only visible when the regulatory region is USA or France.
HCM Administrator (PeopleSoft Human Capital Management administrator)	Select the administrator who oversees the PeopleSoft Human Capital Management applications that integrate with PeopleSoft Services Procurement.

Other Page Elements

Field or Control	*Description*
Add Another Service	Click to add another service requisition line.
Copy Current Service	Click to copy the current service requisition line. For multi-resource service types, the system copies all the associated multiple unique services along with the main top-line service.

Field or Control	***Description***
Delete Current Service	Click to delete current service requisition line. For multi-resource service types, the system deletes all the associated multiple unique services along with the main top-line service.
Checkout	Click to access the Checkout – Review and Submit page, where you can submit the requisition for approval.
Cancel Changes	Click to cancel the current requisition line.

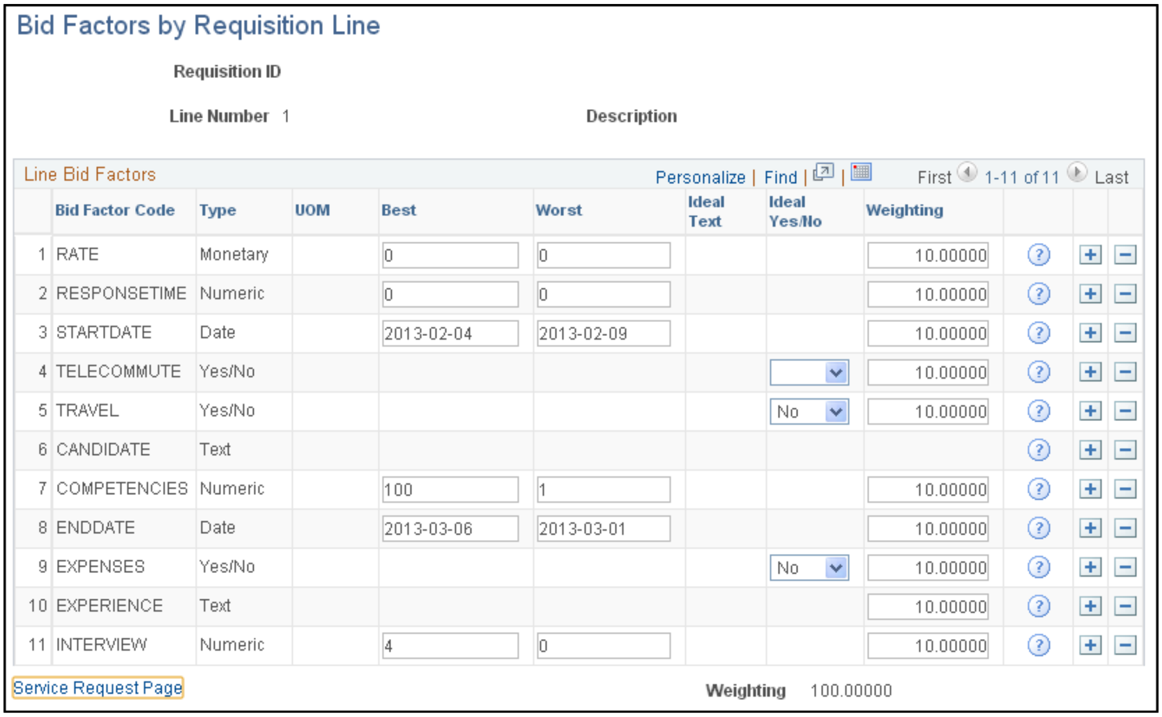
Bid Factors by Requisition Line Page

Use the Bid Factors by Requisition Line page (SPF_BDFTR_REQ_PG) to adjust the weighting of each bid factor to determine its level of importance.

Navigation:

Click the **Scoring Criteria** link on the Service Requisition Information page.

This example illustrates the fields and controls on the Bid Factors by Requisition Line page. You can find definitions for the fields and controls later on this page.



Bid Factors by Requisition Line

Requisition ID

Line Number 1

Description

	Bid Factor Code	Type	UOM	Best	Worst	Ideal Text	Ideal Yes/No	Weighting
1	RATE	Monetary		0	0			10.00000
2	RESPONSETIME	Numeric		0	0			10.00000
3	STARTDATE	Date		2013-02-04	2013-02-09			10.00000
4	TELECOMMUTE	Yes/No						10.00000
5	TRAVEL	Yes/No					No	10.00000
6	CANDIDATE	Text						
7	COMPETENCIES	Numeric		100	1			10.00000
8	ENDDATE	Date		2013-03-06	2013-03-01			10.00000
9	EXPENSES	Yes/No					No	10.00000
10	EXPERIENCE	Text						10.00000
11	INTERVIEW	Numeric		4	0			10.00000

Weighting 100.00000

For resource-based requisitions, the system automatically selects every bid factor with a resource service type bid factor selected on the Bid Factor Mapping page.

Field or Control	***Description***
Bid Factor Code	Displays PeopleSoft Services Procurement bid factor codes that appear by default from the Bid Factors page. **Note:** You can add improvised bid factors or modify existing bid factors while you create the requisition. Improvised bid factors are not predefined for PeopleSoft Services Procurement.
Best and **Worst**	Enter the best and worst possible responses that a candidate can provide in response to a particular question.
Ideal Yes/No	Select the ideal response that a candidate can provide for a particular question. Values are *Yes* and *No.*
Weighting	Adjust the weighting of each bid factor to determine its level of importance. For example, if the candidate start date is the most important qualification, then you might weigh that bid factor more heavily than the others. **Note:** The total of all bid factor weightings must equal 1.
?	Click the **Question** button to view the bid factor question that is associated with the bid factor code. For example, if a bid factor code is experience, then the bid factor question associated with the code might be: "How many relevant years of experience does the candidate have?"

Related Links

Bid Factor Setup Page

Suggest a Supplier Page

Use the Suggest a Supplier page (SPF_SUG_VENDOR) to enter supplier information for a new supplier that is not in the system yet.

Navigation:

Click the **Suggest Supplier** link on the Service Requisition Information page.

Field or Control	***Description***
Supplier Name	Enter the name of the preferred supplier.
Contract	Select to indicate that the supplier has signed the service agreement.

Field or Control	***Description***
Notify by email	Select to send an email notification to the administrator that includes the suggested supplier details. The administrator can elect to add the supplier to the enterprise network.

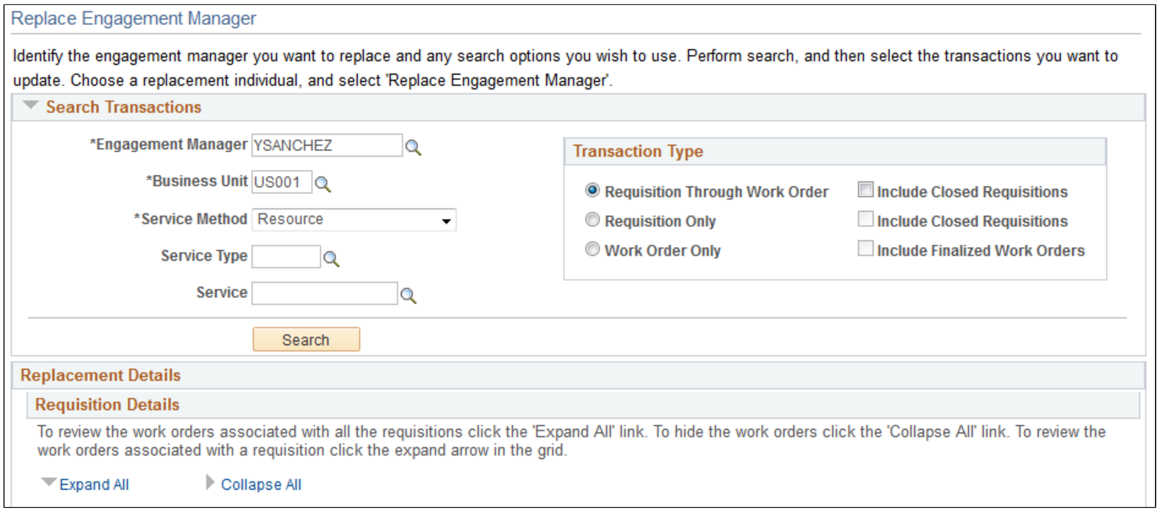
Replace Engagement Manager Page

Use the Replace Engagement Manager (SPB_REPLACE_EM) page to select a new engagement manager for a requisition or work order.

Navigation:

Services Procurement, User and Team Setup, Replace Engagement Manager

This example illustrates the fields and controls on the Replace Engagement Manager page (1 of 2). You can find definitions for the fields and controls later on this page.



Replace Engagement Manager

Identify the engagement manager you want to replace and any search options you wish to use. Perform search, and then select the transactions you want to update. Choose a replacement individual, and select 'Replace Engagement Manager'.

Search Transactions

*Engagement Manager: YSANCHEZ

*Business Unit: US001

*Service Method: Resource

Service Type:

Service:

Transaction Type

● Requisition Through Work Order

○ Requisition Only

○ Work Order Only

☐ Include Closed Requisitions

☐ Include Closed Requisitions

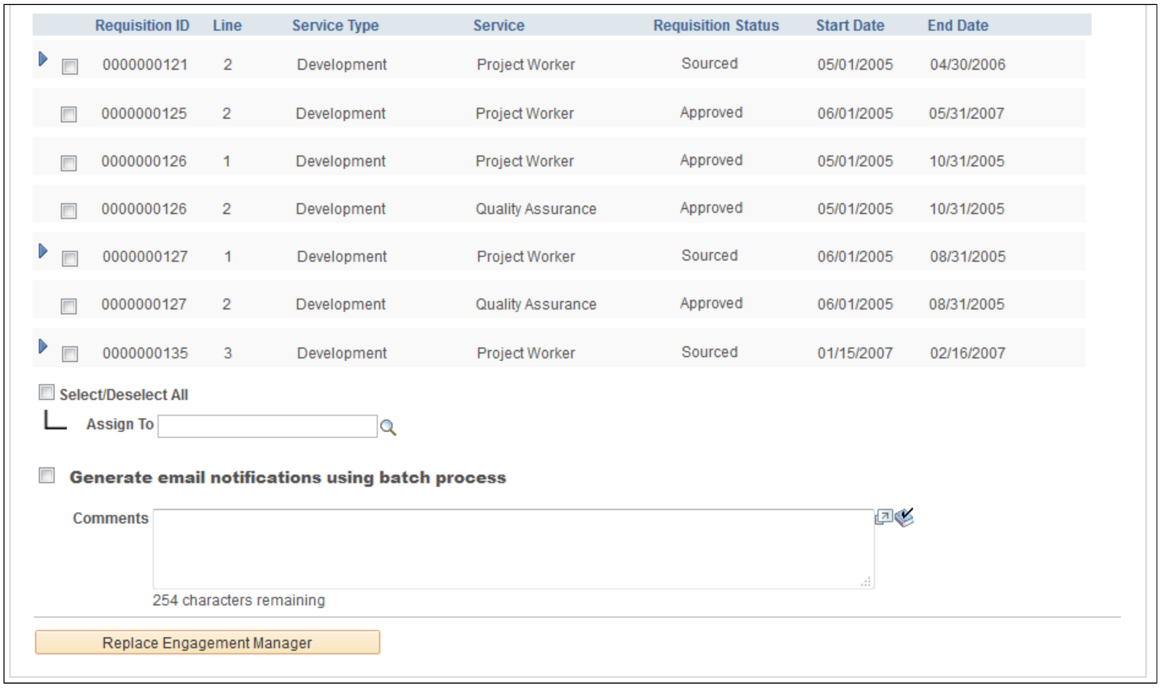
☐ Include Finalized Work Orders

Replacement Details

Requisition Details

To review the work orders associated with all the requisitions click the 'Expand All' link. To hide the work orders click the 'Collapse All' link. To review the work orders associated with a requisition click the expand arrow in the grid.

This example illustrates the fields and controls on the Replace Engagement Manager page (2 of 2). You can find definitions for the fields and controls later on this page.



		Requisition ID	Line	Service Type	Service	Requisition Status	Start Date	End Date
▶	☐	0000000121	2	Development	Project Worker	Sourced	05/01/2005	04/30/2006
	☐	0000000125	2	Development	Project Worker	Approved	06/01/2005	05/31/2007
	☐	0000000126	1	Development	Project Worker	Approved	05/01/2005	10/31/2005
	☐	0000000126	2	Development	Quality Assurance	Approved	05/01/2005	10/31/2005
▶	☐	0000000127	1	Development	Project Worker	Sourced	06/01/2005	08/31/2005
	☐	0000000127	2	Development	Quality Assurance	Approved	06/01/2005	08/31/2005
▶	☐	0000000135	3	Development	Project Worker	Sourced	01/15/2007	02/16/2007

☐ Select/Deselect All

Assign To

☐ Generate email notifications using batch process

Comments

254 characters remaining

Select the current engagement manager, business unit, service method, and transaction type and perform your search.

Field or Control	***Description***
Requisition Through Work Order	Select to replace the Engagement Manager for selected Requisitions and the Work orders associated with them.
Requisition Only	Select to replace the Engagement Manager in selected requisitions only.
Work Order Only	Select to replace the Engagement Manager in selected Work Orders.
Requisition Details	Select the requisitions to be transferred to the new engagement manager.
Assign To	Select the new engagement manager.
Generate email notifications using batch process	Select to send notifications through batch process (i.e. SP_ EMAIL). If you want to send the notification at the time of replacement you may deselect this check box.
Comments	Enter your comments to the new engagement manager.

Field or Control	***Description***
Replace Engagement Manager	Click this button to confirm your selection. Upon confirmation, the new engagement manager receives an e-mail notification.

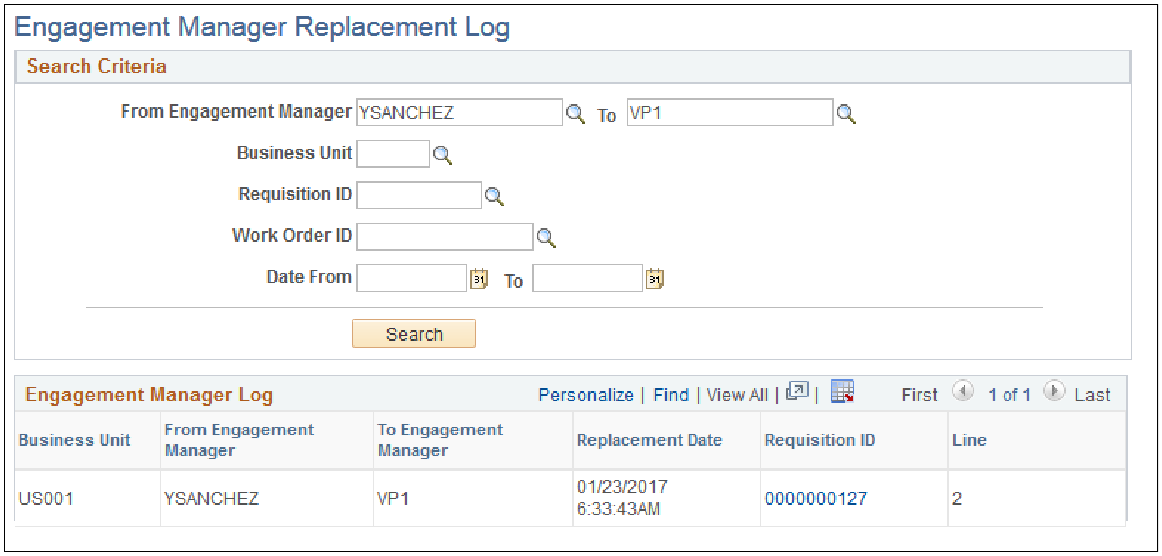
Engagement Manager Replacement Log Page

Use Engagement Manager Replacement Log page (SPB_REPLAEM_LOG) to view the details of the reassigned requisitions.

Navigation:

Click the **Engagement Manager Log** link in the e-mail notification.

This example illustrates the fields and controls on the Engagement Manager Replacement Log page.



Engagement Manager Replacement Log

Search Criteria

From Engagement Manager: YSANCHEZ To: VP1

Business Unit:

Requisition ID:

Work Order ID:

Date From: To:

Engagement Manager Log

Business Unit	From Engagement Manager	To Engagement Manager	Replacement Date	Requisition ID	Line
US001	YSANCHEZ	VP1	01/23/2017 6:33:43AM	0000000127	2

Enter the search criteria to search and view the details of reassigned transactions.

Creating Requisition Lines for Deliverables-Based Services

This topic provides an overview of deliverables-based expense capture in Service Requisitions.

Pages Used to Create Requisition Lines for Deliverables-Based Services

Page Name	***Definition Name***	***Usage***
Requisition Page	SPF_REQ_INFO_PG	Enter basic service requisition information.

Page Name	***Definition Name***	***Usage***
Bid Factors by Requisition Line Page	SPF_BDFTR_REQ_PG	Adjust the weightings of each bid factor to determine its level of importance.
Currency Information Page	EXCH_RT_DTL_INQ	View the currency information and exchange rate. Requisition Page
Suggest a Supplier Page	SPF_SUG_VENDOR	Enter supplier information for a new supplier that is not yet in the system. Requisition Page

Understanding Deliverables-Based Expense Capture

To support resource tracking for deliverables-based engagements, the **Track Resource** option is available in the service type definition. This option initiates the process of identifying the resources for the engagement.

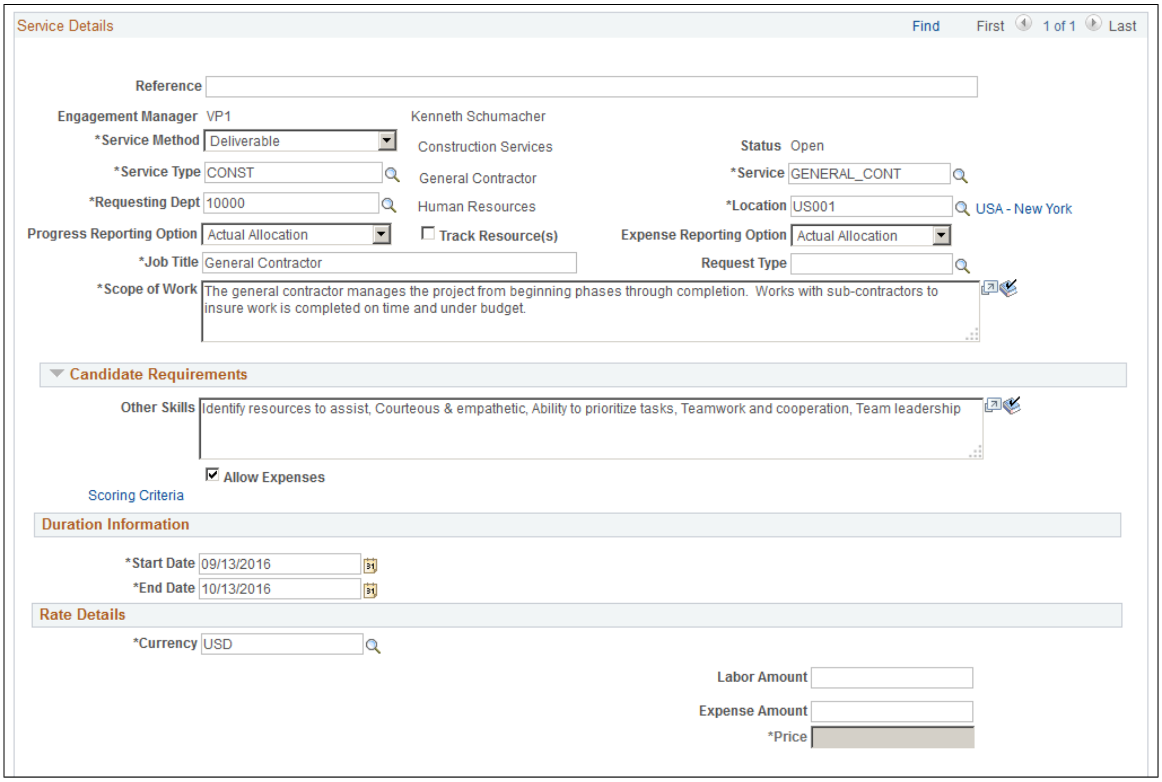
Requisition Page

Use the Requisition page (SPF_REQ_INFO_PG) to enter basic service requisition information.

Navigation:

Services Procurement > Requisitions

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



Reference

Engagement Manager VP1 Kenneth Schumacher

*Service Method Deliverable Construction Services

Status Open

*Service Type CONST General Contractor

*Service GENERAL_CONT

*Requesting Dept 10000 Human Resources

*Location US001 USA - New York

Progress Reporting Option Actual Allocation

☐ Track Resource(s)

Expense Reporting Option Actual Allocation

*Job Title General Contractor

Request Type

*Scope of Work The general contractor manages the project from beginning phases through completion. Works with sub-contractors to insure work is completed on time and under budget.

Other Skills Identify resources to assist, Courteous & empathetic, Ability to prioritize tasks, Teamwork and cooperation, Team leadership

☑ Allow Expenses

*Start Date 09/13/2016

*End Date 10/13/2016

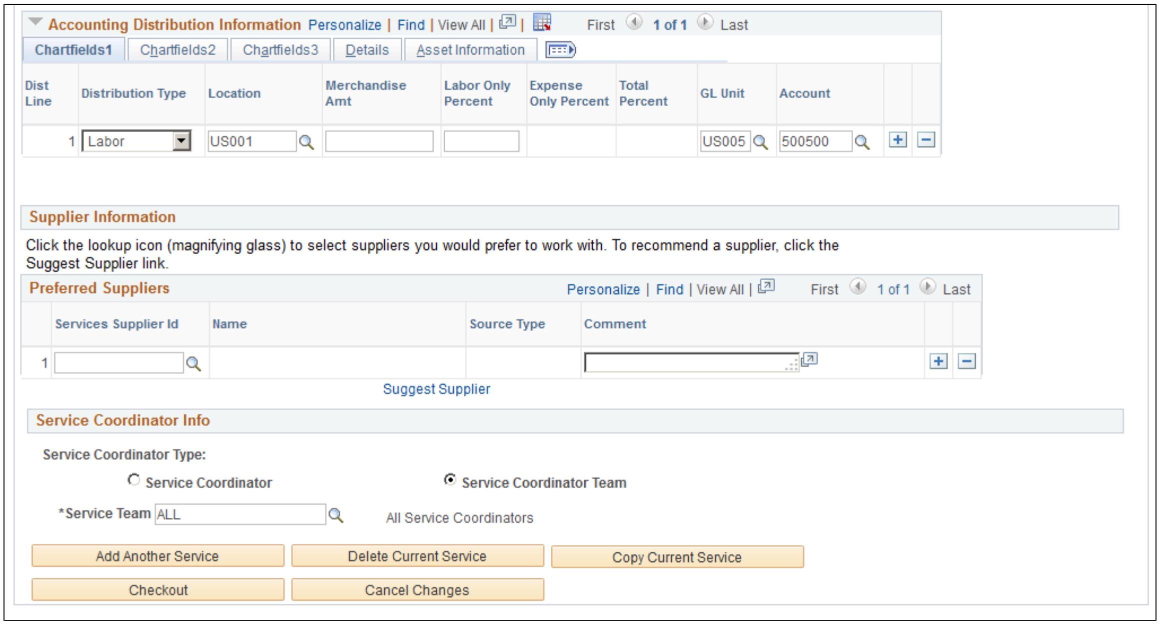
*Currency USD

Labor Amount

Expense Amount

*Price

This example illustrates the fields and controls on the Service Requisition Page (2 of 2). You can find definitions for the fields and controls later on this page.



Dist Line	Distribution Type	Location	Merchandise Amt	Labor Only Percent	Expense Only Percent	Total Percent	GL Unit	Account
1	Labor	US001					US005	500500

Click the lookup icon (magnifying glass) to select suppliers you would prefer to work with. To recommend a supplier, click the Suggest Supplier link.

	Services Supplier Id	Name	Source Type	Comment
1				

Service Coordinator Type:

○ Service Coordinator ● Service Coordinator Team

*Service Team ALL All Service Coordinators

1. Verify the job title, scope of work, and other skills, which appear by default based on attributes associated with the service.

2. Verify the value of the Progress Reporting Option that is defaulted from Service Types. You can override this value. If you modify the values for Service method or for a Service Type, the Progress Reporting Option value will revert to the default value.
3. Enter a price for the entire deliverable rather than an hourly rate, because this is a deliverables-based requisition.
4. Verify the service coordinator, which appears by default from the service requester defaults.
5. Select whether you want to track resources for the deliverables-based requisitions.

   The system provides the settlement options as a default from the service.

Related Links

Understanding Services Projects

Maintaining Service Setup

Bid Factors by Requisition Line Page

Use the Bid Factors by Requisition Line page (SPF_BDFTR_REQ_PG) to adjust the weightings of each bid factor to determine its level of importance.

Navigation:

Click the **Scoring Criteria** link on the Service Requisition Information page.

For deliverables-based requisitions, the system provides bid factors by default from the **Bid Factors by Service, Bid Factors By Activity, Bid Factors by Item Category,** or **Deliverable Service type** check box on the Bid Factor Mapping page. The system eliminates duplicates.

Bid factors enable suppliers to indicate how much they charge for individual price components of the total project amount. You can include lines for each service that you are sourcing. The suppliers answer all the bid factor lines and questions associated with each bid factor code when bidding on the services requisition.

Bid factor weightings must equal 100. If you do not ensure that the bid factors equal 100, the system weighs each bid factor equally. When the service coordinator sources the requisition, he can update the bid factor weightings on the Manage Sourcing page.

Related Links

Sourcing Requisitions

Bid Factors and Requisitions

Bid Factor Setup Page

Creating Requisition Lines for Multi-Resource Services

This topic discusses how to creating requisition lines for multi-resource services.

- Create multi-resource service requisitions.

- Add services to multi-resource requisition lines.
- Add default multi-resource services for requisitions.

Pages Used to Create Requisition Lines for Multi-Resource Services

Page Name	***Definition Name***	***Usage***
Requisition Page	SPF_REQ_INFO_PG	Create multi-resource service requisitions.
Default Service Page	SP_DEF_MULTI_SERV	Add default multi-resource services.
Cap Amount Information Page	SPF_REQ_SERV_PG	Add services to multi-resource requisition lines. Requisition Page

Requisition Page

Use the Requisition page (SPF_REQ_INFO_PG) to create multi-resource service requisitions.

Navigation:

Services Procurement > **Create a Service Requisition**

This page is similar to the both the resource-based and deliverables-based requisition pages described previously in this set of topics. When you select to create a multi-resource service, the Multi Services Information grid and additional buttons become available.

Using this page, you can establish overall requisition line information for the multi-resource service. The amount specified here becomes the overall not to exceed total for the combined associated individual services. In addition, many values specified at the top level, such as location and dates, will default down to the associated individual services when they are created.

Individual Service Information Page

Access the Individual Service Information page (click the **New Services** link on the Requisition page).

This page displays service information associated to the multi-resource service line. The page is similar to the Requisition page, except that it provides parent service information about the related multi-resource service requisition line.

As part of adding services to multi-resource lines, the system:

- Calculates the VMS rate based on the VMS supplier defined at the top level, when applicable.

  If the VMS rate is not available for the lower-level service, the system uses the top-level VMS rate.
- Verifies that the start and end dates of the service do not go beyond the start and end dates defined in the top line.

- Does not enable the **Expense, Expense Rate, Expense UOM,** and **Expense Amount** fields if the top line does not have an expense amount.

Field or Control	***Description***
Add Another Service	Click to open a new service details page, where you can define the details of another service.
Copy Current Service	Click to copy the current service as a new service details page.
Delete Current Service	Click to remove the current service from the multi-resource requisition line. The system prompts you to verify that you want to delete the service.
Previous Service	Click to access the previous service associated to the multi-resource requisition line. Using the link, you can view or edit all the services associated with the multi-resource requisition line without returning to the Requisition page. This link is not available until after you click the **Next Service** link.
Next Service	Click to access the next service associated with the multi-resource requisition line. Using the link, you can view or edit all the services associated with the multi-resource requisition line without returning to the Requisition page.
Continue	Click to save the service data you entered. The system validates the data using the same criteria it uses for resource-based requisitions. It displays messages for data that is not valid. After validation, the system copies the data to the **Multi Resource Information** grid on the Requisition page.
Cancel Changes	Click to roll back all the changes and to reload the original information from the service.

Default Service Page

Use the Default Services page (SP_DEF_MULTI_SERV) to add default multi-resource services.

Navigation:

Click the **Add Default Service** button on the Requisition page. The link is located in the **Multi Services Information** grid, which appears when you create multi-resource requisitions.

Use this page to view basic requisition information that has been defined for default services. The page header provides business unit and requisition information. After selecting the service that you want to include, click the **OK** button and the system loads the services into the **Multi Resource Information** grid on the Requisition page. Click the **Cancel** button to cancel adding a default service.

Field or Control	***Description***
Select	Click to include this service in the requisition line.
Service Type	Displays the ID of a grouping of services. Only service types associated to the*Resource* **Service Method** are included.
Service	Displays a specific service. When you select a service for use with multi-resource services and multiple services are defined for the service, the system displays the **Use Default Service** button so that you can select individual services from the service or select to include all services on the requisition.
Positions	Displays the number of positions for this service. The default value is 1, but you can override this value.
Select/Deselect All	Click to select all services that appear on this page. The default value for the check box is deselected.

Individual Services Information

Use this grid to view and maintain individual service information. The grid is available when you select to use a multi-resource service method and then select a service type. The grid initially appears empty. You populate the grid by adding default services with the button or selecting to add individual services one by one. . You can select from the list of services within a service type.

When you add default services, the services provided by the system are based on the setup of services and service type for multi-resource services.

Field or Control	***Description***
Service Type	Displays the service type after you add or select a service for this requisition.
Service	Displays the service after you add or select a service.
Job Title	Click to access the service details where you can update service information.
Positions	Displays the number of positions that you want to include in this requisition. You can change this information by clicking the service link.
Location	Displays the business unit location used for this service.

Field or Control	***Description***
Start Date andEnd Date	Displays the start and end dates for the service. These dates must be within the date range of the related multi-resource service.
Duration	Displays the length of time for this service. The value is in days. The system calculates the default value for this field by calculation work days within the date range, based on a 5 day work week. You can edit the number of days to indicate a longer or shorter work week as long as the days do not exceed the total number of days within the range.
Rate	Displays the rate at which this service is paid.
UOM (unit of measure)	Displays the unit of measure in which the rate appears.
Add New Service	Click to add a service. The system displays resources-based service information, and you can update the page with the new service information. See Cross Ref to new section

Reviewing, Editing, and Submitting Requisitions

This topic discusses how to review, edit, and submit requisitions.

Pages Used to Review and Submit Requisitions

Page Name	***Definition Name***	***Usage***
Checking out Review and Submit Requisitions	PV_REQ_CHECKOUT	View information about items and services based on type of lines included.
Side by Side Comparison for Services Page	SP_REQ_COMP_SEC	View key attributes side by side for comparison
Recently Ordered Page	PV_REQ_RECENT_ORD	View the recently ordered services
Confirmation	PV_REQ_WF_PREVIEW	View requisition details before submitting the requisition. You can also select to submit or edit the requisition or check the budget using the confirmation page.

Checking out Review and Submit Requisitions

The Checkout page contains a combination of items and services. The system displays the appropriate information for each with the column headings varying according to the type of lines included. Deliverable and Multi resource lines show amount information and Resource lines additionally shows rate and position information.

By clicking the service description, you can navigate to the service line. A line details icon is displayed for sPro lines on the Review and Submit page, which navigates to the Job Summary page.

In addition, the system displays a percentage breakdown on the checkout page for sPro distribution lines.

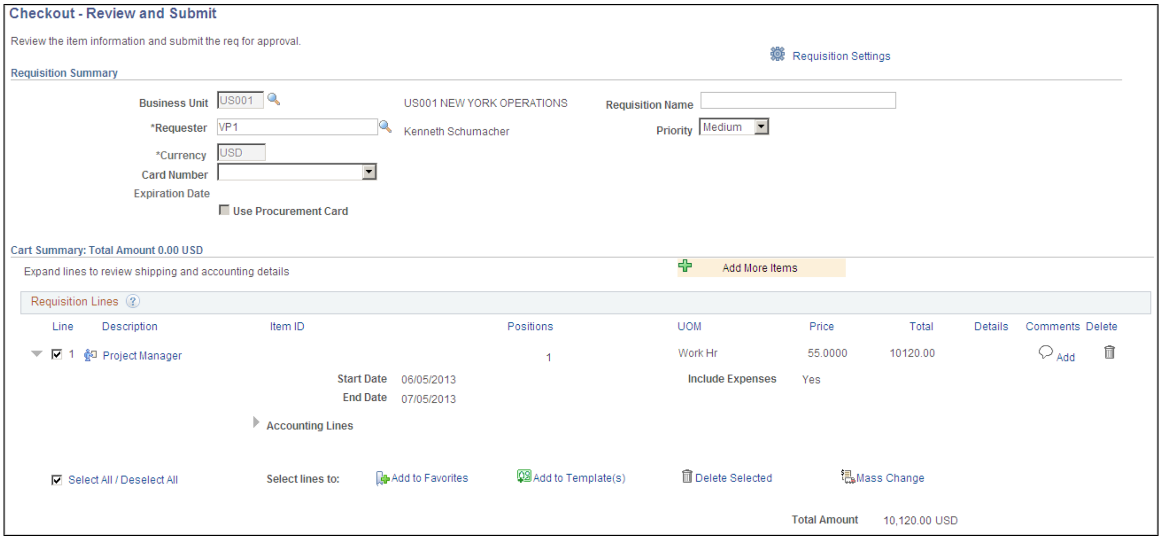
Checkout Review and Submit Page

Use the Checkout Review and Submit page (PV_REQ_CHECKOUT) to view information about items and services based on type of lines included.

Navigation:

Services Procurement > **Requisitions** > **Add a Service Line** . On the sPro page click the Checkout button to navigate to the Checkout page

This example illustrates the fields and controls on the Checkout Review and Submit page.



Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: US001 US001 NEW YORK OPERATIONS

Requisition Name:

*Requester: VP1 Kenneth Schumacher

Priority: Medium

*Currency: USD

Card Number:

Expiration Date:

☐ Use Procurement Card

Cart Summary: Total Amount 0.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Positions	UOM	Price	Total	Details	Comments	Delete
☑ 1	Project Manager		1	Work Hr	55.0000	10120.00		Add	

Start Date 06/05/2013

End Date 07/05/2013

Include Expenses Yes

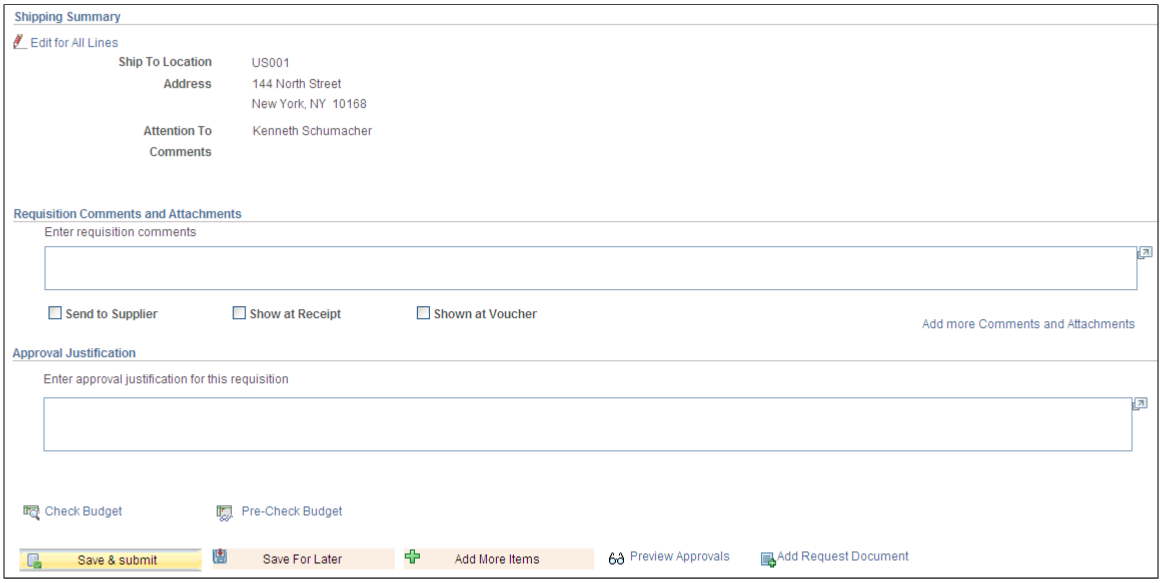
Accounting Lines

☑ Select All / Deselect All

Select lines to:

Total Amount 10,120.00 USD

This example illustrates the fields and controls on the Checkout Review and Submit page 2 of 2.



Shipping Summary

Ship To Location US001

Address 144 North Street
New York, NY 10168

Attention To Kenneth Schumacher

Comments

Requisition Comments and Attachments

Enter requisition comments

Approval Justification

Enter approval justification for this requisition

For multi-resource requisition lines, this page displays only the top-level service request. Click the service Description link in the Requisition Lines grid to access requisition details and to view and update the associated services. If the requisition is going through the re-approval process, you can launch the process from this page.

Field or Control	***Description***
Requester	Enter the requester of the service requisition. **Note:** You are only allowed to edit the requester if you are authorized to request on behalf of other users on the Requester Procurement User Preferences page.
Requisition Name	Enter the requisition name.
Priority	Select the priority of the service requisition. The default is medium priority.
Expiration Date	Displays the expiration date for the credit card. This field is available when you select a credit card number. You cannot change the expiration date.
Use Procurement Card	Select to indicate that you want to use a procurement card for this requisition. This check box is selected when you enter a credit card. If you deselect it, the system removes the credit card information from the requisition. When you select this check box, the system automatically selects the **Use Procurement** check box at the line level. You can also select to use a procurement card at only the requisition line level.

Requisition Lines

If you access a requisition line, the system only permits one service line per requisition; therefore, you cannot delete the line.

Field or Control	***Description***
Line	Displays the line number assigned by the system.
🔒**Select Source Details**	Click to view sourcing details for this requisition line.
Description	Click the link in the Description column to edit the service requisition.
Positions	Displays the number of positions for a resource-based or multi-resource requisition line. If the requisition line is a multi-resource service, then the system calculates the field value as the sum of all the number of positions for the services associated with the multi-resource service line.
Inc. Exp (include expenses)	Displays the expenses for the requisition line when you select to include expenses.
Modify Line/Accounting	Click the **Modify Line/Accounting** button to update the distribution information for multiple lines.
Add/Edit Comments	Add comments for the service requisition line. Comments appear to the supplier if the **Send to Supplier** check box is selected.
Add to Favorites	Click to add the selected line as a favorite that you can select when creating future service requisitions.
Add to Template(s)	For a PeopleSoft Services Procurement, you can select this check box to add the service requisition line as a template item by selecting from the existing templates or creating new templates. For PeopleSoft eProcurement you can use this check box to add the item as a catalog item in the template.

Accounting Lines

Field or Control	***Description***
Dist Type (distribution type)	Displays the distribution type selected for the requisition line. Valid values are *Labor* or *Expense*.

Comparing Services

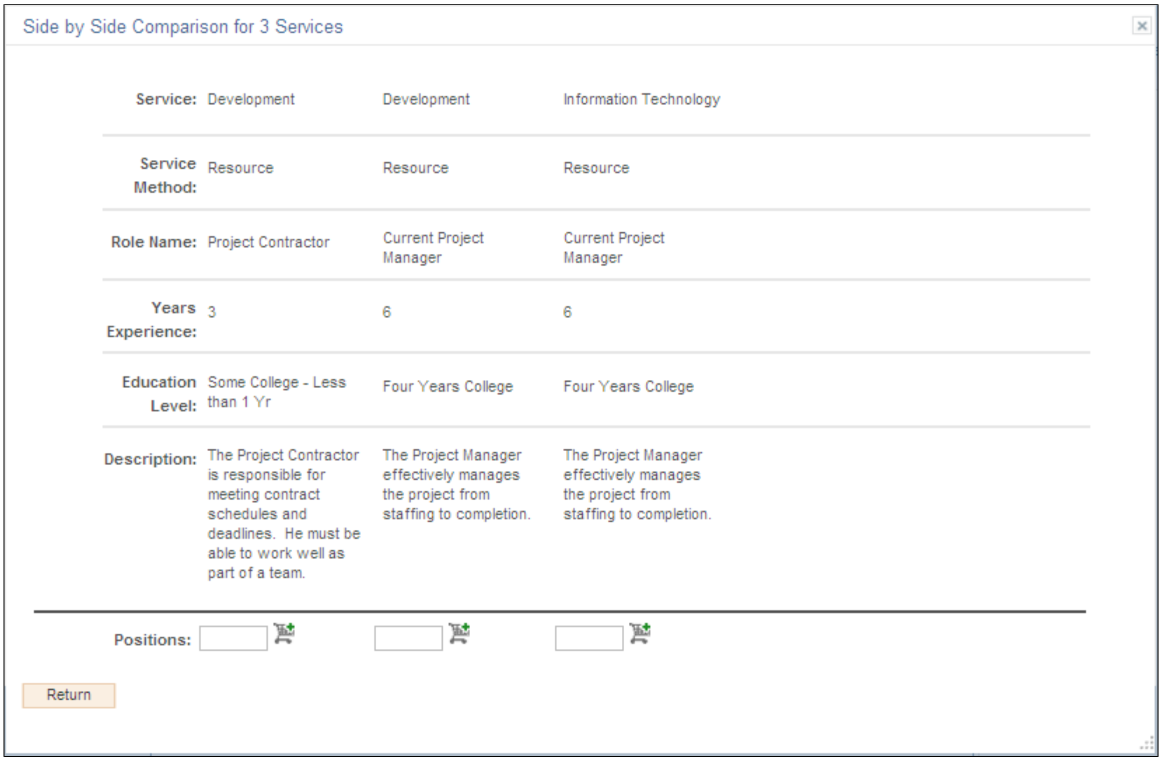
You can select multiple services from the search results and view key attributes side by side for comparison. From Search Results page, select two or more lines, and then click the Compare button at the top of the page.

Side by Side Comparison for Services Page

Navigation:

Use the Side by Side Comparison for Services page (SP_REQ_COMP_SEC)to compare services. (**Services Procurement** > **Requisition** > **Services search result**, click Compare button)

This example illustrates the fields and controls on the Side by Side Comparison for Services page.



Side by Side Comparison for 3 Services

Service:	Development	Development	Information Technology
Service Method:	Resource	Resource	Resource
Role Name:	Project Contractor	Current Project Manager	Current Project Manager
Years Experience:	3	6	6
Education Level:	Some College - Less than 1 Yr	Four Years College	Four Years College
Description:	The Project Contractor is responsible for meeting contract schedules and deadlines. He must be able to work well as part of a team.	The Project Manager effectively manages the project from staffing to completion.	The Project Manager effectively manages the project from staffing to completion.

Recently Ordered Services

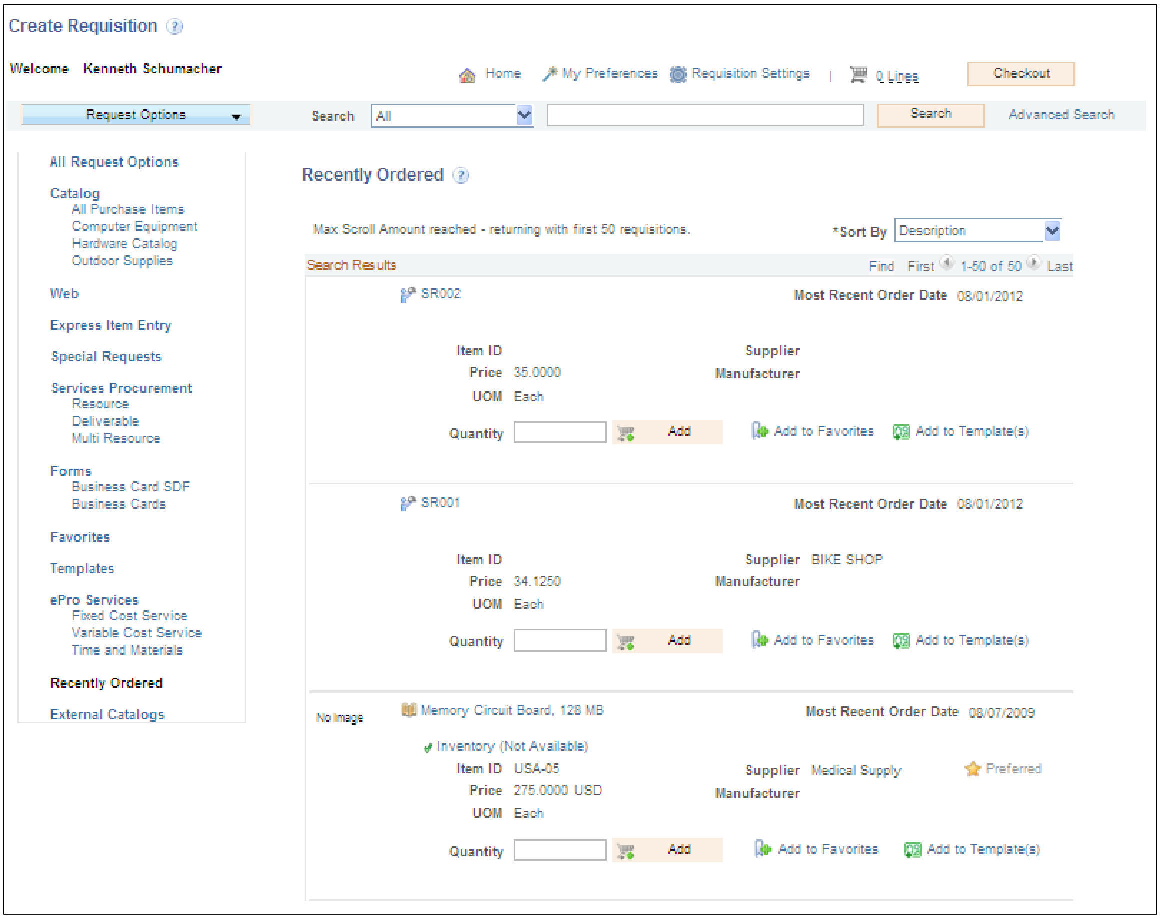
You can view a list of recently ordered services. The Recently Ordered page displays both goods and services using the same format as other search results. Goods and services are displayed separate grids.

Recently Ordered Page

Navigation:

Use the Recently Ordered page (PV_REQ_RECENT_ORD) to view the recently ordered requisitions (From left navigation, select Recently Ordered)

This example illustrates the fields and controls on the Recently Ordered page.



Welcome Kenneth Schumacher

Search: All

Max Scroll Amount reached - returning with first 50 requisitions.

*Sort By: Description

SR002 — Most Recent Order Date: 08/01/2012
Item ID:
Price: 35.0000
UOM: Each
Supplier:
Manufacturer:
Quantity:

SR001 — Most Recent Order Date: 08/01/2012
Item ID:
Price: 34.1250
UOM: Each
Supplier: BIKE SHOP
Manufacturer:
Quantity:

Memory Circuit Board, 128 MB — Most Recent Order Date: 08/07/2009
Inventory (Not Available)
Item ID: USA-05
Price: 275.0000 USD
UOM: Each
Supplier: Medical Supply
Manufacturer:
Quantity:

Managing Service Requisitions

This topic discusses how to manage service requisitions.

Pages Used to Manage Service Requisitions

Page Name	***Definition Name***	***Usage***
Manage Requisitions Page	PV_REQ_STATUS	Manage requisitions that are entered by the service coordinator or requester. You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.
Requisition Details Page	SPF_REQ_STATUS_PG	View services requisition details.

Page Name	***Definition Name***	***Usage***
Requisition Line Job Summary Page	SPF_REQ_SUMMARY_PG	View the requisition line summary. Requisition Details Page
Requisition Line Position Details Page	SPF_REQ_LN_FILL	View individual position information for resource and multi-resource service requisition lines. Access the Filled Service Details page. Requisition Details Page
Filled Service Details Page	SPF_REQ_SERV_FILL	View filled services for a requisition line.
Requisition History Page	SPF_REQ_HISTORY	Review the history of your requisition request, including the service coordinator or team that was assigned to the requisition at the time this history was recorded. Requisition Details Page
Change Request List Page	PV_CHNG_RQST_LIST	Inquire about change requests. Manage Requisitions Page
Requisition to PO Xref Page (requisition to purchase order cross-reference)	RUN_POY100	Run the Requisition to PO Cross-Reference report. Manage Requisitions Page
Requisition Schedule and Distribution Page	PV_REQ_APP_DTL_GRD	View the requisition schedule and description. Requisition Details Page
“VAT Details For Distribution Page” (PeopleSoft eProcurement)	REQ_INQ_DIST_VAT	View value-added tax (VAT) calculations and information for the selected schedule or distribution. You only have access to VAT information if the PeopleSoft Purchasing business unit has enabled VAT on requisitions and VAT is applicable for the requisition.
Requisition Service Details Page	SPF_REQSUM_SERV_PG	View requisition service details. “VAT Details For Distribution Page” (PeopleSoft eProcurement)

Page Name	***Definition Name***	***Usage***
Requisition Life Cycle Page	PV_REQ_CYCLE_PAGE	View the location of a requisition in the requisition life cycle. Requisition Details Page
Close Requisitions Page	RUN_REQRECON	Close all qualified requisitions using the Run Close Requisitions process and generate the Requisition Reconciliation report.

Requisition Details Page

Use the Requisition Details page (SPF_REQ_STATUS_PG) to view services requisition details.

Navigation:

Expand the collapsible grid section for the requisition request and then click the **Requisition** button on the Manage Requisitions page.

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

Requisition Details

Requisition Summary

Requisition Name	Requisition ID	Unit	Date	Status	Total
0000000107	0000000107	US001	11/30/2012	Approved	4,024.50

Requisition Lines

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	25 inch Desktop LCD Monitor,...	Available	No	1.0000 Each	125.00000 USD	Approved	125.00
2	802.11 g/b Desktop PC Router...	Available	No	1.0000 Each	72.50000 USD	Approved	72.50

Contract Information

SetID	Contract ID	Version	Contract Line	Category Line
SHARE	0000000000000000000000058	1	2	

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
3	1337 Desktop PC Motherboard...	Available	No	1.0000 Each	258.00000 USD	Approved	258.00

Contract Information

The Requisition Details page provides basic information about the requisition, along with line and distribution information. It also provides contract and purchase order information when the requisition has been processed into a purchase order or contract.

Note: This page displays the pre-encumbrance balance for the requisition. When you use commitment control, the system deducts each type of financial obligation from the budget and tracks it according to obligation type. This functionality enables you to determine the monies that you have committed in pre-encumbrances.

Line Item Description

Field or Control	***Description***
Status	Click to access the Requisition History page, where you can view the history of the requisition line details.
Positions	Displays individual instances of a resource-based service. The number of positions for a service line determines the number of service providers who will fill the requisition line. View the total number of positions available for the service request.
Filled Positions	Displays the number of positions that are already filled for the service request, including multi-resource services. When you click the link, the system accesses the Filled Services Detail page with services associated to the multi-resource requisition line.
Requisition Life Cycle	Click to view the location of a requisition in the requisition life cycle.
Requisition Schedule and Distribution	Click to view the requisition schedule and description.
	Click to access the Work Order page, where you can view information about the linked work order. **Note:** This button only appears if you have a work order linked to the requisition line.

Related Links

Understanding Services Work Orders
Understanding PeopleSoft Services Procurement Workflow
Sourcing Requisitions

Filled Service Details Page

Use the Filled Service Details page (SPF_REQ_SERV_FILL) to view filled services for a requisition line.

Navigation:

- Click the **Number of Filled Positions** button on the Requisition Details page.
- Click the **Number of Filled Positions** link on the Job Summary page.

This page displays the filled services associated to the multi-resource requisition line. The top section of the page displays the multi-resource top-line information. If the position is a single position service, then the page displays the name of the service provider. If the position is a multi-resource service position, then the system provides a link to the Requisition Line Position Detail page.

Field or Control	***Description***
Service Type	Displays the service type of the filled requisition line.
Service	Displays the service of the filled requisition line.
Qty (quantity)	Displays the number of positions filled for the requisition line. Multi-resource services can have multiple services with multiple positions. In this case the quantity will reflect the sum of the position quantities for all of the services.
Service Provider	Displays the name of the service provider when the requisition line has only one position. If the requisition line has multiple positions, then a link appears in the field. Click the link to access the Requisition Line Position Detail page, which displays the service providers assigned to this service.
Manage Requisitions	Click to return to the Manage Requisitions page.

Manage Requisitions Page

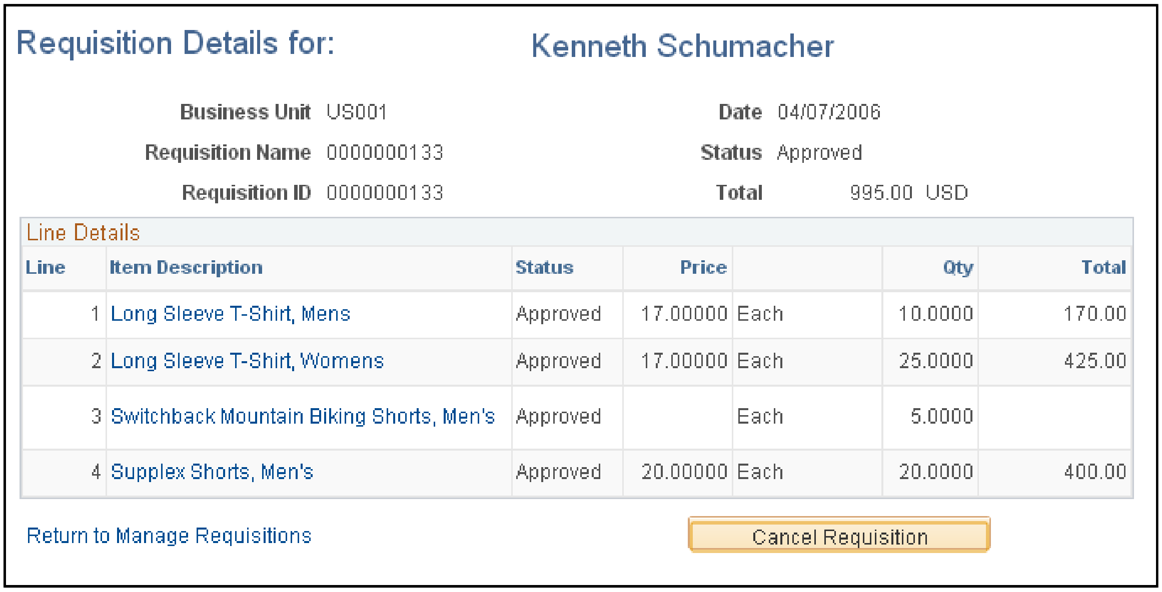
Use the Manage Requisitions page (PV_REQ_STATUS) to manage requisitions that are entered by the service coordinator or requester.

You can review existing service requisitions, edit them, view their statuses, cancel them, or access related sourcing and work order information.

Navigation:

Services Procurement > **Manage Requisitions**

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



Business Unit US001

Date 04/07/2006

Requisition Name 0000000133

Status Approved

Requisition ID 0000000133

Total 995.00 USD

Line	Item Description	Status	Price		Qty	Total
1	Long Sleeve T-Shirt, Mens	Approved	17.00000	Each	10.0000	170.00
2	Long Sleeve T-Shirt, Womens	Approved	17.00000	Each	25.0000	425.00
3	Switchback Mountain Biking Shorts, Men's	Approved		Each	5.0000	
4	Supplex Shorts, Men's	Approved	20.00000	Each	20.0000	400.00

You can cancel requisitions on the Requisition Details page, which you access from the Manage Requisitions page. In addition, you can cancel individual requisition lines from either the Manage Requisitions page or the Requisition Details page.

To access the Requisition Details page and cancel a requisition, select the *Cancel* option from the **Select Option** list of values on the Manage Requisitions page and then click the **Go** button.

After you click the **Go** button on the Manage Requisition page, the system accesses the Requisition Details page, where you can cancel the entire requisition if you have both PeopleSoft eProcurement and Services Procurement installed or a selection of lines if you have only Services Procurement installed.

You can also cancel individual requisition lines one at a time directly from the Manage Requisitions page by opening the line details for the requisition and selecting the **Cancel** button on the individual line.

If you cancel a requisition from the Requisition Details page, select the **Cancel Requisition** button. To cancel selected lines, select the check box to the left of each requisition line to be cancelled and click the **Cancel Selected Lines** button.

Note: When you cancel the requisition or requisition line, the system displays a Cancel Requisition Confirmation page, where you can enter a reason code and comments before confirming the cancellation transaction. The reason code functionality is available if the business unit is defined with optional or mandatory reason codes for requisition cancellation.

Note: When you cancel a requisition line, all affected parties are notified. The system also removes the cancelled requisition line entry from any affected worklists.

Close Requisitions Page

Use the Close Requisitions page (Services Procurement, Reconciliations, Close Requisitions).

Use this page to close all qualified services requisitions and to run the Requisitions Reconciliation Report.

See “Understanding the Close Purchase Orders Process” (PeopleSoft Purchasing).

See PeopleSoft Services Procurement Reports: General Description

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Approving and Denying Requisitions

This topic discusses how to use the requisition approval process.

Pages Used for Approving Requisitions

Page Name	***Definition Name***	***Usage***
Monitor Approvals Page	EOAW_ADM_MON_SRC	Manage Approval Framework approvals. You can also use the Worklist to access requisitions awaiting you approval.
Requisition Approval Page	PV_REQ_APPROVAL	Approve, deny, or hold a requisition during the workflow approval process.
Requisition Approval confirmation Page	PV_REQ_APPR_CONFRM	Confirm or deny the approval of a requisition or requisition line. Monitor Approvals Page
Item Description	PV_NEW_ITM_DESCR	View the requisition line item description.
Comments	PV_REQ_APPLN_WK_COMMENTS	View requisition comments.

See the product documentation for *PeopleTools: Workflow Technology*

Related Links

Setting Up Requisition Workflow

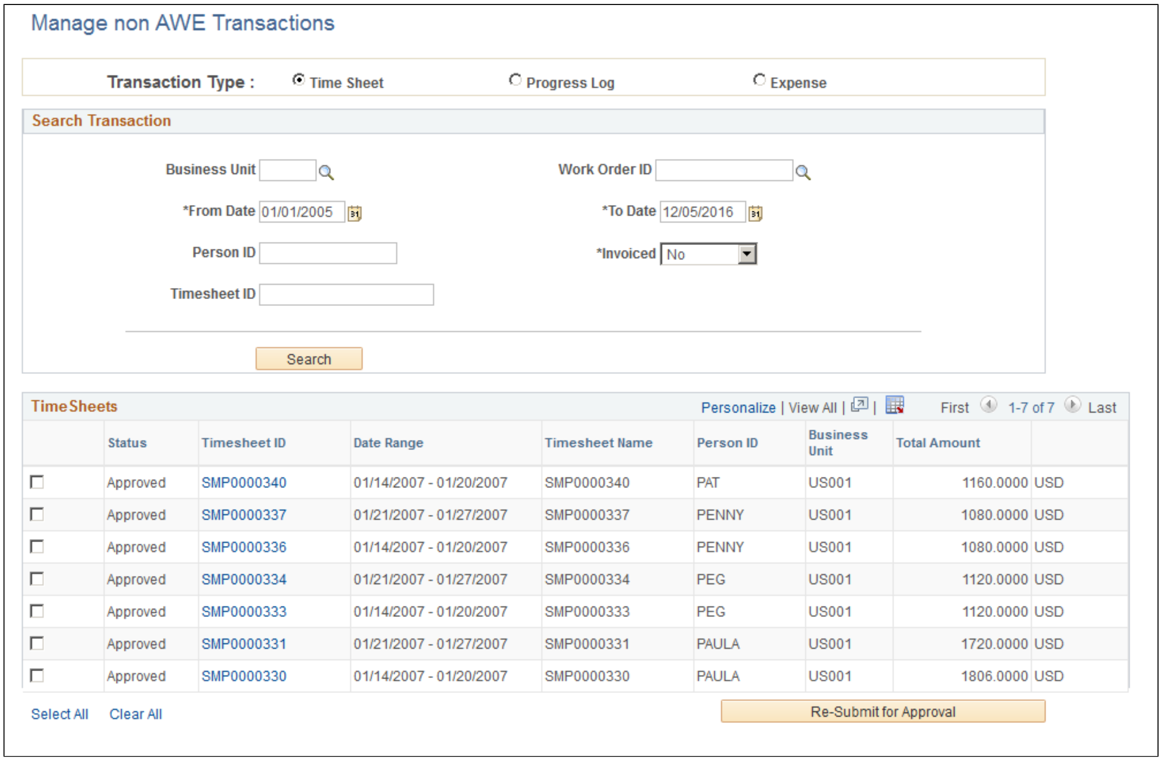
Manage non AWE Transactions Page

Use the Manage non AWE Transactions page (SP_APRR_SRCH_PG) to view and resubmit approved transaction for Timesheets, Progress Logs and Expenses.

Navigation:

Services Procurement, Manage Non-AWE Transactions

This example illustrates the fields and controls on the Manage non AWE Transactions page. You can find definitions for the fields and controls later on this page.



Manage non AWE Transactions

Transaction Type : ● Time Sheet ○ Progress Log ○ Expense

Search Transaction

Business Unit		Work Order ID	
*From Date	01/01/2005	*To Date	12/05/2016
Person ID		*Invoiced	No
Timesheet ID			

TimeSheets

	Status	Timesheet ID	Date Range	Timesheet Name	Person ID	Business Unit	Total Amount	
☐	Approved	SMP0000340	01/14/2007 - 01/20/2007	SMP0000340	PAT	US001	1160.0000	USD
☐	Approved	SMP0000337	01/21/2007 - 01/27/2007	SMP0000337	PENNY	US001	1080.0000	USD
☐	Approved	SMP0000336	01/14/2007 - 01/20/2007	SMP0000336	PENNY	US001	1080.0000	USD
☐	Approved	SMP0000334	01/21/2007 - 01/27/2007	SMP0000334	PEG	US001	1120.0000	USD
☐	Approved	SMP0000333	01/14/2007 - 01/20/2007	SMP0000333	PEG	US001	1120.0000	USD
☐	Approved	SMP0000331	01/21/2007 - 01/27/2007	SMP0000331	PAULA	US001	1720.0000	USD
☐	Approved	SMP0000330	01/14/2007 - 01/20/2007	SMP0000330	PAULA	US001	1806.0000	USD

Field or Control	***Description***
Transaction Type	Select a transaction type. The default transaction type is **Timesheet**.
From Date, **To Date**	Select a date range.
Invoiced	*Yes*: Select to view invoiced time sheets, expenses, or progress logs. *No*: Select to view non-invoiced time sheets, expenses, or progress logs.

Select **Search** to view the approved transactions. To resubmit for transactions for approval, select the transactions and then select **Re-Submit for Approval**. Re-submission is possible only for Approved transactions which are not invoiced.

Monitor Approvals Page

Use the Monitor Approvals page (EOAW_ADM_MON_SRC) to manage Approval Framework approvals.

Navigation:

Services Procurement, Manage Approvals

In addition to using the Worklist to locate and approve requisitions, you can use this page to search for requisitions, review additional requisition information, and select requisitions for approval processing. Search criteria includes searching for requisitions based on their status. **Status** field values include:

- *Approved*
- *Complete*
- *Denied*
- *Hard Deny*
- *Initial*
- *Not active*
- *Pending*
- *Pending Denial*
- *Suspended/Pending Denial*
- *Terminated*

After retrieving search results, you can click the requisition link to access the Requisition Approval page where you can process the approval.

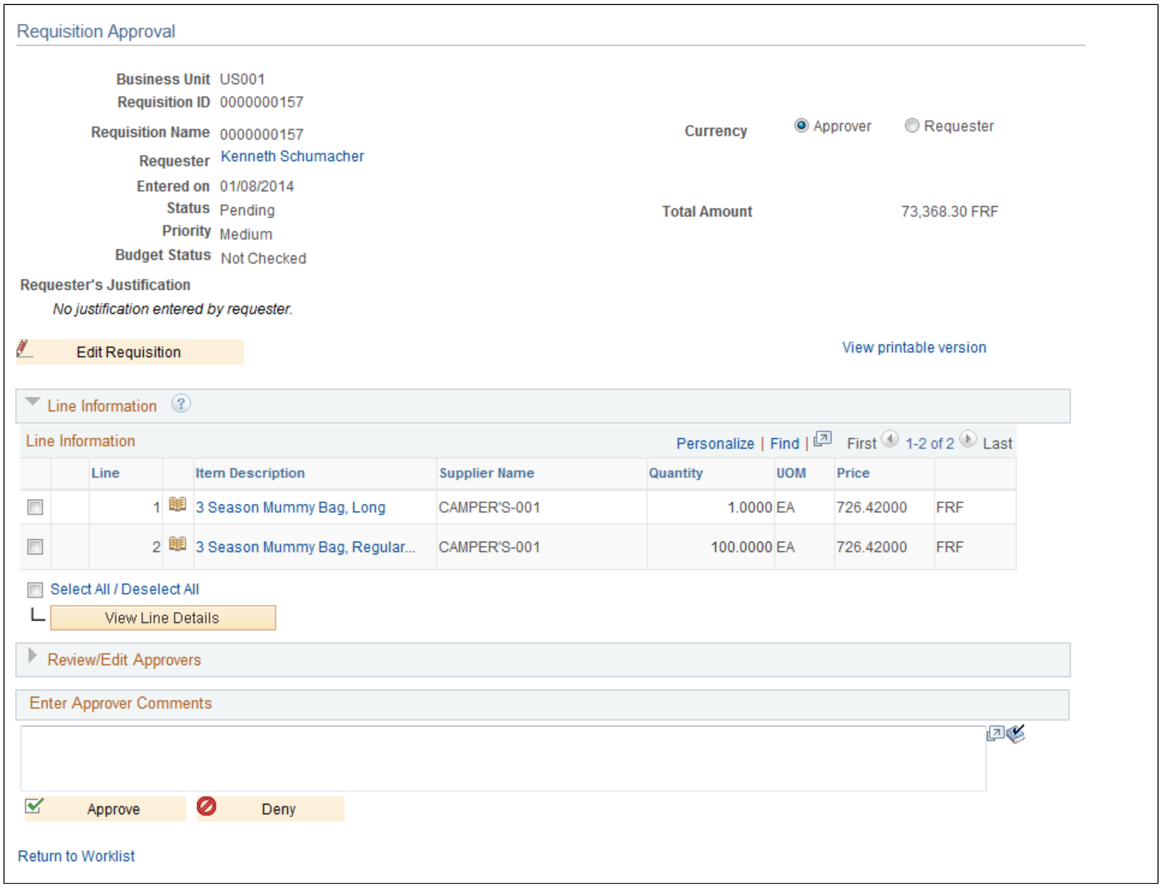
Requisition Approval Page

Use the Requisition Approval page (PV_REQ_APPROVAL) to approve, deny, or hold a requisition during the workflow approval process.

Navigation:

Home > **Worklist**. Select the requisition ID that needs approval.

This example illustrates the fields and controls on the Requisition Approval page (1 of 2). You can find definitions for the fields and controls later on this page.



Requisition Approval

Business Unit US001
Requisition ID 0000000157
Requisition Name 0000000157
Requester Kenneth Schumacher
Entered on 01/08/2014
Status Pending
Priority Medium
Budget Status Not Checked

Currency ● Approver ○ Requester
Total Amount 73,368.30 FRF

Requester's Justification
No justification entered by requester.

	Line	Item Description	Supplier Name	Quantity	UOM	Price	
☐	1	3 Season Mummy Bag, Long	CAMPER'S-001	1.0000	EA	726.42000	FRF
☐	2	3 Season Mummy Bag, Regular...	CAMPER'S-001	100.0000	EA	726.42000	FRF

Use the Requisition Approval page to approve, deny, or push back a requisition during the workflow approval process. You can also add approvers and reviewers to the workflow routing. If you are a reviewer, this page is display-only. You can also access the page using the eProcurement Manage Approvals component.

Available actions change depending on the authorizations for each user accessing the Requisition Approval page. For example, an approver, might not have the authorization to edit the document, so the **Edit Document** button does not appear and the approver can only enter comments as part of an approval or denial.

Note: You must have a workflow role that is assigned for requisition approval or else you must be the requester who entered the requisition.

Click the **Edit Requisition** link to access the Maintain Requisitions - Requisition page. You can make updates to the requisition before approving it.

Line Information

This section displays information about requisition lines.

Field or Control	***Description***
View Line Details	Click to view all lines associated with the requisition. The system creates a scrollable report with the requisition details.
Approve	Click to approve the requisition and access the Requisition Approval confirmation page. Using the page you can view any additional approvals. The approval is immediate when you click the **Approve** button.
Deny	Click to deny this requisition. A worklist entry is sent to the original requester with any comments that you enter. **Note:** When you click this button, you access the Requisition Approval confirmation page, where you can enter a reason code and comments for the denied requisition or requisition line.

Review/Edit Approvers

Use this section of the Requisition Approval page to review aspects of the approval flow, such as who has approved the requisition or who the requisition goes to after your approval. The grid displays all approval steps for the paths that are defined in the approval stage. Each stage is identified by a heading within the grid. The first stage must be approved before the next stage begins the approval process. When a stage begins the approval process, the system updates the approval status in the heading and sets the next stage or stages to the Awaiting Further Approvals status.

Field or Control	***Description***
⊞	Click to enter another approver or reviewer for this requisition. New approvers are added after the approval. The system adds the requisition to the new approver's worklist, and the approver must approve the requisition before it can continue through the approval process. You can add any combination of approvers and reviewers to the requisition by clicking the **Insert Approver** button. **Note:** Another, identical button in this section is used for another function. Click the **Start New Path** button to start a new approval path for the requisition approval process.

Field or Control	*Description*
User ID	Enter the ID for the user that you add as an approver or reviewer of this requisition. **Note:** If you click the **Start New Path** button, this field is used to add a new approver or reviewer to the new requisition approval path.

Note: After a requisition is fully approved, it is removed from the reviewer's to do list whether or not it has actually been reviewed. The requisition then appears in the Worklist belonging to the service coordinator responsible for sourcing the requisition.

Enter Approver Comments

Use this box to enter comments about the requisition. The system keeps the comments for others to review. If comments are required when you deny an approval, the system highlights the box when you click the **Deny** button without entering comments. You must enter a comment before denying the requisition. After you enter comments, click the **Deny** button again to deny the approval of the requisition.

Related Links

Understanding Requisitions

Tracking Requisition Changes

This topic provides an overview of requisition change tracking.

Pages Used to Track Services Procurement Requisition Changes

Page Name	*Definition Name*	*Usage*
Change Template Page	CHNG_ORD_TEMPLATE	Define requisition change templates.
Reason Codes Page	SPB_REASONCD_BU	Define reason codes.
Procurement Change Reason Codes Page	BUS_OPT_PM_REASON	Define Business Unit specific options for Services Procurement, including reason code usage for change tracking “Procurement Change Reason Codes Page” (PeopleSoft Purchasing)
Edit Requisition Page	PV_REQ_FORM	Change requisitions.

Page Name	***Definition Name***	***Usage***
Confirmation Page	SP_REASONCD_DTL	Enter a reason code and comment for making requisition changes that are being tracked.
View Requisition Change Tracking History Page	PV_CHNG_TRK_HIST	View requisition change tracking history.

Understanding Requisition Change Tracking

You can change requisitions and track the history of those changes using the Change Request feature. The feature enables you to determine the fields for which the system tracks changes. The PeopleSoft system uses a common Change Request component for purchase orders, PeopleSoft Purchasing requisitions, PeopleSoft eProcurement and Services Procurement requisitions, and contracts.

For Services Procurement change templates, the system loads the appropriate records so that you can select to:

- Track individual fields for changes.
- Reapprove requisitions when a specific field has changed.

PeopleSoft Services Procurement change tracking set up depends on other whether other PeopleSoft applications are installed on the PeopleSoft system. .

For more information about records and fields available for tracking, see the PeopleSoft Source-to-Settle Common Information documentation.

See “Understanding Change Template” (PeopleSoft Source to Settle Common Information).

For more information about setting up change requests with PeopleSoft Services Procurement with eProcurement, see the PeopleSoft eProcurement documentation .

See “Understanding Requisition Changes and Change Requests” (PeopleSoft eProcurement).

Change Template Page

Use the Change Template page (CHNG_ORD_TEMPLATE) to define requisition change templates.

Navigation:

Services Procurement, Define Services Procurement, General Setup, Change Template

You use the Change Template page to define fields against which you want to track changes. You can define change templates for requisitions, purchase orders, and contracts. You can also define changes for sourced requisition fields that were initiated from the PeopleSoft Services Procurement application. To define a change template:

1. Select a change template type.

Change template types are the record collections from which you select fields to include in change tracking. PeopleSoft provides predefined change template types for purchase orders, contracts, and requisitions. As an example of template type contents, when you select a requisition template type, it contains records for which you can track changes, such as requisition header, line, and schedule fields. Template types can have multiple change templates associated with them.

2. Enter a change template ID.

   You use change templates to create a set of fields that are eligible for change tracking based on the records for the template type that you select. When this change template is selected to record changes for PeopleSoft Services Procurement, the system track changes to the fields. Depending on product installations, the change template is defined at the business unit level for Purchasing when PeopleSoft eProcurement and Service Procurement are installed. The change template is defined on the Service Procurement Definition page when Services Procurement only is installed.

3. Select a record.

   When you select a value in the **Record** field, the system displays all the fields within that are available for change tracking.

4. Use the Record Fields group box to define the fields for which you want to track changes.

5. After you save the record, you can select another record

Field or Control	***Description***
Copy Template	Select an existing change template that you want to copy to create a new template. The template type that you are creating must match the template type from which you want to copy information. When you select a value, the system replaces existing record and field values with values from the copied template. You can then make changes to the new template. You can also copy a template into an existing template. The system removes the existing data and replaces it with the copied template.
Record	Select a record for which you want to define fields for change tracking. If PeopleSoft Service Procurement only is installed, both eProcurement and Services Procurement records are available. **Note:** If you select the *REQ_COMMENTS* record, the only field available for change tracking is *Status.* The system tracks deleted comments only and saves the comment key to the corresponding change track table and inactivates the comment in REQ_COMMENTS table.
Track Change	Select the check box that corresponds to the field for which you want to track changes. You can go through each record and select change tracking fields. After making your selections, click the **Save** button to store the update.

Field or Control	***Description***
Field Valueand**Description**	Displays the field value and description. The fields that appear in this field belong to the record that you selected in the **Record** field.
Reapprove	Select to indicate that if the corresponding field is updated, then the change will initiate a reapprove process for the requisition. If any field in the change template is marked for reapproval and changed in the pending or approved requisition, then the requisition is resubmitted to the Approval Workflow Engine. You cannot re-approve a requisition from the Manage Sourcing page. For Services Procurement fields that are marked for change tracking and re-approval on the change template, if the field is modified by the service coordinator using the Review and Sourcing component, then the system tracks the updated field but does not resubmit the requisition for re-approval.
Update PO (update purchase order)	This setting is not applicable for Services Procurement and is not editable for Services Procurement records. If PeopleSoft Services Procurement only is installed, this check box is not available.
Label Type	Select a label type. The system uses the label type to determine how this field appears on the Change Template page. Values include: *Custom:* Indicates a field label that you specify. When you select *Custom,* the **Label Text** field appears where you can enter the custom label for the field. To save the custom label, the **Track Changes** check box must be selected. *Page:* Indicates that a field label is taken from another page. When you select *Page,* the **Page Name** field becomes available for entry. Enter the page object name from which you want to take the field label. *Rec Long* (record long): Indicates that a field label is taken from the long version of record field text defined for the field. *Rec Short* (record short): Indicates that a field label is taken from the short version of the record field text that is defined for the field.
Page Name	Select a page name from which to take a field label. This field appears when you select *Page* in the **Label Type** field.
Label Text	Enter the text that you want to use for the field custom name label.

Reason Codes Page

Use the Reason Codes page (SPB_REASONCD_BU) to define reason codes.

Navigation:

Services Procurement, Define Services Procurement, General Setup, Business Unit Setup, Services Procurement Defn

Select the Reason Code Setup tab.

This page contains a listing of reason codes that you can maintain for Services Procurement. You can also use the page to define the reason code for procurement changes so that the code is available for selection as a PeopleSoft Services Procurement change reason. Services Procurement uses the purchasing record BU_OPT_PM_RSN to store the reason code setup for change tracking.

Use these steps to make reason codes available for use with Services Procurement:

1. Click the **Change Reason Code** link at the bottom of the Reason Code Setup page.
2. Select the SetID and click the **Search** button to access the Purchasing Options page.
3. Click the**Change Reason Codes**link.

   The Procurement Change Reason Codes page appears.
4. Select a reason code in the **Default Reason Code** field.

   You can also make track change mandatory and require comments for changes using this page.
5. Click the **OK** button and then click **Save** on the Processing Options page.

   After you define the reason code, Service Procurement retrieves the tracking change reason code setup from the Purchasing Processing Option component and displays it as display-only row of data in the Reason Code Setup page. You cannot edit this reason code using this page. You must return to the Purchasing page to make changes to the code

See “Procurement Change Reason Codes Page” (PeopleSoft Purchasing).

Edit Requisition Page

Use the Edit Requisition page (PV_REQ_FORM) to change requisitions.

Navigation:

Services Procurement, Manage Requisitions

Click **Edit** in the **Select Action** field.

You create requisition changes in PeopleSoft Services Procurement using the Edit Requisitions page.

Note: You cannot edit sourced requisitions using the Edit Requisition or Manage Requisitions page. If the service coordinator edits the sourced requisition from the Manage Sourcing page, then the system tracks the changes based on the change request template assigned to the business unit. However, the system does not submit the requisition for reapproval for any changes made on the requisition from the Manage Sourcing page even if the modified field is setup for reapproval on the change template.

After you complete the changes, click the **Go to submit requisition** button. When in use with PeopleSoft eProcurement, Services Procurement passes the tracked change and reason code to eProcurement. When fields are tracked, such as for line, competencies, or bid factors, then the change tracking and reason code setting is set so that eProcurement can trigger the reason code logic when you click the **Save and submit** button.

Note: If the **Service Coordinator** field is set for tracking, changes initiated from the Replace Coordinator or Replace VMS Coordinator pages will also be tracked.

Note: When the Replace Service Coordinator utility is used to change the assigned service coordinator for requisitions, the change tracking rules are followed. Thus, the change tracking template is checked to determine whether the **Service Coordinator** field is being tracked, and if so a change tracking record is created.

View Requisition Change Tracking History Page

Use the View Requisition Change Tracking History page (PV_CHNG_TRK_HIST) to view requisition change tracking history.

Navigation:

Services Procurement, Define Services Procurement, General Setup, Change Tracking History

The Requisition Change History feature provides an audit trail of changes that were made to a PeopleSoft Services Procurement requisition. The history shows all the changes made to the service requisition information sections including header changes, line changes, distribution changes, competencies, bid factors, and preferred supplier changes. Informational messages on the page indicate when there have been no changes to an information section.

You can search for requisitions to view based on business unit, requisition ID ranges, requesters, and date range. After you enter the criteria and click the **Search** button, the system populates the page with requisitions that match the criteria. Search results are returned by descending requisition ID. To view changes for each information section, click the **Expand section** button.

Field or Control	***Description***
Req ID (requisition ID) and Requisition Name	Displays the requisition and its name. Click the **Req ID** link to view the requisition.
Requester Name	Displays who created the requisition.
Modified By	Displays the user ID of the person who last updated the requisition

Field or Control	***Description***
Last Changed	Displays the date and time of the change.
Change Batch	Click to access the ePro Requisition Batch Changes page where you can view the change order number and revision date for the batch job.
Filter Criteria	Click to access the Change Tracking Filter Criteria page where you can search for changes based on, for example, reason codes or requisition line changed fields. These criteria are applied against grid contents.

Click the **Expand Section** button to view requisition changes. The system displays a message that indicates the records to which no change have been made. To view changes made to each record, click the **Expand Section** button for each section.

The sections display basic information about the changes, such as the batch and line, change type, and the change value. The reason code used for the change also appears.

Confirmation Page

Use the Confirmation page (SP_REASONCD_DTL) to enter a reason code and comment for making requisition changes that are being tracked.

Navigation:

Click the **Go To Submit Requisition** button on the Edit Requisition page.

You use this page to select a reason code for making the requisition change. You can define a default value for the reason code using the Procurement Change Reason Codes page. The code can be used for change request in the PeopleSoft Services Procurement business unit. In addition, the **Description** field for the default reason code (entered on the Reason Codes page) is used as the default comment on the change requests. To access the Procurement Change Reason Codes page, select Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Options. Then click the **Change Reason Code** link at the bottom of the page.

Field or Control	***Description***
Reason Code	Select a code. You can use the default code or override it with another code.
Comments	Enter a reason for the requisition change. If a default value for the change has been defined, it appears. You can override the value.

Change Tracking Filter Criteria Page

Click the **Filter Criteria** link on the View Requisition Change Tracking History page)

Use this page to reduce the number of search results in each grid for specific reason codes, batch order changes and individual fields. After you populate the grids on the View Requisition Change Tracking History page with the search results, you can, for example, use the filter criteria on this page to reduce the number of requisition fields returned for the View Requisition Change Tracking History grids. You can select a value in each field to include in the search results.

Field or Control	***Description***
Reason Code	Select a specific reason code for which you want to view tracking history. If you make other change selections on this page, they will be limited to those that were made using this reason code.
Change Order Number	Select a specific change order number for which you want to view tracking history. If you make other change selections on this page, they will be limited to those that were made using this change order number.
Requisition Header	Select a header field for which you want to view changes for a requisition. The fields that are available for selection are those fields that are eligible for use with tracked changes. Fields must first be selected for change tracking using the change template. Then, when changes have been made to the field for the selected requisition, the field appears in the search results when you click the **Search** button.
Requisition Line	Select a requisition line field for which you want to view changes for a requisition. The fields that are available for selection are those fields that are eligible for use with tracked changes.
Requisition Schedule	Select a requisition schedule field for which you want to view changes for a requisition. The fields that are available for selection are those fields that are eligible for use with tracked changes.
Search	Click to filter the search results to the criteria that you defined. The system returns to the View Requisition Change Tracking History page with the results of the search.
Clear	Click to remove all previous selections on this page.
Cancel	Click to return to the View Requisition Change Tracking History page.

Chapter 15

Managing PeopleSoft Services Procurement Sourcing

Sourcing Requisitions

This topic provides overviews of services requisition sourcing rules and the requisition sourcing process.

Pages Used to Source Requisitions

Page Name	***Definition Name***	***Usage***
Manage Sourcing Page	SPF_SRC_MANAGE_PG	Access requisitions for sourcing.
Worklist Page	WORKLIST	View the worklist where you can locate approved requisitions for sourcing using the worklist filter *sPro Approved Requisition.*
Sourcing Selection Page	SPF_SOURCE_SELECT	Sourcing requisitions.
Activities by Requisition Page	SPF_REQ_ACT	View activities defined for a requisition. You can add activities only if *Allow add activities* is enabled for the selected service. The **Activities by Requisition** link appears only for deliverables-based requisitions.
Bid Factor Weighting Page	SPF_BDFTR_WEIGHT	Adjust bid factor weightings for a specific requisition.
Sourcing Rules by Requisition Line Page	SPF_SRCRULES_REQ	Managing sourcing rules by requisition line. If you have the proper permission, you can change the sourcing preferences for the requisition.
Define Requisition Rates Page	SPF_DEFN_REQ_RATES	Define requisition rate details.
Reassign Requisition Line Page	SPF_SRC_REASSIGN	Reassign a requisition line to a different service coordinator.

Page Name	***Definition Name***	***Usage***
Sourcing Review Page	SPF_SOURCE_REVIEW	Using the sourcing review.
Sourcing History Page	SPF_SOURCE_HISTORY	View sourcing history.
Requisition Life Cycle Page	PV_REQ_CYCLE_PAGE	View the requisition life cycle. Manage Sourcing Page
Sourcing Selection Page	SPF_SOURCE_SELECT	Enter sourcing requirements.
Job Summary	SPF_REQ_SUMMARY_PG	View a summary of the requisition job requirements.
Location Address	SPF_ADDRESS_LOC	View the location where the service will be performed.
Sourcing History Page	SPF_SOURCE_HISTORY	Review sourcing history.
Supplier Scoring Results Page	SPB_SUP_SCR_RSLT	View supplier scoring results. Sourcing Selection Page

Understanding Services Requisition Sourcing Rules

PeopleSoft Services Procurement sourcing rules enable the service coordinator to send approved requisitions to suppliers who are best qualified to fill a requisition. When service requisitions are submitted or approved, if the business unit settings are set appropriately, service coordinators can source the requisitions using predefined sourcing rules.

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

- The requisition must be approved.

  Note: In most cases, the requisition must be approved prior to sourcing. However, if you've selected the **Allow Sourcing Prior to Approval** option on the Services Procurement Business Unit page, you can source a requisition request after it has been submitted for approval.

- Suppliers must be defined for the business unit supplier network.

PeopleSoft Services Procurement sourcing rules enable you to define suppliers by different attributes to streamline the sourcing process. Suppliers can be defined by region to ensure that you hire only service providers who are located near you to minimize travel costs.

Suppliers who provide resource-based services can be defined by service type. This enables you to define which suppliers provide the best candidates for a particular service type. To further refine the resource-based supplier list, you can define suppliers by region and service type combination.

Suppliers who provide deliverables-based and multi resource services can be defined by service/project role. This enables you to define which suppliers best fit a particular service. To further refine the deliverables-based and multi resource supplier list, you can define suppliers by region and service combination.

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

You can also use bid factor criteria to determine the top bid submittals for a particular requisition. You can source requisitions to both internal and external suppliers.

PeopleSoft Services Procurement provides supplier metrics to help score, analyze, and compare suppliers based on various aspects of the requisition life cycle. Use supplier scoring to determine the best suppliers to satisfy requisition requirements.

Related Links

Understanding Supplier Scoring for PeopleSoft Services Procurement

Understanding Bid Factors

Understanding the Requisition Sourcing Process

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

1. Access the Manage Sourcing page.

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

2. Access the Sourcing Selection page.

   If the business unit is set up for sourcing prior to approval, select pre-approval pending or approved requisition lines to source to suppliers that are listed according to the sourcing rules. If the business unit is not set up for sourcing prior to approval, select only approved requisition lines to source.

3. Access the Reassign Requisition page.

   If the requisition line should be sourced by another service coordinator, you can reassign it to the appropriate service coordinator. The system creates a worklist entry for the new service coordinator.

   Note: You can access this page only if your system administrator gives you the proper permission to reassign requisitions.

   Note: You can only reassign a requisition before you source it to a supplier.

4. Click the **Bid Factor Weighting** link on the Sourcing Selection page to access the Bid Factor Weighting page.

   Use this page to adjust your bid factor weightings for a specific requisition.

5. Click the **Rules by Requisition Lines** link on the Sourcing Selection page to access the Sourcing Rules by Requisition Lines page.

Use this page to change the sourcing preferences on the requisition.

Note: You can access this page only if your system administrator gives you the proper permission on the Service Coordinator Defaults page. Changing information on the Sourcing Rules by Requisition Lines page overrides all previously defined sourcing to preferred suppliers, and it also refreshes and filters a new list of suppliers that meet the new sourcing preferences.

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

Note: The **Submit** button triggers a PeopleSoft Strategic Sourcing event. All bid factors are associated with this event.

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7. Access the Sourcing Review page, and review the list of suppliers to whom you have sourced the requisition.
8. Access the Sourcing History page, and view the history for individual suppliers.

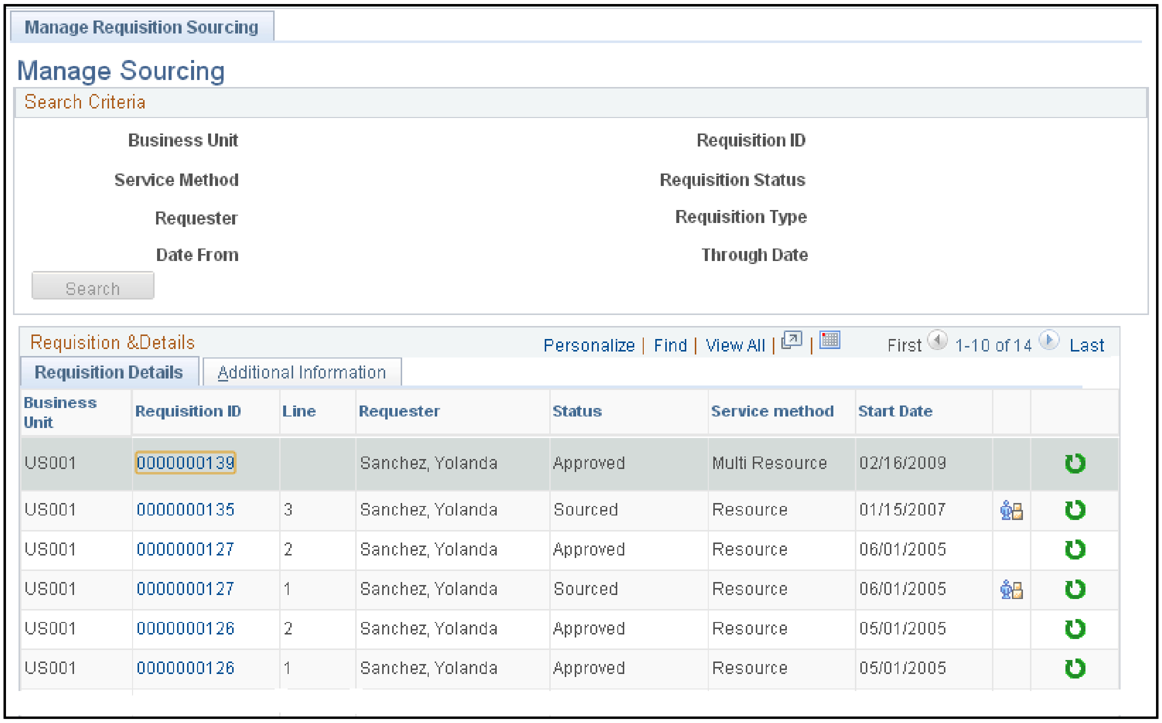
Manage Sourcing Page

Use the Manage Sourcing page (SPF_SRC_MANAGE_PG) to access requisitions for sourcing.

Navigation:

Services Procurement > **Review and Source**

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



Business Unit	Requisition ID	Line	Requester	Status	Service method	Start Date		
US001	0000000139		Sanchez, Yolanda	Approved	Multi Resource	02/16/2009		↻
US001	0000000135	3	Sanchez, Yolanda	Sourced	Resource	01/15/2007	👥	↻
US001	0000000127	2	Sanchez, Yolanda	Approved	Resource	06/01/2005		↻
US001	0000000127	1	Sanchez, Yolanda	Sourced	Resource	06/01/2005	👥	↻
US001	0000000126	2	Sanchez, Yolanda	Approved	Resource	05/01/2005		↻
US001	0000000126	1	Sanchez, Yolanda	Approved	Resource	05/01/2005		↻

The Manage Sourcing page is the central location for accessing and maintaining sourcing information for requisitions and work orders. When you initially access the page, the system displays the requisitions that belong to you. Select the Manage Work Order Sourcing tab to view and access work orders for sourcing. You can enter search criteria to limit the search results.

To search for the requisitions associated with the team but either not yet assigned or assigned to another team member, first select a valid service team, then select a service coordinator and click the **Search** button. The **Service Team** and **Service Coordinator** fields are available only for service coordinators assigned to a team. If you are on a team, all the teams for which you are a member appear in the **Service Team** field list of values. If you aren't on a service team, you can access requisitions only where you are the service coordinator. If you select a requisition from another team member, you have the same access and change privileges for the requisition as the other team member. If you act on a requisition, the system updates the requisition to show you as the service coordinator. This indicates who last worked on the requisition.

You can also source multi-resource transactions. The parent multi-resource service is sourced from the requisition, with visibility of any related individual child services that have been associated to the requisition. However, those individual services are not filled at this time. Only the parent multi-resource service is sourced initially. The individual child services can be sourced with the work order sourcing functionality after the parent multi-resource service has been filled and the related parent work order has been created and approved.

Field or Control	***Description***
Requisition Type	Select to view original or extended requisitions.

Field or Control	***Description***
Requisition Status	View requisitions by status. Statuses include: • *Approved* • *Canceled* • *Closed* • *Denied* • *Filled* • *On Hold* • *Open* • *Pending* • *Pre-Approval Pending* • *Pre-Approval Sourced* • *Sourced* **Note:** If you select the *Pre-Approval Pending* or *Pre-Approval Sourced* value, the system returns requisition values that were sourced but not yet approved. These options are available only when you select the **Pre-Approval Parallel Sourcing** option on the PeopleSoft Services Procurement Business Unit page. See Services Procurement Bus Unit Page.
Service Method	Select a method on which to base a search. Methods include: *Deliverable* *Multi Resource* *Resource*
Service Team	Select a specific team of service coordinators.
Last Worked on by	Select a user ID on which to base a search. This is the user who was the last person to change the requisition.
From Date and Through Date	Define a date range on which to base a requisition search.

Requisition Details

This tab displays the results from the search criteria that you entered.

Field or Control	***Description***
🔍	Click to access the Sourcing Review page.
👤	Click to access the Sourcing Selection page.
↻	Click to access the Requisition Life Cycle page.
✖	Click to cancel the selected requisition line. **Note:** When the service coordinator cancels a requisition line, a confirmation page appears, and the service coordinator can enter the reason code and related comments if the business unit is set up to use reason codes.
¥£$	Click to access the Define Requisition Rates page, where you can define requisition rate details.

Additional Information

Select this tab to view additional information about the requisition, such as the service team, service coordinator, and requisition type.

Worklist Page

Use the Worklist page to source using the worklist filter.

Navigation:

Home > **Worklist**

Field or Control	***Description***
Link	Click the link that corresponds to the requisition ID that you want to source using the worklist filter *sPro Approved Requisition* value. Click this link to access the Sourcing Selection page, where you can source the requisition. **Note:** When an extended requisition is approved, the service coordinator receives a worklist entry with a column indicating that the requisition is extended and approved.

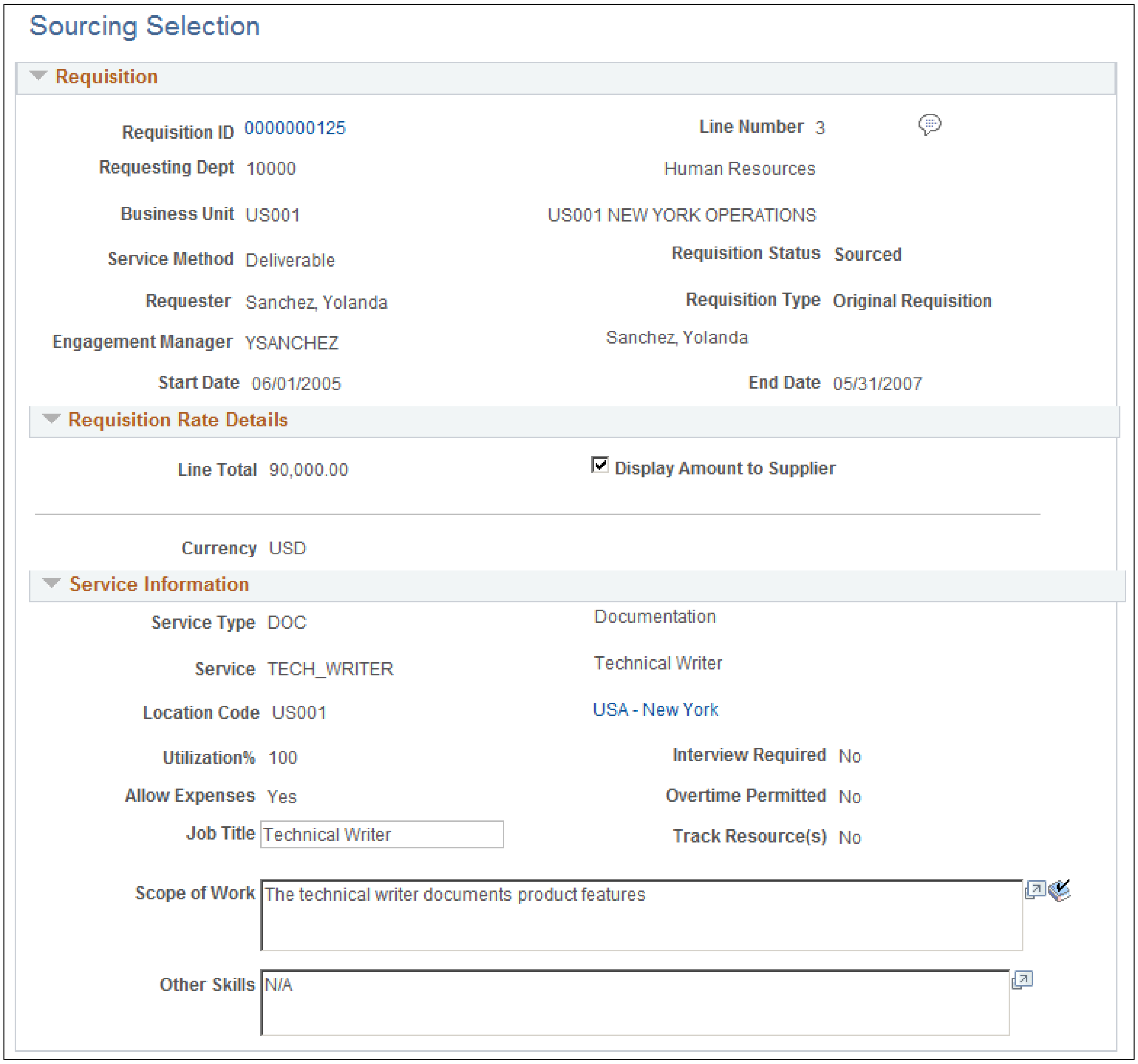
Sourcing Selection Page

Use the Sourcing Selection page (SPF_SOURCE_SELECT) to sourcing requisitions.

Navigation:

Click the **Sourcing Select** button on the Manage Sourcing page.

This example illustrates the fields and controls on the Sourcing Selection page (1 of 2). You can find definitions for the fields and controls later on this page.



Sourcing Selection

Requisition

Requisition ID 0000000125

Line Number 3

Requesting Dept 10000 Human Resources

Business Unit US001 US001 NEW YORK OPERATIONS

Service Method Deliverable

Requisition Status Sourced

Requester Sanchez, Yolanda

Requisition Type Original Requisition

Engagement Manager YSANCHEZ Sanchez, Yolanda

Start Date 06/01/2005

End Date 05/31/2007

Requisition Rate Details

Line Total 90,000.00

☑ Display Amount to Supplier

Currency USD

Service Information

Service Type DOC Documentation

Service TECH_WRITER Technical Writer

Location Code US001 USA - New York

Utilization% 100

Interview Required No

Allow Expenses Yes

Overtime Permitted No

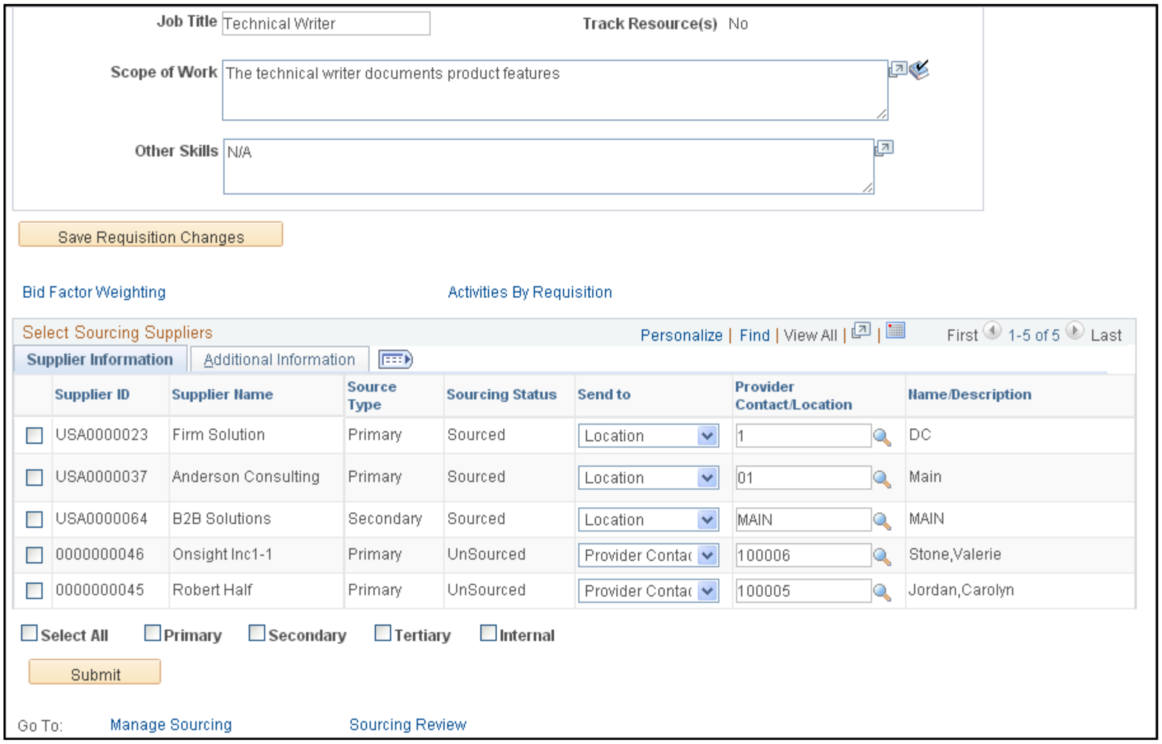
Job Title Technical Writer

Track Resource(s) No

Scope of Work The technical writer documents product features

Other Skills N/A

This example illustrates the fields and controls on the Sourcing Selection page (2 of 2). You can find definitions for the fields and controls later on this page.



Job Title: Technical Writer

Track Resource(s): No

Scope of Work: The technical writer documents product features

Other Skills: N/A

Select Sourcing Suppliers

	Supplier ID	Supplier Name	Source Type	Sourcing Status	Send to	Provider Contact/Location	Name/Description
☐	USA0000023	Firm Solution	Primary	Sourced	Location	1	DC
☐	USA0000037	Anderson Consulting	Primary	Sourced	Location	01	Main
☐	USA0000064	B2B Solutions	Secondary	Sourced	Location	MAIN	MAIN
☐	0000000046	Onsight Inc1-1	Primary	UnSourced	Provider Contac	100006	Stone,Valerie
☐	0000000045	Robert Half	Primary	UnSourced	Provider Contac	100005	Jordan,Carolyn

☐ Select All ☐ Primary ☐ Secondary ☐ Tertiary ☐ Internal

Use this page to review and source the requisition request. When you click a service, you access the Job Summary page for the service. Fields on the Sourcing Selection page vary based on the requisition service method.

Note: The service coordinator can edit many of the requisition fields from this page prior to sourcing the requisition to suppliers. After you update the fields , click the **Save Requisition Changes** button to save the requisition changes.

Note: A service provider/coordinator cannot source a requisition to herself on the Sourcing Selection page.

Note: If you have the **Managed Service Provider Installation** check box selected on the Installations Options page, MSP rate information appears on the Sourcing Selection page.

Field or Control	***Description***
Save Requisition Changes	Click to save the changes that you make to the requisition.
Bid Factor Weighting	Click to access the Bid Factor Weighting page, where you can view bid factor information and attributes. See Bid Factor Weighting Page .

Field or Control	*Description*
Sourcing Rules by Requisition	Click to access the Sourcing Rules by Requisition Line page, where you can update the rate preference, score, and minimum and maximum values. See Sourcing Rules by Requisition Line Page .
Activities By Requisition	Click to access the Activities by Requisition page, where you can view activities for a requisition line. You can also view comments for the line. See Activities by Requisition Page.
Reassign	Click to access the Reassign Requisition Line page, where you can select another service provider for the requisition line. After you reassign the requisition line, the system assigns the line to the new service coordinator and removes it from your work queue. See Reassign Requisition Line Page.

Requisition

The **Requisition** group box provides basic information about the requisition. Click the **Requisition ID** link to access the Requisition Line Job Summary page, where you can view and maintain requisition information. You can also change the requisition start and end dates in this section.

Requisition Rate Details

This group box provides information about the requisition rate, including the requisition line total and currency. You can also select the **Display Amount to Supplier** check box to make the information visible to the supplier.

See Define Requisition Rates Page.

Service Information

This group box provides details about candidate requirements and multiple-resource information for related individual services when you select to source a multi-resource service.

Field or Control	*Description*
Service Method	Indicates whether the requisition is a *Multi Resource, Resource,* or *Deliverable* service method.
Service Type	Displays the service type after you add or select a service for this requisition.

Field or Control	***Description***
Service	Displays the service. Click the link to access the Job Summary page for the service.
Qty (quantity)	Displays the number of positions that you want to include in this requisition. You can change this information by clicking the service link. The field is only available for resource services where you are using a deliverable or multi-resource service.
Location Code	Displays the business unit location used for this service. Click the location link to view the location address associated to the location.
Start Date andEnd Date	Displays the start and end date for the service.
Total Position	Displays the number of positions for this requisition.
Filled Position	Displays the number of positions that have been filled for this requisition.
Utilization% (utilization percentage)	Displays the percentage of time that the candidate will spend during the engagement. For example, if the candidate typically works a half-day, the utilization is 50 percent. If the candidate typically works 3 days per week, the utilization is 60 percent.
Interview Required	Indicates if an interview is required with the candidate to fill this service.
Allow Expenses	Indicates if expenses are allowed for this service.
Overtime Permitted	Indicates if this service permits overtime.
Job Title	Displays the job title used to define the job.
Track Resource(s)	Indicates if the service provider resources are to be included on a deliverables-based requisition.
Scope of Work	Displays the information entered to describe the job.

Field or Control	***Description***
Other Skills	Displays any other skills that a candidate would need to perform this service.
Duration	Displays the length of time for this service.
Rate	Displays the rate at which this service is paid.

Note: The Change Tracking feature setup determines whether changes to requisition data is allowed after approval, and if so whether the changes are tracked.

Service Details

This grid provides information about multi-resource service requisitions. The grid is display-only.

Select Sourcing Suppliers: Supplier Information

You use the Select Sourcing Suppliers: Supplier Information tab to select the supplier to which you want to source a requisition line. You can select an individual supplier or select all suppliers for sourcing the requisition line. You can also select to source the requisition by source type (primary, secondary, tertiary, or internal suppliers). You can select one source type to which to source the requisition line by selecting the corresponding check box.

After you define the source type or manually select individual suppliers for sourcing, click the **Submit** button to source the requisition line. After the system sources the requisition line, it updates the **Sourcing Status** field to *Sourced.*

Field or Control	***Description***
Supplier ID	Displays the supplier. To source this requisition line to the supplier, select the check box and click the **Submit** button.
Supplier Name	Displays the supplier name.
Source Type	Indicates whether the supplier is *Internal, Primary, Secondary,* or *Tertiary.*
Sourcing Status	Displays the sourcing status, *Sourced* or *Unsourced.*
Send To	Select to source the requisition request to either the supplier location or a specific contact at the supplier location. Values include *Location* and *Provider Contact.*

Field or Control	***Description***
Provider Contact/Location	Displays the provider contact name or the location, depending on the selection for the *send to* field.
Name/Description	Displays the name of the service provider or description of the location.
Select All	Click to select all the suppliers listed on the Supplier Information tab.
Primary, Secondary, Tertiary, and Internal	Select a check box to indicate that you want to select all suppliers that are within the a supplier classification. For example, if you want to source requisitions to a secondary supplier, you would select the **Secondary** check box. The system automatically selects all suppliers that are defined as secondary suppliers.

Select Sourcing Suppliers: Additional Information

Field or Control	***Description***
Notification Method	Select *Email and Worklist* or *Worklist Only* to specify the supplier notification method.
Filled Position	The number of people already selected to fill positions for the service. This field is incremented each time a position is filled through bid management and decremented each time a related work order is canceled.
Selection Level	View the supplier selection level values. This value reflects the method that is used to include a supplier in the sourcing selection list. Values for resource-based requisitions are *Region Service Type, Service Type, Region, Preferred,* and *Supplier Network.* Values for deliverable-based and multi-resource requisitions are *Region Service, Service, Region, Preferred,* or *Supplier Network.* **Note:** The selection level indicates the level that is used when you select a supplier.

Field or Control	***Description***
Contract	Indicates whether the supplier has a contract. **Note:** This field appears only if service contracts are enabled on the PeopleSoft Services Procurement Installation Options page, and if *Include all Contract Suppliers* is selected on the PeopleSoft Services Procurement business unit page.
Score	Displays the supplier score based on the established rules that include supplier performance metrics, level codes, weight, and performance-level ranges.
Max Submittal Limit/Position (maximum submittal limit and position)	Enter the maximum number of candidates that a supplier can submit per position for the requisition line. For example, if the requisition line has 5 positions and the maximum submittal limit is set to 3, the supplier may submit up to 15 candidates.
🔍	Click the **Score Analysis** icon to view the analyzed score.

Service Coordinator Edits

If the requisition has not been sourced, service coordinators can edit the **Start Date, End Date,** and **Location** fields. The start date can be moved forward, but not backward. When you change the start date, the system automatically adjusts the end date by the original duration; you can change the end date, but you will be warned if the new duration is shorter than the original duration. The start date, end date, and location fields appear as view only when the requisition is sourced.

Regardless of whether the requisition has been sourced, the service coordinator can edit the job description, competencies, and scope of work.

Related Links

Suppliers by Region Page

Supplier Network Setup Page

Activities by Requisition Page

Use the Activities by Requisition page (SPF_REQ_ACT) to view activities defined for a requisition.

You can add activities only if Allow add activities is enabled for the selected service.

Navigation:

Click the **Activities by Requisition** link on the Sourcing Selection page.

Activities added to the requisition can be added to the work order. The service provider contact can record progress against these activities.

Select a service activity and click the **Save** button.

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

Bid Factor Weighting Page

Use the Bid Factor Weighting page (SPF_BDFTR_WEIGHT) to adjust bid factor weightings for a specific requisition.

Navigation:

Click the **Bid Factors Weighting** link on the Sourcing Selection page.

Field or Control	***Description***
Comment Text	View the bid factors that are associated with a specific requisition.
Weighting	Adjust the weightings of each bid factor to determine its level of importance. For example, suppose that if the candidate start date is the most important qualification, then you would weigh that bid factor more heavily than others. **Note:** The total of all bid factor weightings must equal 100 percent.

Related Links

Bid Factor Setup Page

Sourcing Rules by Requisition Line Page

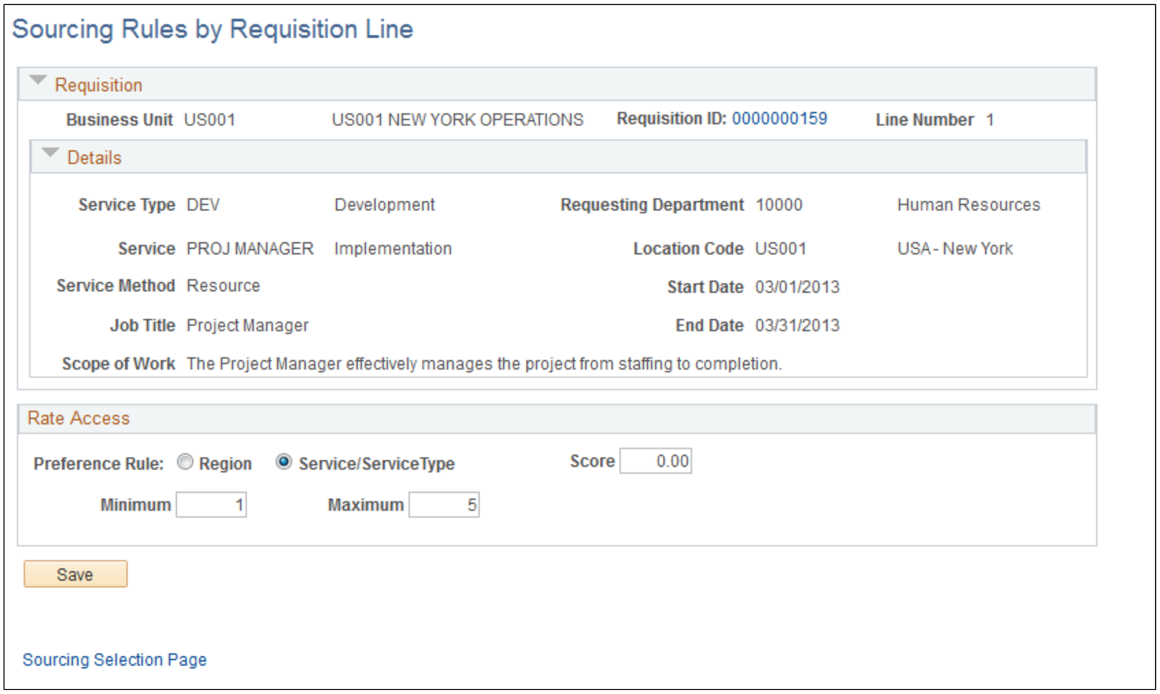
Use the Sourcing Rules by Requisition Line page (SPF_SRCRULES_REQ) to managing sourcing rules by requisition line.

If you have the proper permission, you can change the sourcing preferences for the requisition.

Navigation:

Click the **Sourcing Rules by Requisitions** link on the Sourcing Selection page.

This example illustrates the fields and controls on the Sourcing Rules by Requisition Line page. You can find definitions for the fields and controls later on this page.



Business Unit US001 US001 NEW YORK OPERATIONS Requisition ID: 0000000159 Line Number 1

Service Type DEV Development

Requesting Department 10000 Human Resources

Service PROJ MANAGER Implementation

Location Code US001 USA - New York

Service Method Resource

Start Date 03/01/2013

Job Title Project Manager

End Date 03/31/2013

Scope of Work The Project Manager effectively manages the project from staffing to completion.

Preference Rule: ○ Region ● Service/ServiceType

Score 0.00

Minimum 1

Maximum 5

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

Field or Control	***Description***
Preference Rule	Select **Region** to indicate that selecting suppliers within the same region is more important, or select **Service/Service Type** to indicate that selecting suppliers that provide the right service or service type is more important.
Score	Indicate the minimum score that a supplier must have to be selected for sourcing.
Minimum	Enter the minimum number of suppliers to find using the sourcing rules.
Maximum	Enter the maximum number of suppliers to find using the sourcing rules.
Include All Contract Suppliers	Select to include all suppliers that have an existing contract for the desired role. **Note:** This check box is available only for resource-based requisitions.

Field or Control	***Description***
Save	Click to save changes. When you click the **Sourcing Selection Page** link, the Sourcing engine runs again using the new parameters.

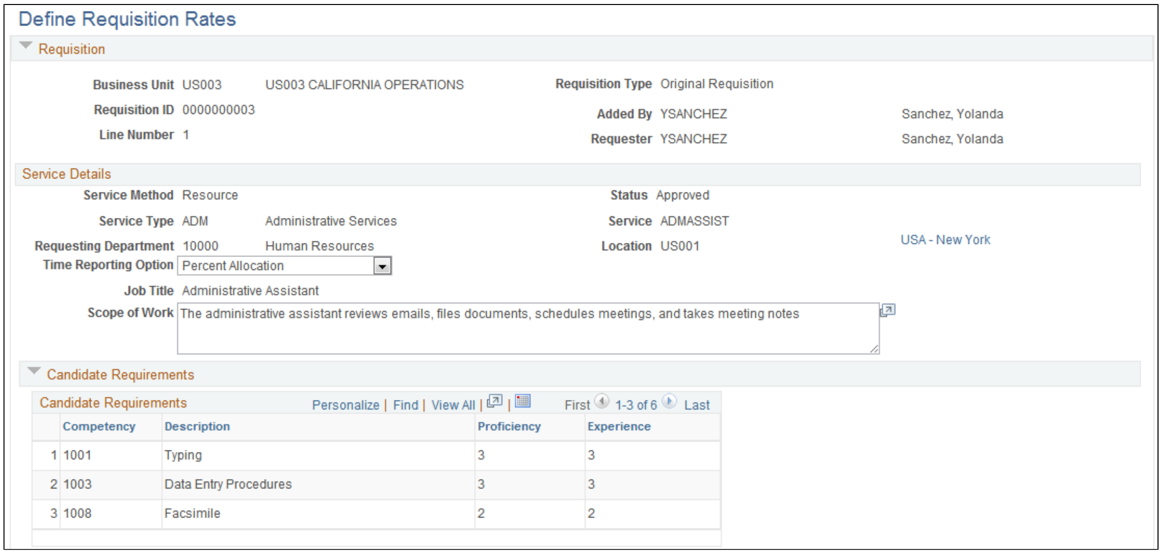
Define Requisition Rates Page

Use the Requisition Rates Page to define requisition rates.

Navigation:

Log in as Service Coordinator > **Worklist** click Define Requisition Rates

This example illustrates the fields and controls on the Define Requisition Rates (1 of 2). You can find definitions for the fields and controls later on this page.



Define Requisition Rates

Requisition

Business Unit US003 US003 CALIFORNIA OPERATIONS

Requisition Type Original Requisition

Requisition ID 0000000003

Added By YSANCHEZ Sanchez, Yolanda

Line Number 1

Requester YSANCHEZ Sanchez, Yolanda

Service Details

Service Method Resource

Status Approved

Service Type ADM Administrative Services

Service ADMASSIST

Requesting Department 10000 Human Resources

Location US001 USA - New York

Time Reporting Option Percent Allocation

Job Title Administrative Assistant

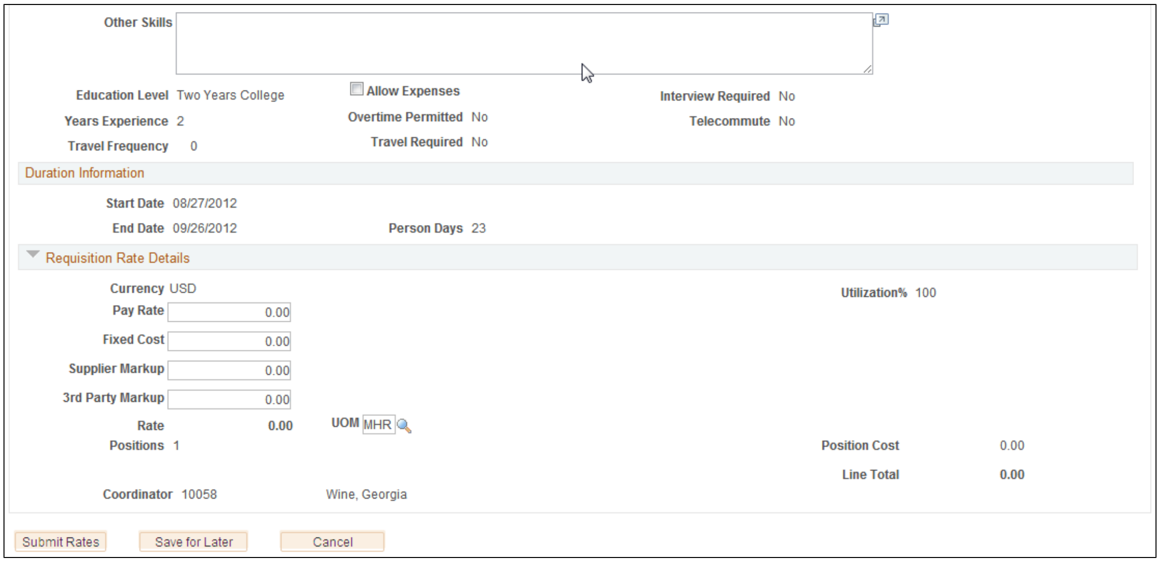
Scope of Work The administrative assistant reviews emails, files documents, schedules meetings, and takes meeting notes

Candidate Requirements

Candidate Requirements Personalize | Find | View All | First 1-3 of 6 Last

	Competency	Description	Proficiency	Experience
1	1001	Typing	3	3
2	1003	Data Entry Procedures	3	3
3	1008	Facsimile	2	2

This example illustrates the fields and controls on the Define Requisition Rates (2 of 2). You can find definitions for the fields and controls later on this page.



Other Skills

Education Level Two Years College

☐ Allow Expenses

Interview Required No

Years Experience 2

Overtime Permitted No

Telecommute No

Travel Frequency 0

Travel Required No

Duration Information

Start Date 08/27/2012

End Date 09/26/2012

Person Days 23

Requisition Rate Details

Currency USD

Utilization% 100

Pay Rate 0.00

Fixed Cost 0.00

Supplier Markup 0.00

3rd Party Markup 0.00

Rate 0.00

UOM MHR

Positions 1

Position Cost 0.00

Line Total 0.00

Coordinator 10058 Wine, Georgia

This page provides requisition and service details, service information, and candidate requirements and duration information. The page is available to the service coordinator when the business unit **Requester Access to Rates** field value is set as *No Access* or *View Only*.

Requisition Rate Details

Field or Control	***Description***
Allow Expenses	Select to allow expenses to be included in the requisition. The check box appears selected or deselected based on its setting on the Create Requisition page. The check box is available if the **SP Expenses Enabled** check box is selected on the Services Procurement Installation Options page.
Labor Amount	Displays the total labor amount calculation based on the rate, unit of measure, and service days specified. You can override the amount.
Expense Amount	Displays the total expense amount for the requisition. The system calculates the value using the expense rate and unit of measure, but you can override the value.
Currency	Displays the monetary currency in which the system measures the expense and labor amounts.
Line Total	Displays the total for labor and expense for all positions for the duration of the requisition.

Rate Definition

When the requester does not have access to the rates, the system routes the requisition to the service coordinator to define the rates.

The service coordinator should define the rates before routing the requisition back to the requester. For multi-resource services, this includes both the top-level parent multi-resource service and the related individual child services. Click the **Service** link to define the rates of individual services. Service coordinators cannot add or delete services from this page.

Field or Control	***Description***
Service Type	Displays the service types for this requisition line. Service types are a way of grouping roles or services.
Service	Displays the services associated with the requisition line. You can click the link to access the Service page. The page displays resourced-based service information for which you can define the rates for the service.
Qty (quantity)	Displays the number of positions required for the requisition line. Multi-resource services can have multiple services for a requisition line.
Start Date andEnd Date	Displays the service provider's earliest start date and end date.
Duration	Displays the number of days between the start and end dates.
Add Individual Services	Click to add a service to this multi-resource service. This button appears if no services are associated with the top-line requisition.

Reassign Requisition Line Page

Use the Reassign Requisition Line page (SPF_SRC_REASSIGN) to reassign a requisition line to a different service coordinator.

Navigation:

Click the **Reassign** link on the Sourcing Selection page.

Field or Control	***Description***
Service Coordinator	Enter a service coordinator to whom you want to reassign the lines.

Sourcing Review Page

Use the Sourcing Review page (SPF_SOURCE_REVIEW) to using the sourcing review.

Navigation:

Click the **Sourcing Review** link on the Sourcing Selection page.

Field or Control	***Description***
No. of Times Sent (number of times sent)	View the number of times this supplier has been sourced for this requisition line.
No. of Submittals (number of submittals)	View the number of bids from the supplier.

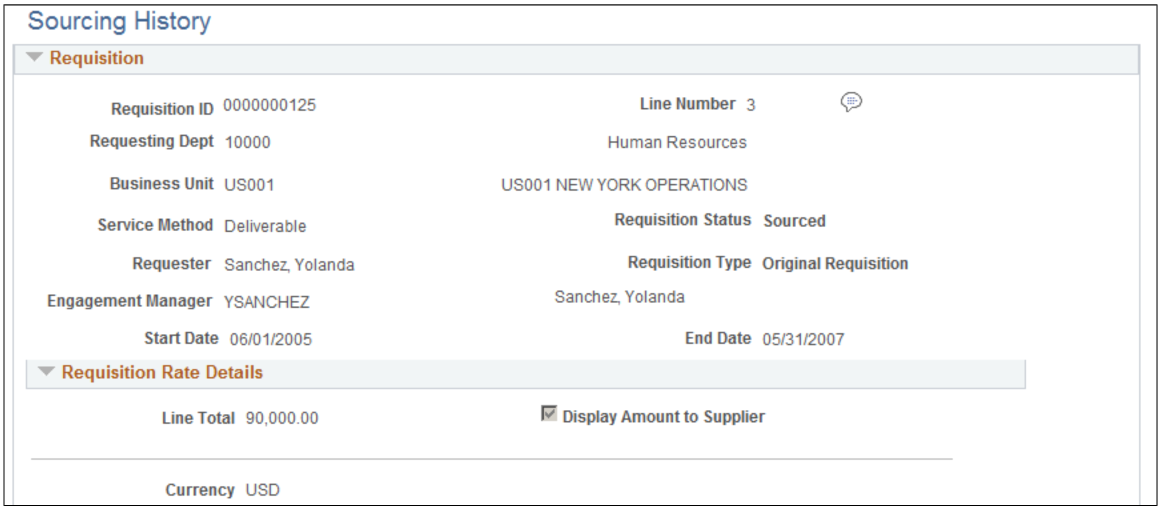
Sourcing History Page

Use the Sourcing History page (SPF_SOURCE_HISTORY) to view sourcing history.

Navigation:

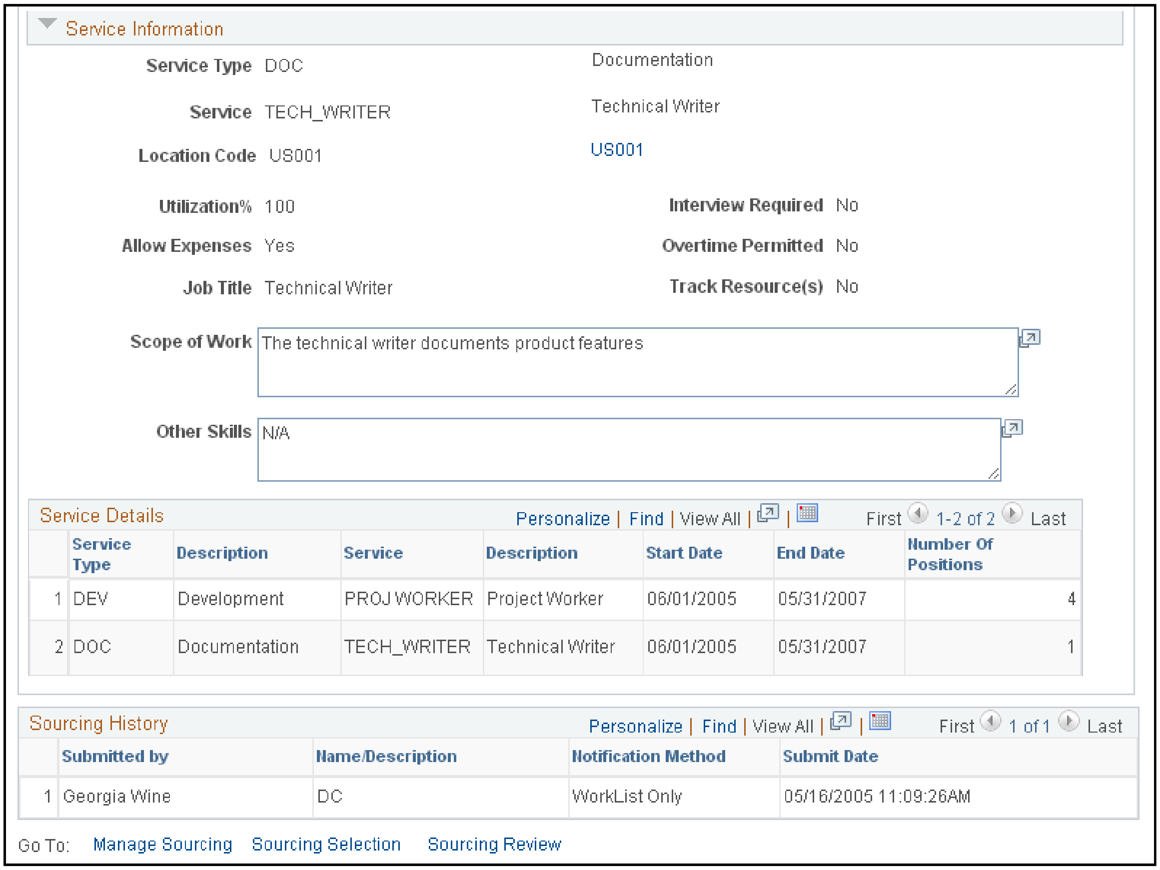
Click the **Sourcing History** button on the Sourcing Review page.

This example illustrates the fields and controls on the Sourcing History Page (1 of 2). You can find definitions for the fields and controls later on this page.



Requisition ID 0000000125
Line Number 3
Requesting Dept 10000 Human Resources
Business Unit US001 US001 NEW YORK OPERATIONS
Service Method Deliverable
Requisition Status Sourced
Requester Sanchez, Yolanda
Requisition Type Original Requisition
Engagement Manager YSANCHEZ Sanchez, Yolanda
Start Date 06/01/2005
End Date 05/31/2007
Line Total 90,000.00
☑ Display Amount to Supplier
Currency USD

This example illustrates the fields and controls on the Sourcing History (2 of 2) page. You can find definitions for the fields and controls later on this page.



Service Information

Service Type DOC Documentation

Service TECH_WRITER Technical Writer

Location Code US001 US001

Utilization% 100 Interview Required No

Allow Expenses Yes Overtime Permitted No

Job Title Technical Writer Track Resource(s) No

Scope of Work The technical writer documents product features

Other Skills N/A

Service Details

	Service Type	Description	Service	Description	Start Date	End Date	Number Of Positions
1	DEV	Development	PROJ WORKER	Project Worker	06/01/2005	05/31/2007	4
2	DOC	Documentation	TECH_WRITER	Technical Writer	06/01/2005	05/31/2007	1

Sourcing History

	Submitted by	Name/Description	Notification Method	Submit Date
1	Georgia Wine	DC	WorkList Only	05/16/2005 11:09:26AM

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

Managing Work Order Sourcing

This topic discusses how to manage work order sourcing.

Pages Used to Manage Work Order Sourcing

Page Name	***Definition Name***	***Usage***
Work Order Sourcing Page	SPF_SRC_MNG_WO_PG	View work orders for sourcing.
Details Page	SPF_WORDER_DETAIL	View details about the work order. Work Order Sourcing Page
Sourcing Select Page	SPF_SOURCE_WO	Source work orders.

Page Name	***Definition Name***	***Usage***
Multi Resource Sourcing Select Page	SPF_SOURCE_SLT_MWO	Source multi-resource work orders.
Work Order Service Sourcing Select Page	SPF_SOURCE_SLT_WO	Source individual work order services within a Multi Resource work order. Multi Resource Sourcing Select Page
Manage Work Order Sourcing Review Page	SPF_SOURCE_REVIEW	Review work order sourcing details.
Work Order History Page	SPF_SOURCE_HIS_WO	View work order sourcing history that was sourced to suppliers.
Requisition Sourcing Review Page	SPF_SOUR_RVW_WO_SP	Review incoming replacements and submit candidates.

Related Links

Creating and Managing Work Orders

Work Order Sourcing Page

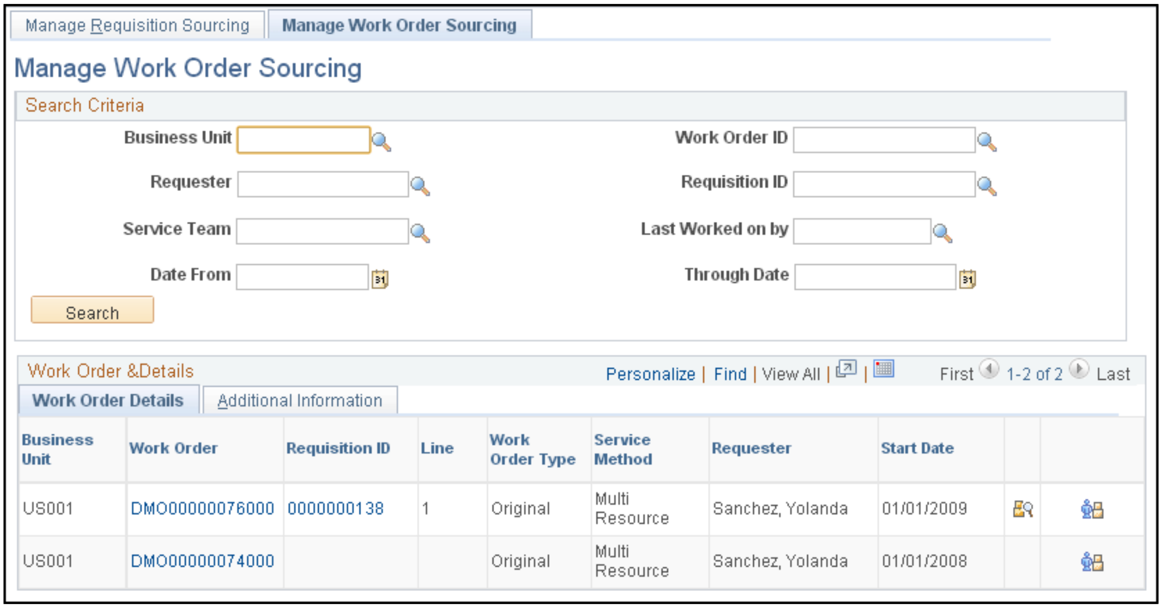
Use the Manage Work Order Sourcing page (SPF_SRC_MNG_WO_PG) to view work orders for sourcing.

Navigation:

Services Procurement > **Review and Source**

Select the Manage Work Order Sourcing tab on the Manage Sourcing page.

This example illustrates the fields and controls on the Manage Work Order Sourcing page. You can find definitions for the fields and controls later on this page.



Business Unit	Work Order	Requisition ID	Line	Work Order Type	Service Method	Requester	Start Date		
US001	DMO00000076000	0000000138	1	Original	Multi Resource	Sanchez, Yolanda	01/01/2009		
US001	DMO00000074000			Original	Multi Resource	Sanchez, Yolanda	01/01/2008		

When you access the Manage Work Order Sourcing page, the system initially displays all work orders for the user. To limit the number of work orders, enter search criteria. Search fields for work orders are similar to those used for searching for requisitions to source. Select a specific work order in the **Work Order ID** field on which to base a search.

Note: After the top-level parent service of a multi-resource requisition line is filled and the related work order is approved, service coordinators can source the service lines one or more at a time using work order sourcing. Sourcing parameters such as notifications, submit limit, and so on are supplied from the top-level line. Service coordinators can still access and update individual services.

When a top-level parent multi-resource service has been filled and the related work order has been approved, service coordinators can then source one or more of the individual child service lines. Some sourcing parameters, such as the notification or the maximum submission limit, are extracted from the top-level parent service.

See Sourcing Requisitions.

The Work Order Details tab provides basic information about the work order, such as the work order type and service method.

Field or Control	***Description***
Work Order	Click to access work order details and cost information.
Requisition ID	Click to access details about the requisition that was used to create the work order.
Line	Displays the line number of the requisition to which the work order applies.

Field or Control	***Description***
Work Order Type	Displays the type of work order. Work order types determine the logistical task group and logistical tasks that are associated with the work order. Values include *Original, Extension, Replaced,* and *Reassigned.*
Service Method	Displays the method used to create the work order. Methods include: *Deliverable:* Services that are generally performed by an entire work force, such as a work order for an entire project, not just the hours worked by a single service provider. *Multi Resource:* Services that support multiple, unique services and service providers *Resource:* Services of an individual service provider. These may also be child services for a multi-resource parent service.
Requester	Displays the user who submitted the requisition.
Start Date	Displays when the work order begins.
Work Order Sourcing Review	Click to access the Work Order Sourcing Review page.
Work Order Sourcing Select	Click to access the Sourcing Select page for the work order. Depending on the service method, the page name can vary.

Sourcing Select Page

Use the Sourcing Select page (SPF_SOURCE_ WO) to source resource-based work orders for selecting service providers.

Navigation:

Click the **Assign New Resources** button on the Manage Services Work Order page for a resource-based work order

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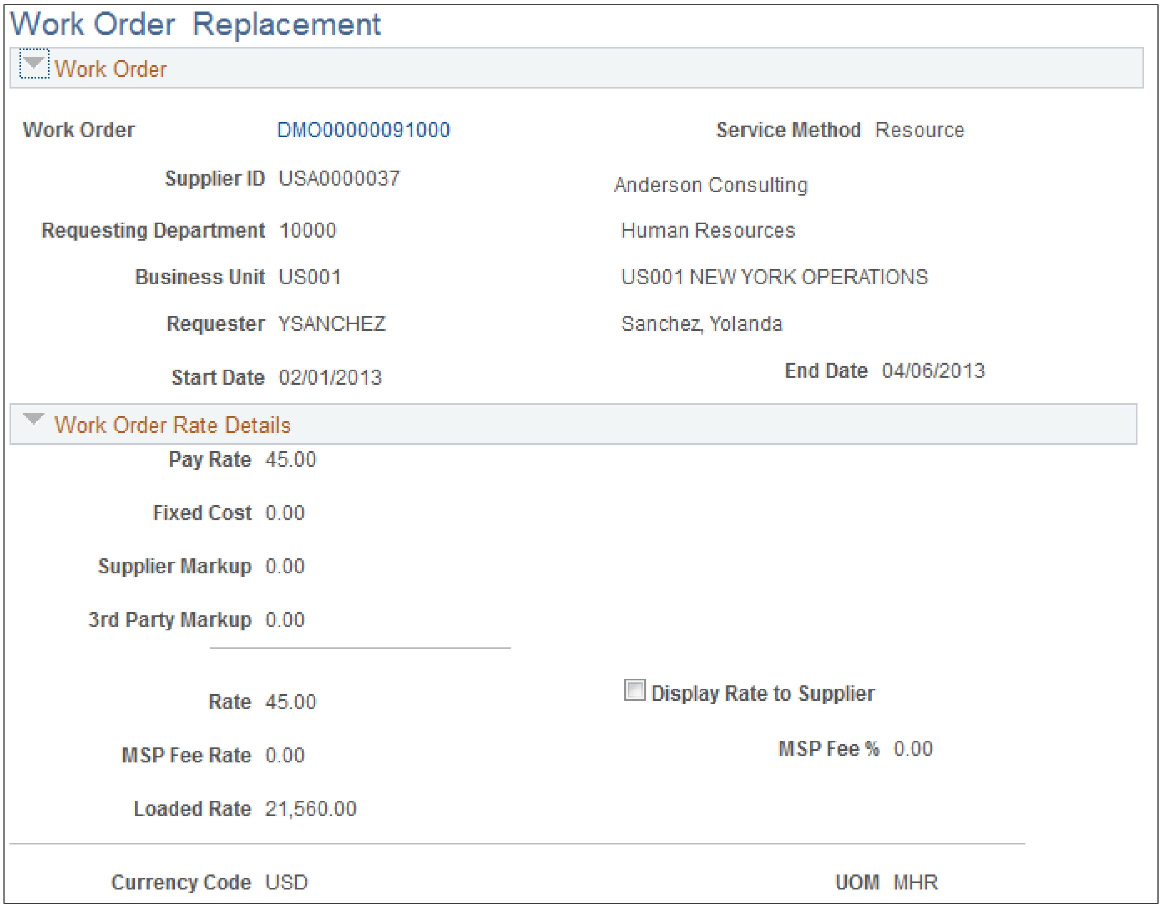
Note: In case the 'Require Sourcing for New Resource Assignment' flag is turned off at the Services Procurement Business Unit definition, you are navigated to the **Assign New Resources interim** page instead of opening the **Sourcing Select** (Work Order Replacement) page directly. On the **Assign New Resource** page, select to either do Work Order Sourcing (Replace) or Manually assign a new resource (Reassign). When you select to do Work Order Sourcing, it navigates to the **Sourcing Select** (Work Order Replacement) page. In case you select to assign a resource manually on the interim page, it opens up the **Work Order** page for manually reassigning the service provider.
In case the 'Require Sourcing for New Resource Assignment' flag is turned on at the Services Procurement Business Unit definition, you are navigated directly to the Sourcing Select (Work Order Replacement) page.

This example illustrates the fields and controls on the Sourcing Select Page (1 of 3).



Work Order Replacement

Work Order

Work Order DMO00000091000

Service Method Resource

Supplier ID USA0000037 Anderson Consulting

Requesting Department 10000 Human Resources

Business Unit US001 US001 NEW YORK OPERATIONS

Requester YSANCHEZ Sanchez, Yolanda

Start Date 02/01/2013

End Date 04/06/2013

Work Order Rate Details

Pay Rate 45.00

Fixed Cost 0.00

Supplier Markup 0.00

3rd Party Markup 0.00

Rate 45.00

☐ Display Rate to Supplier

MSP Fee Rate 0.00

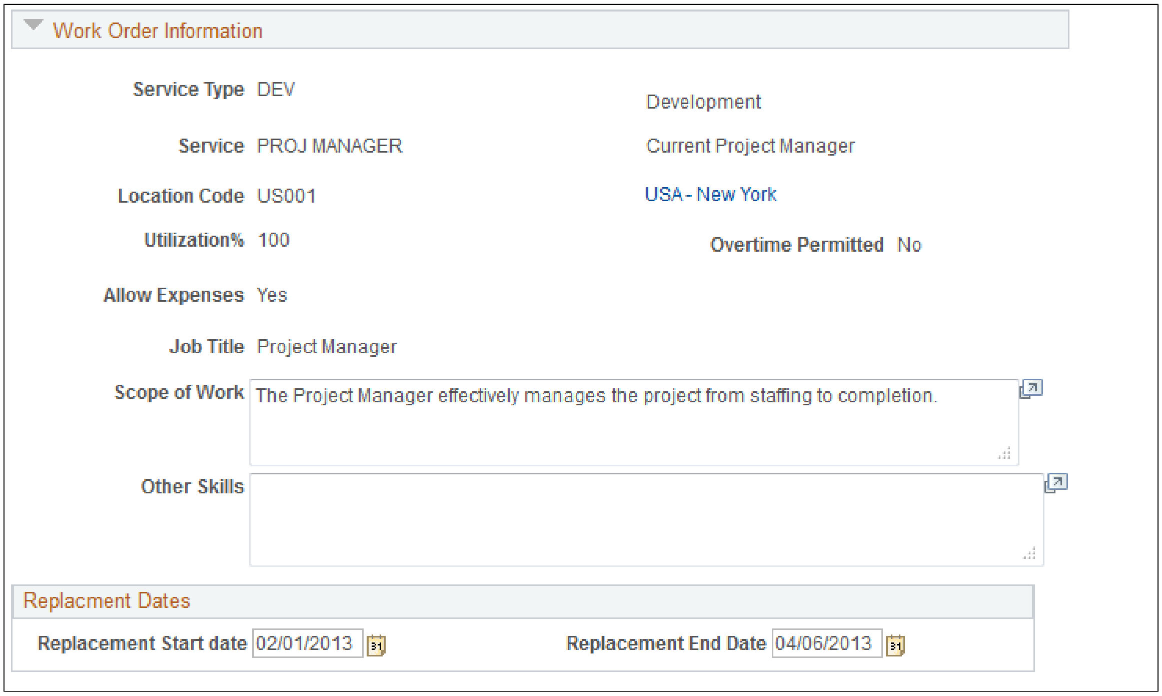
MSP Fee % 0.00

Loaded Rate 21,560.00

Currency Code USD

UOM MHR

This example illustrates the fields and controls on the Sourcing Select Page (2 of 3).



Work Order Information

Service Type DEV Development

Service PROJ MANAGER Current Project Manager

Location Code US001 USA - New York

Utilization% 100

Overtime Permitted No

Allow Expenses Yes

Job Title Project Manager

Scope of Work The Project Manager effectively manages the project from staffing to completion.

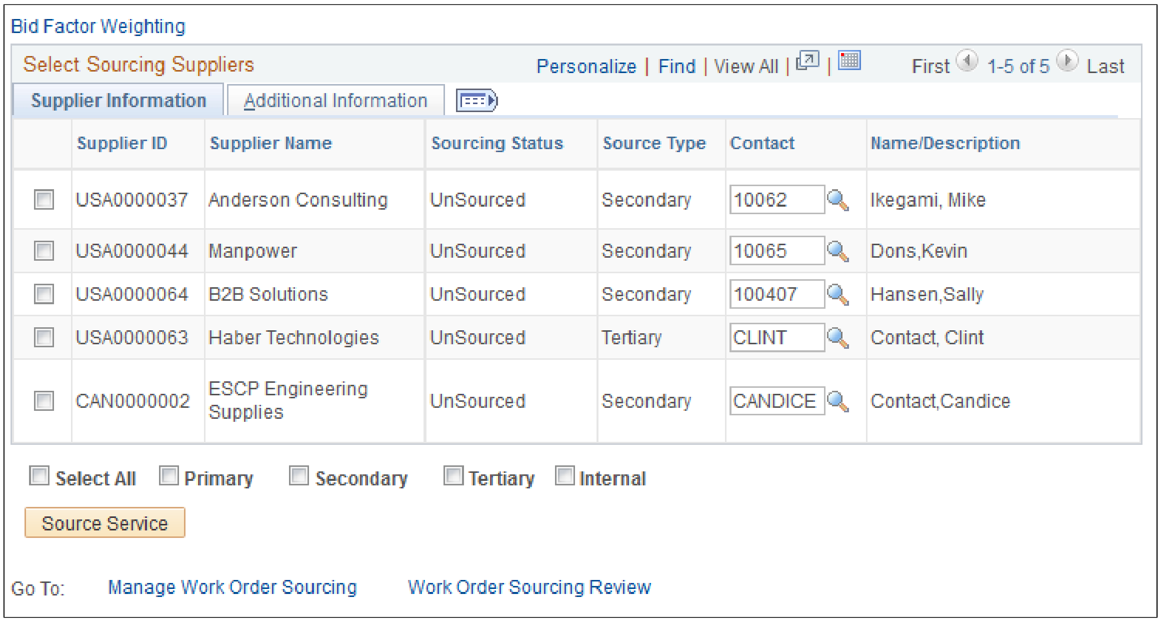
Other Skills

Replacment Dates

Replacement Start date 02/01/2013

Replacement End Date 04/06/2013

This example illustrates the fields and controls on the Sourcing Select Page (3 of 3).



	Supplier ID	Supplier Name	Sourcing Status	Source Type	Contact	Name/Description
☐	USA0000037	Anderson Consulting	UnSourced	Secondary	10062	Ikegami, Mike
☐	USA0000044	Manpower	UnSourced	Secondary	10065	Dons,Kevin
☐	USA0000064	B2B Solutions	UnSourced	Secondary	100407	Hansen,Sally
☐	USA0000063	Haber Technologies	UnSourced	Tertiary	CLINT	Contact, Clint
☐	CAN0000002	ESCP Engineering Supplies	UnSourced	Secondary	CANDICE	Contact,Candice

Use this page to select work orders for sourcing. You can also update

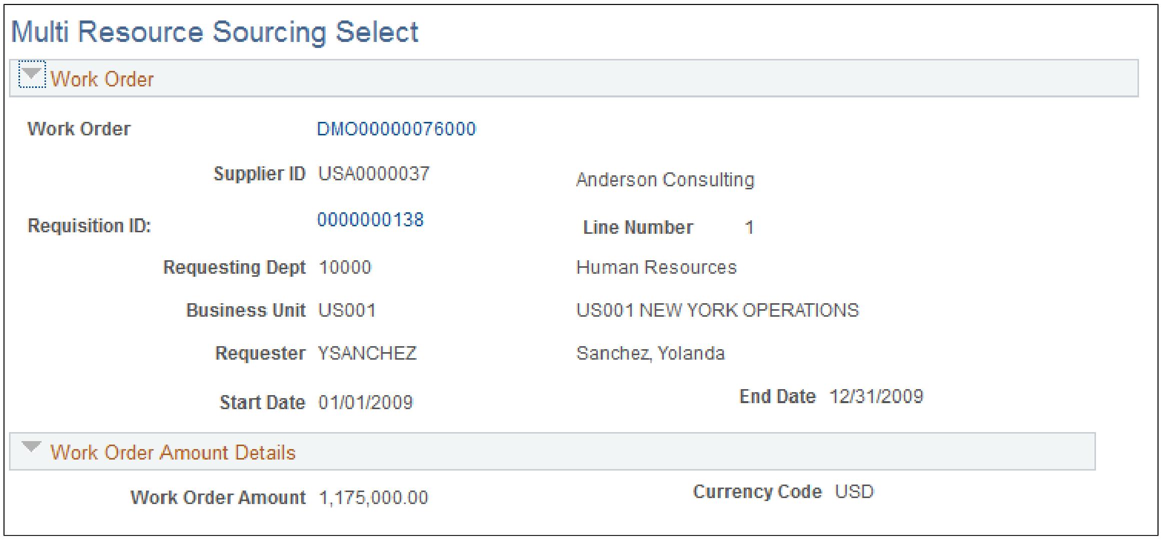
Multi Resource Sourcing Select Page

Use the Multi Resource Sourcing Select page (SPF_SOURCE_SLT_MWO) to source multi-resource work orders.

Navigation:

- Click the **Work Order Sourcing Select** button on the Manage Services Work Order page for a multi-resource work order.
- Click the **Multi Resource Sourcing Select** link on the Work Order Sourcing Review page.

This example illustrates the fields and controls on the Multi Resource Sourcing Select page. You can find definitions for the fields and controls later on this page.


Multi Resource Sourcing Select

Work Order

Work Order DMO00000076000

Supplier ID USA0000037 Anderson Consulting

Requisition ID: 0000000138 Line Number 1

Requesting Dept 10000 Human Resources

Business Unit US001 US001 NEW YORK OPERATIONS

Requester YSANCHEZ Sanchez, Yolanda

Start Date 01/01/2009 End Date 12/31/2009

Work Order Amount Details

Work Order Amount 1,175,000.00 Currency Code USD

The multi-resource service method provides a hierarchical relationship between a fixed-amount, parent-level service work order and multiple resource services at a child level. This enables multiple, unique service providers to be sourced to individual work orders, filling all the required services for a multiple assignment engagement.

The top portion of the Multi Resource Sourcing Select page displays the parent work order while the Work Order Services section displays child-level work orders that make up the parent work order.

Work Order

Use this section to view work order details. You can also access the work order Details page and from that page access lower-level work orders using the Work Order Individual Service Details page. If the parent work order is associated to a requisition, then you can also access details about the requisition.

Work Order Amount Details

This section provides the amount of the work order and its currency code.

Work Order Information

This section provides various work order information, such as the service type, location, job title, and whether expenses are allowed.

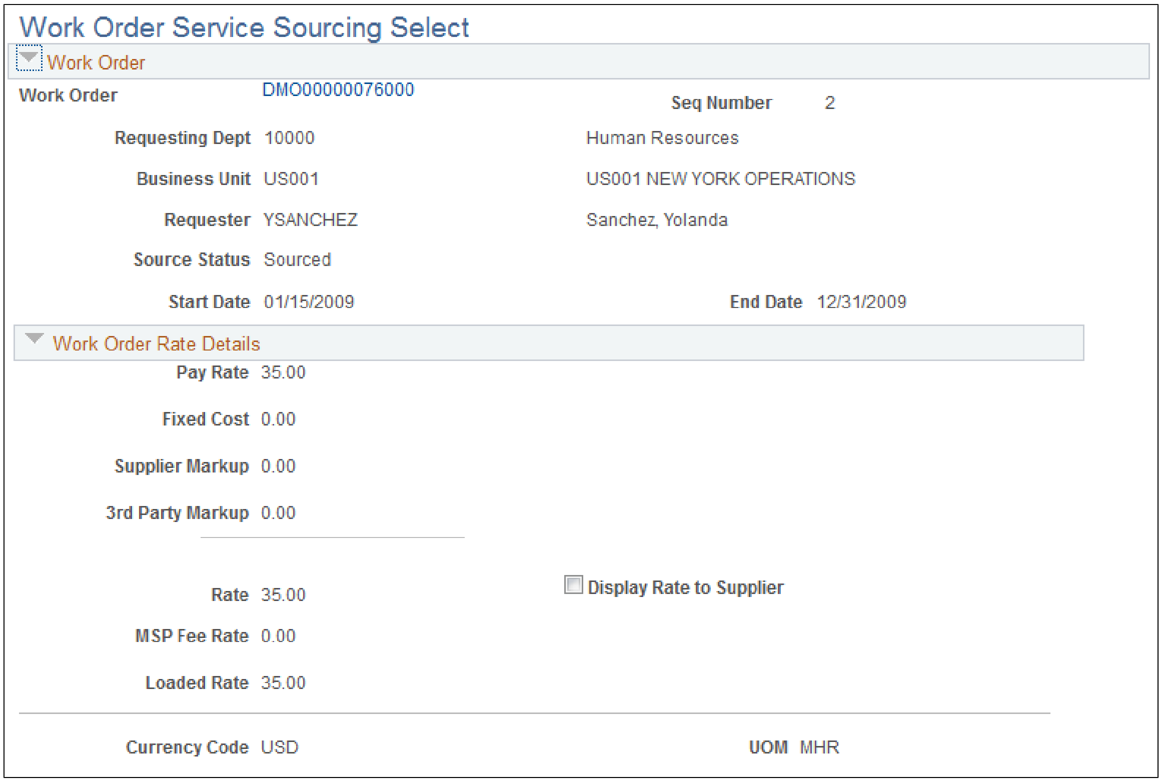
Work Order Services: Service Information

The Service Information tab displays the lower-level work orders for the parent work order. You can use the tab to source any individual service work order that is in a status of Ready for Sourcing. If a work order has already been source, it's source status is Sourced.

Field or Control	***Description***
Work Order Service Sourcing	Click to access the Work Order Service Sourcing Select page for the work order. Depending on the service method, the page name can vary.
Select/Deselect All	Select to indicate that you either want to select all services work order for sourcing or deselect the work orders.
Source Services	Click to source the selected services to the defined supplier. When you source a work order, the system updates the work order status to Sourced.

Work Order Service Sourcing Select Page

This example illustrates the fields and controls on the Work Order Service Sourcing Select Page (1 of 3).



Work Order DMO00000076000 Seq Number 2

Requesting Dept 10000 Human Resources

Business Unit US001 US001 NEW YORK OPERATIONS

Requester YSANCHEZ Sanchez, Yolanda

Source Status Sourced

Start Date 01/15/2009 End Date 12/31/2009

Pay Rate 35.00

Fixed Cost 0.00

Supplier Markup 0.00

3rd Party Markup 0.00

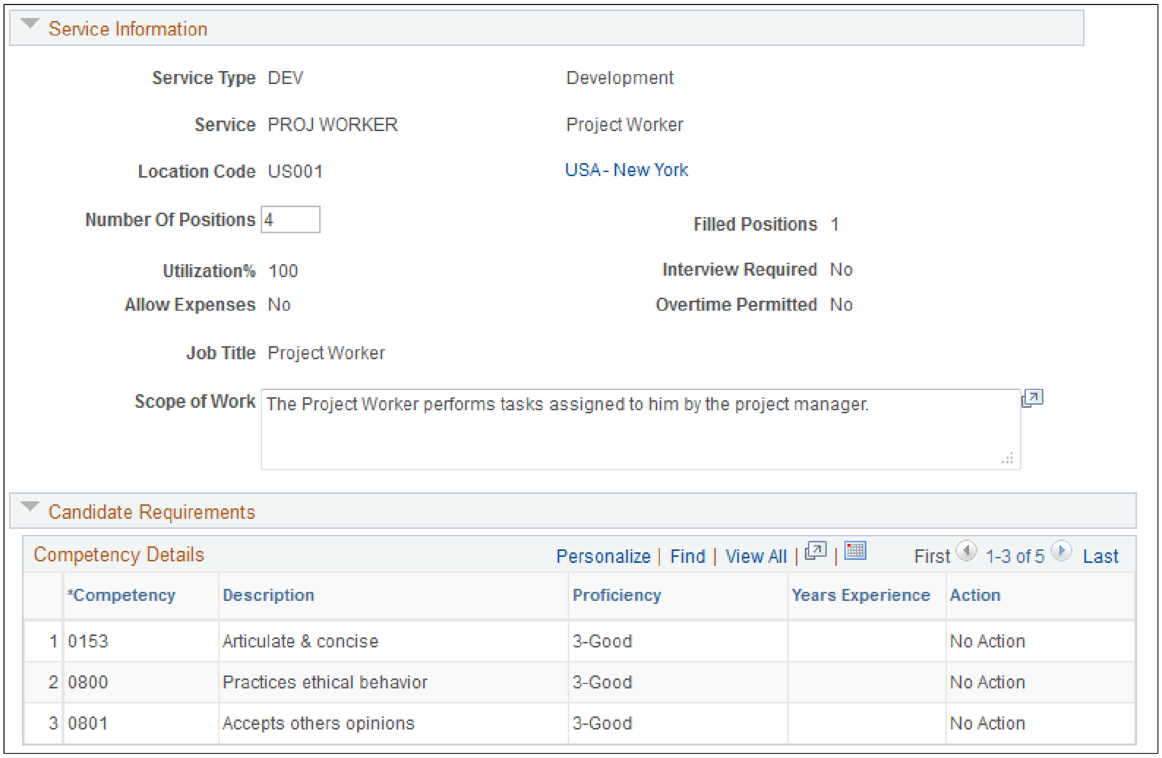
Rate 35.00 ☐ Display Rate to Supplier

MSP Fee Rate 0.00

Loaded Rate 35.00

Currency Code USD UOM MHR

This example illustrates the fields and controls on the Work Order Service Sourcing Select page (2 of 3).



Service Type DEV Development

Service PROJ WORKER Project Worker

Location Code US001 USA - New York

Number Of Positions 4 Filled Positions 1

Utilization% 100 Interview Required No

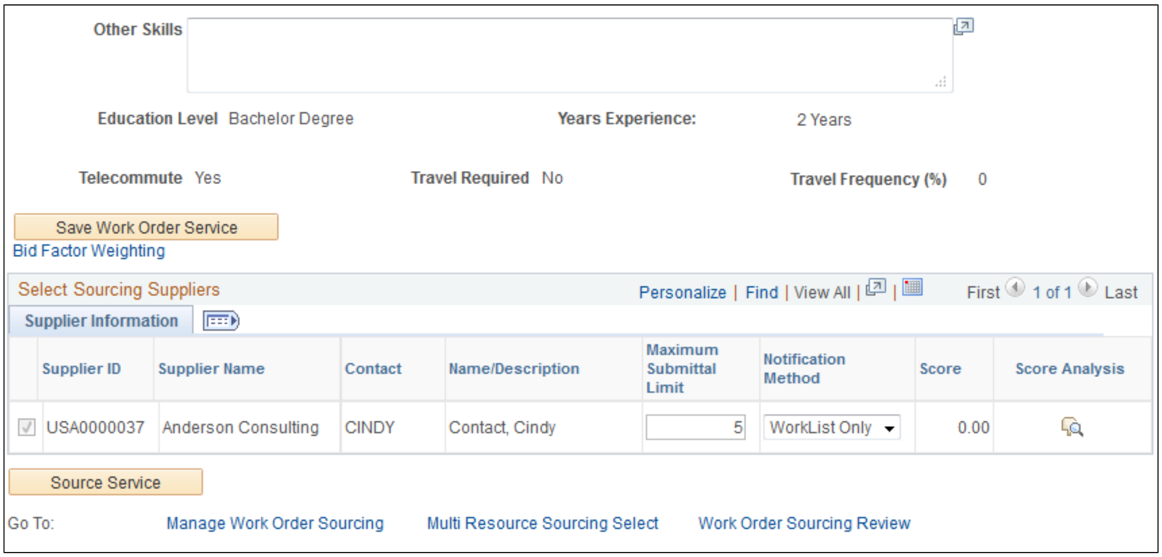
Allow Expenses No Overtime Permitted No

Job Title Project Worker

Scope of Work The Project Worker performs tasks assigned to him by the project manager.

	*Competency	Description	Proficiency	Years Experience	Action
1	0153	Articulate & concise	3-Good		No Action
2	0800	Practices ethical behavior	3-Good		No Action
3	0801	Accepts others opinions	3-Good		No Action

This example illustrates the fields and controls on the Work Order Service Sourcing Select page (3 of 3).



Other Skills

Education Level Bachelor Degree Years Experience: 2 Years

Telecommute Yes Travel Required No Travel Frequency (%) 0

	Supplier ID	Supplier Name	Contact	Name/Description	Maximum Submittal Limit	Notification Method	Score	Score Analysis
☑	USA0000037	Anderson Consulting	CINDY	Contact, Cindy	5	WorkList Only	0.00	

Work Order Services: Additional Information

The Service Information tab displays the lower-level work orders for the parent work order. You can use the tab to source any individual service work order that is in a status of Ready for Sourcing. If a work order has already been source, it's source status is Sourced.

Field or Control	***Description***
Labor Amount	Displays the total amount of the work order.
Select/Deselect All	Select to indicate that you either want to select all services work order for sourcing or deselect the work orders.

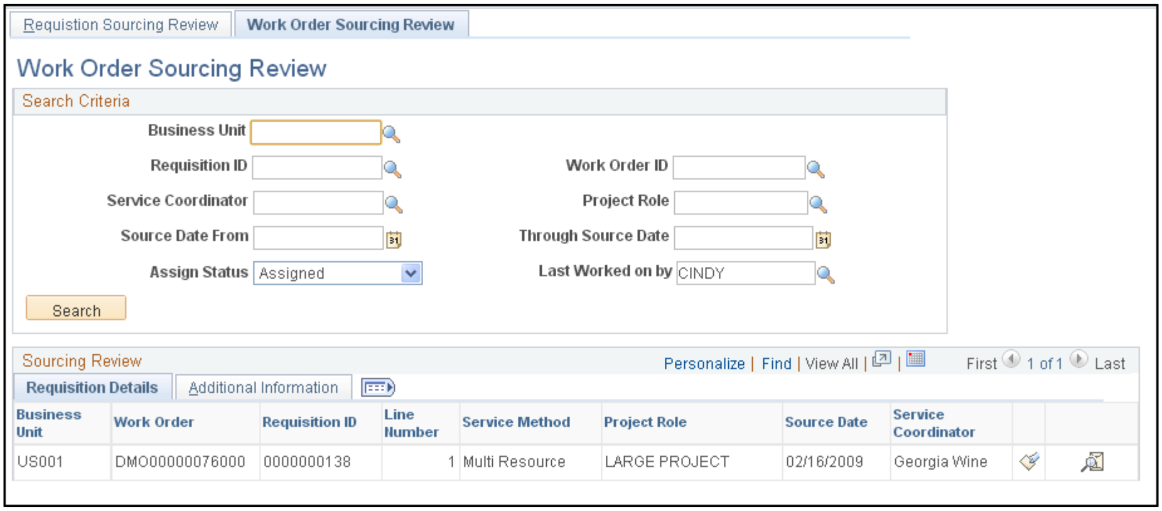
Manage Work Order Sourcing Review Page

Use the Manage Work Order Sourcing Review page (SPF_SOURCE_REVIEW) to review work order sourcing details.

Navigation:

Click the **Work Order Sourcing Review** link on the Manage Services Work Order page.

This example illustrates the fields and controls on the Work Order Sourcing Review page. You can find definitions for the fields and controls later on this page.



Assign Status: Assigned

Last Worked on by: CINDY

Business Unit	Work Order	Requisition ID	Line Number	Service Method	Project Role	Source Date	Service Coordinator
US001	DMO00000076000	0000000138	1	Multi Resource	LARGE PROJECT	02/16/2009	Georgia Wine

Use this page to review sourcing information for work orders. You can access the work order or the requisition used to create the work order using page links.

See Creating and Managing Work Orders.

Note: If you select the mandatory sourcing option on the Services Procurement Business Unit page, then service coordinators must use this sourcing process to establish work order replacements for service providers.

Field or Control	***Description***
Seq Nbr (sequence number)	Displays the system-assigned sequence number. The number determines the processing order for sourcing.

Field or Control	***Description***
Service Type and **Service Type Description**	Displays the service type. Service types are a way of grouping roles or services. A description also appears with the service type.
Name/Description	Displays the work order service provider.
Notify By	Displays the notification method that has been defined for the work order.
Creation Date	Displays when the work order was created.
Work Order Sourcing History	Click to access the Work Order Service Sourcing History page.

Go To

Field or Control	***Description***
Manage Work Order Sourcing	Click to return to the Manage Work Order Sourcing page, where you can select another work order to view or source.

Field or Control	***Description***
Multi Resource Sourcing Select	Click to access the Multi Resource Sourcing Select page. You use the page to source multi-resource work orders.

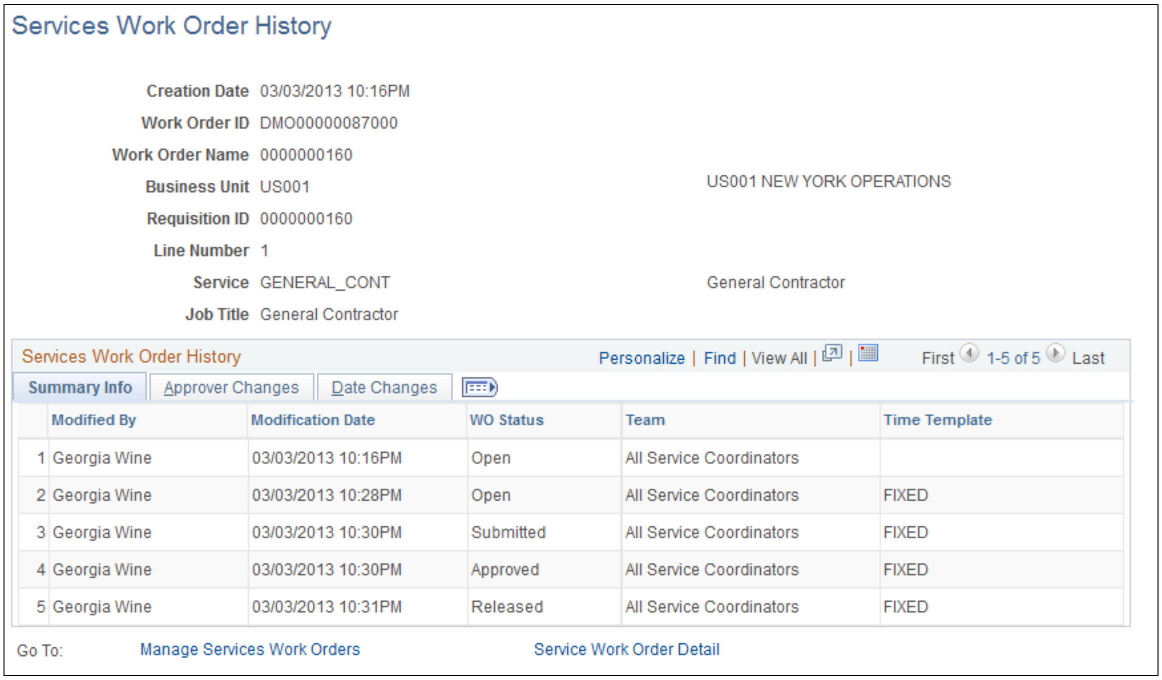
Work Order History Page

Use the Work Order History page (SPF_SOURCE_HIS_WO) to view work order sourcing history that was sourced to suppliers.

Navigation:

Click the **Work Order Sourcing History** button on the Manage Work Order Sourcing Review page.

This example illustrates the fields and controls on the Work Order Sourcing History page. You can find definitions for the fields and controls later on this page.



Services Work Order History

Creation Date 03/03/2013 10:16PM
Work Order ID DMO00000087000
Work Order Name 0000000160
Business Unit US001 US001 NEW YORK OPERATIONS
Requisition ID 0000000160
Line Number 1
Service GENERAL_CONT General Contractor
Job Title General Contractor

Services Work Order History

	Modified By	Modification Date	WO Status	Team	Time Template
1	Georgia Wine	03/03/2013 10:16PM	Open	All Service Coordinators	
2	Georgia Wine	03/03/2013 10:28PM	Open	All Service Coordinators	FIXED
3	Georgia Wine	03/03/2013 10:30PM	Submitted	All Service Coordinators	FIXED
4	Georgia Wine	03/03/2013 10:30PM	Approved	All Service Coordinators	FIXED
5	Georgia Wine	03/03/2013 10:31PM	Released	All Service Coordinators	FIXED

Use this page to view history for work orders that have been sourced. If the work order is a multi-resource service, the system displays both the work order top-level parent service and lower-level individual child services.

The history includes who submitted the work order, the service provider contact, the work order submission date, and the notification method.

Related Links

Creating and Managing Work Orders

Chapter 16

Submitting and Managing Bids

Understanding the Requisition and Work Order Bidding Process

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

Requisitions and work orders can be resource-based, deliverables-based, or multi-resource. If a requisition is resource-based, the supplier submits a candidate to fill the requisition. If the requisition is deliverables-based, the supplier submits a proposal for filling the requisition.

When requisitions are for multi-resource services, suppliers can submit proposals to fill the service and then subsequently submit individual service providers to fill multiple individual services. After the requisition is filled, service providers can report time against individual work orders associated to the overall parent work order.

PeopleSoft Services Procurement enables suppliers to:

- Review sourced requisitions and work orders.
- Submit and maintain bids for resources, deliverable, or multi resource services.
- Withdraw a bid before service coordinators and requesters respond to the bid.
- Review incoming, draft, and outgoing bid information.
- View bid history.
- View interview schedules.
- Manage service providers.

Here is the basic task flow of the requisition and work order bidding process for suppliers:

1. Use the Submit Bids component to review requisitions and work orders that have been sourced to the supplier for consideration.

   Using the component, you can access the Requisition Sourcing Review and Work Order Sourcing Review pages to view bids.

2. Use the Submit Bid and Multi Resource Submit Bid pages to submit bids that meet requisition and work order requirements.

3. As the supplier, you submit a bid to the service coordinator for review and after receiving a response, you use the Maintain Bids page to view the bid response from the service coordinator.

4. Use the Supplier Bid Response page to respond to service coordinators about requisitions and work orders.

Note: Negotiation between the supplier and service coordinator is typically an ongoing process. After the service coordinator selects the action *Fill Bid,* a break in communication occurs. This action officially ends the bid process between the service coordinator and the supplier.

---

5. Access the Service Provider Roster page to manage service provider information.

Prerequisites

A requisition or work order must be sourced to the supplier before a bid can be submitted.

Viewing and Maintaining Services Work Orders

This topic discusses how to view and maintain service work orders.

Pages Used to View and Maintain Services Work Orders

Page Name	***Definition Name***	***Usage***
View Services Work Orders Page	SPF_WO_SUP_ROSTER	View service work orders.
Track Resources Page	SPF_WO_TRK_RSRC	Track resources.

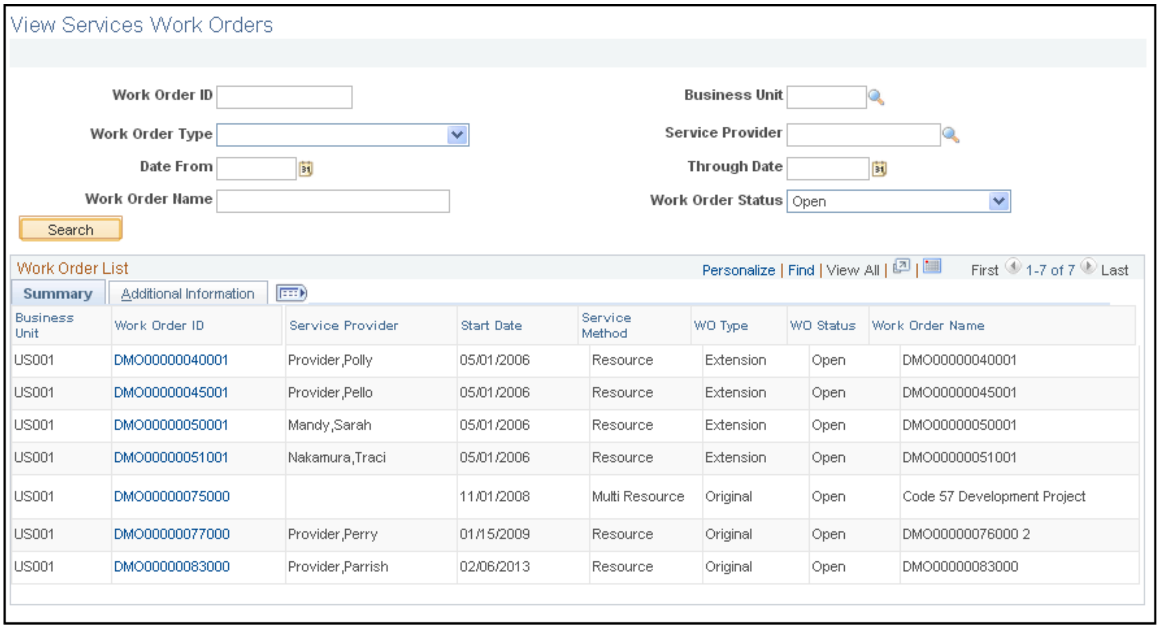
View Services Work Orders Page

Use the View Services Work Orders page (SPF_WO_SUP_ROSTER) to view service work orders.

Navigation:

Services Procurement > **View Services Work Orders**

This example illustrates the fields and controls on the View Services Work Orders page. You can find definitions for the fields and controls later on this page.



Work Order Status: Open

1-7 of 7

Business Unit	Work Order ID	Service Provider	Start Date	Service Method	WO Type	WO Status	Work Order Name
US001	DMO00000040001	Provider,Polly	05/01/2006	Resource	Extension	Open	DMO00000040001
US001	DMO00000045001	Provider,Pello	05/01/2006	Resource	Extension	Open	DMO00000045001
US001	DMO00000050001	Mandy,Sarah	05/01/2006	Resource	Extension	Open	DMO00000050001
US001	DMO00000051001	Nakamura,Traci	05/01/2006	Resource	Extension	Open	DMO00000051001
US001	DMO00000075000		11/01/2008	Multi Resource	Original	Open	Code 57 Development Project
US001	DMO00000077000	Provider,Perry	01/15/2009	Resource	Original	Open	DMO00000076000 2
US001	DMO00000083000	Provider,Parrish	02/06/2013	Resource	Original	Open	DMO00000083000

Suppliers use this page to search for work orders that have been filled by them. The system provides a listing of work orders after you define search criteria and click the **Search** button.

Field or Control	***Description***
Work Order ID	Click to view details and cost information about the selected work order.
Service Provider	Displays the service provider who is going to provide the service.
Start Date	Displays when the service is scheduled to start.
Service Method	Displays the method used to create the work order. Methods include: *Deliverable:* Services that are generally performed by an entire work force, such as a work order for an entire project, not just the hours worked by a single service provider. *Resource:* Work order services for an individual service provider.
Work Order Type	Indicates the type of work order. Values include *Original, Extension, Replaced,* and *Reassigned.*
Work Order Statusand **Work Order Name**	Displays the life-cycle stage for the work order. For example, Open, Submitted, and Closed are stages. The name assigned to the work order also appears.

Additional Information

Select the Additional Information tab to access more details about the work order. These details include whether the work order is a subline, it's creation date, and the purchase order status if applicable.

Track Resources Page

Use the Track Resources page (SPF_WO_TRK_RSRC) to track resources.

Navigation:

Click the **Work Order ID** link on the Multi Resource Work Orders page.

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

Track Resources

Business Unit US001 US001 NEW YORK OPERATIONS

Work Order ID DMO00000072000

Supplier USA0000037 Anderson Consulting

Actual Start Date 01/15/2007

Start Date 01/15/2007

End Date 02/16/2007

Service &Providers

	Person ID	First Name	Last Name	*Start Date	*End Date	Premise Location	Comments	Delete	
1	PARRISH	Parrish	Provider	01/15/2007	01/31/200	☐			+
2	PELLO	Pello	Provider	01/29/2007	02/16/200	☐			+

Supplier users use this page to view, reassign, remove, or add service providers for the selected work order.

Field or Control	***Description***
Person ID	Displays a list of service providers for the work order that you selected. You can add more service providers or edit the providers already listed.
First Name and Last Name	Identify the name of the service provider.
Start Date and End Date	Displays the scheduled start and end dates for the service provider to perform the work order services. You can change the dates as needed. The dates must be within the date range of the work order. For example, you cannot select an end date that is later than the work order end date.
Premise Location	Select to specify that the service provider provides the service at the supplier location.

Field or Control	***Description***
	Click to enter or update comments about the service provider. The system saves the comments when you click the **OK** button at the bottom of the Comments page. You can scroll up and down the page to view and enter comments and access the **OK** button.
	Click the **View Expanded** icon to view and update comments entered for the service provider. After you view or update the comments, click the **OK** button to return to this page.
	Click the **Delete** icon to remove the corresponding service provider from the work order. The deletion is immediate.
Add Service Providers	Click to add or maintain service provider information. See Managing Service Providers.

Viewing Sourced Requisition and Work Order Information

This topic provides a list of common elements and discusses how to view sourced requisition and work order information.

Pages Used to View Sourced Requisition and Work Order Information

Page Name	***Definition Name***	***Usage***
Requisition Sourcing Review Page	SPF_SOUR_REVIEW_SP	Review requisitions sourced to the supplier.
Work Order Sourcing Review Page	SPF_SOUR_RVW_WO_SP	Review work orders sourced to the supplier.

Common Elements Used in This Section

Field or Control	***Description***
Assign Status	Select a value on which to search for requisitions or work orders. Values include: *Assigned:* Select to search for requisitions or work orders that have been assigned to a service provider. *Unassigned:* Select to search for requisitions or work orders that are not assigned to a service provider.

Field or Control	***Description***
Available Positions	The number of positions not yet filled for a requisition line or work order.
Filled Position	The number of people already selected from this supplier to fill positions for the service. **Note:** This field is incremented each time a position is filled through bid management. The value is decremented each time a related requisition or work order is canceled, with the exception of child work orders for a multi resource service.
Last Worked on by	Select a person ID on which to base a search for requisitions or work orders that were last worked on by that person.
Line Number	Displays the requisition line number. The system uses the line number to identify specific service requirements in a requisition. This field is available for requisitions and for work orders when they have had requisitions assigned to them.
Maximum Submittal Limit	Displays the number of times that a supplier can submit a candidate for a position for the requisition line or a work order sequence. For example, if the requisition line has 5 positions and the maximum submittal limit is set to 3, the supplier can submit up to 15 candidates.
Number of Positions	Enter the number of available positions needed to fill the requisition or work order service request.
Number of Times Submitted	Displays the number of times that this service provider has been submitted
Project Role	Select a project role on which to base a search for requisitions or work orders. Project roles determine the type of activities that a user can perform.
Requisition ID	Select a specific requisition on which to base the search when you are using the Requisition Sourcing Review page to search for requisitions. If you are using the Work Order Sourcing Review page to search for work orders, you can also select a requisition ID on which to search. The system returns the requisition as long as it's associated with a work order.

Field or Control	***Description***
Requisition Status	Select a status on which to base the search for requisitions. The system returns only those requisitions that are in the status you select. Values include: *Closed:* Select to view only requisitions that have been closed and are no longer available for bidding. *Filled:* Select to view only requisitions that have already been filled. *Pending:* Select to view only requisitions that are pending. *Sourced:* Select to view only requisitions that have already been sourced to the supplier. These requisitions are available for bidding.
Service Coordinator	Select a service coordinator on which to base the search for requisitions or work orders. The list of values contains those service coordinators who have sourced requisitions or work orders to the service provider contact.
Service Method	Select a service method on which to search for requisitions or work orders. Methods include: *Deliverable:* Services that are generally performed by an entire work force, such as a work order for an entire project, not just the hours worked by a single service provider. *Multi Resource:* Requisition and work order services that support multiple, unique services and service providers. *Resource:* Requisition and work order services of an individual service provider.
Source Date From and **Through Source Date**	Select a range of dates to include in the requisition or work order search. The source date is when the service was sourced to the service provider contact.
Work Order ID	Select a specific work order on which to base a search for work orders. You can also limit the search to specific requisitions associated to the work order.

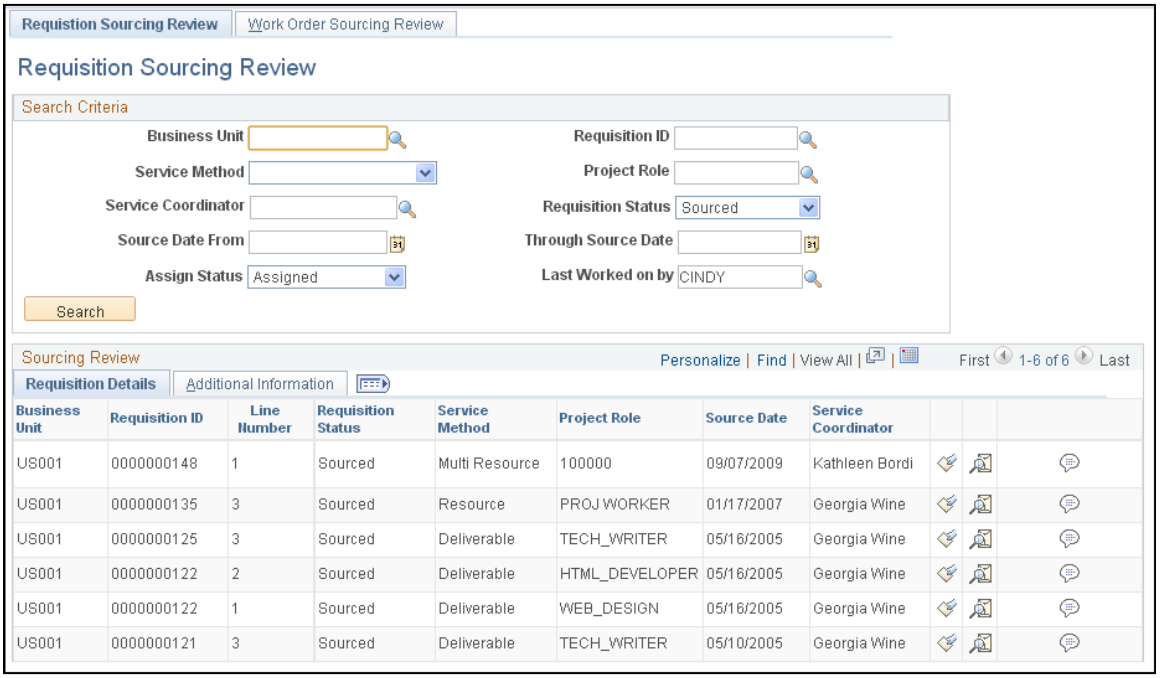
Requisition Sourcing Review Page

Use the Requisition Sourcing Review page (SPF_SOUR_REVIEW_SP) to review requisitions sourced to the supplier.

Navigation:

Services Procurement > **Submit Bids**

This example illustrates the fields and controls on the Requisition Sourcing Review page. You can find definitions for the fields and controls later on this page.



Requisition Sourcing Review

Search Criteria

Business Unit

Requisition ID

Service Method

Project Role

Service Coordinator

Requisition Status: Sourced

Source Date From

Through Source Date

Assign Status: Assigned

Last Worked on by: CINDY

Sourcing Review

Business Unit	Requisition ID	Line Number	Requisition Status	Service Method	Project Role	Source Date	Service Coordinator
US001	0000000148	1	Sourced	Multi Resource	100000	09/07/2009	Kathleen Bordi
US001	0000000135	3	Sourced	Resource	PROJ WORKER	01/17/2007	Georgia Wine
US001	0000000125	3	Sourced	Deliverable	TECH_WRITER	05/16/2005	Georgia Wine
US001	0000000122	2	Sourced	Deliverable	HTML_DEVELOPER	05/16/2005	Georgia Wine
US001	0000000122	1	Sourced	Deliverable	WEB_DESIGN	05/16/2005	Georgia Wine
US001	0000000121	3	Sourced	Deliverable	TECH_WRITER	05/10/2005	Georgia Wine

Use the **Search Criteria** group box at the top of the page to enter specific search criteria for requisitions that have been sourced to the supplier. You can search by business unit, requisition ID, service coordinator, as well as various other search criteria. After you enter the specific search criteria, click the **Search** button to view the results.

Note: This page displays only the main top-line (parent) requisition line if you are viewing a multi-resource requisition. Information about the related child requisition lines is available on the bid page when you click the **Submit Bid** button.

Use the Sourcing Review section in the bottom portion of the page to view requisitions that were sourced to suppliers. Select the Additional Information tab to review more details about the requisition. These details include the number of positions, positions available, and those filled. The details also include the number of times that a bid has been submitted against the requisition and the maximum number of bids allowed for the requisition.

Field or Control	***Description***
	Click the **Submit Bid** icon to access the Submit Bid page, where you can complete candidate information and submit the bid to the service coordinator for consideration.

Field or Control	***Description***
	Click the **View History** icon to access the Sourcing History page, where you can review the sourcing history of the requisition.

Field or Control	***Description***
💬	Click to access the Comments page, where you can review comments associated with the requisition. **Note:** Comments are visible only if the requester has selected the option to send the comments to the supplier.

Additional Information

Select the Additional Information tab to view more details about the service provider and requisition. This information includes the number of total positions, available positions, and filled positions.

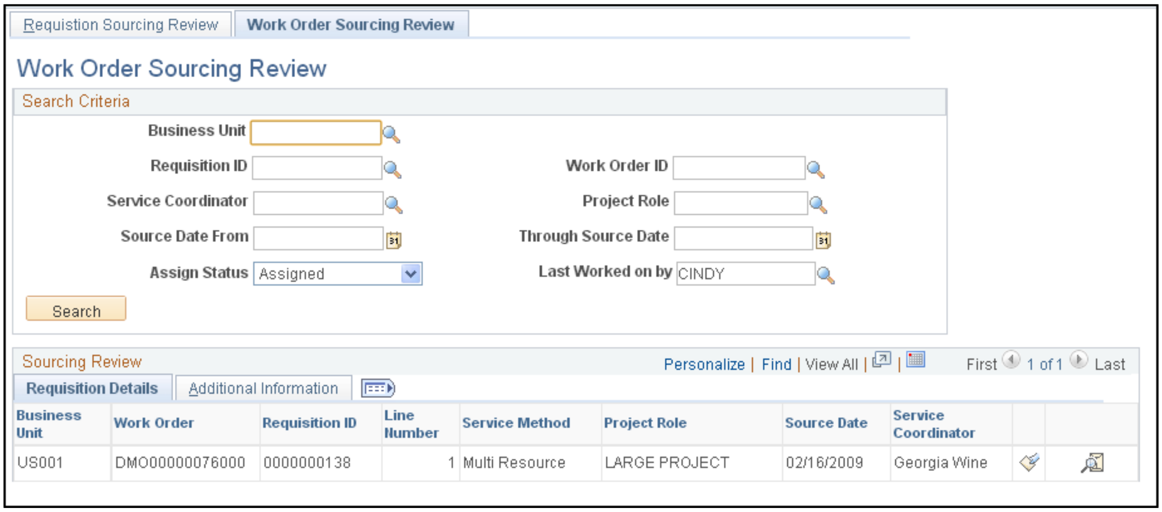
Work Order Sourcing Review Page

Use the Work Order Sourcing Review page (SPF_SOUR_RVW_WO_SP) to review work orders sourced to the supplier.

Navigation:

Select the Work Order Sourcing Review tab on the Requisition Sourcing Review page.

This example illustrates the fields and controls on the Work Order Sourcing Review Page. You can find definitions for the fields and controls later on this page.



Assign Status: Assigned

Last Worked on by: CINDY

Business Unit	Work Order	Requisition ID	Line Number	Service Method	Project Role	Source Date	Service Coordinator		
US001	DMO00000076000	0000000138	1	Multi Resource	LARGE PROJECT	02/16/2009	Georgia Wine		

Use the Search Criteria group box at the top of the page to enter specific search criteria. You can search by business unit, work order ID, requisition ID, or service coordinator, as well as various other search criteria. After you enter specific search criteria, click the **Search** button to view the results.

Use the Sourcing Review section in the bottom portion of the page to view work orders that have been sourced to suppliers by service coordinators. Select the Additional Information tab to review more details about the work order. These details include the number of positions, positions available, and those filled. The details also include the number of times that a bid has been submitted against the work order and the maximum number of bids allowed for the work order.

Field or Control	***Description***
✎	Click the **Submit Another Bid** icon to access the Multi Resource Submit Bid page. Using that page, you can complete candidate information for multi-resource work orders and submit the bid.

Field or Control	***Description***
🔍	Click to access the Work Order Sourcing History page, where you can review the sourcing history of the work order. See Sourcing History Page.

Field or Control	***Description***
💬	Click to access the Comments page, where you can review comments associated with the requisition. **Note:** Comments are visible only if the requester has selected the option to send the comments to the supplier.

Additional Information

Select the Additional Information tab to view more details about the service provider and work order. This information includes the number of total positions, available positions, and filled positions.

Submitting Bids

This topic lists common elements and discusses how to submit bids.

Pages Used to Submit Bids

Page Name	***Definition Name***	***Usage***
Submit Bid Page	SPF_SUBMITAL_PAGE	Submit bids.
Multi Resource Submit Bid Page	SPF_SOURCE_SLT_MWO	View individual services for multi-resource work orders. This page displays individual services associated with a parent work order. Click the **Submit Another Bid** button to continue to the Submit Bid page.

Page Name	***Definition Name***	***Usage***
New Candidate Page	SPF_CANDIDATE_SEC	To submit a candidate who is not yet profiled in the system, create a new candidate profile.
Resume Attachments Page	SPF_RESUME_ATTACH	Attach the candidate's resume to the bid. The process for uploading a candidate's resume is similar to that of uploading a bid attachment. Submit Bid Page
Bid Attachments Page	SPF_BID_ATTACH	Add attachments to bids. Submit Bid Page
Sourcing History Page	SPF_SOURCE_HISTORY	View requisition sourcing history.
Work Order Service Sourcing History Page	SPF_SOURCE_HIS_WO	View work order service sourcing history. Sourcing History Page
Comments	PV_SP_REQ_COMMENTS	View comments associated with the requisition. Comments are visible only if the requester has selected the **Send to Supplier** option when creating the comments.

Common Elements Used in This Section

Field or Control	***Description***
Action	Displays the *Submit* action by default. Additional actions are available only after you submit a candidate. Actions include retracting a bid while it's in a service coordinator or requester's queue.
Add Attachment	Click to attach a file related to the candidate, requisition, or work order. For example, you can attach Microsoft Word and Excel documents. **Note:** You must select an existing candidate or create a new candidate profile before you can add an attachment. See Sourcing History Page.

Field or Control	***Description***
Attach Resume	Click to attach a resume for the candidate. **Note:** You must select an existing candidate or create a new candidate profile before attaching a resume.
Create Candidate	Click to access the New Candidate page, where you can create a new candidate profile. **Note:** This button is active only after the supplier selects the **Submit New Candidate** option. See New Candidate Page.
Fixed Cost	Displays the fixed overhead rate.
Location	Displays the supplier location for this service provider. A link for the location also appears. Click the link to view the location's address.
Pay Rate	Enter the base rate for the service provider.
Save as Draft	Click to save the bid as a draft. The system saves information that you entered for candidate and bid. When you access the bid again using the Maintain Bid page, the folder type appears as a draft.
Service Provider	Select an available service provider to submit as a candidate.
Submit Existing Candidate	Select to submit a candidate who already has a candidate profile. **Note:** When you select this option, the **Service Provider** field becomes available.
Submit New Candidate	Select to submit a new candidate. See New Candidate Page.
Supplier Rate	Displays the rate charged by the supplier.
Third Party Markup	Enter the third-party markup rate, if any.
Third Party Supplier	Enter the third-party supplier name. This value appears if you entered a third-party markup.

Field or Control	*Description*
Supplier Markup	Displays the markup rate for the supplier. You can define the limits on supplier markups by amounts or percentages for particular service types.

Submit Bid Page

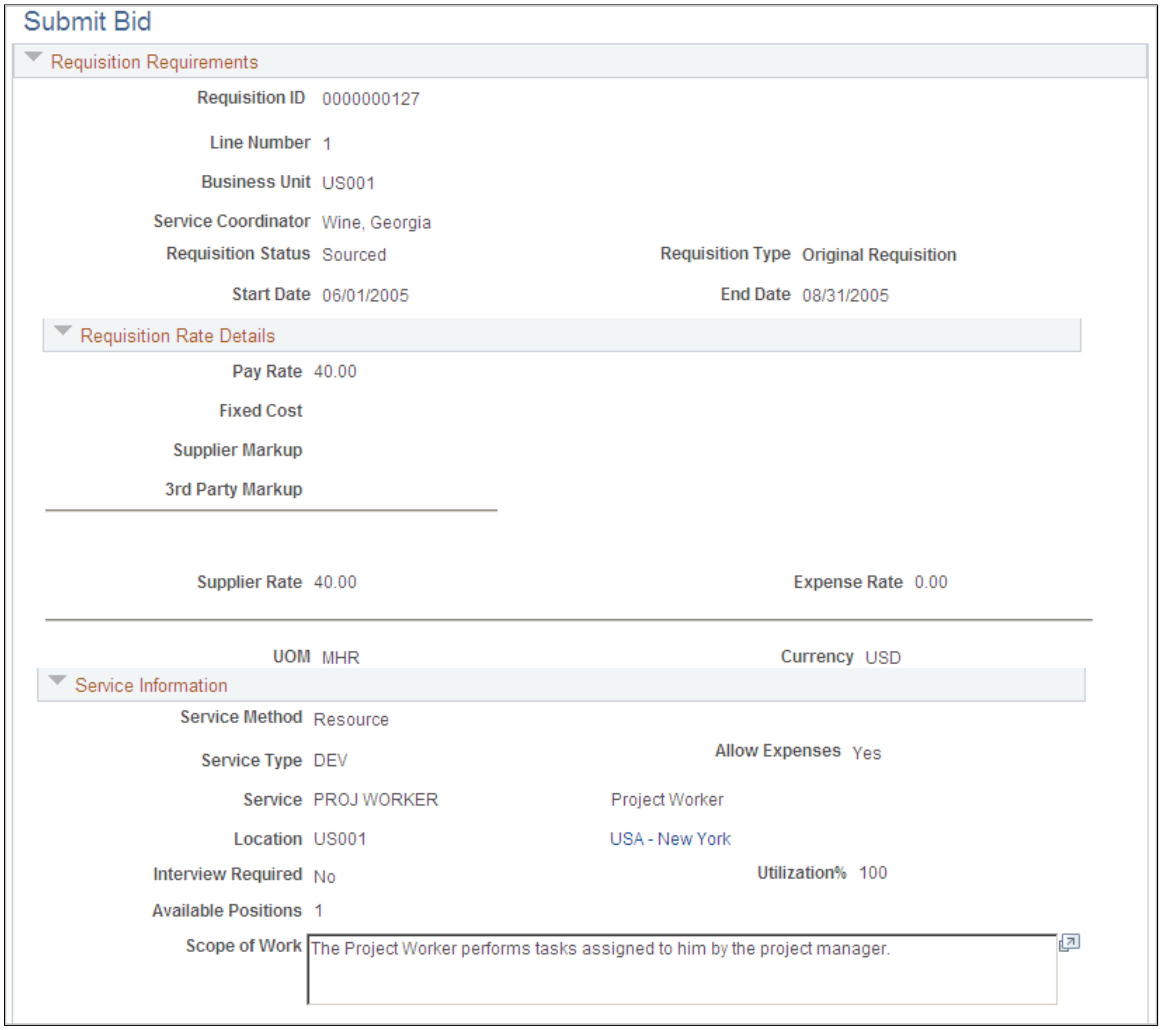
Use the Submit Bid page (SPF_SUBMITAL_PAGE) to submit bids.

Navigation:

Service Procurement, Submit Bids

Click the **Submit Bid** button on the Sourcing Review page.

This example illustrates the fields and controls on the Submit Bid page (1 of 3).



Submit Bid

Requisition Requirements

Requisition ID 0000000127

Line Number 1

Business Unit US001

Service Coordinator Wine, Georgia

Requisition Status Sourced

Requisition Type Original Requisition

Start Date 06/01/2005

End Date 08/31/2005

Requisition Rate Details

Pay Rate 40.00

Fixed Cost

Supplier Markup

3rd Party Markup

Supplier Rate 40.00

Expense Rate 0.00

UOM MHR

Currency USD

Service Information

Service Method Resource

Allow Expenses Yes

Service Type DEV

Service PROJ WORKER Project Worker

Location US001 USA - New York

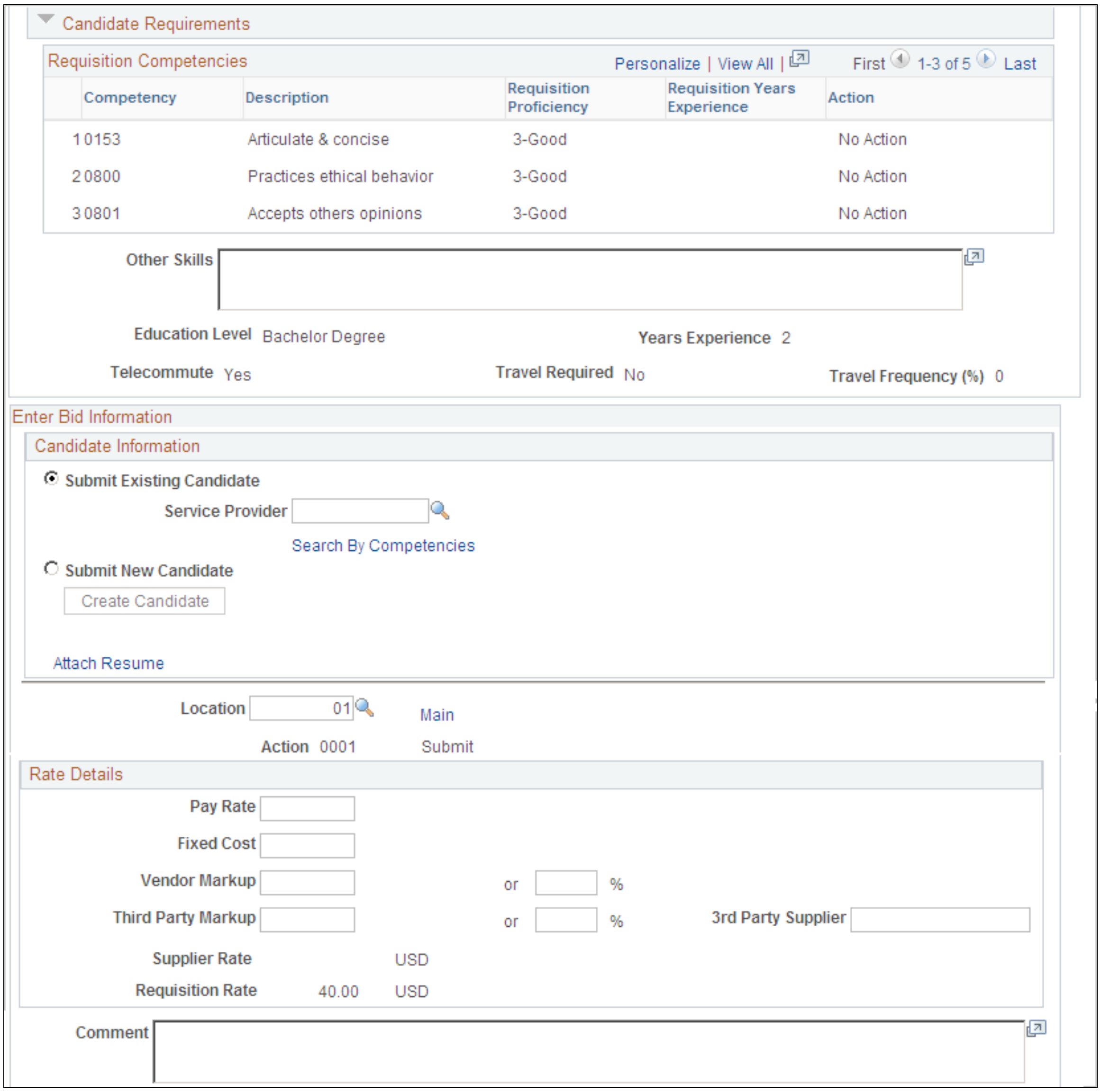
Interview Required No

Utilization% 100

Available Positions 1

Scope of Work The Project Worker performs tasks assigned to him by the project manager.

This example illustrates the fields and controls on the Submit Bid page (2 of 3).



	Competency	Description	Requisition Proficiency	Requisition Years Experience	Action
1	0153	Articulate & concise	3-Good		No Action
2	0800	Practices ethical behavior	3-Good		No Action
3	0801	Accepts others opinions	3-Good		No Action

Other Skills

Education Level Bachelor Degree

Years Experience 2

Telecommute Yes

Travel Required No

Travel Frequency (%) 0

● Submit Existing Candidate

Service Provider

○ Submit New Candidate

Location 01 Main

Action 0001 Submit

Pay Rate

Fixed Cost

Vendor Markup or %

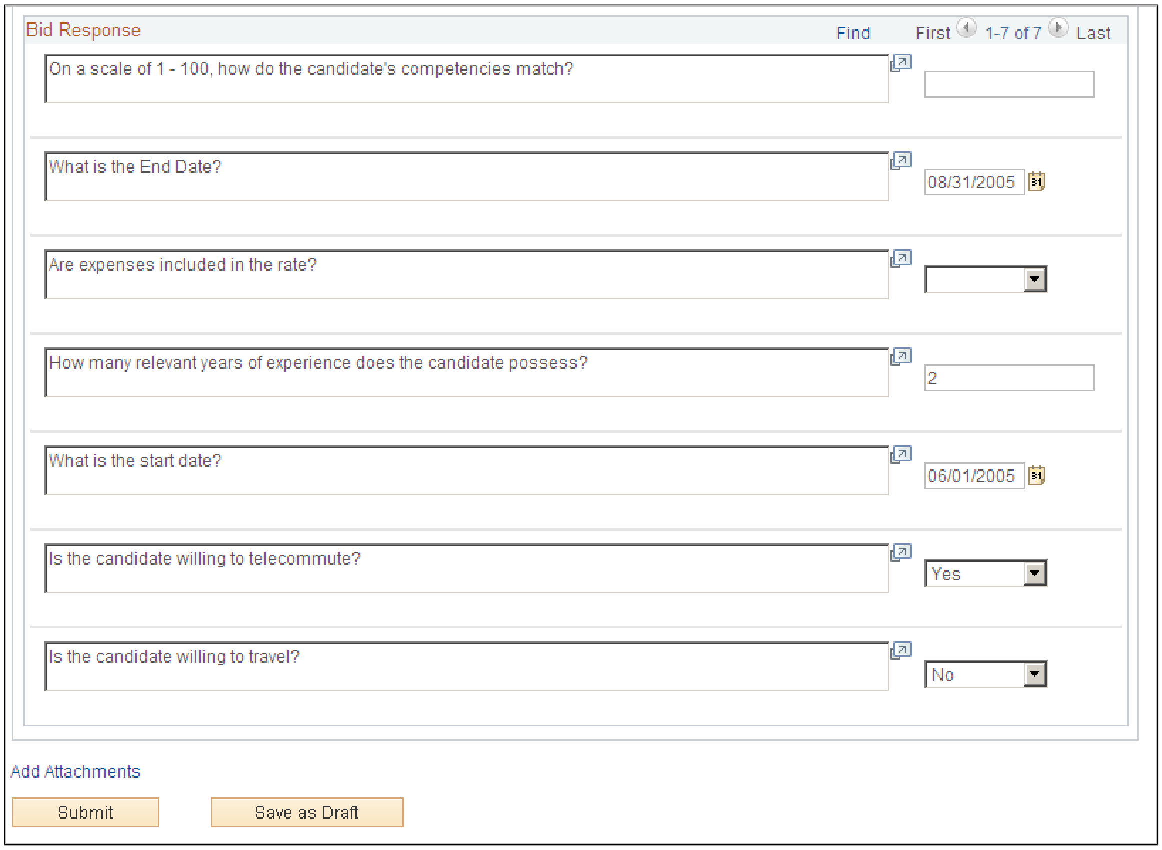
Third Party Markup or % 3rd Party Supplier

Supplier Rate USD

Requisition Rate 40.00 USD

Comment

This example illustrates the fields and controls on the Submit Bid page (3 of 3).



Bid Response

On a scale of 1 - 100, how do the candidate's competencies match?	
What is the End Date?	08/31/2005
Are expenses included in the rate?	
How many relevant years of experience does the candidate possess?	2
What is the start date?	06/01/2005
Is the candidate willing to telecommute?	Yes
Is the candidate willing to travel?	No

Use this page to submit a bid in response to a sourced service. After you submit the bid, you can use the Maintain Bids component to communicate with service coordinators concerning the bid.

This page displays the parent service when you are submitting a bid for a multi-resource service. The page also displays all the child services defined. You cannot submit a bid for the child services until the parent service is filled. You have to complete all the bid factors and enter a monetary amount before submitting a bid.

If sourced sPro requisition gets cancelled, the requisition is removed from the Service Provider Contact's Submit Bids page. Additionally, if there are bid communications in process between the service coordinator and supplier related to the cancelled requisition, those active bids are removed from the Service Provider Contact's Submit Bids page and the Service Coordinators Access and Award Bids page

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Note: A service provider/coordinator cannot submit himself as a candidate (service provider) on the Submit Bid page for a requisition that he sourced.

Enter Bid Information

The supplier must answer each bid factor question at the bottom of the submit bid page before submitting a candidate. Bid factor weightings affect the final score of the candidate.

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

If the system is set to use the rate breakdown feature, the supplier can enter the pay rate, fixed cost, markup, and third-party markup. The sum of the rates is the bid rate.

You can search for existing service providers by clicking the Search By Competencies hyper link. A page with Competencies displays which you can use to enter search criteria and trigger Search Framework.

Rate Details

You define the pay type field labels on the Services Procurement Pay Types page. Pay type fields appear only if they are enabled on the PeopleSoft Services Procurement business unit.

Related Links

Understanding Bid Factors

Multi Resource Submit Bid Page

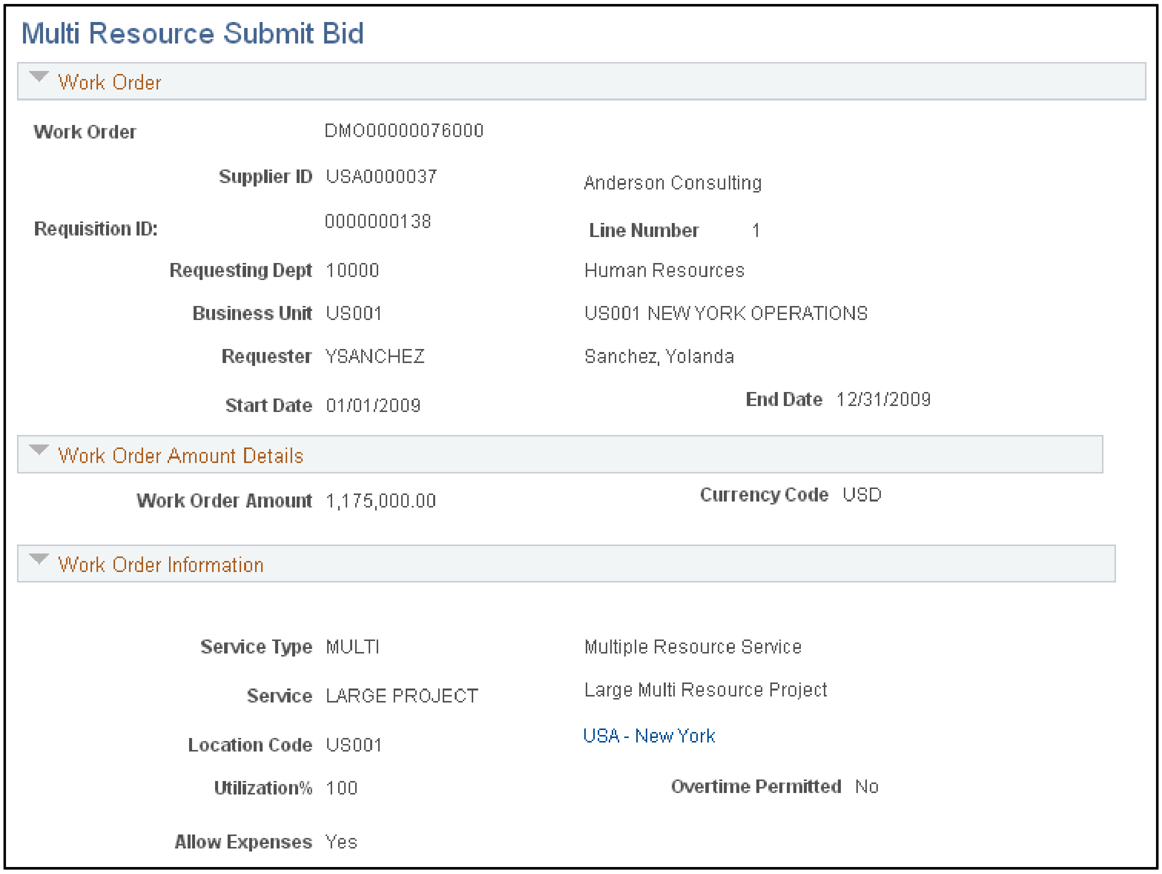
Use the Multi Resource Submit Bid page (SPF_SOURCE_SLT_MWO) to view individual services for multi-resource work orders.

Navigation:

Services Procurement > **Submit Bids**

Select the Work Order Sourcing Review tab on the Requisition Sourcing Review page and then click the **Submit Bid** button on the Work Order Sourcing Review page.

This example illustrates the fields and controls on the Multi Resource Submit Bid page (1 of 2). You can find definitions for the fields and controls later on this page.



Work Order DMO00000076000

Supplier ID USA0000037 Anderson Consulting

Requisition ID: 0000000138 Line Number 1

Requesting Dept 10000 Human Resources

Business Unit US001 US001 NEW YORK OPERATIONS

Requester YSANCHEZ Sanchez, Yolanda

Start Date 01/01/2009 End Date 12/31/2009

Work Order Amount 1,175,000.00 Currency Code USD

Service Type MULTI Multiple Resource Service

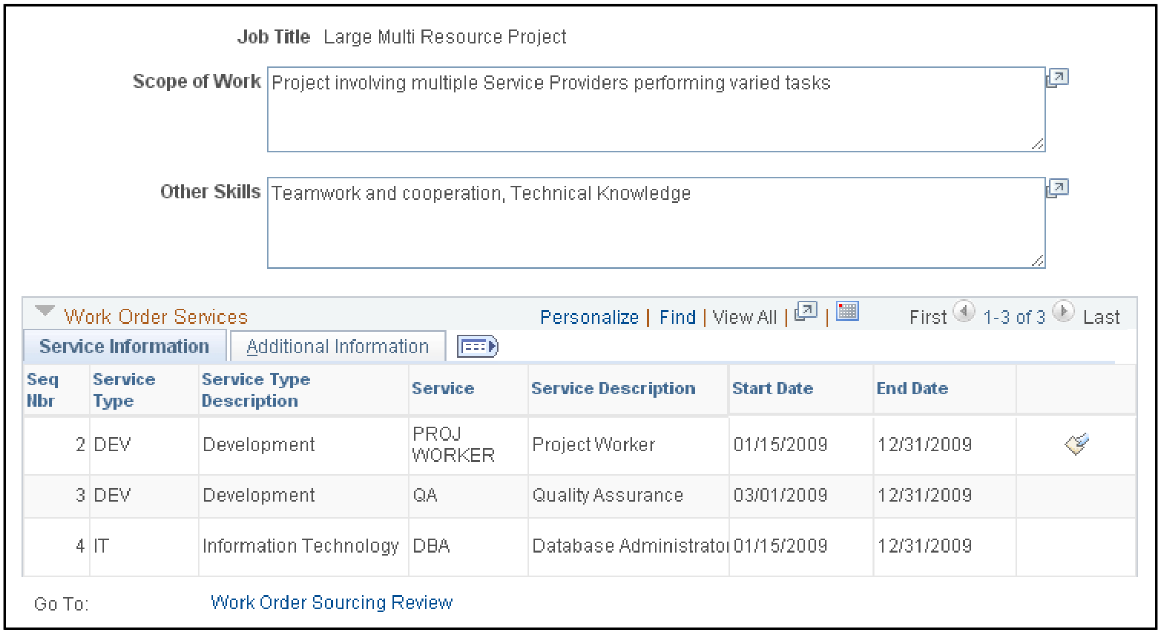
Service LARGE PROJECT Large Multi Resource Project

Location Code US001 USA - New York

Utilization% 100 Overtime Permitted No

Allow Expenses Yes

This example illustrates the fields and controls on the Multi Resource Submit Bid page (2 of 2). You can find definitions for the fields and controls later on this page.



Job Title Large Multi Resource Project

Scope of Work Project involving multiple Service Providers performing varied tasks

Other Skills Teamwork and cooperation, Technical Knowledge

Seq Nbr	Service Type	Service Type Description	Service	Service Description	Start Date	End Date
2	DEV	Development	PROJ WORKER	Project Worker	01/15/2009	12/31/2009
3	DEV	Development	QA	Quality Assurance	03/01/2009	12/31/2009
4	IT	Information Technology	DBA	Database Administrato	01/15/2009	12/31/2009

You use this page to view individual services associated with a parent service. If the parent work order was created from a requisition, the page displays the requisition information. The individual work order services available for sourcing are shown in the grid.

The top portion of the page provides work order and requisition information, work order amounts, and information.

Work Order Services

This grid box provides details about the individual services that make up the parent work order.

Field or Control	***Description***
Seq Nbr (sequence number)	Displays the work order sequence number. The system uses this number to track an individual service.
Service Type	Displays the type of service. Examples of a service type are manufacturing and information technology.
Service	Displays the role that a service provider performs such as a software engineer.
Start Date and End Date	Displays the date range for the corresponding service.
✎	Click the **Submit Another Bid** icon to access the Submit Bid page. You use this page to submit a bid for an individual service on a work order.

Additional Details

Select this tab to view the positions available and filled for each service.

Multi Resource Submit Bid Page

Use the Multi Resource Submit Bid page (SPF_SOURCE_SLT_MWO) to view individual services for multi-resource work orders.

Navigation:

Services Procurement > **Submit Bids**

Select the Work Order Sourcing Review tab on the Requisition Sourcing Review page and then click the **Submit Bid** button on the Work Order Sourcing Review page.

Use this page to submit a bid in response to a sourced work order. After you submit the bid, you can use the Maintain Bids component to communicate with service coordinators concerning the bid.

When working with multi-resource services work orders, you use the parent work order for totals, but use individual services within the parent work order on which to submit bids for services.

You can also add attachments to send with the bid submittal. Click the **Bid Attachments** link to access the File Attachments page where you can locate and upload an attachment.

Click the **Submit** button to submit the bid to the services coordinator. Click the **Save as Draft** button to save your updates to the bid submission. You can access the bid later to complete and submit it. After you save the bid as a draft, it appears as Draft folder type.

Requisition Requirements

Use this group box to view basic requisition details, requisition rates, service information, and candidate requirements and requisition competencies.

Enter Bid Responses

Use this group box to enter bid information about the service provider candidate. You use the Bid Response group box to answer questions about the candidate and the bid.

You must answer each bid factor question at the bottom of the submit bid page before submitting a candidate. Bid factor weightings affect the final score of the candidate. After suppliers submit the first candidate, they can submit additional candidates for the requisition until they reach the maximum number of submittals.

If the system is set to use the rate breakdown feature, the supplier can enter the pay rate, fixed cost, markup, and third-party markup. The sum of the rates is the bid rate.

Related Links

Submit Bid Page

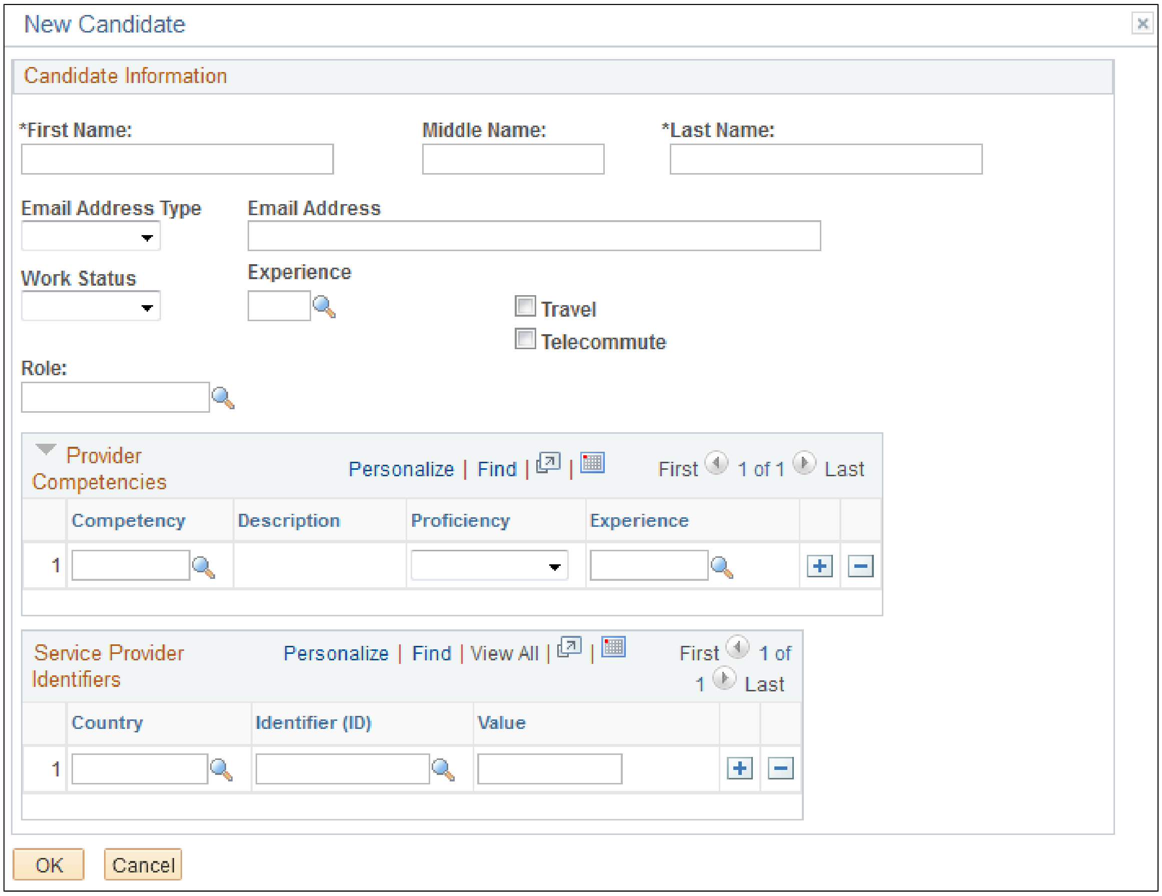
New Candidate Page

Use the New Candidate page (SPF_CANDIDATE_SEC) to submit a candidate who is not yet profiled in the system, create a new candidate profile.

Navigation:

Click the **Create Candidate** button on the Submit Bid page.

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



Field or Control	*Description*
Work Status	Identify the work status for the new candidate. For example, green card holder and citizen.
Years Experience	Identify the number of years of experience for the new candidate.
Travel	Select if the candidate is willing to travel.
Telecommute	Select if the candidate is willing to telecommute.
Role	Identify the main role of the new candidate.
Competency	Identify the main skills associated with the new candidate.

Note: If a candidate is chosen to fill the requisition, the system administrator must add that person as a service provider on the User Profile Setup page. Then, the candidate has a user name and password and can log in to the system to enter time and expenses.

Service Provider Eligibility

Use this grid box to manage service provider details. When a service provider contact submits a new candidate, the contact can optionally enter candidate information related to the candidate's eligibility to fill requisitions or work orders.

Related Links

Maintaining Users and Team Setup

Sourcing History Page

Use the Sourcing History page (SPF_SOURCE_HISTORY) to view requisition sourcing history.

Navigation:

Click the **View History** button on the Requisition Sourcing Review page.

Use this page to upload an attachment related to submitting a candidate as a service provider for a requisition or work order. Before you can access the page, you must select a candidate. To add an attachment using the Bid Attachments page:

1. Click the **Upload** button.

   The File Attachments window appears.

2. Click the **Browse** button to locate the file that you want to attach to the bid.
3. After accessing the file, click the **Upload** button on the File Attachments window.

   The system adds the file to the Bid Attachments page. You can add a description for the file or click the **View** button to view the file.

4. Click the **OK** button to save the uploaded attachment in the system.

   To add another attachment, click the + button.

Sourcing History Page

Use the Sourcing History page (SPF_SOURCE_HISTORY) to view requisition sourcing history.

Navigation:

Click the **View History** button on the Requisition Sourcing Review page.

Use this page to view the requisition sourcing history. The page displays the requisition ID and line number that was sourced to the supplier and the service coordinator who sourced the requisition.

Field or Control	***Description***
Requisition Status	Displays the status of the requisition. You can search requisitions based on their status by using search criteria on the Requisition Sourcing Review page. Values include: *Closed* *Filled* *Pending* *Sourced*

Field or Control	***Description***
Requisition Type	Displays whether the requisition is an extended requisition or an original requisition.

The **Sourcing History** grid box provides information about the service coordinator who submitted the requisition to the supplier, the service provider contact, notification method, such as email, worklist, or both, and when the requisition was sourced to the supplier.

Sourcing History Page

Use the Sourcing History page (SPF_SOURCE_HISTORY) to view requisition sourcing history.

Navigation:

Click the **View History** button on the Requisition Sourcing Review page.

Use this page to view work order sourcing history. For multi-resource services, the page displays the parent work order and requisition line. The page also displays work order amount details for the parent work order, along with information such as the service type and method, utilization, and scope of work.

Field or Control	***Description***
Work Order	Click to access the Details page for the work order. You can use that page to view the child services that make up the parent work order service.
Requisition ID and Line Number	Displays the requisition on which the service order is based
Requester	Displays who submitted the requisition on which the work order is based.

Also, the page displays who submitted the work order, the service provider contact to whom it was submitted, the date on which it was submitted, and the notification method. Click the **Work Order**

Sourcing Review link to go to the Work Order Sourcing Review page, where you can select the history for another work order.

Maintaining Bids and Bid Responses

This topic discusses how to maintain bids and bid responses.

Pages Used to Maintain Bids and Bid Responses

Page Name	***Definition Name***	***Usage***
Maintain Bids Page	SPF_SPC_BID_COM	View bid information.
Supplier Bid Response Page	SPF_SUP_BIDRSP1	Maintain bid responses.
Communication History Page	SPF_BID_HISTORY	View bid history. Maintain Bids Page
Interview Schedule Page	SPF_INTERVIEW_SCHD	Maintain interview schedules. Maintain Bids Page
Resume Attachments Page	SPF_RESUME_ATTACH	Attach resumes to bid responses. Supplier Bid Response Page
Location Address Page	SPF_ADDRESS_LOC	View the supplier location address. Supplier Bid Response Page

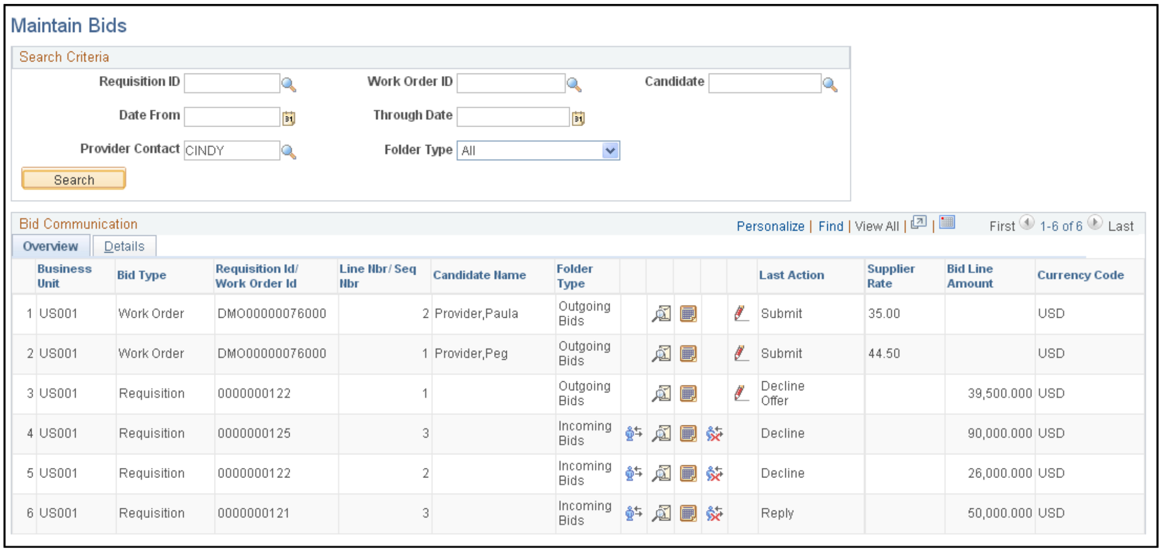
Maintain Bids Page

Use the Maintain Bids page (SPF_SPC_BID_COM) to view bid information.

Navigation:

Services Procurement > **Maintain Bids**

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



Maintain Bids

Search Criteria

Requisition ID:
Work Order ID:
Candidate:
Date From:
Through Date:
Provider Contact: CINDY
Folder Type: All

Bid Communication

	Business Unit	Bid Type	Requisition Id/ Work Order Id	Line Nbr/ Seq Nbr	Candidate Name	Folder Type	Last Action	Supplier Rate	Bid Line Amount	Currency Code
1	US001	Work Order	DMO00000076000	2	Provider,Paula	Outgoing Bids	Submit	35.00		USD
2	US001	Work Order	DMO00000076000	1	Provider,Peg	Outgoing Bids	Submit	44.50		USD
3	US001	Requisition	0000000122	1		Outgoing Bids	Decline Offer		39,500.000	USD
4	US001	Requisition	0000000125	3		Incoming Bids	Decline		90,000.000	USD
5	US001	Requisition	0000000122	2		Incoming Bids	Decline		26,000.000	USD
6	US001	Requisition	0000000121	3		Incoming Bids	Reply		50,000.000	USD

Use this page to search for and access work orders and requisitions associated with bids. The page enables you to access bid features, monitor the bidding process, and communicate with service coordinators. Supplier users use the page to respond to incoming bids and view bids that have been submitted. You can limit search results using search criteria, such as for a requisition or work order, business unit, service provider contact, or candidate.

If sourced sPro requisition gets cancelled in the middle of communication between service coordinator and supplier, the active bids are removed from the Service Provider Contact's Maintain Bids page.

You can also select a value in the **Folder Type** field to indicate the type of bid for which you want to search. Field values include:

- *All:* Select to view all types of bids.
- *Draft:* Select to view only draft bids. These are bids that have been saved as drafts on the Supplier Bid Response page.
- *Incoming:* Select to view only bid responses that are coming from service coordinators.
- *Outgoing:* Select to view only outgoing bid responses that have been sent to service coordinators.

Click the **Search** button to initiate the search. The system displays the search results.

If you are working with a multi-resource work order, this page displays the information that a service provider contact would normally see on the sourcing review pages for the parent service. The service provider contact can see all the services information on this page for a multi-resource work order, such as the number of times the bid was submitted, the maximum submittal limit, and number positions. Service provider contacts can only submit candidates for the sourced services.

Note: When the system compares a service method, it verifies that the comparison is valid for multi-resource requisition sourcing and work order service sourcing.

Field or Control	***Description***
Bid Type	Displays whether the bid is based on a requisition or a work order.
Requisition ID/ Work Order ID	Displays either the requisition or work order identifier.
Line Nbr/ Seq Nbr(line number/sequence number)	Displays either the line number for a requisition or the sequence number for a work order. The system uses these numbers to track elements of a requisition or work order.
Candidate Name	Displays the name of the person who has been identified as the service provider for the work order or requisition.
Folder Type	Displays whether this requisition line or work order sequence is coming from a service coordinator or going to a service coordinator. Draft requisitions or work orders are those that have been updated and saved, but not submitted back to the service coordinator.
	Click the **Create Bid** icon to access the Supplier Bid Response page, where you can enter a bid for the selected requisition or work order service.
	Click the **Submittal History** icon to access the Communication History page, where you can view the bids for the selected work order or requisition.
	Click the **Interview Schedule** icon to access the Interview Schedule page. **Note:** The **Interview Schedule** icon appears only on the Maintain Bids page if the service coordinator has scheduled an interview for the bid.
	Click the **End Communication** icon to generate a bid response that ends the communication regarding a particular bid. After communication has ended, a bid can no longer be considered for a requisition or work order.

Field or Control	***Description***
✎	Click to access the Supplier Bid Response page. If the requisition or work order has not been filled, you can still edit the bid response. You can also withdraw a bid before the service coordinator or requester responds using the page. To withdraw a bid, select the *Retract Bid* value in the **Action** field on the Supplier Bid Response page. When you withdraw a bid before the service coordinator responds to it, the system issues a warning message to confirm that you want to retract the bid submission and then sends an email to inform the service coordinator or service coordinator team. The system also sends an email to the requester if a service coordinator has forwarded the bid to the requester. The withdrawn bid is removed from worklist entries and is not available in the service coordinator's or requester's inbox. **Note:** If the service provider contact edits bids or withdraws bids that have been submitted, the system sends a notification to the service coordinator and the requester if the service coordinator has already forwarded the bid on to the requester for review.
Last Action	Displays the last action performed on the incoming, outgoing, or draft bid. For example, if the service coordinator has responded to fill a bid, the value of the last action performed would be *Fill Bid.* Other values can include *Submit, Decline, Reply,* and *Accept Offer.*
Supplier Rate	Displays the value contained for the supplier's bid rate. This value is the total amount for all service provider costs, including the pay rate, expenses, and markups.
Bid Line Amount	Displays the total amount for the requisition line.
Currency Code	Displays the currency for the supplier rate and bid amount.

Details

Select this tab to view more information about the bid.

Field or Control	***Description***
Date Time	Displays the rate of pay established for the bid for the requisition or work order.
Sent From	Displays the service coordinator who sent the last communication concerning the work order or requisition.

Supplier Bid Response Page

Use the Supplier Bid Response page (SPF_SUP_BIDRSP1) to maintain bid responses.

Navigation:

Click the **Create Bid** button on the Maintain Bids page.

Use this page to respond to service coordinators about bids. The page contents depend on whether you access a requisition bid or work order bid, and the status of the bid. Page contents can include previous and current bid information, candidate skills, bid factors, and rate details. Also, depending on the status, you can update various details about the bid and submit it using another action.

Note: A service provider/coordinator cannot act on a bid on the Supplier Bid Response page if she submitted the bid or if she is the service provider on the bid.

Note: This page is similar to the Submit Bid page. For more information about fields on the Supplier Bid Response page, see the Submitting Bids section.

See Submitting Bids.

Previous Bid Information

This section includes previous bid information and provides links that you can use if you are updating the bid.

Field or Control	***Description***
Supplier Location	Displays the supplier location.
Action	Displays the bid response to the service coordinator for the previous bid. Values are based on the current status and include *Accept Offer, Withdraw, Reply, Decline Offer,* and *End Communication.* You can use the *Withdraw* value to withdraw a submittal after it's already in the service coordinator's or requester's queue.
Comments	Displays all comments for the previous bid.

Rate Details

Rate details appear for the previous bid and the current bid. You can update the rates for the current bid.

Field or Control	*Description*
Proposal Amount	View or edit the total proposal amount for the entire deliverable or multi-resource service. **Note:** Rates and quantities entered in any bid factor responses do not need to total up to the proposal rate.
Rate	View or edit the rate.
Amount in Requisition Currency	Displays the amount currency.
Comments	Enter comments concerning the bid.

Current Bid Response

Use this section to update a bid response by selecting an action. Based on the status of the bid, the system provides the appropriate actions.

Managing Service Providers

This topic discusses how to manage service providers.

Pages Used to Manage Service Providers

Page Name	*Definition Name*	*Usage*
Service Provider Roster Page	SPB_PROV_ROST_PG	Manage service providers that includes reviewing and updating service provider information.
Maintain Service Provider Page	SPB_PERS_PROV_PAGE	Maintain service provider information.
Manage Time/Expense Sheets Page	SPA_MANAGE_TE	View timesheet history. Service Provider Roster Page

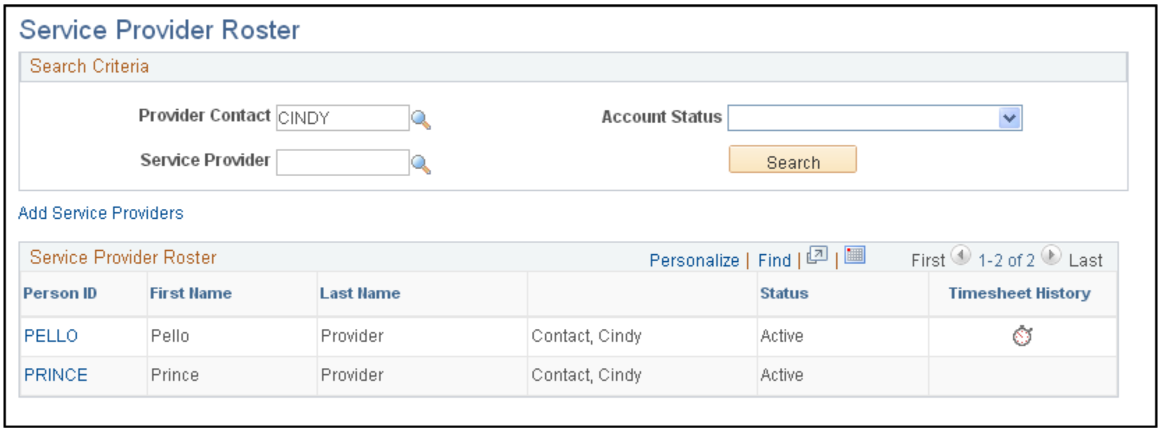
Service Provider Roster Page

Use the Service Provider Roster page (SPB_PROV_ROST_PG) to manage service providers that includes reviewing and updating service provider information.

Navigation:

Services Procurement > **Manage Service Providers**

This example illustrates the fields and controls on the Service Provider Roster page. You can find definitions for the fields and controls later on this page.



Service Provider Roster

Search Criteria

Provider Contact: CINDY

Account Status:

Service Provider:

Service Provider Roster

Person ID	First Name	Last Name		Status	Timesheet History
PELLO	Pello	Provider	Contact, Cindy	Active	⏱
PRINCE	Prince	Provider	Contact, Cindy	Active	

After completing the search criteria, click the **Search** button to populate the **Service Provider Roster** grid box.

Field or Control	***Description***
Provider Contact	Select a provider contact whom you want to include in the search results. If you leave the field blank, the system displays information for all service provider contacts in the organization.
Account Status	Select an account status on which to base the search. Statuses include: *Active:* Select to include only active service providers. *InActive:* Select to include only inactive service providers. *Pending Registration:* Select to include only those service providers who are pending activation. New service providers added by the service provider contact during bid submittal using the New Candidate page are initially created with this status.
Service Provider	Select the service provider for whom you want to search.
Add Service Providers	Click to access the Maintain Service Provider page, where you can add service providers. This link is available only if the user has the SP_ADD_SERV_PROVIDER role action.
Person ID	Click to access the Maintain Service Provider page, where you can review and update service provider information.

Field or Control	***Description***
⏱	Click the **Timesheet History** button to access the Manage Time/Expense Sheets page, where you can view the history for a service provider timesheet.

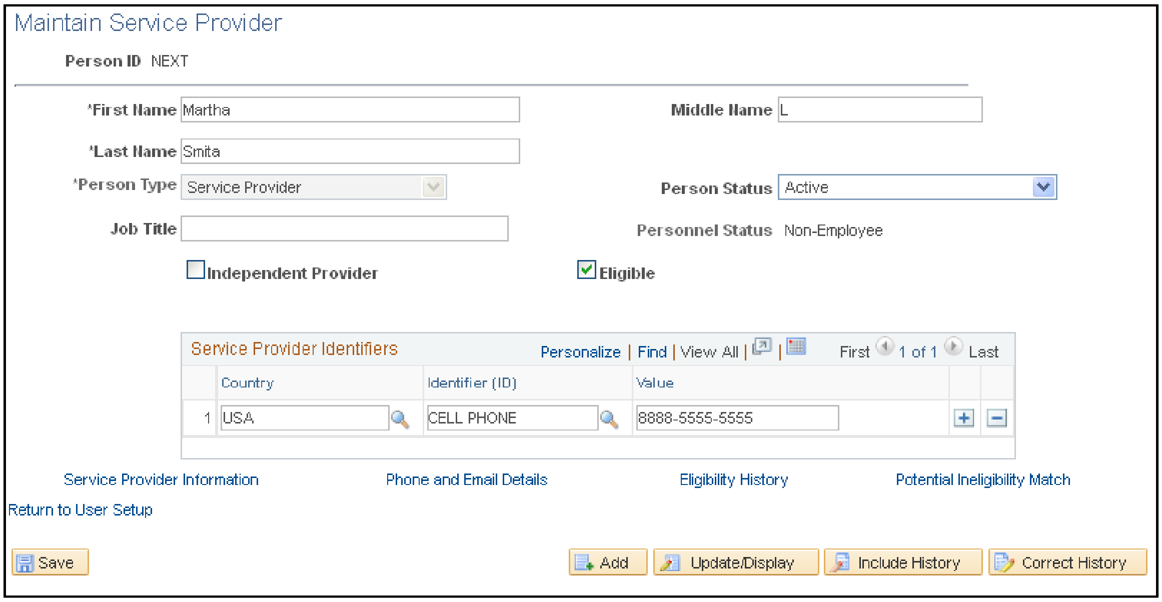
Maintain Service Provider Page

Use the Maintain Service Provider page (SPB_PERS_PROV_PAGE) to maintain service provider information.

Navigation:

Click the **Add Service Providers** link on the Service Provider Roster page.

This example illustrates the fields and controls on the Maintain Service Provider Page. You can find definitions for the fields and controls later on this page.


Maintain Service Provider

Person ID NEXT

*First Name Martha

Middle Name L

*Last Name Smita

*Person Type Service Provider

Person Status Active

Job Title

Personnel Status Non-Employee

☐ Independent Provider

☑ Eligible

Service Provider Identifiers

	Country	Identifier (ID)	Value
1	USA	CELL PHONE	8888-5555-5555

This page displays service provider information.

Field or Control	***Description***
Person Type	Displays the type of role that the person performs. Values include: *Service Provider:* This is the standard person type for a service provider and is the status automatically assigned by the system when the provider is created. *Service Provider/Coordinator:* Only those service providers who have also been given a service coordinator role will have this person type.

Field or Control	***Description***
Person Status	Select a value to indicate the status of the service provider. Values are *Active, Inactive,* and *Pending Registration.*
Job Title	Enter the classification of the position. The value appears by default from the service attributes, if it has been defined.
Personnel Status	Displays the service provider's nonemployee status.
Employee ID	Enter the identifier for the employee.
Country	Select a country code. The **Service Provider Identification** grid contains additional information that you use to identify a service provider. When you select a country code, the identifiers specific for that country will be available for selection, along with any applicable noncountry-specific identifiers. For example, a Social Security number (SSN) would be applicable only for the United States. You use service provider identifier information for eligibility validation when eligibility tracking is enabled for a business unit.
Identifier (ID)	Select a type of information to use to uniquely identify a person. This information, such as a driver's license or passport, can be used to verify the service provider during the bidding process and work order creation.
Value	Enter a value for the identifier. For example, if you selected to use a phone number as an identifier, then you would enter the number in this field.
Service Provide Information	Click to access the Service Provider Information page, where you can view and update additional provider information details.
Phone and Email Details	Click to access the Phone and Email Details page, where you can view and update contact information for the service provider.

Chapter 17

Assessing and Awarding Bids

Understanding Supplier Communications

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

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

- Review incoming, draft, and outgoing supplier bid information.
- Exchange continuous bid communication (service coordinator and requester).
- Respond to bid submissions (service coordinator only).
- Schedule interviews for submitted candidates (service coordinator only).
- Select a qualified bid to fill the position (service coordinator only).

To communicate with suppliers:

1. Access the Assess and Award Bids page to view qualified bids submitted by service provider contacts.
2. Use the Bid Response page to respond to supplier bids.

   Note: Candidate selection is complete when you select the *Fill* value as the bid action. This action officially ends the bid process between you and the supplier. An email notification is automatically sent to all bidding service provider contacts to inform them that the request has been filled by another supplier.

3. Use the Bid Response page to view the responses sent.
4. Access the Interview Schedule page to schedule and rate interviews (service coordinator and requester).
5. Use the Analyze Line and Analyze Total pages to analyze bid amounts and line scores for all bids submitted for the requisition or work order request.

   You can also change the bid factor weightings on these pages to perform a what-if analysis.

6. Fill the requisition or work order from either the Analyze Total page or the Bid Response page.

For more information about how suppliers submit bids and manage their awarded bid, see the Submitting and Managing Bids set of topics.

See Understanding the Requisition and Work Order Bidding Process.

Multi-Resource Requisition and Work Order Bids

The multi-resource services feature supports a grouping of multiple unique services and service providers for PeopleSoft Services Procurement requisitions and work orders. The bidding for multi-resource services is a two-step process. First, the multi-resource (parent) service is filled, and subsequent to that the individual (child) services can be sourced from the parent work order and filled by the supplier that was selected.

Service coordinators, requesters, and service provider contacts can communicate about bids for individual child services. A service coordinator can fill multiple positions for an individual work order service until total position quantity is reached. Each individual work order service position is converted to a child work order for the multi-resource parent.

See Setting Up Multi-Resource Services.

Prerequisites

Before you can communicate with suppliers about requisitions and work orders, suppliers must respond to the sourced service by submitting bids.

Viewing and Responding to Bids

This topic discusses how to view and respond to bids.

Pages Used to View and Respond to Bids

Page Name	***Definition Name***	***Usage***
Assess and Award Bids Page	SPF_SC_BID_COM	View bids including incoming bids submitted by suppliers, outgoing bids to suppliers, and draft bids.
Requisition Line Job Summary Page	SPF_REQ_SUMMARY_PG	View job summary details. Assess and Award Bids Page
Work Order Summary Page	SPF_WORDER_DETAIL	View work order details. Assess and Award Bids Page
Bid Response Page	SPF_CLIBID_RSP	Respond to bids.
Analyze Line Page	AUC_ANALYZE_HDL_PG	Analyze event lines including line amounts and scores for all supplier bids that respond to a requisition or work order request.

Page Name	***Definition Name***	***Usage***
Analyze Total Page	AUC_ANALYZE_HD_PG	Analyze event totals, including amounts for all supplier bids that respond to a requisition or work order request.
Award Details (for service coordinators and requesters) Page	AUC_AWARD_DT_PG	View the details of your events. Analyze Total Page
Supplier Information Page (for service coordinators)	AUC_AWARD_VNDR	View supplier information. Analyze Total Page
Line Bid Factors (for service coordinators) Page	AUC_LN_BF_SEC	Add line bid factors while analyzing events. Events Details Page
Search Bid Factors by Group Page	BID_FCTR_GRP_SRCH	Add bid factors by group. Events Details Page
Submittal History Page	SPF_CLIBID_HIS	View the history for requisition and work order bid responses. Assess and Award Bids Page
Bid Attachments Page	SPF_BID_ATTACH	View and upload attachments that are associated with the bid such as documents or spreadsheets. Bid Response Page

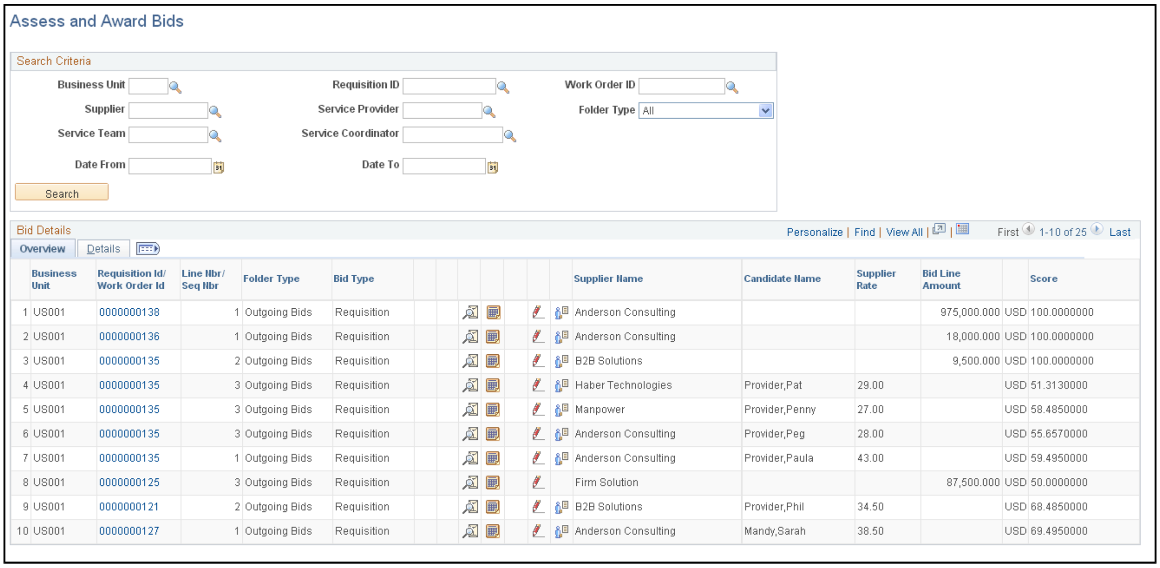
Assess and Award Bids Page

Use the Assess and Award Bids (for service coordinators and requesters) page (SPF_SC_BID_COM) to view bids including incoming bids submitted by suppliers, outgoing bids to suppliers, and draft bids.

Navigation:

Services Procurement > **Assess and Award Bids**

This example illustrates the fields and controls on the Assess and Award Bids page. You can find definitions for the fields and controls later on this page.



Folder Type: All

	Business Unit	Requisition Id/ Work Order Id	Line Nbr/ Seq Nbr	Folder Type	Bid Type	Supplier Name	Candidate Name	Supplier Rate	Bid Line Amount		Score
1	US001	0000000138	1	Outgoing Bids	Requisition	Anderson Consulting			975,000.000	USD	100.0000000
2	US001	0000000136	1	Outgoing Bids	Requisition	Anderson Consulting			18,000.000	USD	100.0000000
3	US001	0000000135	2	Outgoing Bids	Requisition	B2B Solutions			9,500.000	USD	100.0000000
4	US001	0000000135	3	Outgoing Bids	Requisition	Haber Technologies	Provider,Pat	29.00		USD	51.3130000
5	US001	0000000135	3	Outgoing Bids	Requisition	Manpower	Provider,Penny	27.00		USD	58.4850000
6	US001	0000000135	3	Outgoing Bids	Requisition	Anderson Consulting	Provider,Peg	28.00		USD	55.6570000
7	US001	0000000135	1	Outgoing Bids	Requisition	Anderson Consulting	Provider,Paula	43.00		USD	59.4950000
8	US001	0000000125	3	Outgoing Bids	Requisition	Firm Solution			87,500.000	USD	50.0000000
9	US001	0000000121	2	Outgoing Bids	Requisition	B2B Solutions	Provider,Phil	34.50		USD	68.4850000
10	US001	0000000127	1	Outgoing Bids	Requisition	Anderson Consulting	Mandy,Sarah	38.50		USD	69.4950000

Use this page to search for and access bids associated with sourced work orders and requisitions. You can use the page to respond to an incoming bid or edit a draft or outgoing bid. You can limit search results using search criteria, such as for a requisition or work order. Select a value in the **Folder Type** field to indicate the type of bid for which you want to search. Field values include:

- *All:* Select to view all types of bids.
- *Draft:* Select to view only draft bids. These are bids that have been saved as drafts on the Bid Response page.
- *Incoming:* Select to view only incoming bid responses. These bids are awaiting your action.
- *Outgoing:* Select to view only outgoing bid responses.

Click the **Search** button to initiate the search. The system displays the search results.

If you are working with a multi-resource work order, this page displays the information for the higher-level parent work order or requisition line service. The page displays information such as the number of times the bid was submitted, the maximum submittal limit, and number of positions.

If sourced sPro requisition gets cancelled in the middle of communication between service coordinator and supplier, the active bids are removed from the Service Coordinator's Assess and Award Bids page.

Overview

Select the Overview tab.

Field or Control	***Description***
Requisition ID/Work Order ID	Click to view the details of a requisition or work order. The *Bid Type* value indicates whether the bid is related to a work order or requisition.
Line Nbr/Seq Nbr (line number/sequence number)	Displays the line number for requisitions or the sequence number for multi-resource work orders to identify the related child service for the bid.
Folder Type	Displays whether the bid is a draft bid or an incoming or outgoing bid.
Bid Type	Displays whether the bid is based on a requisition or a work order.
	Click to access the Bid Response page and to respond to the supplier or requester.
	Click to access the Bid Analysis page to compare competing bids.
	Click to access the Bid History page.
	Click to access the Interview Schedule page.
	Click to generate a bid response that ends the communication regarding a particular bid. After communication has ended, you can no longer consider the bid for a requisition or work order. The system provides a confirmation page, where you can confirm that you want to end communication. You can also enter a reason code for ending communication and comments about the action.
	Click to access the Bid Response page. Using this page, you can update bid information to complete it and respond to the bid. When you save a bid response as a draft, you can access the bid using this button.
	Click to navigate to the associated work order for filled bids.

Field or Control	***Description***
Supplier Name	Displays the supplier from which the requisition or work order bid was received.
Candidate Name	Displays the service provider submitted by the supplier. **Note:** The **Candidate Name** field is blank for bids on deliverable or multi-resource parent services.
📎	Click the **View Resume** icon to open the resume for the service provider.
Supplier Rate	Displays the rate for resource services. The rate appears in the requisition currency. **Note:** The **Supplier Rate** field is blank for deliverable or multi-resource parent services.
Bid Line Amount	Displays the amount for deliverable or multi-resource parent services. **Note:** The **Bid Line Amount** field is blank for resource services.
Score	Displays the calculated score based on the previous response.

Details

Select the Details tab. The tab displays additional information about the work order or requisition such as the last action, date, and who performed the action.

Field or Control	***Description***
Last Action	Review the last actions submitted by the supplier.
Date	Displays the date and time that the supplier responded to the bid.
Sent From	Displays the name of the user who sent the bid.

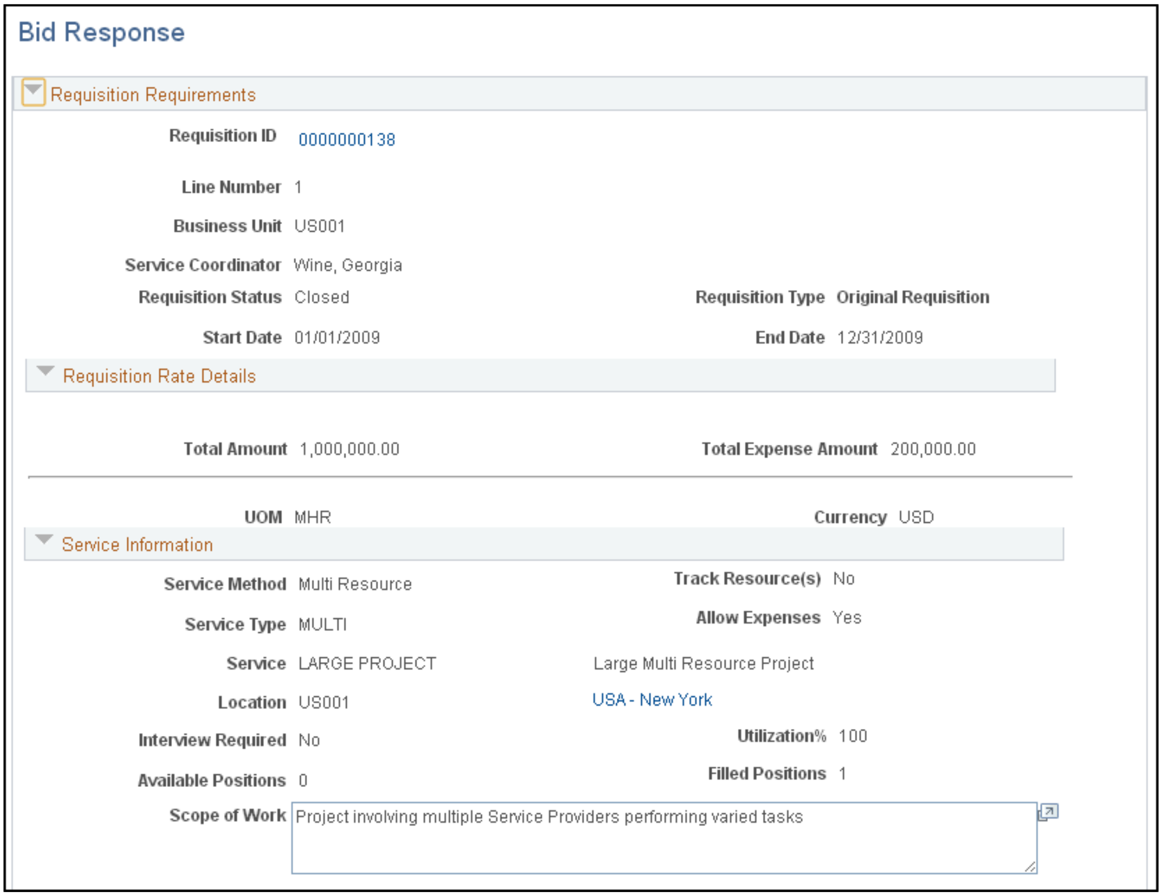
Bid Response Page

Use the Bid Response (for service coordinators and requesters) page (SPF_CLIBID_RSP) to respond to bids.

Navigation:

Click the **Bid Response** button on the Assess and Award Bids page.

This example illustrates the fields and controls on the Bid Response page (1 of 3). You can find definitions for the fields and controls later on this page.



Bid Response

Requisition Requirements

Requisition ID 0000000138

Line Number 1

Business Unit US001

Service Coordinator Wine, Georgia

Requisition Status Closed

Requisition Type Original Requisition

Start Date 01/01/2009

End Date 12/31/2009

Requisition Rate Details

Total Amount 1,000,000.00

Total Expense Amount 200,000.00

UOM MHR

Currency USD

Service Information

Service Method Multi Resource

Track Resource(s) No

Service Type MULTI

Allow Expenses Yes

Service LARGE PROJECT Large Multi Resource Project

Location US001 USA - New York

Interview Required No

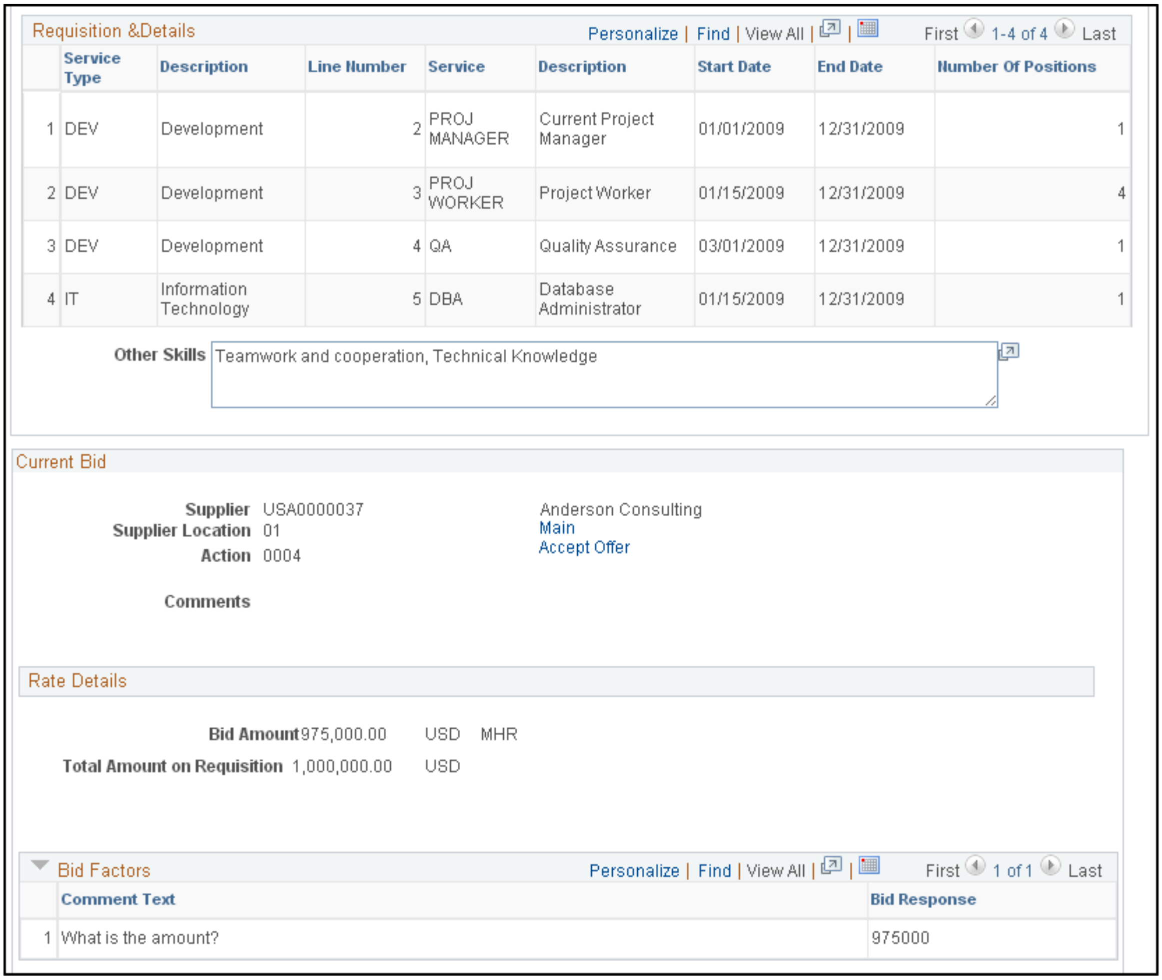
Utilization% 100

Available Positions 0

Filled Positions 1

Scope of Work Project involving multiple Service Providers performing varied tasks

This example illustrates the fields and controls on the Bid Response page (2 of 3). You can find definitions for the fields and controls later on this page.



Requisition &Details

	Service Type	Description	Line Number	Service	Description	Start Date	End Date	Number Of Positions
1	DEV	Development	2	PROJ MANAGER	Current Project Manager	01/01/2009	12/31/2009	1
2	DEV	Development	3	PROJ WORKER	Project Worker	01/15/2009	12/31/2009	4
3	DEV	Development	4	QA	Quality Assurance	03/01/2009	12/31/2009	1
4	IT	Information Technology	5	DBA	Database Administrator	01/15/2009	12/31/2009	1

Other Skills: Teamwork and cooperation, Technical Knowledge

Current Bid

Supplier: USA0000037 Anderson Consulting
Supplier Location: 01 Main
Action: 0004 Accept Offer
Comments:

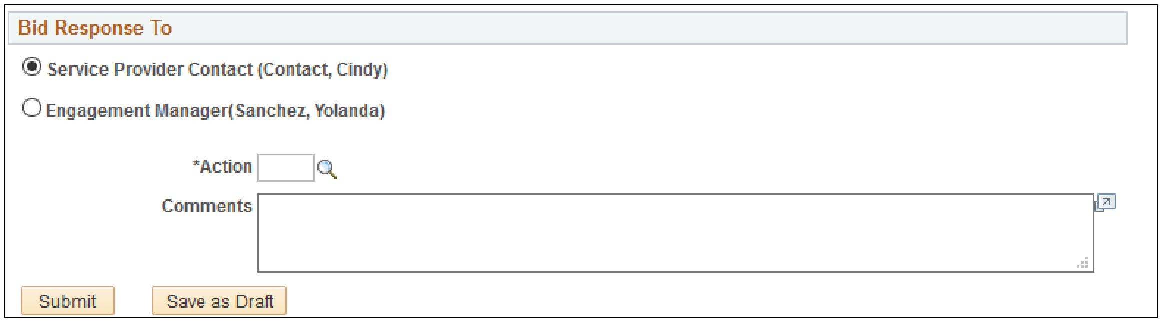
Rate Details

Bid Amount: 975,000.00 USD MHR
Total Amount on Requisition: 1,000,000.00 USD

Bid Factors

	Comment Text	Bid Response
1	What is the amount?	975000

This example illustrates the fields and controls on the Bid Response page (3 of 3). You can find definitions for the fields and controls later on this page.



Bid Response To

● Service Provider Contact (Contact, Cindy)

○ Engagement Manager(Sanchez, Yolanda)

*Action:
Comments:

Service coordinators use this page to respond to supplier bids. The page displays information about requisitions or work orders depending on the type of bid to which you are responding. To access either a requisition or work order, click the **Work Order ID** or **Requisition ID** link on the Assess and Award Bids page.

The page has numerous formats depending on whether it's for a resource or deliverable service, whether it's for a requisition or work order replacement, and whether it's for a multi-resource service or related individual service. The most common use of the Bid Response page is with resource requisitions. The previous page examples are based on resource requisition sourcing.

Requirements

This section displays information about the requisition or work order, including the services coordinator and start and end dates. In the case of work order replacements, the **Replacement For** field displays the work order that requires a replacement service provider. The **Sequence Number** field appears for the work order sequence. The requisition and requisition line number also appear in this section.

You can also perform bid communications for multi-resource work orders. Communications among the service coordinator, requester, and service provider contact act the same way as work order sourcing, except that the system also updates the parent work order with the candidate and rate information after you identify the candidate for the individual service.

Details

This section displays pay rates, fixed cost, and expense rates for a work order. The **3rd Party Markup** field displays additional markups that are charged when the supplier secures resources from a subcontractor, and is available when the **SP Pay Types Enabled** check box is enabled on the Services Procurement Installation Options page.

Requisitions use a **Rate Details** grid that displays total amount for the requisition along with the total expense. It also displays average filled rate and amounts for requisition.

Service Information

This section displays service information, such as whether the work order or requisition uses a multi-resource, deliverable, or resource service method.

Candidate Requirements

This section provides candidate competency requirements for the resource services. Available in the section, for example, are the education level, experience, and other skills. The fields in this section are the same for work orders and requisitions.

Current Bid

This section displays bid information for the work order or requisition.

Field or Control	***Description***
🔍	Click to enter the new bid action response.

Field or Control	***Description***
Action	Select an action and optionally respond to suppliers with comments. This field is required even when you save the bid as a draft. Values include: • *Schedule Interview* 0001 • *Fill Bid:* 0004 • *Offer Position:* 0003 • *Reply:* 0010 • *Decline:* 0011 • *End Communication:* 0015 **Note:** After you select *End Communication,* the bid process between the service coordinator and the supplier officially ends. **Note:** To fill the requisition or work order, select *Fill Bid.* This sends a worklist entry to the requester notifying him that a work order must be generated. The worklist may also go to the service coordinator if his defaults specify that he can create work orders. In addition, the **Generate Work Order** button becomes available at the bottom of the Bid page for service coordinators having authorization If preapproval sourcing is in effect, the service coordinator cannot offer the position until the requisition has been approved. When PeopleSoft Commitment Control has been enabled, service coordinators cannot offer positions or manually release work orders until the requisition has been budget checked.
Supplier Address Name (the actual location name appears on the page)	Click to access the Supplier Address page. You use this page to view the supplier's address information.

Field or Control	*Description*
Submit	Click to access the Submittal History page. You use this page to view the history of the bid submissions.

Rate Details

Field or Control	*Description*
Bid Rate	Displays the bid rate for resource services.
Bid Amount	Displays the bid amount for deliverable or multi-resource services.
Total Amount on Requisition	Displays the total amount for the requisition.

Bid Factors

Displays bid factor questions for the service and responses provided by the supplier for this bid.

Bid Response To

Select the appropriate option in this group box to send communications to the engagement manager of the requisition or to the service provider contact who submitted the bid.

Field or Control	*Description*
Service Provider Contact	Select to submit the bid response to the service provider contact. **Note:** A service coordinator can send a response to either the engagement manager or the service provider contact, not both. If a response is sent to a engagement manager, the service coordinator and engagement manager can select only bid actions that are specific to their communications. Additional bid actions that are intended for the service provider contact are filtered out.
Engagement manager	Select to submit the bid response to the person who requested or manage the requisition.
Action	Select the response that you want to make to the bid.

Field or Control	***Description***
Comments	Enter any comments that you want to include in your response.
Submit	Click to send the bid response to the selected user.
Save as Draft	Click to save the work that you have completed for the page without submitting it. The system saves the response and makes it available as a **Draft Bid** in the Folder Type column on the Assess and Award Bid page. To make additional changes to the bid, click the **Edit** button on the Assess and Award Bid page.

Related Links

Bid Factor Setup Page

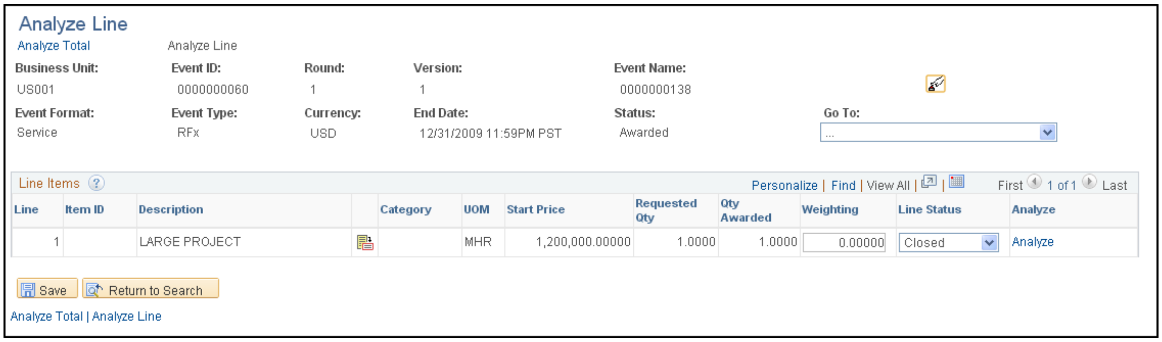
Analyze Line Page

Use the Analyze Line (for service coordinators and requesters) page (AUC_ANALYZE_HDL_PG) to analyze event lines including line amounts and scores for all supplier bids that respond to a requisition or work order request.

Navigation:

Click the **Analyze Events** button on the Assess and Award Bids page.

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



Analyze Line

Analyze Total Analyze Line

Business Unit:	Event ID:	Round:	Version:	Event Name:
US001	0000000060	1	1	0000000138

Event Format:	Event Type:	Currency:	End Date:	Status:	Go To:
Service	RFx	USD	12/31/2009 11:59PM PST	Awarded	...

Line Items

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1		LARGE PROJECT		MHR	1,200,000.00000	1.0000	1.0000	0.00000	Closed	Analyze

Optionally, use this page to view and maintain details about a single event line. To view and maintain event totals, click the **Analyze Total** link.

Field or Control	***Description***
✎	Click the **Change RFI Status to Reviewed** (change request for information status to Reviewed) icon to update the event. When you click the button, the system removes the button and updates the **Status** field to *RFI Rvwed.*
Analyze	Click to have the system run a bid analysis. You can analyze bids at any time during an event, or you can wait until it ends. When analyzing events, you can sort the information using different criteria. For example, you can sort by highest score, lowest price, or lowest total cost to display the best bid. When the system completes the analysis, it displays additional information about the bid, including the analysis results and bid factors. You can also assign a bid action or recalculate the bid using the page.
Bid Action	After you analyze a bid, this field becomes available for you to select an action for the bid, including awarding the event to a bidder. Select *Award* in the **Bid Action** field. You can award the event to one bidder only.

Related Links

"Understanding Bid Analysis" (PeopleSoft Strategic Sourcing)

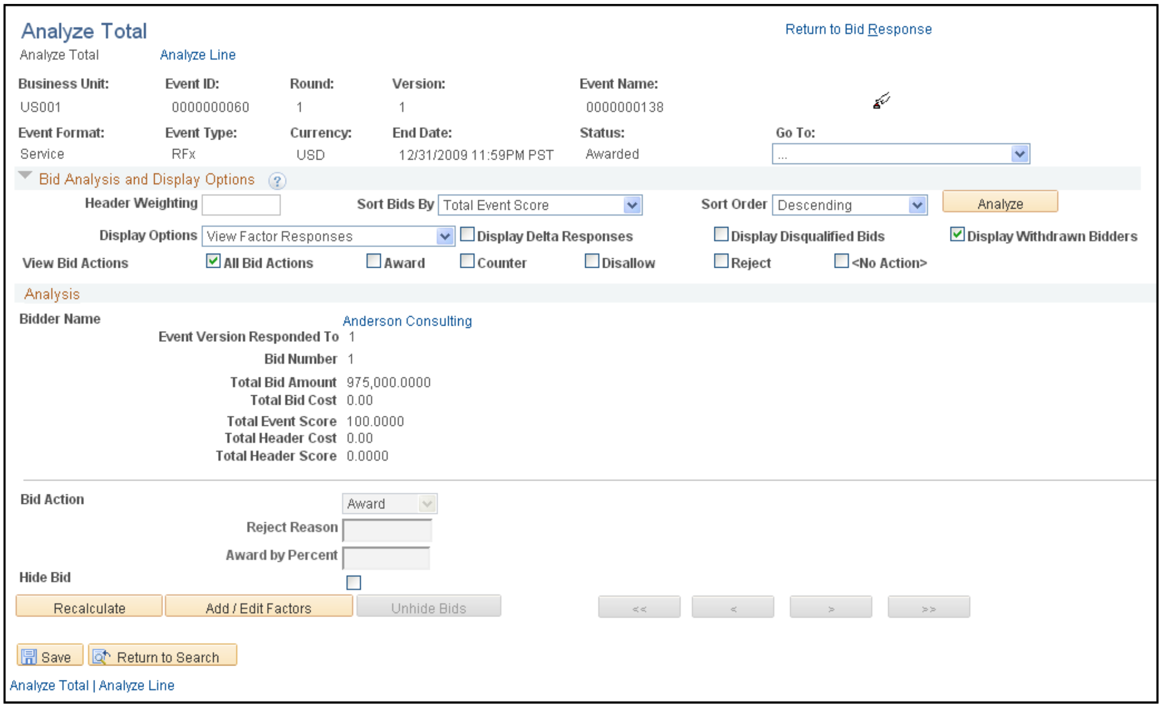
Analyze Total Page

Use the Analyze Total (for service coordinators and requesters) page (AUC_ANALYZE_HD_PG) to analyze event totals, including amounts for all supplier bids that respond to a requisition or work order request.

Navigation:

Click the **Analyze Total** link on the Analyze Line page.

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



Analyze Total

Analyze Total | Analyze Line

Return to Bid Response

Business Unit: US001
Event ID: 0000000060
Round: 1
Version: 1
Event Name: 0000000138
Event Format: Service
Event Type: RFx
Currency: USD
End Date: 12/31/2009 11:59PM PST
Status: Awarded
Go To: ...

Bid Analysis and Display Options

Header Weighting
Sort Bids By: Total Event Score
Sort Order: Descending
Display Options: View Factor Responses
☐ Display Delta Responses
☐ Display Disqualified Bids
☑ Display Withdrawn Bidders
View Bid Actions: ☑ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Reject ☐ <No Action>

Analysis

Bidder Name: Anderson Consulting
Event Version Responded To: 1
Bid Number: 1
Total Bid Amount: 975,000.0000
Total Bid Cost: 0.00
Total Event Score: 100.0000
Total Header Cost: 0.00
Total Header Score: 0.0000

Bid Action: Award
Reject Reason
Award by Percent
Hide Bid ☐

Bidders can view award details when the event status is awarded and you deselect the **Display Bids** check box on the Award Details page.

Field or Control	***Description***
Bid Action	To award an event to a bidder, select *Award* in the **Bid Action** field. You can award the event to one bidder only.

Related Links

“Awarding Events” (PeopleSoft Strategic Sourcing)

Events Details Page

Use the Events Details Page to view details of events.

Navigation:

Select a bid, and click the > **Award Details** link on the Analyze Events page

Field or Control	*Description*
Post Award	Click to post your bid event and award the contract to a supplier. Posting the award sends a worklist item to the requester to generate a work order. A worklist item also is sent to the service coordinator if he is authorized to create work orders as defined in the service coordinator defaults. **Note:** After you post the award, the line details appear.

Related Links

"Posting Awards" (PeopleSoft Strategic Sourcing)

Creating and Maintaining Interview Schedules

This topic provides an overview of the interview process and discusses how to create and maintain interview schedules.

Pages Used to Create and Maintain Interview Schedules

Page Name	*Definition Name*	*Usage*
Interview Schedule Page	SPF_INTERVIEW_SCHD	Create and update an interview schedule for a candidate.
Interview Schedule Details Page	SPF_REQ_SUMMARY_PG	Evaluate candidates based on their interviews.
Job Summary Details Page	SPF_REQ_SUMMARY_PG	View job summary details. Assess and Award Bids Page

Understanding the Interview Process

Here is an overview of the interview process:

1. Use the Interview Schedule page (SPF_INTERVIEW_SCHD) to create and update an interview schedule for a candidate.

   Navigation

   Services Procurement, Assess and Award Bids

   Click the **Interview Schedule** button on the Assess and Award Bids page.

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

Note: After you schedule a candidate interview for a requisition or work order service, the interview schedule details appear for the supplier.

Note: The interviewer must have the requester, service coordinator, or approver role.

2. Use the Interview Schedule Details page (SPF_REQ_SUMMARY_PG) to evaluate candidates based on their interviews.

   Navigation

   Click the **Evaluate** button on the Interview Schedule page.

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

   Note: Only service coordinators and requesters can access the **Send Email Notification** check box.

3. Save the page.

Upon completing the interview, the interviewer rates the candidate using the star rating system. After the **Interview Completed** check box is selected, the system calculates the average interview score for that candidate by selecting the rating for all completed interviews and dividing it by the number of completed interviews. This value is then saved in PeopleSoft Strategic Sourcing bid factor tables and used to calculate the candidate's overall score.

Note: The Enable Rating setting on the business unit does not affect ratings for an interview; it only controls whether timesheet ratings are used.

Note: The calculation of scores happens only when the interview bid factor is associated with this requisition or work order. If the interview bid factor is not used, the rating on the interview page is used for information purposes and is not used to determine the candidate's overall score.

Interview Schedule Page

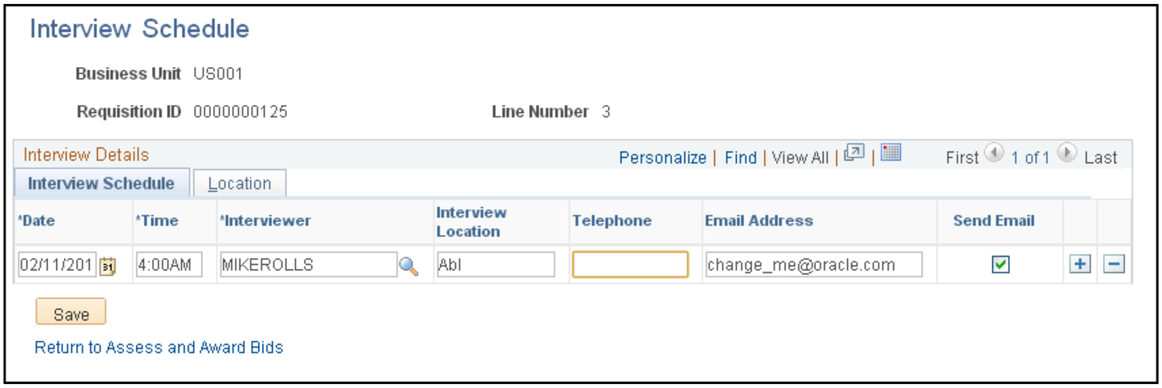
Use the Interview Schedule page (SPF_INTERVIEW_SCHD) to create and update an interview schedule for a candidate.

Navigation:

Services Procurement, Assess and Award Bids

Click the **Interview Schedule** button on the Assess and Award Bids page.

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



Business Unit US001

Requisition ID 0000000125

Line Number 3

*Date	*Time	*Interviewer	Interview Location	Telephone	Email Address	Send Email
02/11/201	4:00AM	MIKEROLLS	Abl		change_me@oracle.com	☑

Enter the details of the interview schedule, including date, time, and interviewer. Header information displays either the work order ID or requisition ID.

Requesters and service coordinators can view the service providers scheduled for interviews. Click the **Evaluate Candidate** button to access the **Interview Schedule Details** page, where you can evaluate the candidate and provide interview details.

Note: You cannot update an interview schedule after you select *Fill bid, Position No Longer Available, Offer Accepted,* or *No Longer Available.*

You can also set up interviews for individual service bids related to a multi-resource service.

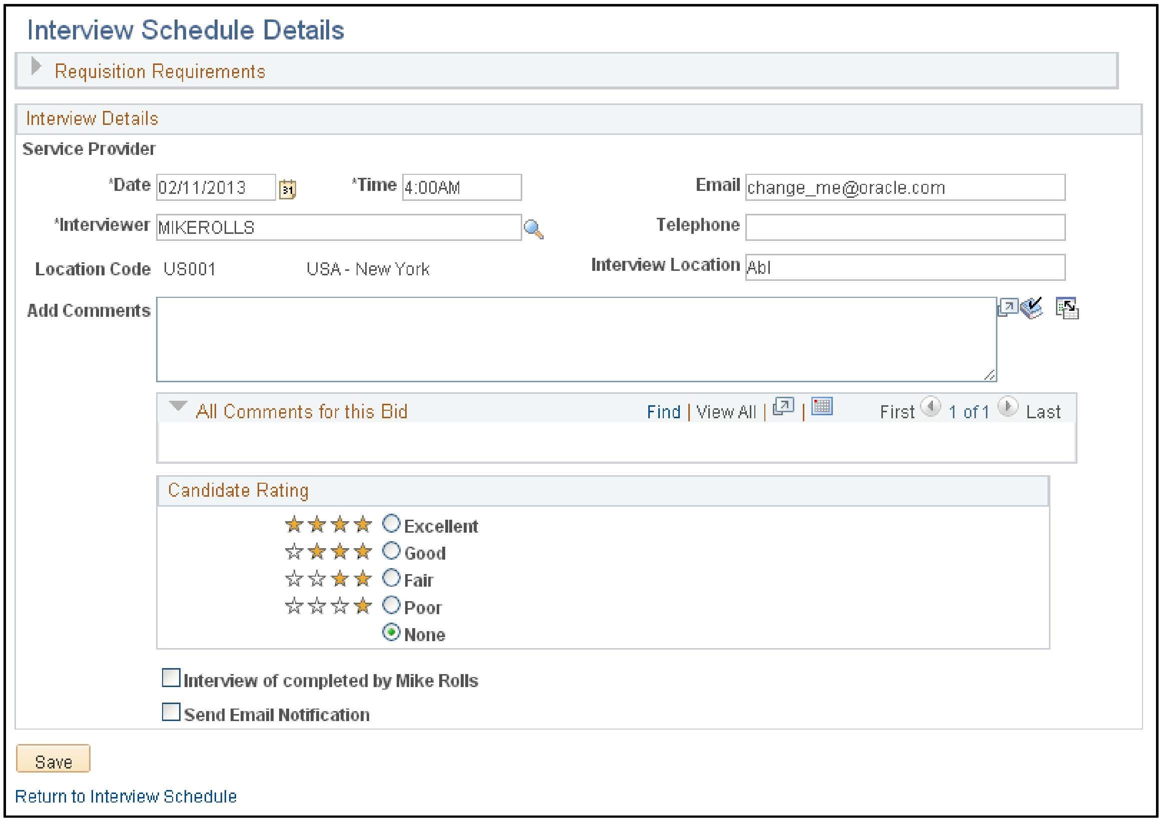
Interview Schedule Details Page

Use the Interview Schedule Details page (SPF_REQ_SUMMARY_PG) to evaluate candidates based on their interviews.

Navigation:

Click the **Evaluate** button on the Interview Schedule page.

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



Interview Schedule Details

Requisition Requirements

Interview Details

Service Provider

*Date 02/11/2013

*Time 4:00AM

Email change_me@oracle.com

*Interviewer MIKEROLLS

Telephone

Location Code US001 USA - New York

Interview Location Abl

Add Comments

All Comments for this Bid

Candidate Rating

○ Excellent

○ Good

○ Fair

○ Poor

● None

☐ Interview of completed by Mike Rolls

☐ Send Email Notification

Use this page to evaluate a candidate for a requisition or work order based on the candidate's interview.

Field or Control	***Description***
Candidate Rating	Select a candidate rating. Options include **Excellent, Good, Fair, Poor,** and **None.**
Interview Completed	Select to indicate that the interview was completed.
Send Email Notification	Select to notify interviewers and the service provider contact of the interview schedule information. **Note:** Only the service coordinator and the requester can access the **Send Email Notification** check box.

Chapter 18

Managing Work Orders

Understanding Services Work Orders

This section provides prerequisites and discusses:

- Services work orders.
- Work order status.
- Access to work orders.
- VAT and SUT for services.
- Multi-resource work orders.

Services Work Orders

In PeopleSoft Services Procurement, you can create work orders for resource, deliverable, or multi-resource services that specify the basic terms and conditions of an assignment. Resource-based work orders reflect work that is conducted by a single service provider. Work orders of this nature are logged against the total hours worked. Deliverable-based work orders or request for proposal (RFP) work orders are work orders that reflect work generally conducted by an entire work team. Progress on deliverable-based work orders is logged against an entire project, not just the hours worked by a single service provider.

Because there is not a specific service provider as part of deliverable-based work orders, a statement of work defines the requirements. The rate and the unit of measure (UOM) are not applicable for deliverable-based work orders, so the user enters a work order amount instead of rate information. Multi-resource work orders reflect work performed by multiple individual providers as part of an overall project. These work orders consist of a higher-level parent work order with associated lower-level individual services, and child work orders associated to those individual services.

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

Work order functionality in PeopleSoft Services Procurement includes the following capabilities:

- Generate a work order from a filled requisition.
- Manually create a work order and link it to an approved or sourced requisition.
- Manually create a work order that is not related to a requisition.
- View tax information.
- View and run the logistical tasks.

- Route a work order for approval using defined workflow rules.
- Track and monitor for eligible service providers.
- Reassign a work order to another service provider.
- Extend the duration of a work order and track the related rate changes and approvals for the extension.
- Adjust the rate on a work order using effective dates.
- Link a work order to a purchase order using the Quick Source process.
- Control expenditures to ensure that a work order does not exceed the agreed amount.
- Notify a service provider or service provider contact that the work can begin.

Note: If you have already selected a service provider, you can create a work order without creating a requisition.

Related Links

Understanding Time Management in PeopleSoft Services Procurement

Logistical Tasks Page

Work Order Status

Throughout the work order process, it passes through various work order management phases. The following are valid work order statuses:

- *Open:* The new work order is created.
- *Submitted:* The work order is submitted for approval.
- *Approved:* The work order is approved.
- *Released:* The linked purchase order has been dispatched.

  Time or progress can be logged against the work order.
- *Cancelled:* The requester or service coordinator cancels the work order.
- *Closed:* The work order is closed.
- *Denied:* The work order is denied for approval.
- *Terminated:* The work order is terminated prior to the expected end date.
- *Finalized:* All time or progress is recorded and invoiced.

  Any associated purchase order is reconciled with the work order.

Time, progress, and expenses cannot be logged past the projected end date of a released work order or the actual end date of a closed, cancelled, or terminated work order. After a work order is finalized, a service provider or service coordinator can no longer log time, progress, or expenses against it.

Access to Work Orders

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

Role Type	***Access***
Requester	Based on permissions, the requester may have complete access to work order functions.
Service Coordinator	Based on the set up on the Service Coordinator defaults page, this person can enter a work order, extend a work order, or delegate requisition sourcing.
Logistical Task Assigned To	This user can only view assigned logistical tasks associated with the work order.
Work Order Approver (dynamically assigned based on workflow rules)	This user has access to change the work order approval details only.
Service Provider Contact	The service provider contact has view access for the work order and authorization for assigning service providers for deliverable work orders with tracking enabled.

VAT and SUT on Services

VAT is a governmental consumer sales tax, a straight percentage that is added to the cost of a good or service. At each step in the supply chain, VAT is calculated by multiplying the cost of the good or service by the tax rate, charged by the seller to the buyer. While at each step in the supply chain except the last, the buyer can normally recover the VAT incurred. Thus, the liability for VAT is essentially the value added at each step in the supply chain.

SUT is a governmental retail sales tax, a straight percentage that is added to the cost of a good or service. Normally, everyone but the final consumer is exempt from this tax. Sales tax is charged, collected, and remitted to the government by the retailer, while use tax is not handled by the retailer, but still due to the government, and must therefore be self-assessed and remitted by the purchaser.

The major difference between VAT and SUT is that almost everyone pays VAT and recovers the VAT they paid except the end consumer, whereas only the end consumer pays SUT. Everyone in the middle of the supply chain is exempt from SUT.

The PeopleSoft tax tables require you to define:

- Tax authorities, which contain individual tax rates and accounting information used to post the tax liability to a general ledger.
- Tax codes, which consist of a group of tax authorities.

The system calculates VAT and SUT when you create a work order. This enables you to estimate VAT and SUT charges at an earlier stage in the supply chain, so that you have a more accurate understanding of the final amount. The system triggers SUT and VAT defaulting and calculations when you save the work order. If PeopleSoft Services Procurement is integrated with PeopleSoft Purchasing, the system copies VAT and SUT codes and percentages as a default from PeopleSoft Purchasing purchase order to the PeopleSoft Services Procurement work order upon work order release.

Multi-Resource Work Orders

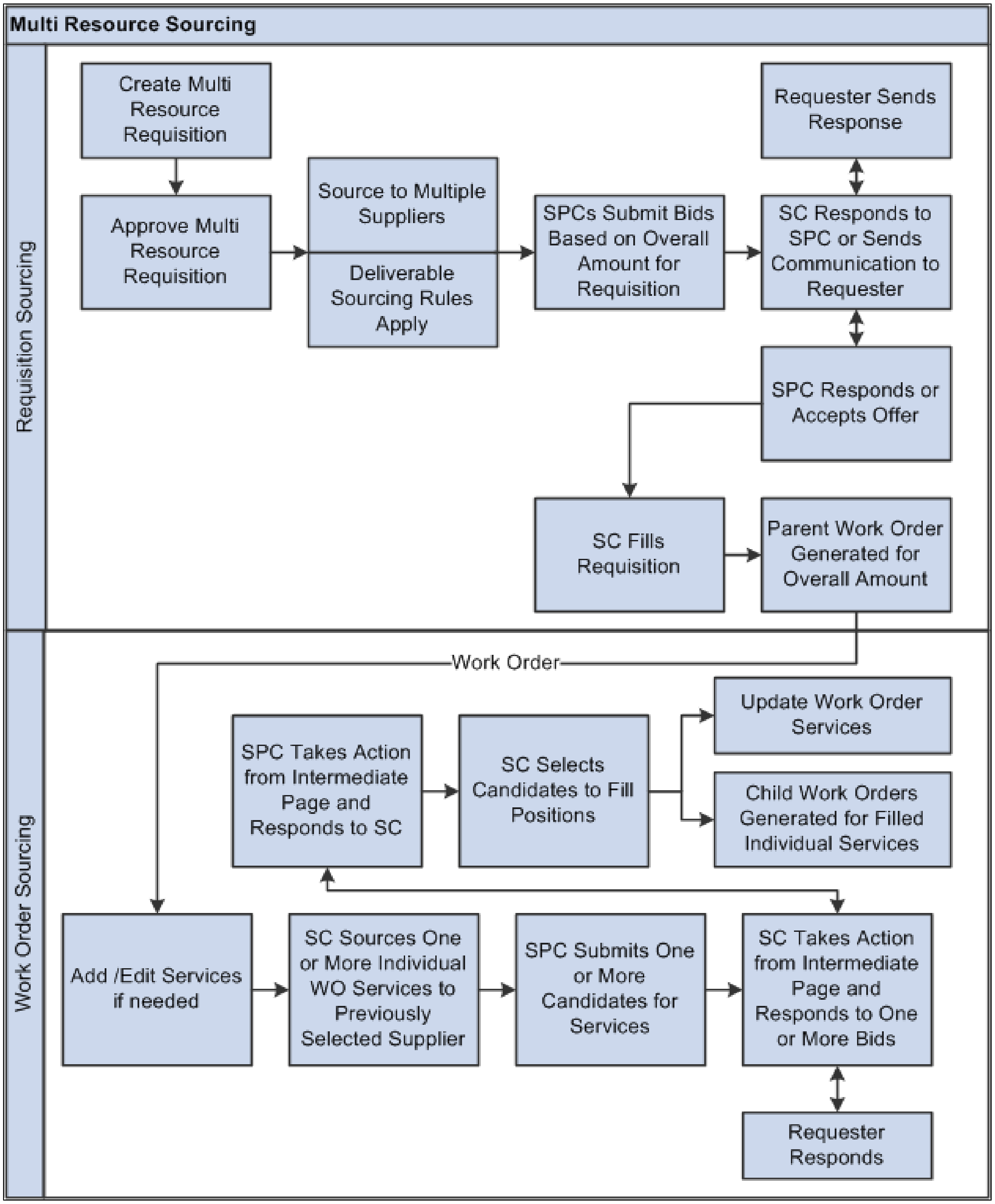
You use multi-resource work orders to manage multiple individual services that are related to a common assignment and share a common overall approved amount. You can link the parent multi-resource service to a requisition and fill it through the requisition sourcing process or create it manually. These individual services can be passed from a related requisition or added and maintained directly on the work order.

You can source these individual services through the work order sourcing process or generate a related-child work order manually. The system records time and expenses against child work orders, but tracks all consumption at both the child work-order level and the parent work-order level. The system places a maximum amount (cap) on the time and materials amount for an overall project that consists of multiple individual services.

PeopleSoft Services Procurement sourcing is accomplished using two steps. The first step of the two-step process sources the parent service from the requisition line with the necessary details about the services and identifies the supplier who will perform the service. The second step is to source the related individual services from the work order to the supplier who is selected in the first step. You cannot change the supplier after the parent requisition line is filled.

The next diagram illustrates how a multi-resource requisition flows through sourcing or can be associated with a work order for sourcing:

How a multi-resource requisition flows through sourcing or can be associated with a work order for sourcing



A multi-resource requisition flows through sourcing and can be associated with a work order for sourcing. During requisition sourcing, the system fills the parent requisition line before the services are sourced to the supplier. Similar to a deliverables-based requisition, additional details about the services are under the parent line. The service coordinator has to source the parent line to suppliers first. Suppliers are setup based on the parent service type. Supplier selection rules are the same for the requisition as a deliverables-based requisition.

After the parent requisition is filled or closed, the service coordinator can then source the requisition service lines one at time or in combination. Sourcing parameters such as, notification and submittal limits, are brought in as default values from the parent line. Service coordinators can access individual services to modify the parameters for a service line.

Prerequisites

Before you can create a work order, the following conditions must be met:

- If selecting a requisition line on the work order, the requisition line status must be *Approved* or *Sourced.*
- The requisition must be filled for automatic work order generation from the sourcing and bid pages.
- A supplier network must be defined for the business unit.
- Projects must be defined if Project Costing is installed.
- Activities must be defined.
- Service types and services must be defined.

To create the logistical tasks associated with the work order, you should:

- Define tasks.
- Define a task group.
- Associate tasks with the task group.
- Associate the task group with existing service types.

Creating and Managing Work Orders

This topic provides an overview of the work order process flow and discusses how to create and manage work orders.

Pages Used to Create and Manage Work Orders

Page Name	***Definition Name***	***Usage***
Manage Services Work Order Page	SPF_WORDER_ROSTER	Manage services work orders.
Work Order - Details Page	SPF_WO_REQ_VEN_DT	Define and view work order details.
Work Order - Cost Page	SPF_WO_COST_PO_PG	Maintain work order cost information.

Page Name	***Definition Name***	***Usage***
Work Order - Consumption Page	SPF_WO_COST_CONSUM	Maintain work order consumption information. This only appears once the work order is released.
Work Order - Approvals and Alerts Page	SPF_WO_APPROVER	Manage work order approvals and alerts.
Work Orders - Comments Page	SPF_WO_COMMENTS	Adding comments and attachments to work orders.
Work Order - Surveys Page	SPF_WO_SUR_USR	Enter work order survey information. The Survey tab is available only if the *Using Surveys* option is enabled for the business unit and the work order is saved.
Service Summary Page	SPF_WO_SRVC_SUM	Use work order services.
View Shifts for Service Page	SPF_SHIFT_BY_SRV	View any shifts associated with this service.
View Assignments for Service Page	SPF_ASGN_BY_SRV	View any assignments associated with this service.
Track Resources Page	SPF_WO_TRK_RSRC	Add and track new services providers for deliverable services.

Page Name	***Definition Name***	***Usage***
Progress Log Activity Page	SPF_PRGLOG_MS_PG SPF_WO_ACTIVITY (resource based – only applicable when Project Costing integration is NOT installed)	View activities associated with a progress log for deliverable services. Use this page for: • Resource based work orders when Project Costing is NOT installed. • Deliverable based Work Orders that have a payment method of milestone, fixed price, or rate based. If you have the SP_ADD_WO_ADHOC_ACT role action, then the Add Ad Hoc Activities button is displayed on this page. When adding ad hoc activities to the Progress Log Activity page, the system automatically adds the new activity to setup tables. After the activity is added to setup tables, the activity is considered as predefined and can be used for future work order activities. Work Order - Cost Page
Work Order Rates Page	SPF_WO_PAYRATE	(Optional) Update the work order rate by effective date. Work Order - Cost Page
Service Work Order History Page	SPF_WO_HISTORY	View status and approval changes, including the service coordinator or team that was assigned to the work order at the time history was recorded. Manage Services Work Order Page
Services Work Order Template History Page	SPF_WO_TE_TEMPLATE	View templates that were linked to the work order. Work Order - Cost Page
Document Attachment Page	SPF_WO_ATTACH	Upload file attachments for a work order. Work Order - Details Page

Page Name	***Definition Name***	***Usage***
Quick Source Page	PV_RUN_REQSORC_1	Run the process that creates purchase orders related to work orders. This process is only accessible if purchase orders are integrated with work orders. Work Order - Cost Page
Maintain Purchase Orders Page	PO_LINE	Access the purchase order where you can run commitment control, check doc tolerance, and dispatch purchase orders. This process is only accessible if purchase orders are integrated with work orders. Work Order - Cost Page
Work Order Approval Status Page	SPF_WO_APPR_STATUS	View work order approval information. The work order approval button is only accessible if the *Enable Approval Process* option is enabled for the business unit on the work order tab. Manage Services Work Order Page
Work Order Activity Page	SPF_WO_ACTIVITY	Identifies the activities associated with a resource-based work order. Work Order - Cost Page
Bid Factors by Work Order Page	SPF_WO_BIDFACTR	Displays bid factors associated with a resource-based work order, including bid factor code, weighting, and activity. Work Order - Details Page
Timesheets by Work Orders View Page	SPF_TIMEBYWO_VIEW	Displays the timesheets related to a specific work order. Work Order - Cost Page
Identify Work Order Services Page	SPF_WO_SERVICE_DTL	Define individual service details for work orders. The Services tab applies only to multi-resource work orders, and is not available for resource or deliverable work orders. Service Summary Page

Page Name	***Definition Name***	***Usage***
Select Services for Extension Page	SPF_WO_EXT_SRV_SEL	Extend individual services on multi-resource work orders.

Understanding the Work Order Process Flow

Here is an overview of the steps in the work order process flow:

1. Use the Manage Services Work Orders page (SPF_WORDER_ROSTER) to manage services work orders.

   Navigation

   Services Procurement > **Manage Services Work Orders**

   Note: You can click the generate work order button from the Bid Response page, the Assess and Award Bids page, or the Requisition Line Position Details page for a filled requisition line to automatically generate a service work order.

   ---

2. For manually created work orders, enter the business unit, work order ID, and service type in the **Add New Work Order** group box on the Manage Services Work Order page.

   Note: The **Service Type** field determines whether the work order is resource-based or deliverables-based.

   ---

3. For manually created work orders, click the **Add** button to access the Maintain Service Work Order page.
4. Enter the required information on the Maintain Services Work Order page.

   If you create a work order that is tied to a requisition, many fields (such as **Start Date** and **End Date, Project, Service Provider,** and so forth) appear by default from the original requisition. In addition, you must enter data in the **Invoice Approver** and **Time Approver** or **Progress Log Approver and Expense Approver** and **Progress Log Template** fields.

5. Save the page.

   If your system is set up to share tasks with Microsoft Outlook, when you create a work order and save it, the associated tasks are queued up in the Desktop Integration queueing tables and sent to Outlook. When a task is in Outlook, the Outlook user can carry out the task and change the status of the task or delete it. Changes made in Outlook are synchronized in PeopleSoft Services Procurement and you can view the status on the View Task Checklist and View Task Detail pages. Likewise, the Services Procurement user can carry out the task and change the status. Changes that are made in Services Procurement are synchronized in Outlook.

   When a task is deleted in Outlook, the Deleted in Outlook check box on the View Task Checklist page in Services Procurement is selected, indicating that it has been deleted. A task that is deleted in Outlook is not sent back to Outlook, but the user in Services Procurement can still carry out the task.

A task can be assigned to another user only in Services Procurement. You do this using the Assign To check box on the View Task Detail page. When this happens, the task is deleted in Outlook and a new task is created in Services Procurement and sent to Outlook with the new user assigned.

6. Click the **View Task List** link on the Maintain Services Work Order page to ensure that all mandatory preapproval logistical tasks are complete.
7. After all mandatory preapproval logistical task are complete, click the **Submit** button on the Maintain Services Work Order page.

   Upon submittal, the work order submittal page displays approval information and the work order status changes to *Submitted* or *Approved,* if the work order creator has sufficient authority to approve work orders or the work order approval process is not used for the business unit.
8. After a work order is submitted for approval, it is routed to the work order approver as defined by the workflow rules.

   There can be more than one approver for each work order, depending on the number of approvers set up in the workflow rules. A new task item appears on the approver's worklist indicating that the work order needs approval. An email notification is sent to the approver's in box. Once approved, the work order status changes from *Submitted* to *Approved.*

   See Understanding PeopleSoft Services Procurement Workflow.
9. Access the Services Work Order Roster page, and locate the approved work order.

   Click the **Edit Work Order** button on the Work Order Roster page to update the approved work order.
10. (Optional) Click the **View Task List** link on the Work Order - Details page to verify that all postapproval logistical tasks are complete.

    You must complete all post approval tasks before releasing the work order.
11. If purchase orders are integrated with work orders, click the **Process Purchase Order** button on the Maintain Services Work Order page to complete purchase order distribution and accounting information, and then click the **Quick Source** link on the **Cost** tab to build the purchase order automatically.

    Note: The **Quick Source** link appears for manually created work orders, as well as work orders that are associated with requisitions.
12. Click the button next to the created purchase order ID to verify that the purchase order has been approved, budget checked, checked for doc tolerance, and dispatched.

    Use the purchase order page to perform these actions.
13. After the purchase order has been dispatched, you can release the work order by clicking the **Release** button.

Note: If password security is not enabled, a user profile will be created automatically upon release of the work order if one does not already exist.

Related Links

Setting Up Integration for Work Order Logistical Tasks with Microsoft Outlook

View Task Checklist Page

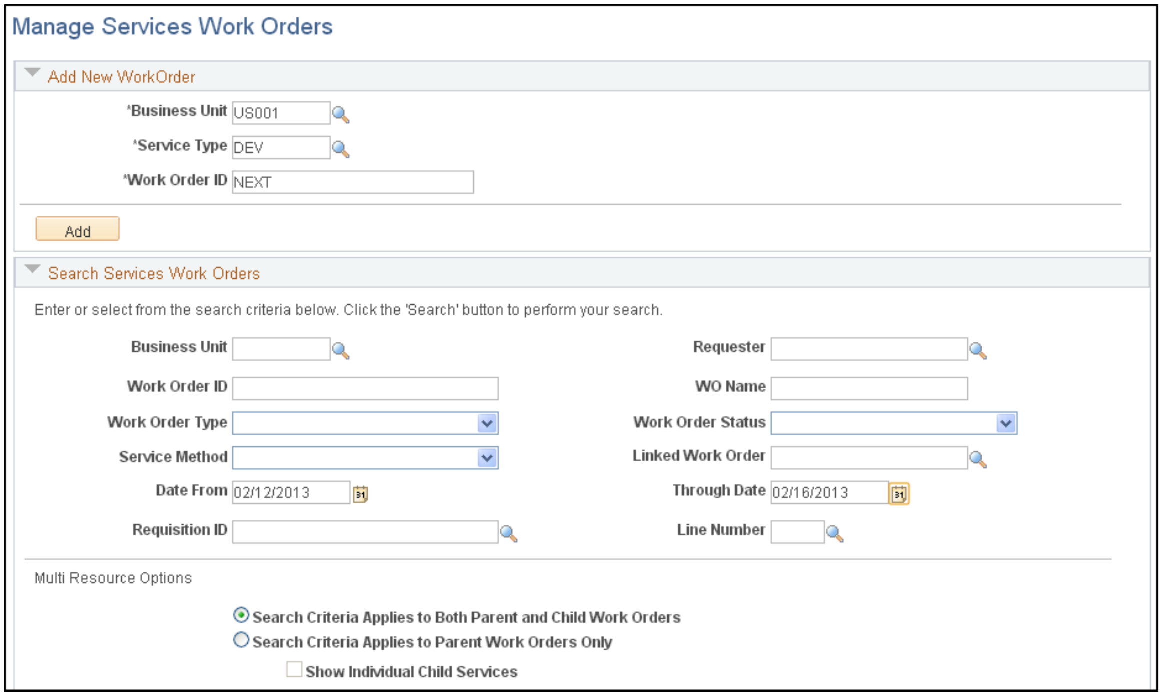
Manage Services Work Order Page

Use the Manage Services Work Orders page (SPF_WORDER_ROSTER) to manage services work orders.

Navigation:

Services Procurement > **Manage Services Work Orders**

This example illustrates the fields and controls on the Manage Services Work Order page (1 of 2). You can find definitions for the fields and controls later on this page.



Manage Services Work Orders

Add New WorkOrder

*Business Unit: US001

*Service Type: DEV

*Work Order ID: NEXT

Search Services Work Orders

Enter or select from the search criteria below. Click the 'Search' button to perform your search.

Business Unit		Requester	
Work Order ID		WO Name	
Work Order Type		Work Order Status	
Service Method		Linked Work Order	
Date From	02/12/2013	Through Date	02/16/2013
Requisition ID		Line Number	

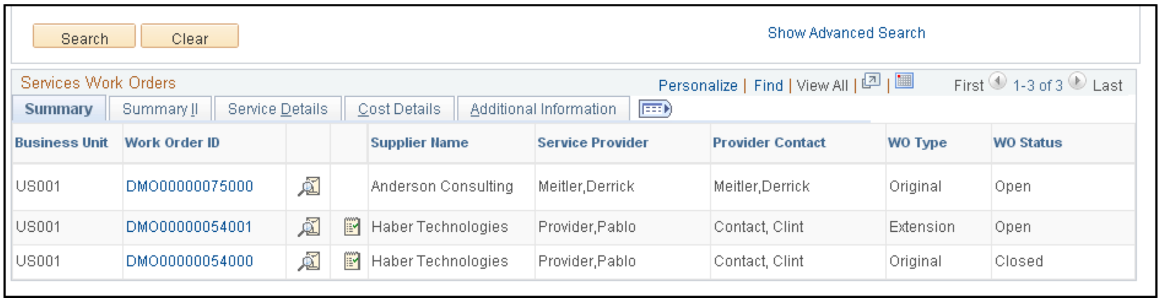
Multi Resource Options

● Search Criteria Applies to Both Parent and Child Work Orders

○ Search Criteria Applies to Parent Work Orders Only

☐ Show Individual Child Services

This example illustrates the fields and controls on the Manage Services Work Order page (2 of 2). You can find definitions for the fields and controls later on this page.



Services Work Orders

Business Unit	Work Order ID			Supplier Name	Service Provider	Provider Contact	WO Type	WO Status
US001	DMO00000075000			Anderson Consulting	Meitler,Derrick	Meitler,Derrick	Original	Open
US001	DMO00000054001			Haber Technologies	Provider,Pablo	Contact, Clint	Extension	Open
US001	DMO00000054000			Haber Technologies	Provider,Pablo	Contact, Clint	Original	Closed

Use the Manage Work Order page as the central location to create, maintain, and extend work orders, including multi-resource service work orders. Use the Add New Work Order group box to create a new work order. Select a business unit and use the **Work Order ID** field to define a work order ID. The system assigns an ID if you do not enter one.

Note: A service coordinator cannot be the same as the service provider, and a service coordinator cannot access work orders for which he is the service provider or service provider/coordinator.

The content and use of the work order depends on the value you select in the **Service Type** field. You can select a service type that is based on a deliverable-, multi-resource-, or resource-based service method. Each of these methods has a different function for a work order.

After you enter the work order information, click the **Add** button to enter details about the work order. If you are creating a multi-resource work order, use the Services Summary tab to define default services or add a new service.

Note: The monetary amount appears only if you are a requester and have **View** or **Define and View** requester rate access for the business unit or if you are a service coordinator.

Search Services Work Orders

Use the Search Services Work Orders group box to streamline the search results for the work order. After you enter the search criteria, go to the roster area where you can edit, establish workflow, and cancel work orders. You can search for work orders based on a business unit, requester, work order ID, and work order name.

Note: Search results display only the top-line information for multi-resource transactions. When you expand the top-line work order ID, the system displays the corresponding services line details.

Note: If row-level security has been implemented for the business unit and permission list, you must enter a business unit before you can search for a requester using the **Look up Requester** button.

Field or Control	***Description***
Work Order Type	Select a type of work order on which to base the search. Work order types determine the logistical task group and logistical tasks that are associated with the work order. Values include: *Original, Extension, Replaced,* and *Reassigned.*
Work Order Status	Select a work order status on which to base the search. The status is the work order's life-cycle stage. For example, *Open, Submitted,* and *Closed* are stages.
Service Method	Select the service method on which to base the search. Values include: *Deliverable, Multi Resource,* and *Resource.*

Field or Control	***Description***
Linked Work Order	Select to base the search on a linked work order. This is a work order to which another work order has been linked by either extending, reassigning, or replacing the existing work order. **Note:** Linked work orders that are associated to multi-resource services do not display in the search results. Use the multi-resource search criteria instead.
Date From andThrough Date	Select a range of creation dates on which to base the work order search.
Requisition ID	Enter a requisition ID on which to base the search.
Line Number	Select a requisition line number on which to base the search.
Search Criteria Applies to Both Parent and Child Work Orders	Select to indicate that the search should include all lower-level individual service work orders related to a multi resource work order along with the top-line parent work order. This button applies only to multi-resource work orders. When you select this option, the system retrieves only child work orders if the child work order itself meets the search criteria that you select.
Search Criteria Applies to Parent Work Orders Only	Select to indicate that the search should include only the top-level parent work orders for multi resource services. This button applies only to multi-resource work orders. If you select this button, the system makes the **Show Individual Child Services** available. The system uses the criteria that you select to retrieve applicable parent work orders.
Show Individual Child Services	Select to display lower-level individual service work orders related to selected multi resource work orders in the search results. This check box applies only to multi resource work orders and is available when you select to search parent work orders only. It determines whether the system retrieves related-child work orders for those parent work orders that were selected. In this case, it doesn't matter whether the child work orders also meet the specified search criteria. If the parent work order meets the criteria and it is selected to show children, the system retrieves the children regardless.
Show Advanced Criteria	Click to view more search fields, including **Survey ID, Supplier ID, Coordinator,Service Provider, Service Team,** and **Provider Contact.**

Services Work Orders: Summary Tab

Use this tab to review basic information for work orders that the system retrieves based on your search criteria.

Field or Control	***Description***
🔍	Click to access the Services Work Order History page, where you can view a summary and history of the work order.
📋	Click to access the Service Work Order - View Task Checklist page, where you can view the logistical tasks for the work order.
☑	Click to access the Work Order Approval Status page, where you can review the work order approval information.
↔	Click the **Extend Work Order** icon to extend the duration of the work order. This button appears only for resource- and multi-resource-based work orders. When you click the system displays the Service page, where you can enter a new end date for the work order. Logistical tasks that are associated with the work order type are used are associated with the new extended work order. A new purchase order amount associates with the extended work order, which requires additional approval. For multi-resource services, the system extends the top-line work order, along with all open individual child service work orders. Any individual service filled from the original parent work order after the extension has been created can be extended by using the Select Services for Extension page to create new work orders to extend the individual service work orders
👥	Click the **Assign New Resources** icon to assign a new service provider to the work order either by manually replacing the service provider or going through the fulfillment process. **Note:** Click this button to access the Maintain Services Work Order page, where you can enter a new start date and select a new service provider for the work order. You can assign new resources to resource-based work orders only.

Summary II

Use this tab to view and access additional information about the work that includes the projected start and end dates. Other fields on this tab are the same as the field on the Summary tab.

Service Details

Use this tab to view and access additional information about the work order. This information includes the service method, such as multi resource, service type, service and job title. Other fields on this tab are the same as for the Summary tab.

Cost Details

Use this tab to view and access additional information about the work order. Information on this tab includes the loaded rate, work order amount, and purchase order status.

Additional Information

Use this tab to view and access more details about the work order that includes the projected start and end dates. You can view the requester, service coordinator, team, and survey ID. The tab provides the work order creation date and who created it. Also available is the parent work order ID and the sub line.

Work Order - Details Page

Use the Work Order - Details page (SPF_WO_REQ_VEN_DT) to define and view work order details.

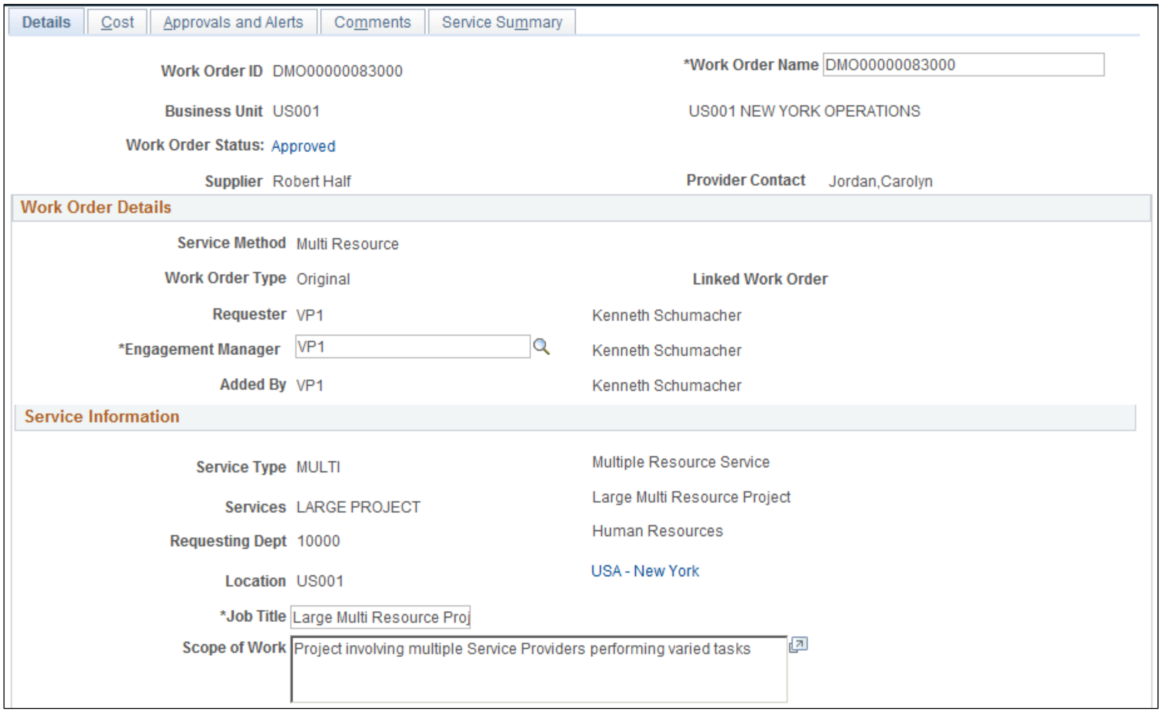
Navigation:

Services Procurement > **Manage Service Work Orders**

Click the **Add** button on the Manage Services Work Order page.

Click a **Work Order ID** link on the Manage Services Work Order page.

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



Work Order ID DMO00000083000

*Work Order Name DMO00000083000

Business Unit US001

US001 NEW YORK OPERATIONS

Work Order Status: Approved

Supplier Robert Half

Provider Contact Jordan,Carolyn

Work Order Details

Service Method Multi Resource

Work Order Type Original

Linked Work Order

Requester VP1 Kenneth Schumacher

*Engagement Manager VP1 Kenneth Schumacher

Added By VP1 Kenneth Schumacher

Service Information

Service Type MULTI Multiple Resource Service

Services LARGE PROJECT Large Multi Resource Project

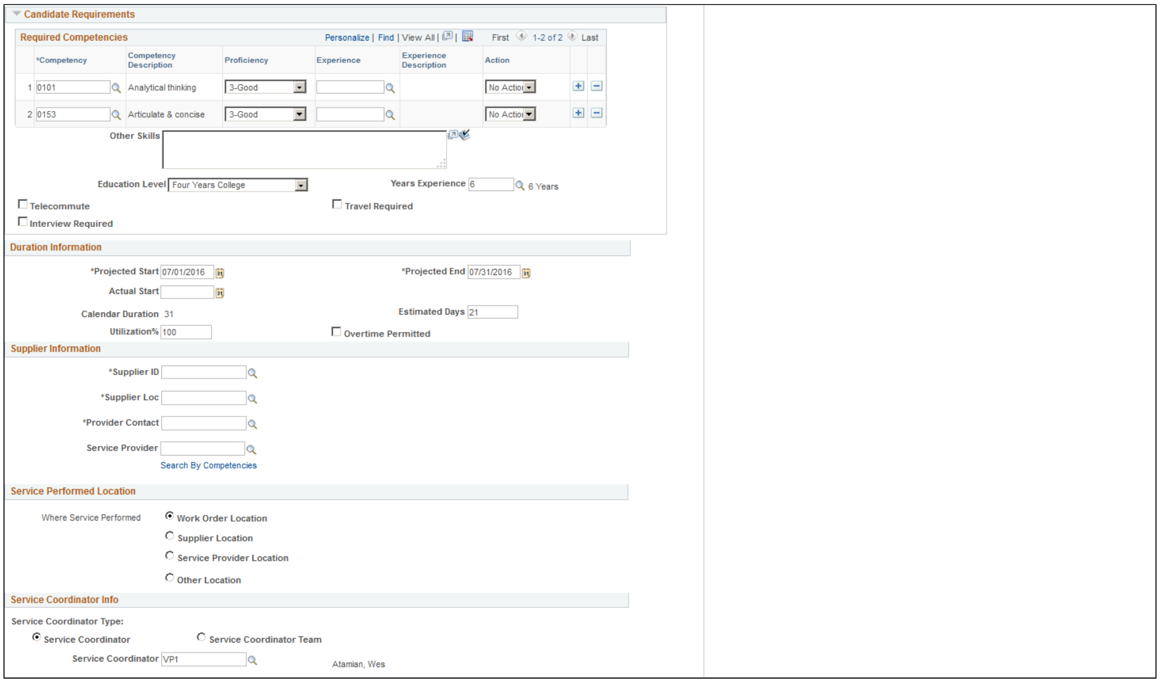
Requesting Dept 10000 Human Resources

Location US001 USA - New York

*Job Title Large Multi Resource Proj

Scope of Work Project involving multiple Service Providers performing varied tasks

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



Candidate Requirements

Required Competencies

	*Competency	Competency Description	Proficiency	Experience	Experience Description	Action
1	0101	Analytical thinking	3-Good			No Actio
2	0153	Articulate & concise	3-Good			No Actio

Other Skills

Education Level Four Years College

Years Experience 6 6 Years

☐ Telecommute

☐ Travel Required

☐ Interview Required

Duration Information

*Projected Start 07/01/2016

*Projected End 07/31/2016

Actual Start

Calendar Duration 31

Estimated Days 21

Utilization% 100

☐ Overtime Permitted

Supplier Information

*Supplier ID

*Supplier Loc

*Provider Contact

Service Provider

Search By Competencies

Service Performed Location

Where Service Performed

● Work Order Location

○ Supplier Location

○ Service Provider Location

○ Other Location

Service Coordinator Info

Service Coordinator Type:

● Service Coordinator ○ Service Coordinator Team

Service Coordinator VP1 Atamian, Wes

Field or Control	***Description***
Work Order ID	Displays the unique work order ID that is assigned when you create a new work order.
Work Order Status	Displays the status of the work order. Values are: • *Open* • *Submitted* • *Approved* • *Released* • *Canceled* • *Closed* • *Denied* • *Terminated* • *Finalized*
Work Order Name	Enter a descriptive name for the work order. The requisition name (if one is associated with the work order) or to the work order ID is the default value.

Work Order Details

Field or Control	***Description***
Service Method	Displays the service method of *Deliverable Based, Multi Resource,* or *Resource Based.* **Note:** The service method is determined by the service type selected in the **Add New Work Order** group box.
Work Order Type	Displays the work order type. Work order values are *Original, Extension, Replaced,* or *Reassigned.* **Note:** Work order types determine the logistical task group and logistical tasks that are associated with the work order. Preapproval and postapproval logistical tasks are determined by the work order type values.

Field or Control	***Description***
Linked Work Order	Displays a linked work order. A new work order is linked to an existing work order by either extending, reassigning, or replacing the existing work order. When you extend, reassign, or replace an existing work order, information from the original work order appears by default on the new work order.
Engagement Manager	This field is available for all service methods including the multi resource child service. The value for the Engagement Manager is passed on from the linked Requisition when one is present. When no requisition is linked, the value will be defaulted to the same value as the Requester upon initial creation for resource, deliverable, and parent multi resource services. For multi resource children, the value will be the same as the parent service. The Engagement Manager value for resource, deliverable, and multi resource parent work orders will be available for editing until the Work Order has been finalized for all types of work orders. You can also use the Replace Engagement Manager Page to change the engagement manager.

Requisition Information

Field or Control	***Description***
Requisition ID	(Optional) Enter the requisition ID associated with the service work order. The requisition line must have a status of *Approved* or *Sourced.* The system displays links to original sourcing requisitions. Click a Requisition ID link to access the Requisition Line Job Summary page for that requisition. **Note:** You can generate a work order from filled requisitions by clicking the **Work Order** button on the Requisition Details page or Assess and Award Bids page.
Line Number	Enter the requisition line number. When you link a requisition line, information from that line appears by default on the work order. Some of that information is not editable on the work order.

Service Information

Field or Control	***Description***
Service Type	Displays the service type selected in the **Add New Work Order** group box. **Note:** This can only be changed to a service type with the same service method.
Services	Select the specific service to be performed, for example, *Program Manager* or *Java Developer*. The services are linked to the service type on the Services by Service Type page.
Track Resource	Select this check box if this is a deliverable service method work order and you want the service provider resources to be included on the work order.
Requesting Dept (requesting department)	Select the requesting department which must be a valid HCM department (if HCM is enabled on the Services Procurement installation); otherwise select a valid department for PeopleSoft Financials/Supply Chain Management.
Location	Enter the ship to location for the work order. The ship to location appears by default from the requester defaults.
Job Title	Enter the job title for the work order. **Note:** This value defaults from the service attributes.
Scope of Work	Enter free-form comments to describe the type of work that the candidate needs to perform on the work order.

Candidate Requirements

This group box contains various candidate requirements. The default values come from the requisition if there are skills associated with the requisition; otherwise the values come from the competencies associated with the work order.

Field or Control	***Description***
Competencies	This display-only field is used to screen candidates that do not have the competencies required for the work order.

Field or Control	***Description***
Proficiency	This display-only field indicates the minimal level that the candidate should possess in order to be qualified for the position. **Note:** Proficiency is for informational purposes only
Experience	This display-only column indicates the minimum years of experience the candidate should possess, and is for informational purposes only.
Action	Select *Block, No Action,* or *Warn* depending on the action you want to occur if the service provider entered on the work order does not have the required competencies.
Other Skills	Enter any free-form text in this field to indicate additional skills that may be required for the position.

Field or Control	***Description***
Settlement Options	View the settlement method for a work order, which is based on the service selected. Progress will be recorded based on the method defined. Values include: • *Fixed Amount*: Progress payments are made against milestone activities where the supplier enters the amount to be paid on the progress logs. You can record progress multiple times against the same milestone for work order to allow payment upon partial completion of a activity. • *Milestone*: Payments are made when agreed upon milestones are met. For example, you could agree to pay the construction company 25 percent of the total fee when the foundation is complete. The supplier can only select each milestone activity once for completion. • *Percentage*: Payments are made based on the percentage of completion for the total work order amount entered on the progress log. • *Rate Based*: Payments are based on an agreed upon rate for service activities. For example, you could agree to pay a contractor pouring concrete a specific rate per cubic foot. For this example, the actual cubic feet poured is entered in the progress log and the payment is based on that agreed rate. **Note:** This field applies to deliverable-based work orders only.

Duration Information

Field or Control	***Description***
Projected	Enter a projected start and end date for the work order. The start date reflects the date when the work is projected to begin. The end date reflects the date when the work is anticipated to end.

Field or Control	***Description***
Actual	Enter the actual dates when the work begins and ends. You must enter the actual start date before releasing the work order. Enter actual end date after the work order is canceled, terminated, or closed.
Calendar Duration	Displays the number of calendar days from work order start date to the end date. **Note:** This option appears for resource-based work orders only.
Estimated Service Days	Displays the total number of service days estimated for the work order. The value can be overwritten and the work order total is recalculated. **Note:** This option appears for resource-based work orders only.
Utilization % (utilization percentage)	Enter the percentage of time that the candidate spends in a work week. For example, if the candidate typically works a half day, the utilization would reflect 50 percent. If the candidate will work three days per week, the utilization will reflect 60 percent. The default value is 100 percent. **Note:** This option appears for resource-based work orders only.
Overtime Permitted	Select the check box if overtime is allowed for the work order. **Note:** This option appears for resource-based work orders only.

Supplier Information

Field or Control	***Description***
Supplier ID	Enter the supplier ID.
Supplier Loc (supplier location)	Enter the supplier location. If only one location exists for the supplier, it automatically appears on the work order.

Field or Control	***Description***
Track Resource(s)	Select to track the service provider resources for deliverable-based engagements.
Review Service Provider Eligibility	Click to access the Service Provider Eligibility Review page. You use the page to view service providers that are marked as not eligible and are potential matches to the service provider on the current work order. The system does not allow actual matches for selection. Any potential matches of identifier ID against the selected service provider produces a system warning and provides service coordinators an opportunity to notify administrators if they feel the potential match is a true match.
Search By Competencies link	Click the hyper link to search for the existing service providers. A page with Competencies displays which you can use to enter search criteria and trigger the Search Framework.

Service Performed Location

Field or Control	***Description***
Where Service Performed	Select a service location. PeopleSoft Services Procurement calculates taxes based on the service performed location that you select. Taxes as per the location will be displayed on a purchase order, invoices and vouchers. The service performed location options will be available only if third party tax integration is enabled at the BU level. **Note:** The **Supplier Location** and **Service Provider Location** options can be selected only if you have entered the supplier details in the Supplier Information section. For more information, see “SUT Processing on the Purchase Order” (PeopleSoft Purchasing), Manage Invoices Page, “Invoice Information Page” (PeopleSoft Payables)

Service Coordinator Information

Field or Control	***Description***
VMS Supplier (supplier managed service supplier)	View the name of the supplier who manages third-party suppliers performing the services. **Note:** This field appears only for work orders that are VMS managed, which is based on the settings for the business unit or service type.
VMS Location (supplier managed service location)	View the supplier location that manages third-party supplier performing the service. **Note:** This field appears only for work orders that are VMS managed, which is based on the settings for the business unit or service type.
Service Coordinator Type	Determines whether an individual service coordinator or a team is responsible for the work order. If the work order is VMS managed, this field is view only.
Service Coordinator	Select the specific individual service coordinator or team assigned to the work order. If the work order is VMS managed, this field is view only.

Links and Other Status Buttons

Links change based on the status of a work order.

Field or Control	***Description***
Manage Service Work Orders	Click to access the Manage Services Work Orders page.
Work Order History	Click to view the history for a work order. The history includes summary information, approval updates and date changes for the work order.
Statement of Work	Click to access the Document Attachment page, where you can attach files associated with previously created work orders.
Task Check List	Click to view logistical tasks that are associated with the work order.

Field or Control	***Description***
Task Check List	Click to view logistical tasks that are associated with the work order.
Bid Attachments	Click to access the Bid Attachments page, where you upload attachments to bids.
Process Purchase Order	Click to submit the approved work order details to the PeopleSoft Purchasing application. This field is available after the work order has been approved and when PeopleSoft Purchasing integration is selected. Use the Integration Option group box on the eProcurement Business Unit Options page to define this setting.
View Shifts for Service	Click this link to access the View Shifts for Service inquiry page. This link is available only if the business unit is enabled to use shifts and if there are any valid shifts by service combinations associated with this work order. See View Shifts for Service Page.
View Assignments for Service	Click to access the View Assignments for Service inquiry page. This link is available only if the business unit is enabled to use assignments and if there are any valid assignments by service combinations associated with this work order. See View Assignments for Service Page.
Scoring Criteria	Click to enter bid factors for the service provider contact to respond to and by which the bid score is calculated. This enables the service coordinator to make an informed decision. You can define bid factors at the work order and work order service level.
Cancel Work Order	Click to cancel the work order. **Note:** If you cancel the work order, and if the work order is tied to a requisition line, the status of the requisition line is changed to Sourced. After the status of the requisition line is changed to Sourced, the requisition line is available for resourcing to suppliers. An exception to this is the individual child services for a multi-resource parent service. When these child work orders are canceled, the status of the individual service on the parent work order is not reset.

Field or Control	***Description***
Close Work Orders	Click to close the work order after the service has been completed. The actual end date is specified when the work order is closed and no time or progress may be entered past this date.
Submit	Click to submit the work order for approval. **Note:** If the preapproval logistical tasks aren't complete, an error message appears and the status does not change to *Submitted.*
Terminate	Click to terminate the candidate. The work order is terminated prior to the expected date.
Release	Click to release the work order. After the work order is released, the supplier is notified that he can begin to log time or progress logs. **Note:** If the postapproval logistical tasks aren't complete, an error message appears and the status does not change to *Released.*
Finalize	Click to indicate that all time or progress is recorded and invoiced. Any associated purchase order is reconciled with the work order.
Extended Work Order	Click to extend the duration of the work order and track related rate, approval, and logistical task changes. This button appears for resource and multi-resource work orders only.

Field or Control	***Description***
Assign New Resources	Click to assign a different service provider for this work order. This button appears for resource-based work orders only. Depending on the business unit setup, clicking the **Assign New Resource** button may enable users to choose the option to manually reassign the service provider or go through the fulfillment process. **Note:** If you want to reassign resources without using sourcing to a specific service provider, the work order has a type of *Reassign.* If you want to reassign resources using the bid process, it will populate the same work order associated with the requisition and will enable you to source it. Source it to different supplier from the original requisition, then submit the bid, accept and fill, and a new work order type of *Replace* will be created.

Related Links

Understanding Progress Logs
Maintaining Service Setup
Understanding Settlements in PeopleSoft Services Procurement

Work Order - Cost Page

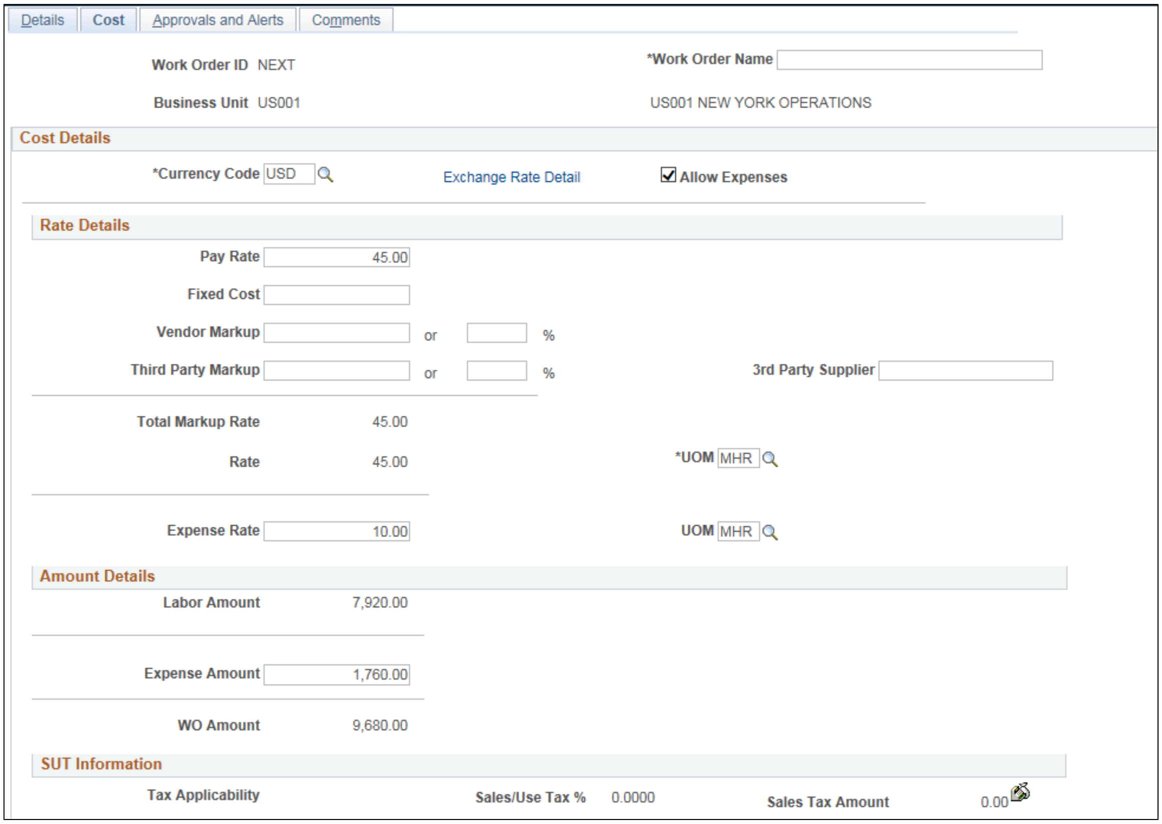
Use the Work Order - Cost page (SPF_WO_COST_PO_PG) to maintain work order cost information.

Navigation:

Services Procurement > **Manage Services Work Orders** > **Work Order - Service**

Select the **Cost** tab.

This example illustrates the fields and controls on the Work Order - Cost page (1 of 2). You can find definitions for the fields and controls later on this page.



Work Order ID NEXT

*Work Order Name

Business Unit US001 US001 NEW YORK OPERATIONS

Cost Details

*Currency Code USD

☑ Allow Expenses

Rate Details

Pay Rate 45.00

Fixed Cost

Vendor Markup or %

Third Party Markup or %

3rd Party Supplier

Total Markup Rate 45.00

Rate 45.00

*UOM MHR

Expense Rate 10.00

UOM MHR

Amount Details

Labor Amount 7,920.00

Expense Amount 1,760.00

WO Amount 9,680.00

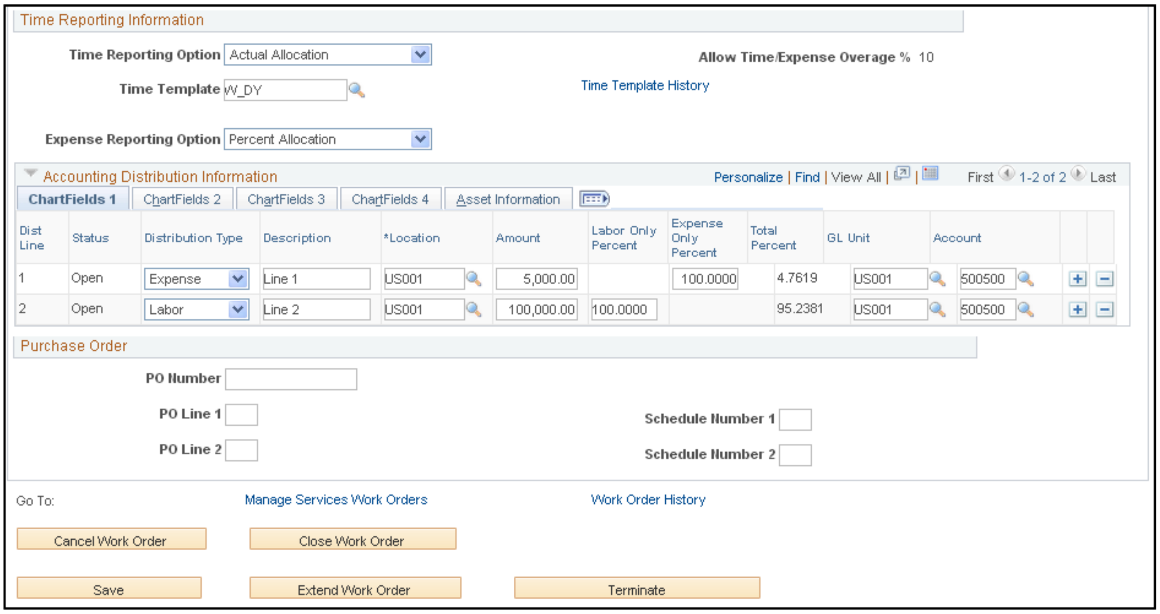
SUT Information

Tax Applicability

Sales/Use Tax % 0.0000

Sales Tax Amount 0.00

This example illustrates the fields and controls on the Work Order - Cost page (2 of 2). You can find definitions for the fields and controls later on this page.



Time Reporting Information

Time Reporting Option Actual Allocation

Allow Time/Expense Overage % 10

Time Template W_DY

Expense Reporting Option Percent Allocation

Accounting Distribution Information

Dist Line	Status	Distribution Type	Description	*Location	Amount	Labor Only Percent	Expense Only Percent	Total Percent	GL Unit	Account
1	Open	Expense	Line 1	US001	5,000.00		100.0000	4.7619	US001	500500
2	Open	Labor	Line 2	US001	100,000.00	100.0000		95.2381	US001	500500

Purchase Order

PO Number

PO Line 1

Schedule Number 1

PO Line 2

Schedule Number 2

Note: When you are creating a new work order and ChartField security has been established for work order prompts and fields, the system applies values according to the ChartField security rules and prevents you from entering prompt values that are not valid. Also when you are updating the Cost page, and do not have ChartField security, the system issues a message and does not display protected field values.

If you select the **Use Pay Types** check box on the Services Procurement Business Unit Options page and if the service method is Resource, then, the system displays the **Rate Breakdown** group box. Rate breakdowns are not used for work orders when the service method is Deliverable.

If you create a manual work order and rate sheet information is defined, rate breakdown and expense information defaults from the associated rate sheet.

Note: User role actions determine which users can view rate breakdown information.
Manual work orders created by a requester are routed to the service coordinator for rate definition prior to approval if the rate definition for the business unit is set to not allow rate definition for the requester.

Cost Details

Field or Control	*Description*
Currency Code	Displays the currency code associated with the work order.
Exchange Rate Detail	Click the **Exchange Rate Detail** link for currency and exchange rate information.
Allow Expenses	Select to report expenses for work orders. When you select to allow expenses, you must enter an expense rate and amount. The system provides a warning message that indicates the **Allow Expenses** check box is selected, but an expense-related rate and amount have not been entered. **Note:** This check box is only available if the **SP Expenses Enabled** check box is selected on the Services Procurement Installation Options page. Although this setting defaults from the Services Procurement Business Unit page, you can override it here.
Display in Work Order Currency and **Display in Base Currency**	Toggle between Work Order and base currency. Select **Display in Work Order Currency** to view the currency code and rate in the work order currency. Select **Display in Base Currency** to view the currency code and rate in base currency.

Rate Details

Field or Control	***Description***
Pay Rate	Enter or view the amount that is paid to the service provider. The rate detail fields do not apply when the service method is deliverable or multi-resource. **Note:** This option appears when the pay types option is enabled on the Services Procurement Installation Options page.
Fixed Cost	Enter or view additional amounts that are used to cover fixed costs of the supplier related to providing the service. **Note:** This option appears when the pay types option is enabled on the Services Procurement Installation Options page.
Supplier Markup	Enter or view markups charged by the supplier for providing the resources to perform the service. **Note:** This option appears when the pay types option is enabled on the Services Procurement Installation Options page.
Third Party Markup	Enter or view additional markups that are charged when the supplier secures resources from a subcontractor. **Note:** This option appears when the pay types option is enabled on the Services Procurement Installation Options page.
Total Markup Rate	Displays the total markup rate. The system adds the **Pay Rate, Fixed Cost, Supplier Markup,** and **Third Party Markup** fields to determine this value. **Note:** This option appears when the pay types option is enabled on the Services Procurement Installation Options page.

Field or Control	***Description***
Rate	Enter the rate of pay associated with the work order when pay types are not enabled. You can view the rate of pay when pay types are enabled. Modifications to the rate amount are validated against rate sheets defined for the project role and region. If you enter a rate amount that is out of tolerance withe rate sheet, you receive either an error or a warning message.
📅	Click to enter effective-dated rate. When time is logged against the work order, the rate effective for the time period is used to calculate the timesheet amount. **Note:** When a requisition is filled and a work order is created, there may be two entries in the effective-dated rate. The first entry is for the requisition rate and the second rate is the filled rate. This provides visibility of the rate history and enables comparison. If the rate is increased, the work order amount may be consumed at a quicker rate. An extension may need to be created if the amount is consumed before completion of the work order.
UOM (unit of measure)	Enter the unit of measure associated to the defined rate, or select a unit of measure from the list of available values.
Expense Rate	Enter the rate allowed for expenses.

Amount Details

Field or Control	***Description***
Labor Amount	Displays the total amount calculated for labor. It does not include any tax values and is updated when a new time report is entered.
VMS Fee (supplier managed service fee)	Displays the total amount calculated for the supplier managed services fees. **Note:** This value only appears for work orders that are VMS managed.
Loaded Amount	Displays the sum of the labor amount and the VMS fee.

Field or Control	***Description***
Expense Amount	Displays the total amount of expense calculated for the work order. The system calculates the expense amount as the work order rate multiplied by the work order duration.
WO Amount (work order amount)	Displays the total amount for the work order, including labor, expense, and any applicable VMS markup. This amount is calculated based on the amounts entered in the Labor and Expense Amount fields.

Note: You can edit the **Expense Rate, UOM,** and **Amount** fields only if the requisition is not associated with a work order. If the work order is associated with a requisition, the values appear by default from the requisition and can only be viewed.
The work order total calculation does not include any amounts for shift or assignment pay.

SUT Information and VAT Information

Field or Control	***Description***
Tax Applicability	Displays SUT applicability for this work order.
Sales/Use Tax % (sale and use tax percent)	Displays the total SUT percentage.
Sales Tax Amount	Displays the total taxable amount.
VAT Percent	Displays the total percentage for all VAT authorities included for the VAT code.
VAT Entity	Displays the entity in the organization that reports VAT. The VAT entity is determined from the PeopleSoft General Ledger business unit associated with the PeopleSoft Purchasing business unit. If an entry exists for the PeopleSoft General Ledger business unit, then VAT calculations are performed on the work order. If not, VAT fields are hidden on the work order.
VAT Amount	Displays the VAT amount charged in the transaction line currency.

Time Reporting Information

Field or Control	***Description***
Time Reporting Option	Select a value from the three given options. Options include: Actual Allocation, Percent Allocation, and Default from Business Unit. This value defaults from the service type or business unit when new work orders are created. The time reporting option indicates whether actual allocation or percentage allocation is used for recording time against the work order. If actual allocation is selected, the service provider must specify which ChartField distribution line to which the time is associated. If percentage allocation is selected, time is prorated automatically across all ChartField distribution lines based on the percentage of the work order labor total for each line.
Time Template History	Select an option that controls how time will be reported for the work order. This template defines options such as the time reporting period (weekly, monthly, and so on), the time reporting calendar, the ChartField accounts that are displayed during time entry, and any related time reporting rules.
Activities	Click to access the Activities page, where you can view activities associated with the work order.
Expense Reporting Option	Select a value from the three given options. Options include: Actual Allocation, Percent Allocation, and Default from Business Unit. This value defaults from the service type or business unit when new work orders are created. The expense reporting option indicates whether actual allocation or percentage allocation is used for recording expense against the work order. If actual allocation is selected, the service provider must specify which ChartField distribution line to which the expense is associated. If percentage allocation is selected, expense is prorated automatically across all ChartField distribution lines based on the percentage of the work order labor total for each line. **Note:** This field is available only if "Expenses Allowed" indicator is selected on the Work Order - Cost page.
Allow Time Expense Overage	Enter the percent tolerance for time and expense. This value defaults from the service requester or service coordinator setup.

See Understanding Time Management in PeopleSoft Services Procurement.

Progress Reporting Information

This example illustrates the fields and controls on the Progress Reporting Information page. You can find definitions for the fields and controls later on this page.

Progress Reporting Information

Progress Reporting Option: Actual Allocation

Progress Log Template:

Expense Reporting Option: Actual Allocation

Allow Progress Log Overage %: 10

Field or Control	Description
Progress Reporting Option	Select a reporting option. This value defaults from the service type or business unit when new work orders are created.
Progress Log Template	Select an option that controls how progress will be reported for the Work order. The templates available for selection depends on the Progress Reporting Option you have selected
Activities	Click to access the Activities page, where you can view activities associated with the work order.
Expense Reporting Option	Select a value from the three given options. Options include: Actual Allocation, Percent Allocation, and Default from Business Unit. This value defaults from the service type or business unit when new work orders are created. The expense reporting option indicates whether actual allocation or percentage allocation is used for recording expense against the work order. If actual allocation is selected, the service provider must specify which ChartField distribution line to which the expense is associated. If percentage allocation is selected, expense is prorated automatically across all ChartField distribution lines based on the percentage of the work order labor total for each line. **Note:** This field is available only if "Expenses Allowed" indicator is selected on the Work Order - Cost page.
Allow Progress Log Overage	Enter the percent tolerance for Progress and Expense. This value defaults from the service requester or service coordinator setup.

See Understanding Time Management in PeopleSoft Services Procurement.

Accounting Distribution Information

Use this section to enter and review distribution information.

Field or Control	***Description***
Distribution Type	Select from the two available options when adding new distribution lines. Options for this field are "*Labor*" and "*Expense*".
Expense Only Percent	Enter the expense percent allocation for the requisition line that is charged to a ChartField combination. **Note:** This column is only available when the distribution type is Expense.
Amount	Enter the amount that is to be charged to a particular ChartField combination. **Note:** Changes to the labor percentage or total percentage triggers an automatic recalculation of the distribution line amount.
Labor Only Percent	Enter the labor percent allocation for the requisition line that is charged to a ChartField combination. **Note:** Changes to the total percentage or amount triggers an automatic recalculation of the labor percentage for the distribution line.
Total Percent	Enter the percent allocation of the total amount for the requisition line that is charged to a ChartField combination. For example, if you have one distribution and you enter 100 for that distribution line, the system charges 100 percent of the requisition request to the same department or project. However, if you have two distribution lines, and you enter 50 percent for the first distribution line and 50 percent for the second distribution line, the system evenly distributes the requisition line amount among both distributions. **Note:** Changes to the labor percentage or amount triggers an automatic recalculation of the total percentage for the distribution line.
Account	Enter the account that is to be charged to a particular ChartField combination.

Field or Control	***Description***
Budget Status	Displays whether the distribution has been budget checked, when commitment control is on. Values for the field include *Not Chekd* and *Valid.*
Budget Date	Displays the date used by commitment control to determine the budget period to which this item cost belongs.
Pre-Encumbrance Balance	Displays the pre-encumbrance balance. Pre-encumbrance is created in your budget records by the budget-checking process when you generate a requisition.

Note: If the work order is linked to a requisition, all distribution information defaults from the requisition. You can override the distribution information here.
In the case of multi-position requisitions, work order distribution amounts are recalculated to prorate the amounts for a single position, which is based on the percentage defined on each distribution line on the requisition.
For individual service work orders related to a multi-resource work order, the distribution information for the parent work order is also displayed as available distribution lines for selection . You can select the distribution line that you want to add to the lower-level individual service work order. After you select a distribution from the available distribution lines, that line no longer appears in the list of values available for selection in future searches.

Purchase Order Information

Field or Control	***Description***
📄	Click to access the purchase order generated for the work order. The purchase order must be approved, budget checked (if commitment control is enabled), have valid doc tolerance, and must be dispatched before releasing the work order. **Note:** If the preapproval logistical tasks aren't complete, an error message appears and the status does not change to *Submitted.*
Process PO (process purchase order)	Click to populate the purchase order staging tables. **Note:** This button appears only if purchase orders are integrated with work orders.

Field or Control	***Description***
Quick Source	Click to access the Requisition Sourcer run control page, where you can automatically build a purchase order. **Note:** This option does not appear before a work order is approved or after the work order is released.

Work Order - Consumption Page

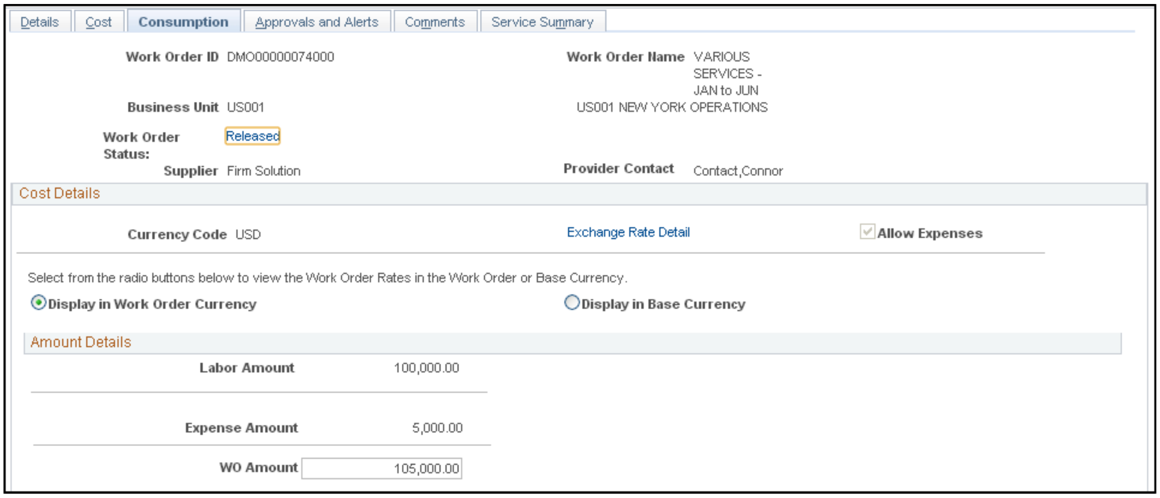
Use the Work Order Cost Consumption page (SPF_WO_COST_CONSUM) to maintain work order consumption information.

Navigation:

Services Procurement, Manager Services Work Orders, Work Order - Service

Select the Consumption tab on the Work Order page.

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



Work Order ID	DMO00000074000	**Work Order Name**	VARIOUS SERVICES - JAN to JUN
Business Unit	US001		US001 NEW YORK OPERATIONS
Work Order Status:	Released		
Supplier	Firm Solution	**Provider Contact**	Contact,Connor

Cost Details

Currency Code USD

Exchange Rate Detail

☑ **Allow Expenses**

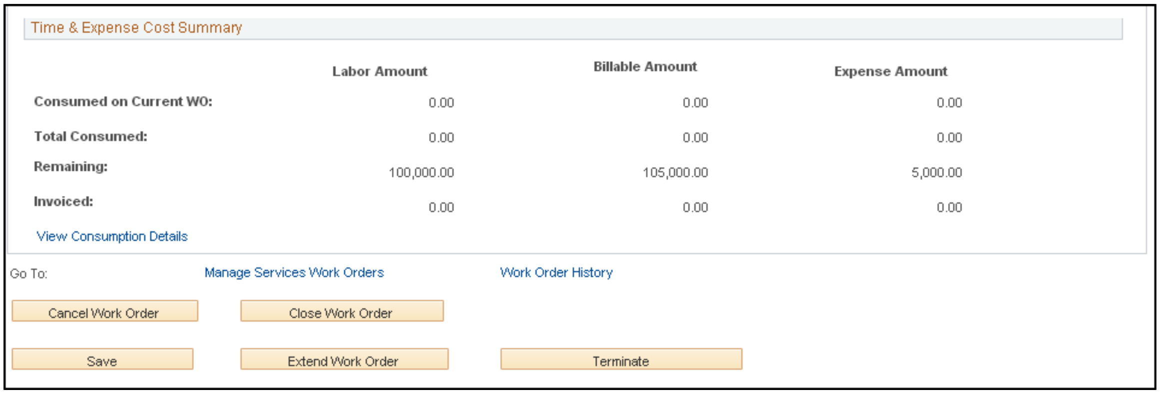
Select from the radio buttons below to view the Work Order Rates in the Work Order or Base Currency.

● **Display in Work Order Currency** ○ **Display in Base Currency**

Amount Details

Labor Amount	100,000.00
Expense Amount	5,000.00
WO Amount	105,000.00

This example illustrates the fields and controls on the Consumption page (2 of 2). You can find definitions for the fields and controls later on this page.



	Labor Amount	Billable Amount	Expense Amount
Consumed on Current WO:	0.00	0.00	0.00
Total Consumed:	0.00	0.00	0.00
Remaining:	100,000.00	105,000.00	5,000.00
Invoiced:	0.00	0.00	0.00

Note: This page appears only when the work order is released.

Field or Control	***Description***
Billable Amount	Displays the total billable amount service providers reported against a particular work order. It does not include any tax values and is updated when a new time report is entered. This amount reflects any shift or assignment pay.
View Consumption Details	Click to access the timesheets, expenses, and invoices that are related to this work order.

Note: These fields appear after the work order is released and time and expense sheets have been logged. Multi-resource parent work orders display the cumulative consumption for all related individual service work orders. Individual service work orders display both the overall consumption for the related parent multi resource work order and the consumption for the specific individual service.

Work Order - Approvals and Alerts Page

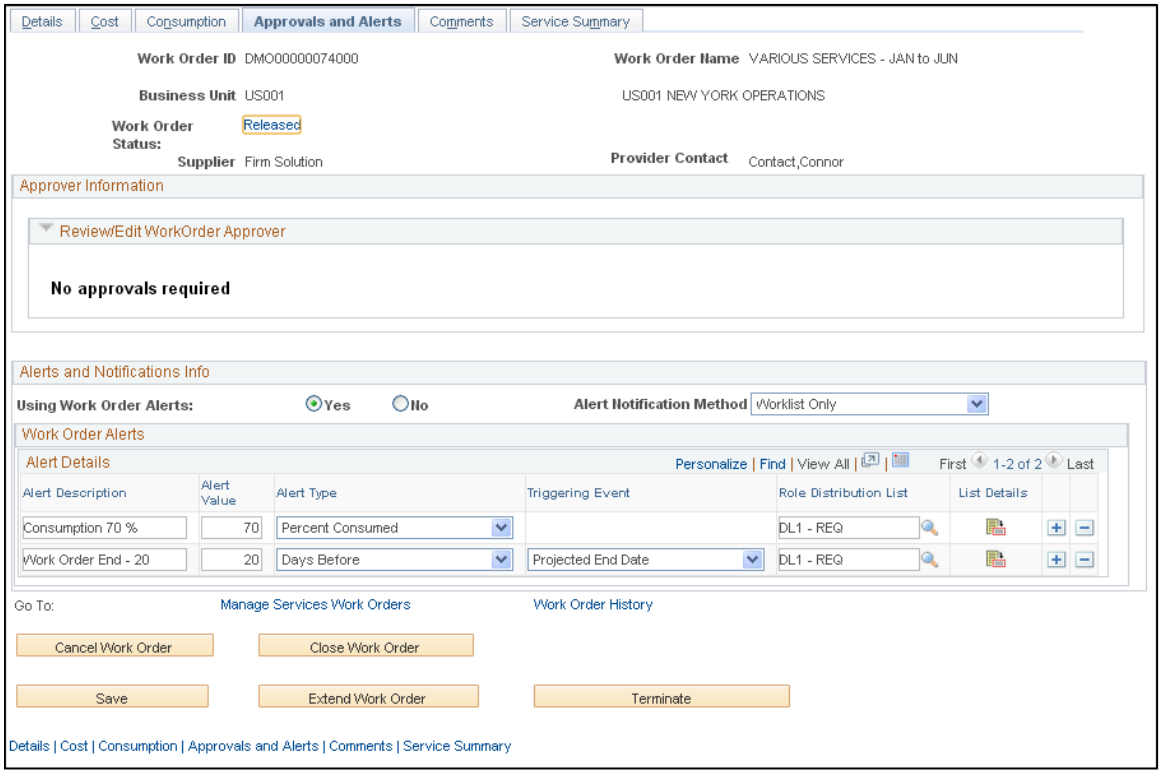
Use the Work Order - Approvals and Alerts page (SPF_WO_APPROVER) to manage work order approvals and alerts.

Navigation:

Services Procurement > **Manage Services Work Orders** > **Work Order - Service**

Select the **Approvals and Alerts** tab.

This example illustrates the fields and controls on the Work Order - Approvals and Alerts page. You can find definitions for the fields and controls later on this page.



Work Order ID DMO00000074000 Work Order Name VARIOUS SERVICES - JAN to JUN

Business Unit US001 US001 NEW YORK OPERATIONS

Work Order Status: Released

Supplier Firm Solution Provider Contact Contact,Connor

Approver Information

Review/Edit WorkOrder Approver

No approvals required

Alerts and Notifications Info

Using Work Order Alerts: ● Yes ○ No Alert Notification Method Worklist Only

Work Order Alerts

Alert Details

Alert Description	Alert Value	Alert Type	Triggering Event	Role Distribution List
Consumption 70 %	70	Percent Consumed		DL1 - REQ
Work Order End - 20	20	Days Before	Projected End Date	DL1 - REQ

Field or Control	***Description***
Using Work Order Alerts	This default value comes from the **Service Requester Defaults, Service Coordinator Defaults, Service Type,** or **Business Unit**– in that order. Select *Yes* if you want alert notifications to be generated for the triggers entered in the **Work Order Alerts** grid. Select *No* if work alerts are not needed.
Alert Notification Method	This default value comes from the **Service Requester Defaults,Service Coordinator Defaults,Service Type,** or **Business Unit**– in that order. Select if you want alert notifications to be generated for the triggers entered in the **Work Order Alerts** grid. Specify if the alerts should be *Worklist* entries only or both *Worklist and Email.*
Alert Description	Enter a brief description for the work order alert notification. Alert information defaults from requester or service coordinator default information, service type, or business unit.

Field or Control	***Description***
Alert Value	Enter a value to determine when the work order event triggers. **Note:** This value is represented in days and percent. For example, if you create a work order alert description of Consumption 80%, the alert value will be 80. When the system reaches an 80 percent consumption rate, the work order event triggers. As well, if you create a work order alert description of Work Order End - 10, the alert value will be 10, to indicate that the work order will trigger 10 days before the work order projected end.

Field or Control	***Description***
Alert Type	Select the type of alert that the system uses to trigger the work order notification. Values are: • *Days Before*: Indicates the number of days before a specific event. • *Days After*: Indicates the number of days after a specific event. • *Percent Consumption*: Indicates a percent that must be reached in order for a work order event to trigger. **Note:** The **Alert Type** and **Alert Value** fields work in combination together.

Field or Control	***Description***
Triggering Event	Select to indicate the trigger for the when the work order notification. For the **Days Before** alert type, the valid triggering events are *Actual End Date, Projected Start Date,* and *Projected End Date.* For the **Days After** alert type, the valid triggering events are *Actual Start Date, Actual End Date, Approval Date, Cancel Date, Closed Date, Entered Date, Projected End Date, Projected Start Date, Released Date,* and *Terminated Date.* For Alert Types or Days Before or Days After, the triggering event is used in conjunction with the alert value to determine when the alert is sent.

Field or Control	***Description***
Role Distribution List	Select the list of users that will receive the work order notification. See Role Distribution List Page.

Related Links

Work Order Settings Page

Work Orders - Comments Page

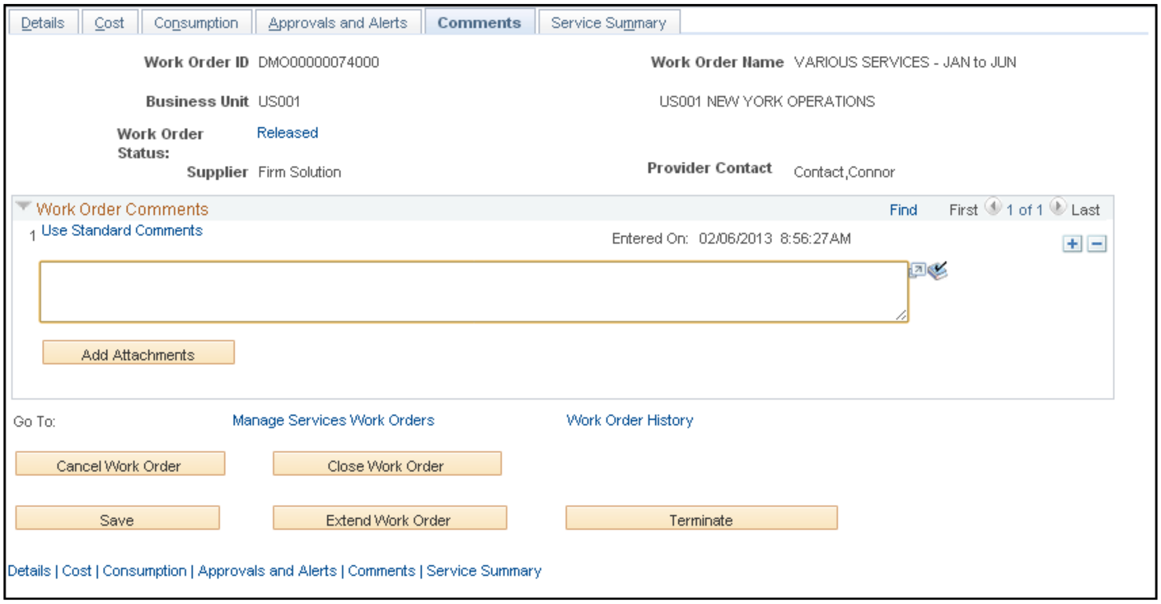
Use the Work Order - Comments page (SPF_WO_COMMENTS) to adding comments and attachments to work orders.

Navigation:

Services Procurement > **Manage Services Work Orders** > **Work Order - Service**

Select the **Comments** tab.

This example illustrates the fields and controls on the Work Order - Comments page. You can find definitions for the fields and controls later on this page.



Work Order ID DMO00000074000

Work Order Name VARIOUS SERVICES - JAN to JUN

Business Unit US001

US001 NEW YORK OPERATIONS

Work Order Status: Released

Supplier Firm Solution

Provider Contact Contact,Connor

Entered On: 02/06/2013 8:56:27AM

You use this page to add comments about the work order and to upload additional documents as attachments to the work order. To upload attachments, click the **Add Attachment** link. To view attachments that are associated with the work order, click the **View** button.

Work Order - Surveys Page

Use the Work Order - Surveys page (SPF_WO_SUR_USR) to enter work order survey information.

Navigation:

Services Procurement > **Manage Services Work Orders** > **Work Order - Service**

Select the **Surveys** tab.

See Editing and Submitting Work Order Surveys.

Service Summary Page

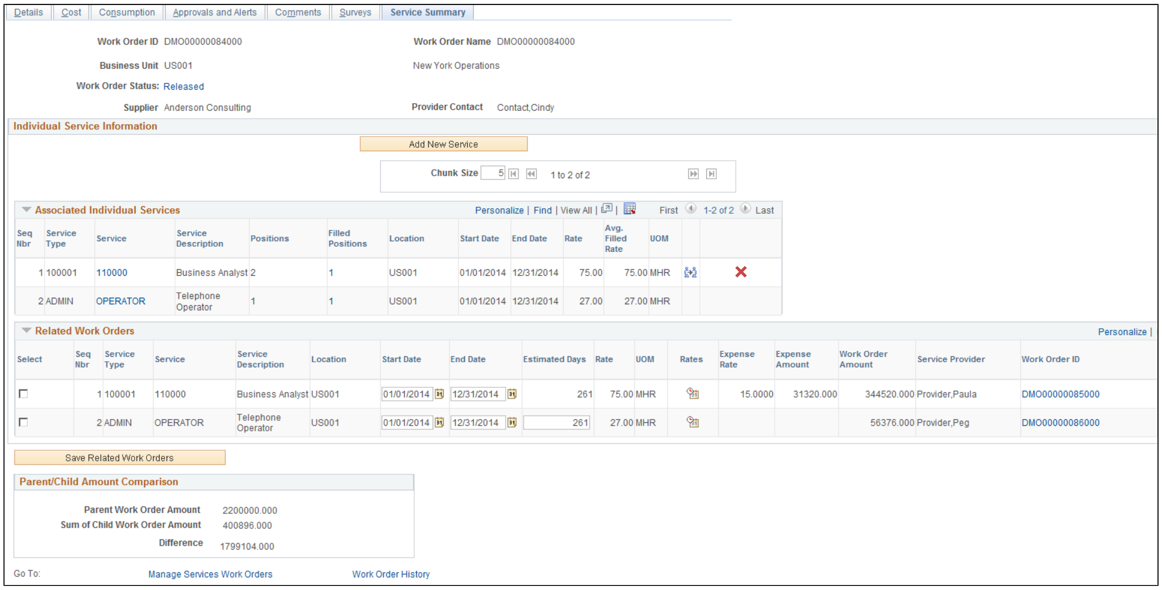
Use the Work Order - Service Summary page (SPF_WO_SRVC_SUM) to use work order services.

Navigation:

Services Procurement, Manage Services Work Orders, Work Order - Service

Click the Service Summary tab.

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



Work Order ID DMO00000084000

Work Order Name DMO00000084000

Business Unit US001

New York Operations

Work Order Status: Released

Supplier Anderson Consulting

Provider Contact Contact,Cindy

Individual Service Information

Chunk Size 5 1 to 2 of 2

Associated Individual Services

Seq Nbr	Service Type	Service	Service Description	Positions	Filled Positions	Location	Start Date	End Date	Rate	Avg. Filled Rate	UOM		
1	100001	110000	Business Analyst	2	1	US001	01/01/2014	12/31/2014	75.00	75.00	MHR		✕
2	ADMIN	OPERATOR	Telephone Operator	1	1	US001	01/01/2014	12/31/2014	27.00	27.00	MHR		

Related Work Orders

Select	Seq Nbr	Service Type	Service	Service Description	Location	Start Date	End Date	Estimated Days	Rate	UOM	Rates	Expense Rate	Expense Amount	Work Order Amount	Service Provider	Work Order ID
☐	1	100001	110000	Business Analyst	US001	01/01/2014	12/31/2014	261	75.00	MHR		15.0000	31320.000	344520.000	Provider,Paula	DMO00000085000
☐	2	ADMIN	OPERATOR	Telephone Operator	US001	01/01/2014	12/31/2014	261	27.00	MHR				56376.000	Provider,Peg	DMO00000086000

Parent/Child Amount Comparison

Parent Work Order Amount	2200000.000
Sum of Child Work Order Amount	400896.000
Difference	1799104.000

When you create a work order for a multi-resource service, you can access the individual child service information by selecting the Service Summary tab. Header information on the Service Summary page provides basic details about the work order. You can click the **Status** link to access the Service Work Order History page.

Click the **Add New Service** button to access the Identify Work Order Services page where you can add a lower-level service. You can add a new service until the parent multi-resource work order is cancelled, closed, terminated, or finalized. For individual child services, you can update the total number of positions until the last position is filled.

Add Individual Services

This grid displays the lower-level individual services and enables the sourcing process to fill them and create child work orders.

Field or Control	***Description***
Seq Num (sequence number)	Displays the service sequence number. This is the unique identifier for the individual child services because it is possible to have more than one occurrence of the same kind of service. You can sort individual services information and the system maintains the sequence number with the work order to which it was assigned.
Service	Displays the service associated with this work order sequence. Click the link to access the Identify Work Order Services page where you can maintain detailed information. Individual services are resource-based services.
Positions	Displays the number of positions that have been defined for this service.
Filled Positions	Displays the number of positions that have been filled for this service. The field appears in the grid after you fill a service position and a child work order has been created. Click the value to highlight the corresponding services work order rows on the Related Work Orders grid box.
→	Click to access the Assign Sourcing page where you can select to manually assign the work order to a service provider without sending it out for bid negotiations. Or, you can select to use the sourcing process to assign work order to a service provider through bid negotiations. For multi-resource position services, the **Select Resource** button is available until you fill the last position. **Note:** If the business unit is not set to allow manual selection of service provider, you must use the sourcing process to fill the work order service. The Manage Work Order Sourcing page in the Review and Source component is used to manage the sourcing of individual services.
⊟	Click to remove this service from the work order.
✕	Click to cancel this service from the work order.

Related Work Orders

This grid box provides information about any work order in which multi-resource service positions were filled. The grid box appears with the highlighted work orders when you click the **Filled Positions** link in the Add Individual Service grid box.

Click the **Work Order ID** link to access review and maintain the work order.

This grid box is a centralized area for making changes to the child work orders. A limited set of data can be edited on the central maintenance page. For all other updates or other information, you need to drill into the existing work order page.

Field or Control	***Description***
Start Date	Displays the start date of the child work order. This field can be edited on the grid from the parent work order.
End Date	Displays the end date of the child work order. This field can be edited on the grid from the parent work order.
Estimated Days	Displays the estimated time period of the work order in terms of days.
📅	Click this icon to view effective dated rate information.
Expenses	Displays the expenses amount of the work order.
Work Order Amount	Displays the overall amount for the work order
📋	Click this icon will navigate to the View Task Checklist page
👥	Click the icon to navigate to either the Assign New Resources page to select the method of replacement or directly to the Work Order Replacement sourcing page, depending on the Business Unit setup defined.
↔	Click this icon to extend the work order.

Click **Save Related Work Orders** after you make any changes to the child work orders in the grid box.

Parent/Child Amount Comparison

The Parent/Child Amount Comparison group box displays the sum of the child work orders and compares it to the parent work order amount.

The child work order hours/cost totals will change dynamically so the impact of proposed changes made to the child work orders can be seen before new child work orders are created. This ensures the spend amount does not exceed the parent work order amount. A warning message displays if the child work order cumulative total exceeds the total of parent work order.

View Shifts for Service Page

Use the View Shifts for Service page (SPF_SHIFT_BY_SRV) to view any shifts associated with this service.

Navigation:

Services Procurement, Manage Services Work Orders, Work Order - Service

Click the **View Shifts for Service** link at the bottom of the work order.

Use this page to view the shifts that are associated with a specific service.

Important! When a work order is associated to a time template that uses a 24-hour clock and the Derive Shifts from Time of Day option is selected, the start and end times that appear on this page are the start and end times from the time template rather than from the Shifts by Service definition because the time template information takes precedence.

View Assignments for Service Page

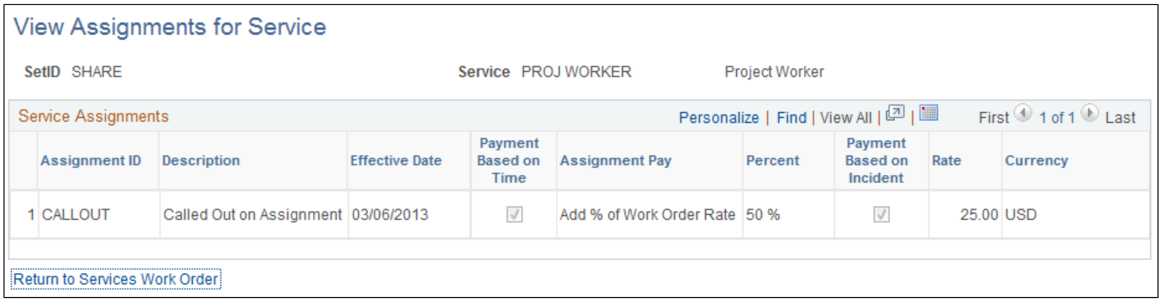
Use the View Assignments for Service page (SPF_ASGN_BY_SRV) to view any assignments associated with this service.

Navigation:

Services Procurement, Manage Services Work Orders, Work Order - Service

Click the **View Assignments for Service** link at the bottom of the work order.

This example illustrates the fields and controls on the View Assignments for Service page. You can find definitions for the fields and controls later on this page.



View Assignments for Service

SetID SHARE

Service PROJ WORKER Project Worker

Service Assignments

	Assignment ID	Description	Effective Date	Payment Based on Time	Assignment Pay	Percent	Payment Based on Incident	Rate	Currency
1	CALLOUT	Called Out on Assignment	03/06/2013	☑	Add % of Work Order Rate	50 %	☑	25.00	USD

Use this page to view the assignments that are associated with a specific service.

Work Order Individual Service Details Page

Navigation:

Services Procurement > **Manage Services** > **Work Orders** click the **Work Order ID** link, select the Service Summary tab, and click the**Add New Service** button.

You use this page to define the service type and service, the number of positions for the additional service for multi-resource work orders. You can source on lower-level individual services before you release the top-line work order.

After completing the service details, click the **Go To Main Transaction** link to return to the Services Summary page. The new service will appear in the Associated Individual Service grid along with the information you define on this page. Using the Services Summary page, you can then source the individual services. Depending on the business unit setting, you might have the option to manually assign the work order to a service provider without sending it out for bid negotiations. Regardless of the business unit setting, you can always use the sourcing process to assign work order to a service provider through bid negotiations.

Assign Resource Page

Navigation:

Services Procurement > **Manage Services Work Orders** and after completing the work order search, click the **Work Order ID** link, select the Service Summary tab, and click the **Select Resource** button

Use the page to select a method for assigning resources to the multi-resource work order that you selected when the business unit is defined to allow manual assignment of service providers. Click the **OK** button after making your selection and the system accesses the appropriate page for you to assign the resource.

Field or Control	***Description***
Assign Known Service Provider	Select to use the work order process to assign the work order to a service provider without sending it out for bid negotiations. When you click the **OK** button, the system displays the Manage Services Work Orders - Service page.
Assign Service Provider through Bid Process	Select to Use the sourcing process to assign work order to a service provider through bid negotiations When you click the **OK** button, the system displays the Work Order Service Sourcing Select page.

Select Services for Extension Page

Use the Select Services for Extension page (SPF_WO_EXT_SRV_SEL) to extend individual services on multi-resource work orders.

Navigation:

Services Procurement > **Manage Services Work Orders**

After completing the work order search, click the **Extend Work Order** link.

You can extend individual services for multi-resource work orders when the top-line, multi-resource work order is extended. After you select a service, adjust the position value, if needed, and click the **OK** button, the system displays the Service page with the original work order and service values. After you update the work order, click the **Save** button and the system creates the extension work orders.

Note: If the work order was created using a manually-entered ID, you'll have to assign an ID for the work order.

Field or Control	***Description***
Select Service	Select to include the corresponding service in a new work order to extend the service.
Positions	Select to include the corresponding service in a new work order to extend the service. You can adjust the number of position to extend. When the system creates the new work order, it will be for the positions that you select. The new position value must be less than or equal to the current value.

Based on the status, there are some restrictions on extending individual services. Individual services that are not yet filled when the multi-resource service is extended will not be extended along with it. If they are subsequently filled, they can be manually extended. You cannot extend individual services that are closed or cancelled.

Note: Individual service work orders can be extended separately within the date range of the parent multi-resource service work order.

Creating Purchase Orders with the Quick Sourcer

If purchase order integration is activated, you must create a purchase order for a work order before releasing it. You must use the link on the work order page to initiate the purchase order creation.

Note: You cannot release a work order without creating and dispatching the purchase order first.

Pages Used to Create Purchase Orders with the Quick Sourcer

Page Name	***Definition Name***	***Usage***
Quick Sourcer - Autosource Parameters Page	PV_RUN_REQSORC_1	Enter parameters for the AutoSelect Requisitions process.
Quick Sourcer - Purchase Order Values Page	PV_RUN_REQSORC_2	Enter parameters for the PO Calculations process and the Create Purchase Order process.

Quick Sourcer - Autosource Parameters Page

Use the Quick Sourcer - Autosource Parameters page (PV_RUN_REQSORC_1) to enter parameters for the AutoSelect Requisitions process.

Navigation:

Click the **Quick Source** link on the Work Order - Cost page.

The values for the parameters are filled in automatically if you run the process from the link on the work order page.

Field or Control	***Description***
Request Type	Displays *Purch Ord* as the requisition type by default.
Item ID Required	Displays a check box that is deselected, because work orders do not have an item ID.
From Business Unit and **To Business Unit**	Displays the work order business unit by default.
Work Order ID	Displays the work order ID by default.
Supplier	Displays the work order supplier by default.
From Requisition ID and **To Requisition ID**	Displays the work order requisition ID by default, if the work order is linked to a requisition.

Quick Sourcer - Purchase Order Values Page

Use the Quick Sourcer - Purchase Order Values page (PV_RUN_REQSORC_2) to enter parameters for the PO Calculations process and the Create Purchase Order process.

Navigation:

Click the **Purchase Order Values** link on the Quick Sourcer - Autosource Parameters page.

Field or Control	***Description***
Buyer	Displays the buyer defined on the procurement user defaults.
Consolidation Method	Determines whether purchase orders are consolidated by business unit, supplier, and buyer (select *B*) or by business unit and supplier only (select *V*) The consolidation method applies only to staged rows that are identified for consolidation.

Field or Control	***Description***
Pre-Approve Supplier	Select to approve the supplier that the PO_POCALC process selects automatically. You can run the PO Calculations process and the Create PO process as a unit, without having to approve the suppliers. Appears selected by default. For services the supplier is the supplier from the work order.
Build PO's as Approved	Select to create POs with an *Approved* status when you run the Create PO process. If you select this option, the process examines auto approval criteria set at the business unit level. Appears selected by default.
Expedite Staged POs	Select to source all requisitions that are located in the staging table. Appears selected by default.
Hold from Further Processing	Select to place the resultant purchase orders on hold and prevent further processing.
Calculate PO Line Numbers	Select to ignore staged entry line numbers when the Create PO process creates new purchase orders and assigns sequential line numbers, beginning with 1. If you do not select this option, the performance is faster, but you might have purchase orders with nonsequential line numbers that do not begin with 1. Appears selected by default.
Allow Dispatch When Approved	Select to make the resultant purchase orders eligible for dispatch. Appears selected by default.

Related Links

“Understanding the Purchase Order Sourcing Business Process” (PeopleSoft Purchasing)

Managing Purchase Orders

Use this page to run budget checking (if commitment control is enabled for PeopleSoft Purchasing), check doc tolerance, and dispatch purchase orders.

Note: You can edit the SUT information only if purchase orders are not integrated with work orders

Field or Control	***Description***
Budget Check	Click the **Budget Check** button to run budget checking for this purchase order. This button is available if commitment control is enabled for PeopleSoft Purchasing. **Note:** When commitment control is enabled, the services coordinator cannot offer the position or manually release the work order until the requisition has been budget checked
Doc Tol Status (document tolerance status)	If document tolerance checking is enabled, the system displays the document tolerance status. The system runs the Document Tolerance process (before budget checking) when you click the **Budget Check** button, or you can run the process separately. Document tolerance checks the change in percentage or a fixed dollar amount between the purchase order and requisition at the ChartField distribution level. Values are: • *V* (valid): The purchase order has passed document tolerance checking. • *N* (not checked): The purchase order requires document tolerance checking. If any amounts, quantities, or ChartFields are modified after the document tolerance is checked, the system resets the document tolerance status to *Not Checked.* • *E* (error): Exceptions were generated for the purchase order during document tolerance checking. You can override document tolerance exceptions on the Document Tolerance Exception page.
Dispatch	Click the **Dispatch** button to dispatch the purchase order. **Note:** The purchase order must be dispatched before the work order can be released.

Closing Services Purchase Orders

This topic discusses how to close services purchase orders.

Page Used to Close Services Purchase Orders

Page Name	***Definition Name***	***Usage***
Close PO Page	RUN_PORECON	Close all qualified services purchase orders by running the Close Purchase Order (PO_POREP) process, and generate the Purchase Order Reconciliation report.

Close PO Page

Use the Close PO page (RUN_PORECON) to close all qualified services purchase orders by running the Close Purchase Order (PO_POREP) process, and generate the Purchase Order Reconciliation report.

Navigation:

Services Procurement > **Reconciliations** > **Close Purchase Orders**

Use the Close PO page to close qualified purchase orders and to generate the Close Purchase Order Report.

See “Managing Purchase Orders Using the Buyer's Workbench” (PeopleSoft Purchasing).

Related Links

PeopleSoft Services Procurement Reports: General Description

Viewing Service Provider Assignments

This topic discusses how to view service provider assignments.

Pages Used to View Service Provider Assignments

Page Name	***Definition Name***	***Usage***
Service Provider List Page	SPF_WO_SP_LIST	View a list of service providers assignments.
Service Provider - Details Page	SPF_WORDER_DETAIL	View the work order details for a particular service provider. Service Provider List Page

Service Provider List Page

Use the Service Provider List page (SPF_WO_SP_LIST) to view a list of service providers assignments.

Navigation:

Services Procurement > **Service Provider Assignments**

Use this page to search the service provider list based on work order ID, service provider, and start date.

Field or Control	***Description***
Work Order ID	Click to access the Service Provider - Details page, where you can view work order details for a specific service provider.

Viewing Logistical Tasks

This topic provides an overview of the logistical task flow and discusses how to view task checklists.

Pages Used to View Logistical Tasks

Page Name	***Definition Name***	***Usage***
Manage Services Work Order Page	SPF_WORDER_ROSTER	Add and maintain work orders.
View Task Checklist Page	SPF_WO_TASK_CHKLST	View logistical tasks.
View Task Detail Page	SPF_WO_VIEW_TASKDT	View details of your logistical task. View Task Checklist Page

Logistical Task Flow

Logistical tasks are administrative tasks that need to be executed and approved before a work order is released. Logistical tasks include both preapproval and postapproval executions. Preapproval tasks must be completed before the work order is approved. For example, a preapproval logistical task might include assigning a new badge or ordering a new laptop. Postapproval tasks, on the other hand, must be completed before a work order is released to a service provider. For example, postapproval logistical tasks might include scheduling orientation or setting up the service provider email account.

Here is the basic flow of logistical tasks:

1. Create a service work order.
2. View the logistical task checklist.

   After preapproval tasks are complete, select the **Execution Complete** check box.
3. Submit the work order for approval.

After an open work order is submitted for approval, the system automatically checks for all preapproval logistical tasks that are assigned to that work order. You must complete all preapproval tasks before submitting the work order for approval.

4. Release the work order to the service provider.

   After the work order is released to the service provider, the system automatically checks for all postapproval logistical tasks that are assigned to that work order. You must complete all mandatory postapproval tasks before releasing the work order. Automatic postapproval tasks will be marked as completed.

   After the work order is released to the service provider, the service provider can use it to log time and expense.

   Note: If you have implemented eligible service provider functionality, the system monitors for eligible service providers and provides warnings about providers who are not eligible to fill a work order before the work order is released.

   ---

5. (Optional) Terminate the work order.

   After the termination process is initiated, notification is sent for any termination logistical tasks associated with the work order. The termination can not be completed until the termination tasks are marked completed.

Related Links

Logistical Tasks Page

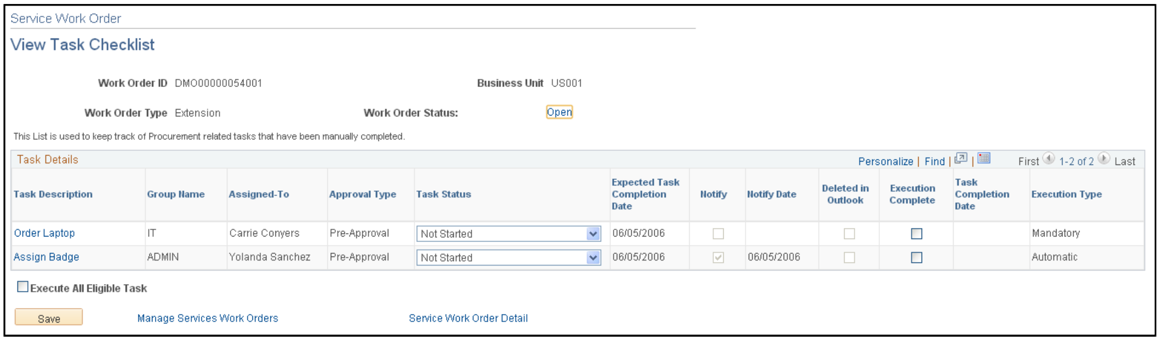
View Task Checklist Page

Use the View Task Checklist page (SPF_WO_TASK_CHKLST) to view logistical tasks.

Navigation:

Click the **View Logistical Task List** button on the Manage Services Work Order page.

This example illustrates the fields and controls on the View Task Checklist page. You can find definitions for the fields and controls later on this page.



Work Order ID DMO00000054001

Business Unit US001

Work Order Type Extension

Work Order Status: Open

This List is used to keep track of Procurement related tasks that have been manually completed.

Task Description	Group Name	Assigned-To	Approval Type	Task Status	Expected Task Completion Date	Notify	Notify Date	Deleted in Outlook	Execution Complete	Task Completion Date	Execution Type
Order Laptop	IT	Carrie Conyers	Pre-Approval	Not Started	06/05/2006	☐		☐	☐		Mandatory
Assign Badge	ADMIN	Yolanda Sanchez	Pre-Approval	Not Started	06/05/2006	☑	06/05/2006	☐	☐		Automatic

☐ Execute All Eligible Task

Field or Control	***Description***
Task Description	Click to access the View Task Details page, where you can view the task details associated with the work order.
Group Name	The system displays the task group to which the task has been assigned.
Assigned-To	Displays the requester or approver to whom the task has been assigned.
Approval Type	Displays at what point in the work order approval process that a task is performed. Values include *Pre-Approval, Post-Approval, Off-board,* and *Terminate.*
Task Status	Displays the status of the task. If your system is enabled to send work order tasks to Microsoft Outlook, then the statuses for this field are the same as those in Microsoft Outlook. When the status of a task is changed in Outlook, the status in this field is updated to match. You can also change the status manually in this field and the status is synchronized in Outlook. This field appears on the page regardless of whether your system is enabled to send tasks to Outlook. Field values include: • *Completed:* Indicates that the task is complete. When you select this value and save the page, the system selects the **Execution Complete** check box to indicate the completion of the task. The system also updates this field to *Completed* and selects the **Execution Complete** check box when the status is updated to Completed in Outlook. • *Deferred:* Indicates that the task is deferred. The value can be changed on this page or in Microsoft Outlook. • *In Progress:* Indicates that the task is in progress. The value can be changed on this page or in Microsoft Outlook. • *Not Started:* Indicates that the task has not been started. This is the default value. • *Waiting on someone else:* Indicates that the task is waiting for another user for input. The value can be changed on this page or in Microsoft Outlook.
Expected Task Completion Date	Displays when the task is expected to be completed.
Notify	Select to send an email message to the person to whom the task is assigned.
Notify Date	The system displays the date that the notification email was sent to the person to whom the task is assigned.

Field or Control	***Description***
Deleted in Outlook	Indicates whether a task has been deleted in Microsoft Outlook. If the check box is selected, the task has been deleted. This is a display-only check box. As a Services Procurement user, you cannot delete a task, whereas a task can be deleted in Microsoft Outlook. If a task is deleted in Outlook, it is not sent back to Outlook. However, you can still carry out the task in Services Procurement. This field is hidden if your system is not enabled to share tasks with Outlook.
Execution Complete	Select when the logistical task is complete. If the task is completed in Microsoft Outlook, this check box is automatically selected.
Task Completion Date	The system displays the date that the logistical task was performed.
Execution Type	The system displays *Mandatory, Automatic,* or *Optional.*

Viewing VAT and SUT Information

This topic discusses how to view VAT and SUT information.

Pages Used to View VAT and SUT Information

Page Name	***Definition Name***	***Usage***
Work Order VAT Page	SPF_WO_VAT	View VAT locations and defaults. VAT defaults can be edited if purchase orders are not integrated with work orders.
Work Order Sales/Use Tax Information Page	SPF_WO_SUT	View SUT information. SUT information can be edited if purchase orders are not integrated with work orders.

Work Order VAT Page

Use the Work Order VAT page (SPF_WO_VAT) to view VAT locations and defaults.

Navigation:

Click the **VAT/Intrastat** button on the Work Order - Cost page.

Use this page to review the VAT that appears by default for the work order. If the VAT information needs to be updated, update it on the generated purchase order before releasing the work order. Upon releasing the work order, the purchase order VAT information is copied on the work order where it is view only.

Note: You can edit the VAT defaults only if purchase orders are not integrated with work orders. Because complex algorithms are used to obtain the VAT defaults, avoid manually changing these values as far as possible.

Field or Control	***Description***
Return to Services Work Order	Click to return to the Services Work Order page.
Expand All Sections	Click the expand button to scroll to and access every section on the page. You can also expand one or more sections by clicking the arrow next to the section's name.
Collapse All Sections	Click to collapse all sections that display only the header information. If you expand one or more sections, you can click the arrow next to the section's name to collapse the section.

Field or Control	***Description***
Physical Nature	Indicates whether an object is a good or a service. Many countries are required to report the sale and purchase of goods separately from services. **Note:** Because these are service work orders, physical nature should always be *Services,* and you won't need to change it.

VAT Locations

Field or Control	***Description***
Location Country	Displays the PeopleSoft Purchasing business unit bill to location country.
Location State	Displays the PeopleSoft Purchasing business unit bill to location state.
Supplier Location Country	Displays the supplier's order from location country.
Supplier Location State	Displays the supplier's order from location state.

Field or Control	***Description***
Service Performed Country	Depending on the services performed option setting in the PeopleSoft Purchasing defaulting hierarchy (for example, on the supplier or business unit), here are some ways in which the system can set the value for this field: • If the option specifies the ship from location, this field is set to the supplier's ship from location country • If the option specifies the ship to location, this field is set to the ship to location country. • If the option specifies the buyer's location, this field is set to the PeopleSoft Purchasing business unit bill to location country. • If the option specifies the suppliers location, this field is set to the supplier's order from location country.
Service Performed State	This value appears only if the service performed country requires that VAT be tracked by state or province. Depending on the services performed setting in the PeopleSoft Purchasing default hierarchy (for example, on the supplier or business unit), the system sets the following values for this field: • If services performed specifies the ship from location, this field is set to the supplier's ship from location state. • If services performed specifies the ship to location, this field is set to the ship to location state. • If services performed specifies the buyer's location, this field is set to the PeopleSoft Purchasing business unit bill to location state. • If services performed specifies the suppliers location, this field is set to the supplier's order from location state.
Ship From Country	Displays the supplier's ship from location country. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.
Ship From State	If the ship to country is defined as tracking VAT by state and province, it displays the supplier's ship from location state. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Field or Control	***Description***
Ship To Country	Displays the ship to location country. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.
Ship To State	If the ship to country is defined as tracking VAT by state and province, the system displays the ship to location state. In the case of transactions involving goods or freight service transactions, this is used to determine the VAT treatment.

Reviewing VAT Defaults

Use this group box to view VAT defaults. You can only update VAT defaults if purchase orders are not integrated with work orders.

Field or Control	***Description***
Service Type	The system displays the VAT service type of *Freight* or *Other.* The value in this field determines whether or not the special rules for freight transport within the European Union (EU) apply.
Place of Supply Driver	Displays the usual place of supply (the place where VAT is usually liable) for the service. This value is used to help determine the place of supply country and the VAT treatment. Values are *Buyer's Countries, Supplier's Countries* or *Where Physically Performed.*
Reporting Country	Displays the country for which this VAT is to be reported. This is the VAT entity and VAT registration country that determines many of the VAT defaults.
Defaulting State	If the reporting country requires that VAT be tracked by state or province, this field displays the state within the reporting country that is used to retrieve values from the VAT Defaults table.
Supplier Registration Country and **Supplier Registration ID**	Displays the registration country and ID of the supplier.
Exception Type	Displays the exception granted to the VAT entity. Values are *None, Exonerated,* or *Suspended.* This value is specified on the VAT entity registration.

Field or Control	***Description***
Certificate ID	If applicable, displays the ID of the VAT exception certificate that may have been issued to the VAT entity.
Calculate at Gross or Net	Indicates how VAT is calculated. The default value comes from the VAT entity driver. Values are: • *Gross:* The system calculates VAT before it applies any early payment discounts. • *Net:* The system calculates VAT after it deducts early payment discounts. If there are two percentage discounts, the system uses the larger of the two when it calculates VAT. The system does not use discount amounts, only discount percentages.
Recalculate at Payment	Select this check box to enable the recalculation of VAT at payment time to allow for any early payment discounts, if you are calculating VAT at gross. This causes the system to adjust the VAT amount at the time of payment if the discount has been taken. This is set on the VAT entity driver.
Declaration Point	For a good or a service, displays when you want VAT transaction information to be recognized for reporting purposes. Values are: • *Invoice:* VAT is recognized at time of invoice. • *Payment:* VAT is recognized at time of payment. • *Delivery:* VAT is recognized on delivery. This value may be set at four levels in the VAT hierarchy: VAT entity registration, purchase order options, supplier, and supplier location.

Field or Control	***Description***
VAT Rounding Rule	Displays the VAT rounding rule. The default value comes from the VAT country, VAT entity registration, supplier, or supplier location driver. Values are: • *Natural Round:* Amounts are rounded normally (up or down) to the precision specified for the currency code. For example, for a currency defined with two decimal places, 157.4659 would round up to 157.47, but 157.4649 would round down to 157.46. • *Round Down:* Amounts are rounded down. For example, for a currency defined with two decimal places, 157.4699 would round down to 157.46. • *Round Up:* Amounts are rounded up with a rounding precision to one additional decimal place. For example, for a currency defined with 2 decimal places, 157.4659 would round up to 157.47, but 157.4609 would round down to 157.46.
Use Type	Determines the split between recoverable (taxable) and nonrecoverable (nontaxable) VAT. For the Canadian public sector, the use type also determines the rebate of the nonrecoverable VAT. VAT rebates are calculated based on statutory rebate rates that are established for each public service body. The value comes from the VAT defaulting hierarchy, from the item, item business unit, item category, supplier location, supplier, or purchasing options.
Include Freight	If selected, the system includes any freight amounts in the VAT basis by calculating VAT on the merchandise amount, plus any freight amount. This option is only available for exclusive VAT calculation. The value comes from the VAT entity registration driver.
Include Miscellaneous	If selected, the system includes any miscellaneous charge amounts in the VAT basis by calculating VAT on the merchandise amount, plus any miscellaneous charge amount. This option is available only for exclusive VAT calculation. The value comes from the VAT entity registration driver.
Place of Supply Country	For services, displays the country in which the VAT is liable. The default value comes from a complex algorithm.

Field or Control	*Description*
Treatment	Displays the VAT treatment, based on a complex algorithm. Values are: • *Domestic Goods Purchase:* If the ship from and ship to countries are the same, and the supplier is registered for VAT, the transaction is treated as domestic. • *Domestic Services Purchase:* If the buyer and seller are both located in the country where the VAT is liable, the transaction is treated as domestic. • *EU Goods Purchase:* If the ship from and ship to countries are different, the system determines whether both countries are located within the EU. If so, the system looks at the VAT registration for each trading partner to determine whether the transaction should be treated as an intra-EU purchase, domestic, or outside the scope of VAT. • *EU Services Purchase:* If each trading partner is located and registered in different EU countries, and the VAT on a service is liable in the buyer's country, the transaction is treated as a self-assessed EU services purchase. • *Self-Assess Goods Import:* If the ship from country is different from the ship to country and either or both of the countries are located outside of the EU, and the supplier is not registered in the ship to country, the transaction would be treated as an import. If the option on the entry in the VAT Country table for the VAT reporting country indicates that VAT on imports should be self-assessed, the transaction is treated as a self-assess goods import, and both input and output VAT are recorded. • *Self-Assess Services Import:* If each trading partner is located and registered in different countries, and the VAT on a service is liable in the buyer's country, the transaction is treated as a self-assessed services import. • *Zero-rated Goods Import:* If the ship from country is different from the ship to country and either or both of the countries are located outside of the EU, and the supplier is not registered in the ship to country, the transaction would be treated as an import. If the option on the entry in the VAT Country table for the VAT reporting country indicates that only input VAT

Field or Control	***Description***
	should be recorded on imports, the transaction is treated as a zero-rated goods import. • *Outside of Scope:* If the supplier is not registered for VAT, or if the VAT is liable in a country other than the VAT reporting country, the transaction is treated as outside the scope of VAT. • *No VAT Processing:* For transactions where the physical nature is goods, if the ship to country has not been defined as a VAT country and the VAT reporting country on the transaction is blank, no VAT information is recorded. Within PeopleSoft, detail VAT treatment values on the transaction lines are used for applying the precise defaults applicable to the transaction lines. The treatment is determined based the rules applicable to the transaction. **Note:** Treatments values related to goods do not apply for PeopleSoft Services Procurement.
Applicability	Displays the VAT status, which comes from an algorithm. Values are: • *Taxable* • *Exempt* (not subject to VAT) • *Outside of Scope of VAT* • *Suspended* • *Exonerated*
Record Output VAT	Select this check box to enable entry of vouchers where VAT is not included on the invoice but is payable to the VAT authority rather than the supplier. In this case, you are accounting for both input and output VAT for the purchase. This is the case for an intra-EU acquisition or when you must account for output VAT on a service supplied by a foreign supplier. This is also referred to as self-assessing for VAT. The value comes from an algorithm that uses the treatment and applicability to retrieve the applicable value from the VAT system setup data that PeopleSoft delivers.
VAT Code	Displays the VAT code that defines the rate at which VAT is calculated for this line.

Field or Control	***Description***
Transaction Type	Displays the code that categorizes and classifies this transaction for VAT reporting and accounting.

Adjust/Reset VAT Defaults

Any changes that you make to fields on this page may affect VAT defaults on this page. For accuracy and consistency, use the following fields to adjust affected VAT defaults or to reset all VAT defaults. Adjusting or resetting VAT defaults only affect fields within the **VAT Defaults** group box.

Field or Control	***Description***
Adjust Affected VAT Defaults	Click this button to have the system adjust the VAT defaults that are affected by the changes. All changes that you have made to VAT defaults on this page that affect other VAT defaults on this page are retained. Click the **i** button to list the fields to be adjusted. **Note:** Always click the **Adjust Affected VAT Defaults** button after changing any defaults on the VAT page.
Levels	Enables you to specify the levels within the requisition transaction hierarchy to reset when you click the **Reset All VAT Defaults** button. Values are: • *All lower levels:* Resets all VAT defaults at lower levels for this page, namely the requisition distribution level. • *This and all lower levels:* Resets all VAT defaults on this page and at any lower levels of this page. • *This level only:* Resets all VAT defaults on this page.
Reset All VAT Defaults	Click to have the system reset the VAT defaults based on the levels value that you selected. Any changes that you have previously made to VAT defaults will be lost. **Note:** Reset completely redetermines the VAT defaults. This does not necessarily mean they are to be reset to their original values. For example, the user may not have changed any VAT default values, but if a VAT driver field has changed, then clicking **Reset** redetermines all defaults based on the new driver value.

Work Order Sales/Use Tax Information Page

Use the Work Order Sales/Use Tax Information page (SPF_WO_SUT) to view SUT information.

Navigation:

Click the **Sales/Use Tax** button on the Work Order - Cost page.

Use this page to review the SUT information for the work order. If the SUT information must be updated, update it on the generated purchase order before releasing the work order. Upon releasing the work order, the purchase order SUT information is copied onto the work order where it is viewed.

Note: You can edit the SUT information only if purchase orders are not integrated with work orders.

Field or Control	***Description***
Ultimate Use Code	Enter an ultimate use code to override the default tax rate for a location.
Sales/Use Tax Exception Type and **SUT Excptn Cert** (SUT exemption certificate)	Defaults from the ship to location for the SUT destination. SUT exception type values include *Direct Pay, Exempt/ Exonerated,* and *None.*

Field or Control	***Description***
Calculate SUT (calculate sales and use tax)	Click to calculate the SUT using the changes that you made on the page.

See “Understanding PeopleSoft Tax Solutions” (PeopleSoft Supply Chain Management Integration).

Calculation Parameters

Field or Control	***Description***
Include VAT (include value-added tax)	This setting is relevant if each line has separate tax code values for SUT and VAT, in which case it is possible to have both on a given line resulting in a tax-on-tax situation. In these instances, the system calculates VAT, then SUT, either on the net-extended amount for the line or on the sum of the net-extended amount and VAT amount. If this option is selected, it indicates that the VAT amount needs to be taxed and the system adds the VAT amount to the net-extended amount before calculating SUT.

Note: The **Include Vat** calculation parameter appears by default from the Ship To Location Sales/Tax setup page.

Related Links

"Understanding PeopleSoft Tax Solutions" (PeopleSoft Supply Chain Management Integration)

Submitting and Approving Work Orders

This topic provides an overview of using work order approval.

Pages Used to Submit and Approve Work Orders

Page Name	***Definition Name***	***Usage***
Work Order - Approvals and Alerts Page	SPF_WO_APPROVER	Submit work orders for approvals.
Work Order Approval Page	SPF_WO_APPR_PG	Approve or deny a work order during the workflow approval process.
Work Order Details Page	SPF_WO_REQ_VEN_DT	View additional information about the work order that you are asked to approve. Work Order Approval Page
Deny Work Order Page	SP_REASONCD_DTL	Confirm the denial to approve a work order and to provide a reason code and comments for the denial. Work Order Approval Page

Using Work Order Approval

You use the PeopleSoft Approval Framework to approve work orders. For work order approvals, the system looks at the approval rules to send the approval notifications. By setting up the appropriate criteria in the approval process definition, you can also perform service provider approvals on the lower-level individual services associated to a multi-resource work order.

See Setting Up Work Order Workflow.

Work Order - Approvals and Alerts Page

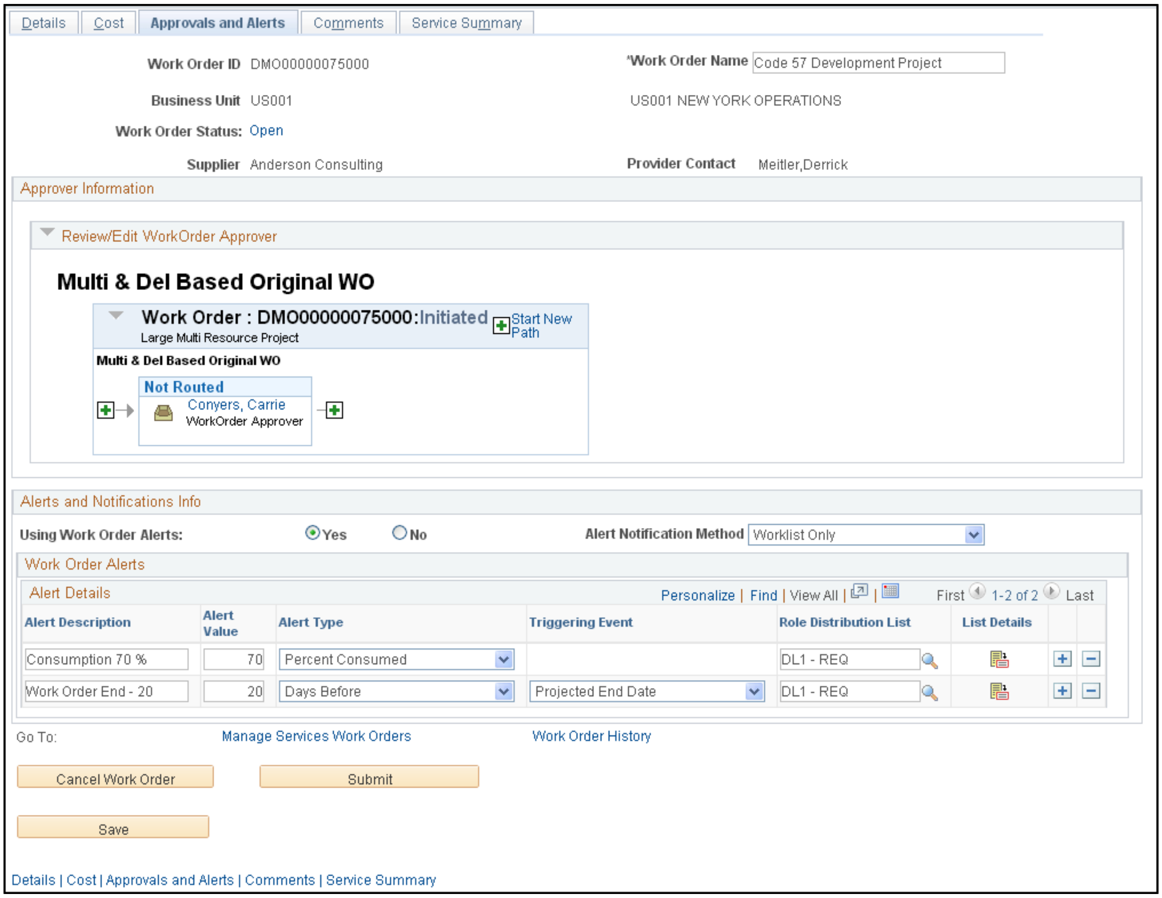
Use the Work Order - Approvals and Alerts page (SPF_WO_APPROVER) to submit work orders for approvals.

Navigation:

Services Procurement > **Manage Services Work Orders** > **Work Order - Service**

Select the **Approvals and Alerts** tab.

This example illustrates the fields and controls on the Work Order - Approvals and Alerts page. You can find definitions for the fields and controls later on this page.



Work Order ID DMO00000075000

*Work Order Name Code 57 Development Project

Business Unit US001 US001 NEW YORK OPERATIONS

Work Order Status: Open

Supplier Anderson Consulting

Provider Contact Meitler,Derrick

Approver Information

Review/Edit WorkOrder Approver

Multi & Del Based Original WO

Work Order : DMO00000075000:Initiated

Start New Path

Large Multi Resource Project

Multi & Del Based Original WO

Not Routed

Conyers, Carrie

WorkOrder Approver

Alerts and Notifications Info

Using Work Order Alerts: ● Yes ○ No

Alert Notification Method Worklist Only

Work Order Alerts

Alert Details

Alert Description	Alert Value	Alert Type	Triggering Event	Role Distribution List	List Details
Consumption 70 %	70	Percent Consumed		DL1 - REQ	
Work Order End - 20	20	Days Before	Projected End Date	DL1 - REQ	

Go To: Manage Services Work Orders Work Order History

You can submit work order approvals using Work Order pages. Click the **Submit** button on any of the pages to send the work order for approval. The Approvals and Alerts page provides a preview of the workflow and any approvers and reviewers in the workflow. This information is available after you save the work order and is derived from the rules and values defined for approval process definitions.

See Setting Up Work Order Workflow.

The Approver Information section provides a graphical map of approvers and reviewers for the workflow and the status of their review. You can insert additional ad hoc approvers or reviewers or create a new approval path for the work order. If you insert an ad hoc approver or reviewer, you can also remove the approver or reviewer.

The section also displays the invoice approver and the invoice approver for the supplier who has been assigned to this work order.

Note: When you insert an approver or reviewer, the system provides a **Save** button in the Review/Edit WorkOrder Approver grid. Make sure that you save the user information before saving the entire page. If you don't save the information, the system doesn't retain updated approver information when you save the page.

For more information about using the Approvals and Alerts page, see the Managing Work Order Approvals and Alerts section.

See Work Order - Approvals and Alerts Page.

When you submit the work order, the Work Order Submittal page appears confirming that the work order has been submitted.

After the work order approval has been submitted, you can return to the work order or navigate to the Manage Services Work Orders page where you can select to view work order history and submittal information about the work order.

Work Order Approval Page

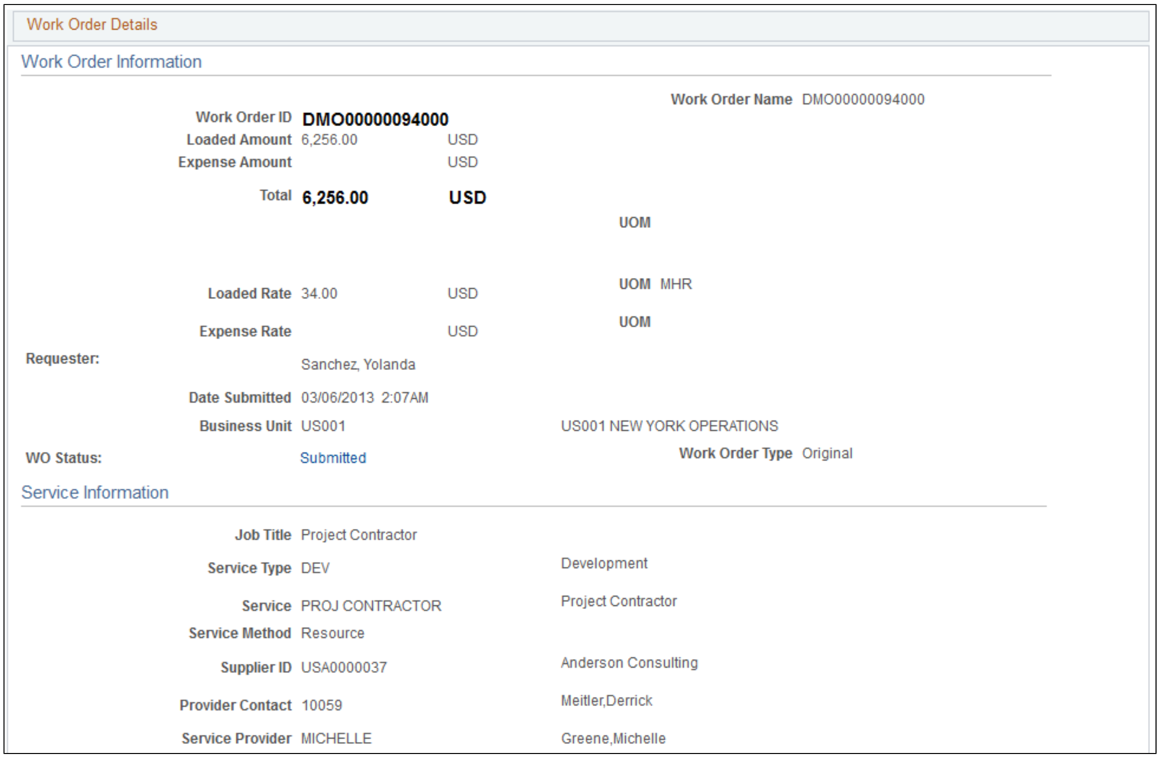
Use the Work Order Approval page (SPF_WO_APPR_PG) to approve or deny a work order during the workflow approval process.

Navigation:

Home > **Worklist**

Click the link to the work order ID that needs approval.

This example illustrates the fields and controls on the Work Order Approval page (1 of 2). You can find definitions for the fields and controls later on this page.


Work Order Details

Work Order Information

Work Order Name DMO00000094000

Work Order ID **DMO00000094000**

Loaded Amount 6,256.00 USD

Expense Amount USD

Total **6,256.00** **USD**

UOM

Loaded Rate 34.00 USD

UOM MHR

Expense Rate USD

UOM

Requester: Sanchez, Yolanda

Date Submitted 03/06/2013 2:07AM

Business Unit US001 US001 NEW YORK OPERATIONS

WO Status: Submitted

Work Order Type Original

Service Information

Job Title Project Contractor

Service Type DEV Development

Service PROJ CONTRACTOR Project Contractor

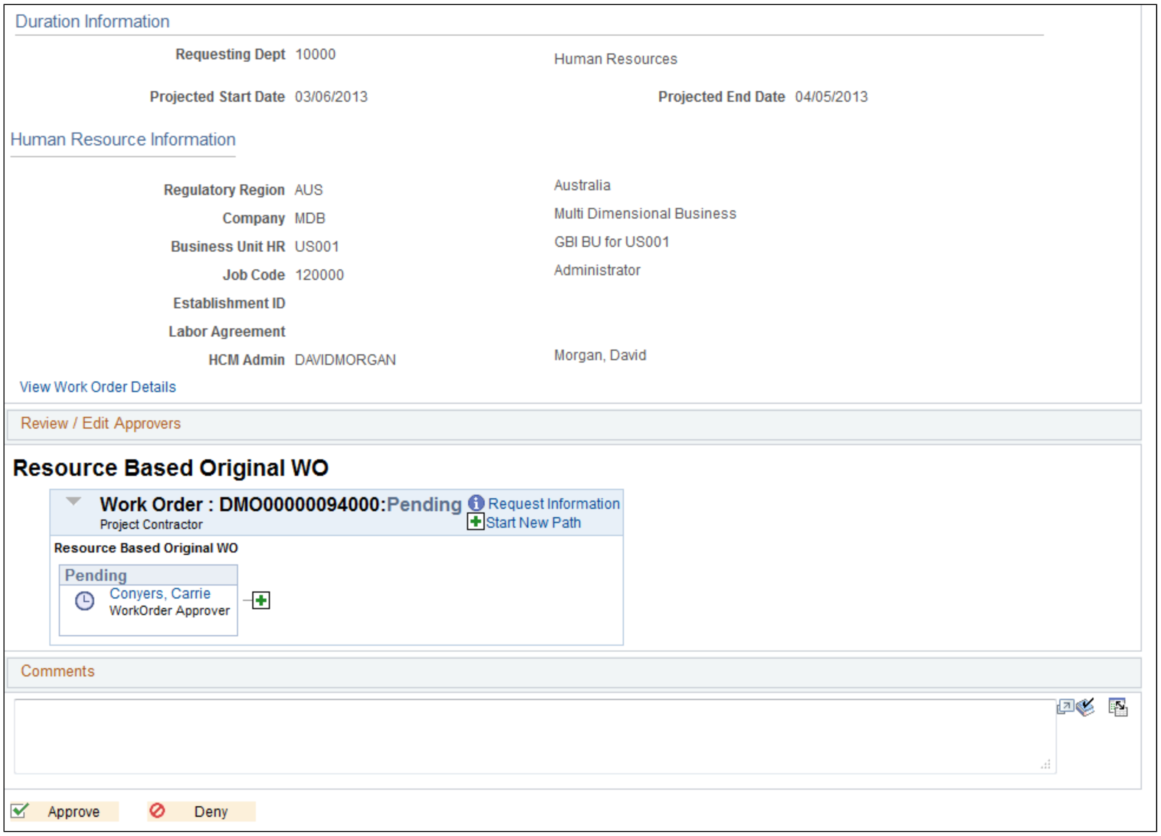
Service Method Resource

Supplier ID USA0000037 Anderson Consulting

Provider Contact 10059 Meitler,Derrick

Service Provider MICHELLE Greene,Michelle

This example illustrates the fields and controls on the Work Order Approval page (2 of 2). You can find definitions for the fields and controls later on this page.



Duration Information

Requesting Dept 10000 Human Resources

Projected Start Date 03/06/2013 **Projected End Date** 04/05/2013

Human Resource Information

Regulatory Region AUS Australia

Company MDB Multi Dimensional Business

Business Unit HR US001 GBI BU for US001

Job Code 120000 Administrator

Establishment ID

Labor Agreement

HCM Admin DAVIDMORGAN Morgan, David

View Work Order Details

Review / Edit Approvers

Resource Based Original WO

Work Order : DMO00000094000: Pending

Project Contractor

Resource Based Original WO

Pending

Conyers, Carrie

WorkOrder Approver

Comments

Along with providing basic work order information, the Work Order Approval page enables you to approve, deny, or push back a parent or individual services work order during the workflow approval process.

Note: To approve a work order, you must have a workflow role designed for work order approval.

Use the next links and buttons to access additional information about the work order and to manage work order approvals.

Field or Control	***Description***
WO Status (work order status)	Click to access the Services Work Order History page. The page includes the changes made by approvers and when the approvals occurred. The link displays the current status of the work order.
View Work Order Details	Click to view the detailed summary of the work order.

Field or Control	*Description*
Approve	Click to approve the work order. This forwards the work order and any comments that you inserted to the next approver in the path. The system provides a confirmation message when you click this button. When you confirm that you want to approve the work order, the system updates the approval graphic with the newest routing information.
Deny	Click to deny the work order. The system accesses the Deny Work Order page where you can provide a reason code for denying the approval and comments about the denial. If denial reasons are required, you must enter a code. After you deny a work order, the workflow stops and the system sends a worklist entry to the original requester with any comments that you enter for the denial. The work order's original requester can update the work order to address the issues and resubmit the work order for approval.
Pushback	Click to return the work order to the previous approval step. Pushing back a work order is a way for the approver to question the prior step's approval and request clarification about the approval.

Review/Edit Approvers

This grid contains a graphical map with information about the approval and its status. The title represents the type of work order that is being processed and includes the overall status of the approval. The graphics provide information about individual approvers and the status of their approvals and vary in color depending on the approval status. The system also indicates whether approvals are required.

During the approval process, approvers can add ad hoc approvers or reviewers to the current or a later stage of the work order approval process. For example, if an approver wants input from an service coordinator, she can add the coordinator as an approver. Ad hoc approval applies only to the approval instance in which the addition occurs and does not affect the underlying process definition used for other requests. You can add or remove an ad hoc approver by clicking the plus or minus button next to a graphic. You can also view user information by selecting the link that contains the user ID.

Field or Control	*Description*
Request Information	Click to return the approval to another user for more information about the work order. That user might not be an approver, but must respond to the request before the approval can proceed to the next approver or reviewer. The system displays a new graphic that represents information has been requested and who is responsible for the request. You can use the comments section to clarify requested information.

Field or Control	*Description*
Start New Path	Click to start a new approval path for this work order. The system displays the Start new approval path page so that you can select who you want to approve or review the work order. The system places a new graphical symbol at the bottom of the path order after you select the user.
View/Hide Comments	Click to either view or hide comments that are associated with the work order approval.

Comments

Use this section to enter any comments explaining why you are approving this work order. Your comments can be viewed by other approvers and reviewers. Click the View/Hide Comments link to view or hide comments associated with a work order approval. Use the **View Expanded** button at the right to view additional text.

Approving Services Work Orders Using the PeopleSoft Fluid User Interface

This topic provides an overview of the self-service approval pages for services work orders, and how to access these pages using the PeopleSoft Fluid User Interface. PeopleSoft builds these mobile approval pages on the Enterprise Component Fluid Approvals framework.

Pages Used to Approve Services Work Orders Using PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Pending Approvals - Services Work Order Page (List)	EOAWMA_MAIN_FL	View a list of pending approvals for services work orders and perform mass approvals. For more information, see the overview of approvals on the PeopleSoft Fluid User Interface: “Pending Approvals Page” (Application Fundamentals).
Services Work Order Page	EOAWMA_TXNHDTL_FL	Review information for a single services work order, and approve or deny the work order depending on role criteria. For more information, see the “Approval Header Detail Page” (Application Fundamentals).

Page Name	***Definition Name***	***Usage***
Work Order Approval Page	SPF_WO_APPR_PG	Approve or deny a work order during the workflow approval process in the classic interface. Access this page through the Services Work Order Page .

Understanding Approvals for Services Work Orders Using the PeopleSoft Fluid User Interface

PeopleSoft provides mobile approvals using the Enterprise Component Fluid Approvals framework. Approvers can take Application Workflow Engine (AWE) actions on select PeopleSoft transactions pending their approval using a smart phone or a tablet. The tablet version is also available for desktop use.

Services work order workflow enables the requester to submit the work order for approval. You can submit work order approvals using Work Order pages. When you click the **Submit** button on any of the pages to send the work order for approval, the Application Workflow Engine runs the work order through the defined approval process. For information about registering and defining an approval process for services work orders, see Setting Up Work Order Workflow.

Using the PeopleSoft Fluid User Interface, approvers can view a list of pending approvals for various types of transactions, and add comments on the centralized Pending Approvals page. An approver or multiple approvers review the transaction details. Each approver in the workflow selects an appropriate action, such as Approve, Deny within the approval pages.

Services work order approvals also support push notifications, a framework delivered in PeopleTools. The flag icon in the Oracle banner shows a counter for new push notifications. Note that the counter disappears once you view the push notification list. The notification link takes you directly to the header approval page for items awaiting your approval.

Delegating Services Work Order Approvals

You can use the Delegation Framework to delegate services work order approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

“Understanding Delegation” (Enterprise Components)

“Configuring Delegation Transactions” (Enterprise Components)

“Working with Self-Service Delegation” (Enterprise Components)

Pending Approvals - Services Work Order Page (List)

Use the Pending Approvals - Services Work Order list page (EOAWMA_MAIN_FL) to view a list of pending approvals for services work orders and perform mass approvals.

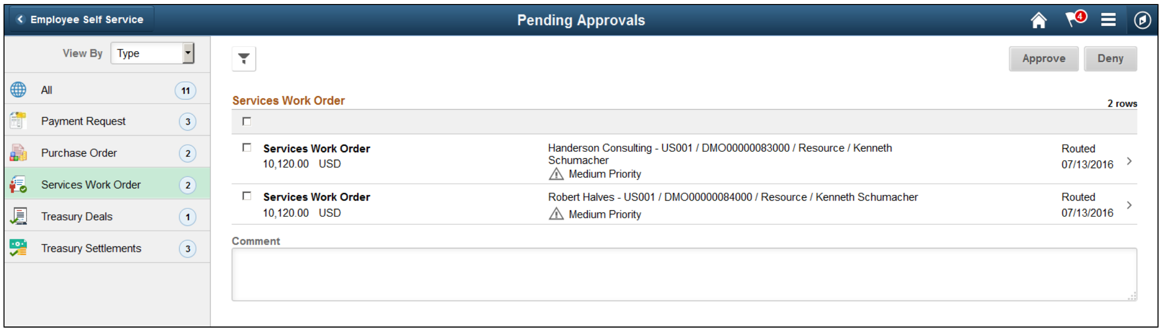
Navigation:

Employee Self Service > **Approvals**

On the Pending Approvals page, select **Services Work Order** in the View By - Type pane to view the work order entries in the right pane.

Smartphone: On the Pending Approvals - View By Type page, select **Services Work Order** to open a new page that lists the work order entries.

This example illustrates the fields and controls on the Pending Approvals - Services Work Order list page. You can find definitions for the fields and controls later on this page.



View By: Type

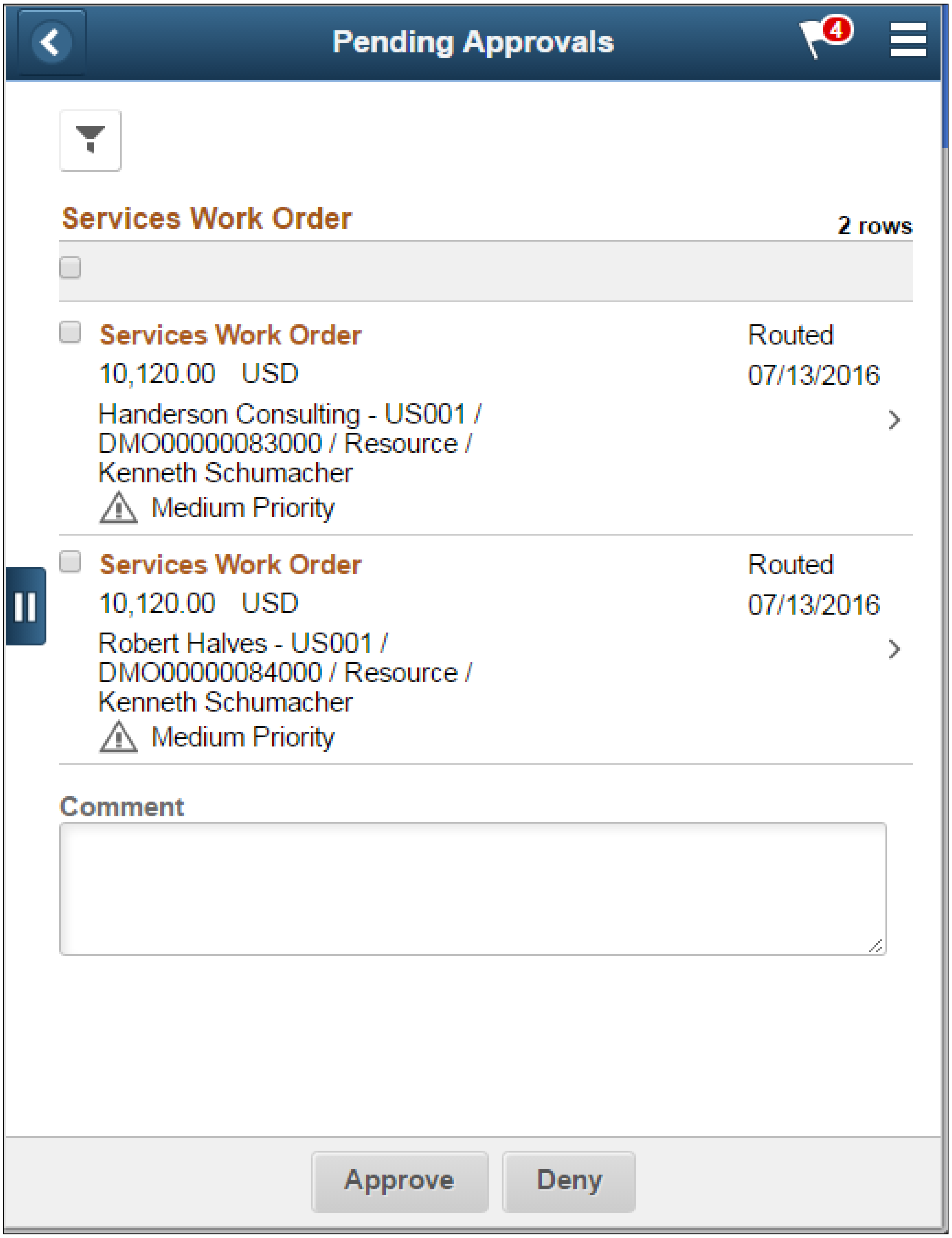
All	11
Payment Request	3
Purchase Order	2
Services Work Order	2
Treasury Deals	1
Treasury Settlements	3

Services Work Order

2 rows

☐	**Services Work Order** 10,120.00 USD	Handerson Consulting - US001 / DMO00000083000 / Resource / Kenneth Schumacher ⚠ Medium Priority	Routed 07/13/2016
☐	**Services Work Order** 10,120.00 USD	Robert Halves - US001 / DMO00000084000 / Resource / Kenneth Schumacher ⚠ Medium Priority	Routed 07/13/2016

This example illustrates the fields and controls on the Pending Approvals - Services Work Order list page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



Services Work Order 2 rows

☐

☐ **Services Work Order** Routed
10,120.00 USD 07/13/2016
Handerson Consulting - US001 / DMO00000083000 / Resource / Kenneth Schumacher
Medium Priority

☐ **Services Work Order** Routed
10,120.00 USD 07/13/2016
Robert Halves - US001 / DMO00000084000 / Resource / Kenneth Schumacher
Medium Priority

From the list page, you can do the following:

- Review header information for the services work orders currently routed for approval. To access header details for a particular work order, select a header row.
- Select all or several work orders on the list page and perform a mass action on the selected work orders.

> You can enable mass approvals on the Mobile Approval Options - Transactions page (**Enterprise Components** > **Approvals** > **Approvals** > **Mobile Approval Options** > **Transactions**).

You can also use the filter to narrow results on the page. For more information about using the filter, see the "Filters Page" (Application Fundamentals).

Field or Control	***Description***
Comment	Enter comments in the text entry field.
Approve or **Deny**	Perform a mass action by selecting multiple transactions, and then selecting an approval action button.
⏸	Select this button to expand or collapse the View By Type page.

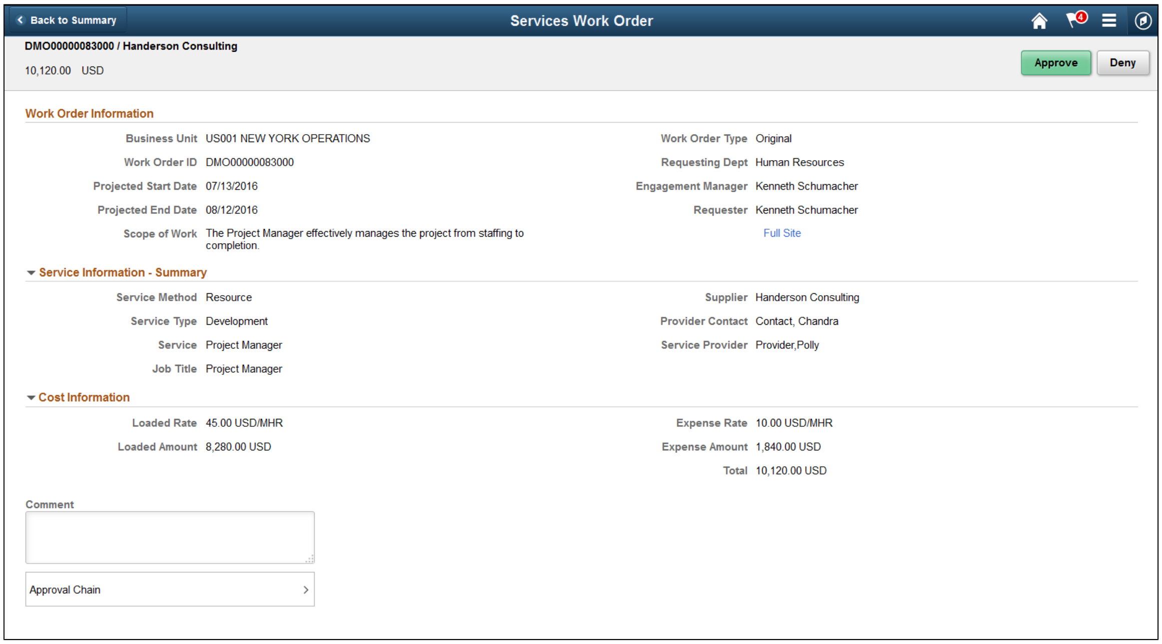
Services Work Order Page

Use the Services Work Order approval page (EOAWMA_TXNHDTL_FL) to review information for a single work order, and approve or deny depending on role criteria.

Navigation:

Select a work order in the list on the Pending Approvals - Services Work Order list page.

This example illustrates the fields and controls on the Services Work Order page.



DMO00000083000 / Handerson Consulting

10,120.00 USD

Business Unit US001 NEW YORK OPERATIONS
Work Order ID DMO00000083000
Projected Start Date 07/13/2016
Projected End Date 08/12/2016
Scope of Work The Project Manager effectively manages the project from staffing to completion.

Work Order Type Original
Requesting Dept Human Resources
Engagement Manager Kenneth Schumacher
Requester Kenneth Schumacher

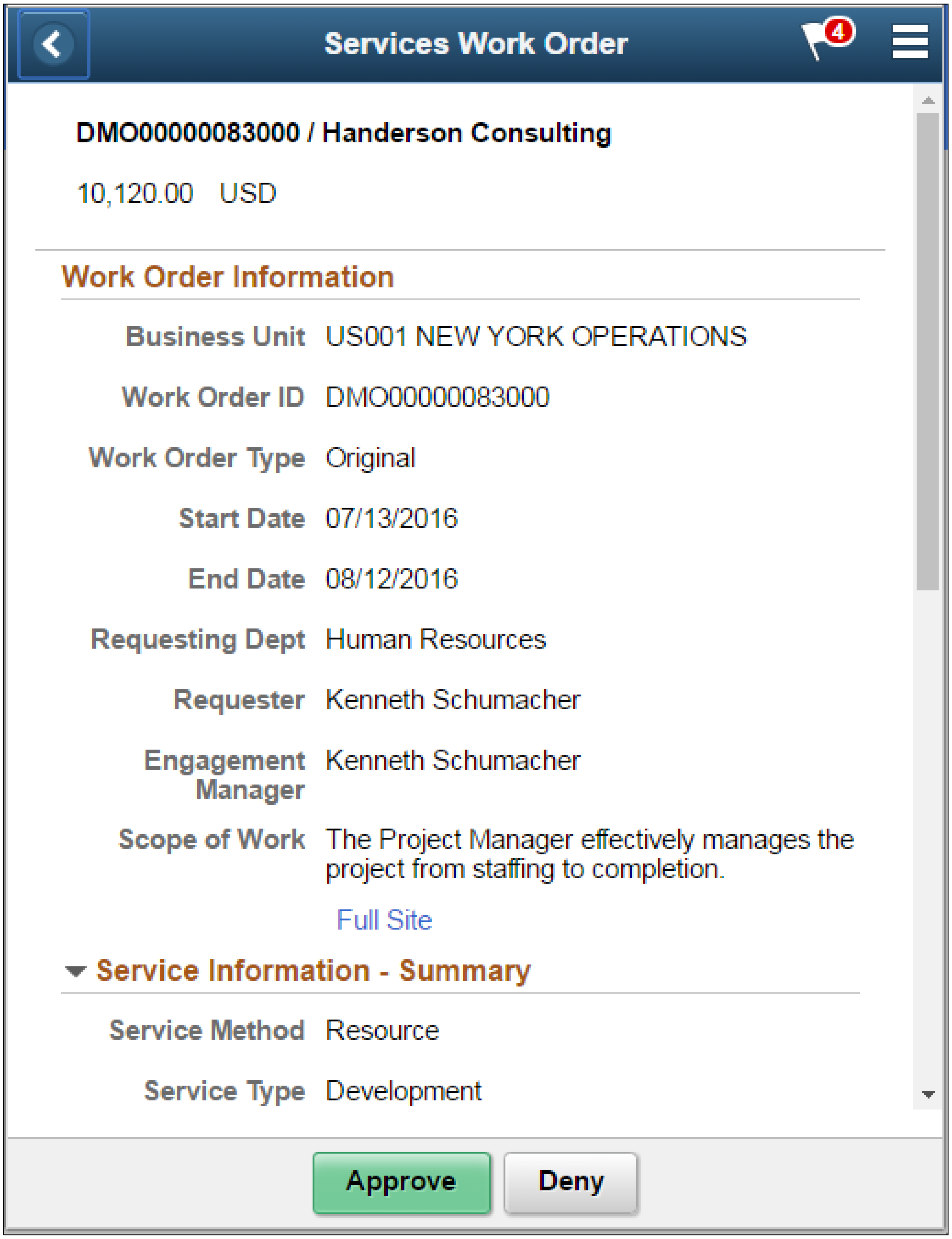
Service Method Resource
Service Type Development
Service Project Manager
Job Title Project Manager

Supplier Handerson Consulting
Provider Contact Contact, Chandra
Service Provider Provider,Polly

Loaded Rate 45.00 USD/MHR
Loaded Amount 8,280.00 USD

Expense Rate 10.00 USD/MHR
Expense Amount 1,840.00 USD
Total 10,120.00 USD

This example illustrates the fields and controls on the Services Work Order page as displayed on a smartphone.



DMO00000083000 / Handerson Consulting

10,120.00 USD

Work Order Information

Business Unit	US001 NEW YORK OPERATIONS
Work Order ID	DMO00000083000
Work Order Type	Original
Start Date	07/13/2016
End Date	08/12/2016
Requesting Dept	Human Resources
Requester	Kenneth Schumacher
Engagement Manager	Kenneth Schumacher
Scope of Work	The Project Manager effectively manages the project from staffing to completion.

Service Information - Summary

Service Method	Resource
Service Type	Development

When viewing a work order on a smartphone, you must scroll down to view the service and cost information, approver comments and approval chain.

Field or Control	*Description*
Work Order Information	View the display-only work order details. The work order information displayed varies depending on whether MSP, VMS, or HCM integrations have been set up.
Full Site	Select this link to open the Work Order Approval page in the classic interface. Use this link only when accessing the approval pages in PeopleSoft Fluid User Interface on a desktop or laptop. The Work Order Approval page is not rendered best when using a smartphone or a tablet. For more information, see the documentation for the Work Order Approval Page in the classic interface.
Service Information — Summary	View the display-only service information. You can expand or collapse **Service Information** by selecting the Expand/Collapse icon.
Cost Information	View the display-only cost information. You can expand or collapse **Cost Information** by selecting the Expand/Collapse icon.
Comment	Enter comments in the text entry field.
Approval Chain	Select to review approval chain information. You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.
Approve or **Deny**	Select an action button. When you select an action button, you have the option to select **Submit** to continue the action or **Cancel** to back out of the action. Upon submitting the action, the system generates a message that the action is successful. **Note:** A reason code is necessary when you deny a service work order. Select the Full Site link to open the Work Order Approval page in the classic interface to deny a Work Order and then enter a reason code in the Work Order Approval page.

Chapter 19

Managing Time in PeopleSoft Services Procurement

Understanding Time Management in PeopleSoft Services Procurement

The service provider uses the timesheet to record and submit time to an approver for immediate, online approval through the Approval Workflow Framework (AWF). The service provider can also track daily activities and report issues. The timesheet approver can provide feedback to the service provider, including performance-rating information through the approval process.

When the service provider logs time against a work order, the time template determines the time reporting codes for that work order. There could be different rules for applicable pay types. For instance, you may pay the pay rate, fixed cost and markups for the first eight hours but only pay the pay rate and fixed costs after eight hours. There could be shift pay differentials or assignment pay differentials associated with the time being logged. When creating invoices against timesheets, the invoicing process considers the rates defined on the work order and the pay types and multipliers associated with the time reporting code, as well as any applicable shift or assignment adjustments, to determine the rate for the supplier.

The timesheet provides the following capabilities:

- Records the number of hours worked on a project as hours per day or as start and stop times, and submits it to the time approver for approval.
- Records specific activities and tracks progress on a project.
- Records and reports project-related problems or issues to the time approver.
- Summarizes all the information entered to create a comprehensive time report.
- Records performance information about a service provider's performance on a project.
- Creates individual services timesheets related to work orders for multi-resource services.

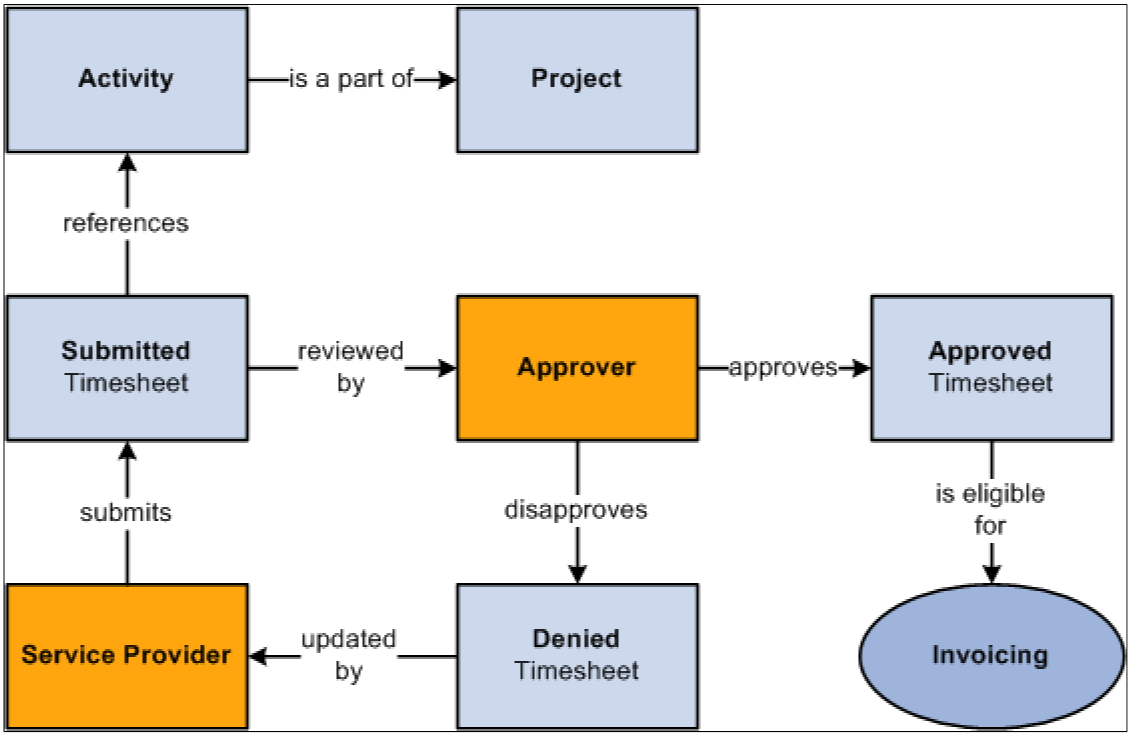
You use the Manage Timesheets page as the focal point for all time activity in PeopleSoft Services Procurement. Use this page to:

- Create, edit, submit, or view timesheets (supplier service provider).
- Filter reports by selecting the criteria in the timesheet status, service provider, or date fields.
- Access pages used to modify time details.

Approval Process

The timesheet approval process begins when the service provider submits his time, along with any project issues, to the designated timesheet approver for review and approval. Any rejected timesheets are returned to the service provider for correction. Submitted timesheets are eligible for adjustment before approval. Approved timesheets are eligible for adjustment upon invoicing.

The following diagram illustrates the timesheet approval process:



Approval Methods

A timesheet can be approved in these ways:

- Mass approval of multiple timesheets.
- Mass line approval for multiple lines.
- Line-by-line approval.

Prerequisites

These attributes must be set up before you enter time information:

- Service methods.
- Services time templates.
- Time reporting rules.
- (Optional) Shifts and assignments, and any associated services.
- Calendars.

- Email messaging.
- Time reporting codes.
- Approval process definition set up.

A work order must also be defined before time transactions can be logged against it. The work order must be resource-based services (versus deliverables-based for progress logs), and it must be in a released status.

Related Links

Maintaining Settlement Setup

Understanding Services Work Orders

Creating Timesheets

This topic discusses how to create timesheets.

Pages Used to Create Timesheets

Page Name	***Definition Name***	***Usage***
Manage Timesheets Page	SPA_SP_R_MAIN_PG	Access timesheets.
Enter Time Page	SPA_TIME_ENTRY	Enter time worked by week using a non-24-hour clock template. Enter time worked by calendar and 24-hour clock. Enter time against multi-resource work orders.

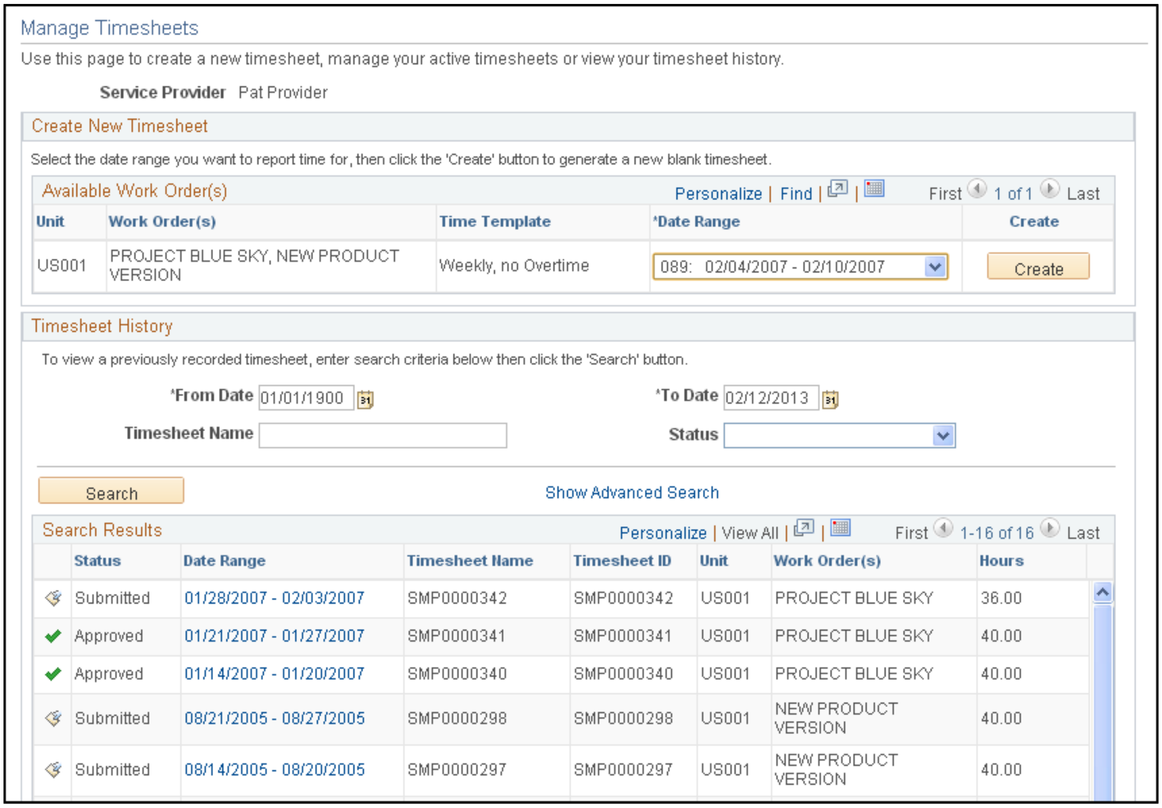
Manage Timesheets Page

Use the Manage Timesheets page (SPA_SP_R_MAIN_PG) to access timesheets.

Navigation:

Services Procurement > **Maintain Timesheets (external)**

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



Manage Timesheets

Use this page to create a new timesheet, manage your active timesheets or view your timesheet history.

Service Provider Pat Provider

Create New Timesheet

Select the date range you want to report time for, then click the 'Create' button to generate a new blank timesheet.

Available Work Order(s)

Unit	Work Order(s)	Time Template	*Date Range	Create
US001	PROJECT BLUE SKY, NEW PRODUCT VERSION	Weekly, no Overtime	089: 02/04/2007 - 02/10/2007	Create

Timesheet History

To view a previously recorded timesheet, enter search criteria below then click the 'Search' button.

*From Date 01/01/1900

*To Date 02/12/2013

Timesheet Name

Status

Search Results

	Status	Date Range	Timesheet Name	Timesheet ID	Unit	Work Order(s)	Hours
	Submitted	01/28/2007 - 02/03/2007	SMP0000342	SMP0000342	US001	PROJECT BLUE SKY	36.00
✓	Approved	01/21/2007 - 01/27/2007	SMP0000341	SMP0000341	US001	PROJECT BLUE SKY	40.00
✓	Approved	01/14/2007 - 01/20/2007	SMP0000340	SMP0000340	US001	PROJECT BLUE SKY	40.00
	Submitted	08/21/2005 - 08/27/2005	SMP0000298	SMP0000298	US001	NEW PRODUCT VERSION	40.00
	Submitted	08/14/2005 - 08/20/2005	SMP0000297	SMP0000297	US001	NEW PRODUCT VERSION	40.00

Use this page to create timesheets, view active timesheets, and timesheet history.

Create New Timesheet

The Create New Timesheet grid groups a unique combination of work orders for a given work order time template.

If multi-resource work orders are available, the individual child work orders appear in the Create New Timesheet section, and the Active Timesheets and Timesheet History grids.

Available Work Order(s)

This grid displays work orders that are available to enter time against.

Field or Control	***Description***
Work Order	Displays work orders for which you can create timesheets. This field also displays multi-resource work orders.
Time Template	Indicates the time template that is used by the work order. The template determines how you enter time for the timesheet. Time templates from the lower-level services of a multi-resource service work order also appear in this column.

Field or Control	***Description***
Date Range	Displays the dates that are available for timesheet entry. To see additional dates, click the down arrow at the right of the field. When the work order is a multi-resource order, the date range that appears is the range for the individual child work orders. The system considers the date ranges for the lower-level services to populate the values for the **Date Range** field. **Note:** This value always appears by default on the next available time template date range.
Create	Click to create a new timesheet for the selected time template. The system displays the Enter Time for page for data entry. All work orders for the service provider and the selected template and time period will be available on the timesheet, including any individual child work orders for a multi-resources service

Active Timesheets

This section displays timesheets that are in an active status. These timesheets can include timesheets that were created but never submitted or timesheets that were denied and require re-submission.

To modify a timesheet, click the link that corresponds with the active timesheet.

Timesheet History

Use this section to search for and view past timesheets. You can search for a specific timesheet or timesheets in a certain status. Click the **Advanced Search Criteria** link to also search for a specific work order or work orders in a certain status.

Manual Entry of TRCs for Timesheets

PeopleSoft Services Procurement enables service providers to manually enter TRCs (time reporting codes) for timesheets. This feature adds flexibility in meeting unique time-recording requirements for scenarios in which you are unable to define a generic rule that covers unusual or complex time keeping requirements. Using manual TRC entry, you can specify the appropriate TRCs to meet time reporting requirements.

The system enables service providers or time approvers to manually identify the correct TRC for special situations in which the system cannot automatically derive the correct TRC. When you create a service time/progress template, you can indicate that you want the capability to manually enter TRCs. Then, when a service provider logs time against a work order for that template, the approver can manually specify TRCs for the time reported. This feature is available for templates using both percentage and actual allocation, as well as both the 24- and non-24-hour clock. To use the feature:

1. Access the Service Time/Progress Template page.

A services administrator can either create a new template or update an existing template. If an existing template already has associated timesheets, you cannot modify the setting for manually entered TRCs.

2. Complete the template and ensure that you select the **Manually enter Timesheet TRCs** check box.
3. A services coordinator or requester can then create a resource-based work order that references the template you created or updated in the first step.
4. The service provider can then enter a timesheet against the work order.

   Using the manual time entry feature, the time for each day can be allocated into the appropriate TRC categories based on your specific requirements.
5. Submit the timesheet for approval.

   Approvers can view whether the provider has specified the TRCs or if they were automatically assigned by the system.
6. The time approver can then approve the timesheet.

   Approvers can view and, if necessary, manually adjust the TRCs before approving the timesheet.

Note: Approvers with appropriate permissions can override a TRC that the system automatically assigned from the Review/Override Time Categories page when manual TRC entry is not allowed. The manual TRC assignment capability does not change the override process, but you can make adjustments to manually assigned TRCs on the timesheet directly when manual TRC entry is allowed.

Enter Time Page

Use the Enter Time page (SPA_TIME_ENTRY) to enter time worked by week using a non-24-hour clock template.

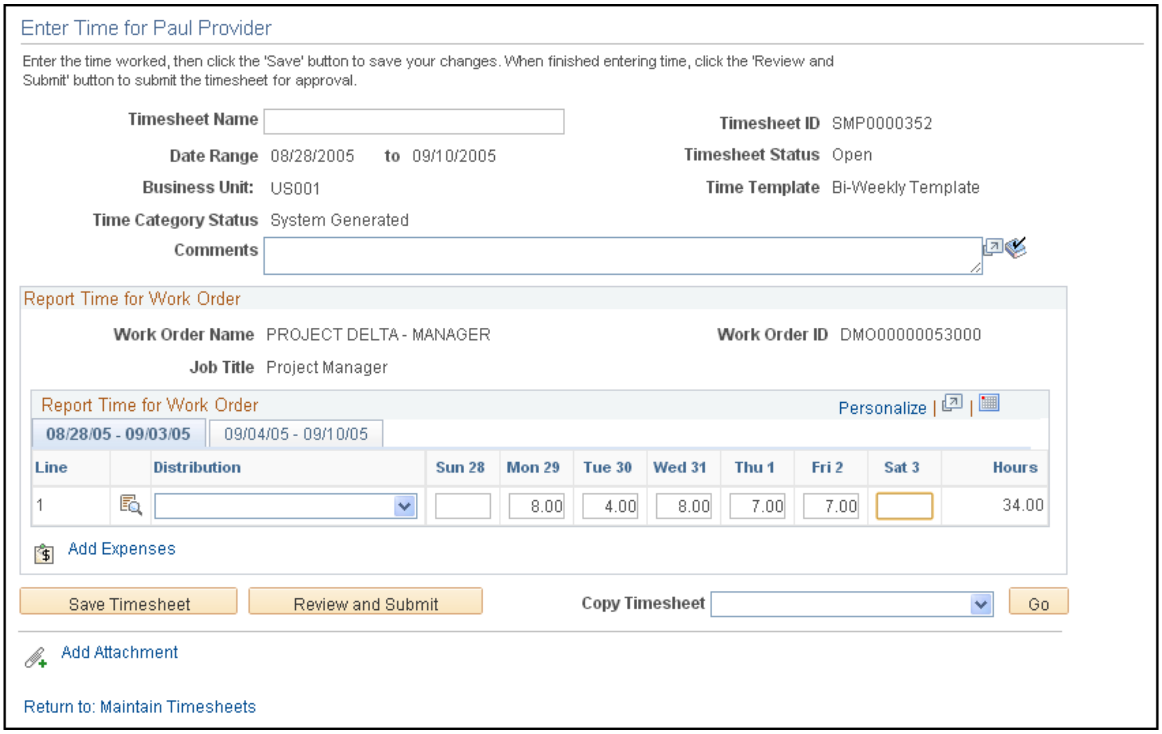
Enter time worked by calendar and 24-hour clock. Enter time against multi-resource work orders.

Navigation:

Click a linked time report on the Manage Timesheets page to view an existing timesheet.

Click the **Create** button on the Manage Timesheets page to enter time on the timesheet.

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



Enter Time for Paul Provider

Enter the time worked, then click the 'Save' button to save your changes. When finished entering time, click the 'Review and Submit' button to submit the timesheet for approval.

Timesheet Name

Timesheet ID SMP0000352

Date Range 08/28/2005 to 09/10/2005

Timesheet Status Open

Business Unit: US001

Time Template Bi-Weekly Template

Time Category Status System Generated

Comments

Report Time for Work Order

Work Order Name PROJECT DELTA - MANAGER

Work Order ID DMO00000053000

Job Title Project Manager

Report Time for Work Order

08/28/05 - 09/03/05 | 09/04/05 - 09/10/05

Line		Distribution	Sun 28	Mon 29	Tue 30	Wed 31	Thu 1	Fri 2	Sat 3	Hours
1				8.00	4.00	8.00	7.00	7.00		34.00

The format of the time entry page is determined by the time template specified on the work order. In the previous example, the time template makes it possible to enter time on a weekly basis. The Enter Time page header provides basic information about the timesheet. To copy an existing timesheet, select a timesheet in the **Copy Timesheet** field and click the **Go** button.

The page displays the lower-level individual service and sequence number when you are entering time related to a lower-level service for a multi-resource, service-method work order. The hours that you enter are assigned by work order and by lower-level services and sequence numbers. If time has been reported against multiple lower-level services in the same timesheet, you can distinguish the time reported for lower-level services.

When using multi-resource work orders, the work order ID and name, time template, job title, distribution, activities, shifts, and assignments and assignment incidents available on the timesheet are from the lower-level services of the work order.

Field or Control	***Description***
Timesheet Name	Displays the name of the timesheet that you selected on the Manage Timesheets page. The name can be assigned by the user or the system when the timesheet is created.
Timesheet ID	Displays the system identifier for the timesheet.
Date Range	Displays the from and to dates to which the timesheet applies.

Field or Control	***Description***
Timesheet Status	Displays the status of the timesheet. Values include: *Approved, Denied, Open, Submitted, Line Denied,*and *Line Pending*
Time Template	Displays the time template used to create the timesheet. If the service method is multi-resource, the time template is the one assigned to the associated lower-level service.
Time Category Status	Indicates how the system assigned the time categories for this timesheet. Values include: *Manually Assigned:* Indicates that the service provider manually entered the time reporting codes during time entry. *System Generated:* Indicates that the system automatically assigned the time reporting codes based on predefined rules.
Adjusted After Approval	Indicates if the timesheet was updated after it was initially approved. This field appears after an adjustment has been made to the timesheet.
Comments	Enter comments related to the timesheet. The comments are available for use during approvals and reviews.
Save Timesheet	Click to save the timesheet. When you save the timesheet, the timesheet appears in the **Active Timesheet** group box on the Manage Timesheets page.
Review and Submit	Click to review and submit the timesheet to the timesheet approver.

Report Time for Work Order

This section displays basic information about a work order.

Field or Control	***Description***
Work Order Name	Displays the work order name.
Work Order ID	Displays the work order ID.
Job Title	Displays the job title for this work order. If this is a multi-resource work order, the job title is for the associated lower-level service.

Field or Control	***Description***
Parent Work Order Name	When entering time for lower-level service related to a multi-resource work order, the parent work order name is displayed in addition to the work order name of the lower-level service itself.
Parent Work Order ID	When entering time for lower-level service related to a multi-resource work order, the parent work order ID is displayed in addition to the work order ID of the lower-level service itself.

Distribution

Field or Control	***Description***
🔍	Click the **Work Order Distribution** icon to access the View/Select Work Order Distribution For: page to select the appropriate accounting line for the work order. This column is available only for actual allocation time reporting.
Distribution	This field is populated with the work order distribution line number selected on the View/Select Work Order Distribution For: page or can be manually selected for actual allocation time reporting. For multi-resource work orders, values for this page are retrieved from the lower-level service.
TRC (time reporting code)	Select a time reporting code to use with this timesheet line. The column appears for timesheets associated to a service time/progress template that is set for manual TRC selection.
Activity	This field is available if Project Costing is not installed. It is populated with resource-based service activities associated with the work order and generic service activities.
Shift	Select the valid shift for the project, if applicable. This column is available if the **Enable Shifts** check box is selected on the Services Procurement Bus Unit definition page and if shifts are associated with the service for the reporting time period.

Field or Control	*Description*
Assignment	Select the valid assignment for the project, if applicable. This column is available if the **Enable Assignments** option was selected on the Services Procurement Bus Unit definition page and if assignments are associated with the service for the reporting time period.
Time Period	Enter the number of hours worked for the time period.
Hours	Displays the total hours by line for the time period reported.

See Services Procurement Bus Def (business unit definition) Page .

Report Incidents for Work Order

This section appears if the **Enable Assignments** option is selected on the Services Procurement Bus Unit definition page, if valid assignments are associated with the service during the time period reported, and if the **Based on Incidents** option is selected on the Assignment by Service page.

Assignment pay rates come from the Assignment by Service definition if the **Define for This Service** option is selected; otherwise, the assignment pay rates come from the Assignment definition.

Assignments can be based on time or number of incidents. Any applicable managed service provider (MSP) or enable supplier managed services (VMS) fees are in addition to the assignment pay rate.

Assignment incidents have the following attributes:

- They do not require associated time.
- Multiple assignments can occur in the same day.
- They can have both time and number of incidents associated to them on the same timesheet.

Field or Control	*Description*
Date(s)	Select the dates for the incident. You can report time against multiple assignments in the same day.
Assignment	Select the appropriate assignment for the time period.
Incident(s)	Enter the number of incidents for the assignment during the time period. The number of incidents is entered on a per line basis.

Related Links

Maintaining Settlement Setup

Understanding Services Work Orders

Enter Time Page

Use the Enter Time page (SPA_TIME_ENTRY) to enter time worked by week using a non-24-hour clock template.

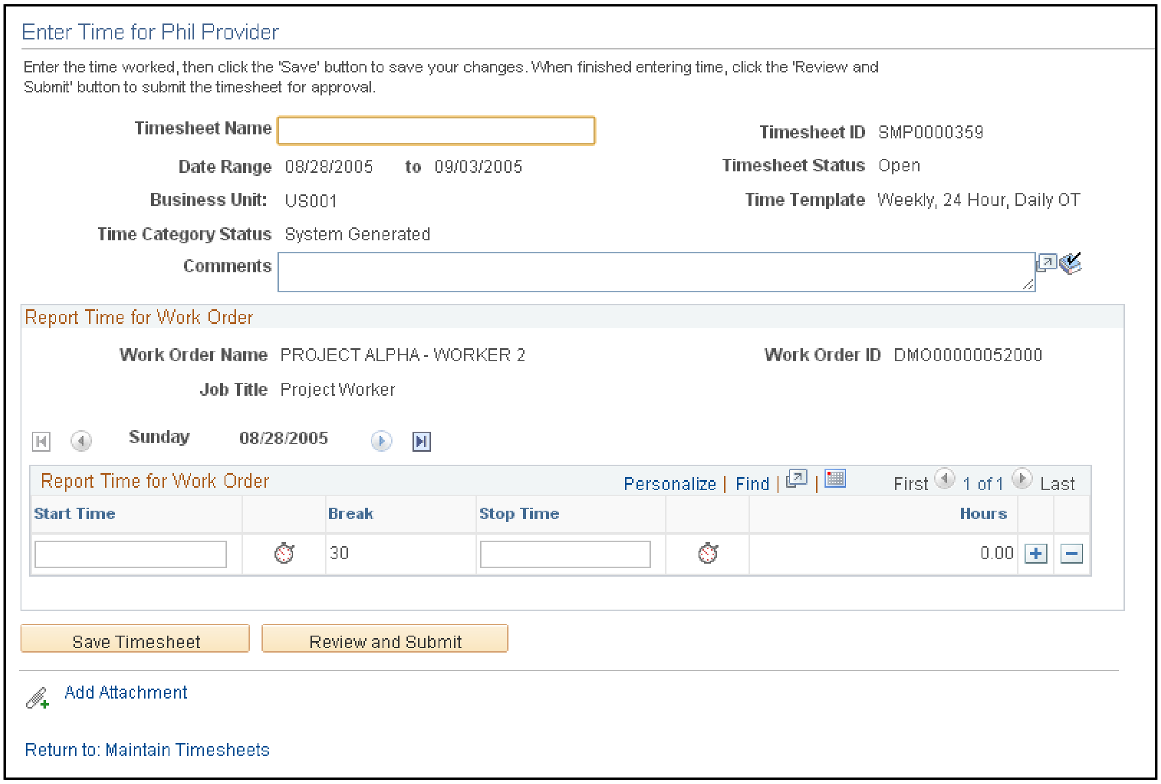
Enter time worked by calendar and 24-hour clock. Enter time against multi-resource work orders.

Navigation:

Click a linked time report on the Manage Timesheets page to view an existing timesheet.

Click the **Create** button on the Manage Timesheets page to enter time on the timesheet.

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


Enter Time for Phil Provider

Enter the time worked, then click the 'Save' button to save your changes. When finished entering time, click the 'Review and Submit' button to submit the timesheet for approval.

Timesheet Name

Timesheet ID SMP0000359

Date Range 08/28/2005 to 09/03/2005

Timesheet Status Open

Business Unit: US001

Time Template Weekly, 24 Hour, Daily OT

Time Category Status System Generated

Comments

Report Time for Work Order

Work Order Name PROJECT ALPHA - WORKER 2

Work Order ID DMO00000052000

Job Title Project Worker

Sunday 08/28/2005

Start Time		Break	Stop Time		Hours
		30			0.00

The format of the time entry page is determined by the time template specified on the work order. In this example, the time template enables you to enter time using a 24-hour clock. This method of reporting time enables users to record time on a day-by-day basis, with both start and end times. For example, a user can enter time for a day with a start time of 8:00 a.m., a lunch break from 12:00 noon until 1:00 p.m., and an end time of 5:00 p.m. Time can be reported across two days. For such a timesheet, any hours reported as a.m. following hours reported for p.m. will be considered as a.m. of the next day.

Report Time for Work Order

Field or Control	***Description***
Shift	Select the valid shift for the project, if applicable. This column is available if the **Enable Shifts** option was selected on the Services Procurement Bus Unit definition page and if shifts are associated with the service for the reporting time period. In addition, the **Derive Shift From Time of Day** option on the Service/Time Template page cannot be selected or this column will not appear during time entry. Shifts can be selected manually or automatically based on the time template. Pay rates come from the service itself if the **Define for this Service** option is selected on the Shift by Service definition page. Otherwise, the pay rates come from the Shift definition page. Values are: • **Manual selection:** Used for non-24-hour clock templates and for 24-hour clock templates for which the **Derive From Time of Day** option is not selected. Service provider selects the related shift for each line. Service providers can manually enter shifts based on the following scenarios: • Different shifts on different days • Multiple shifts on the same day • Gaps in time, such as split shifts • **Automatic selection:** Used for 24-hour clock templates where the **Derive From Time of Day** option is selected. Service provider enters Start Time, Break time, and Stop Time for each line, and the system automatically derives the shift based on the times entered. The system can derive multiple shifts for a single time line.

Shift Pay Rate Calculations

Shift rate calculation is based on the shift pay type. Any applicable MSP or VMS fees are added in addition to the shift rate.

See Shift Page.

Field or Control	***Description***
Assignment	Select the valid assignment for the project, if applicable. This column is available if the **Enable Assignments** option was selected on the Services Procurement Bus Unit definition page and if assignments are associated with the service for the reporting time period.
Hours	Displays the total number of hours worked for a week.
Review/Adjust Time Category	Click to access the Review Time Categories page where you can review the time reporting categories for timesheet.
Details	Click to access the Timesheet details page where you can view the work order and timesheet details, along with the comments and history for the timesheet.
Add Expenses	Click to access the Create Services Expense Report page where you can define expenses associated with this timesheet.
Save Timesheet	Click to save the timesheet. The system verifies field values that you entered and saves the timesheet.
Review and Submit	Click to access the Review Timesheet page. Using the page, you can submit the timesheet for approval, preview approvers, and view charted values for time reporting codes contained in the timesheet.
Add Attachment	Click to access the Timesheet Attachments page. You use the page to upload attachments.

Report Incidents for Work Order

This section appears if the **Enable Assignments** option is selected on the Services Procurement Bus Unit definition page, if valid assignments are associated with the service during the time period reported, and if the **Based on Incidents** option is selected on the Assignment by Service definition page.

Field or Control	***Description***
Date(s)	Select the dates for the incident. You can report time against multiple assignments in the same day.
Assignment	Select the appropriate assignment for the time period.

Field or Control	***Description***
Incident(s)	Enter the number of incidents for the assignment during the time period. The number of incidents is entered on a per line basis.

Enter Time for Page

Use the Enter Time page (SPA_TIME_ENTRY) to enter time worked by week using a non-24-hour clock template.

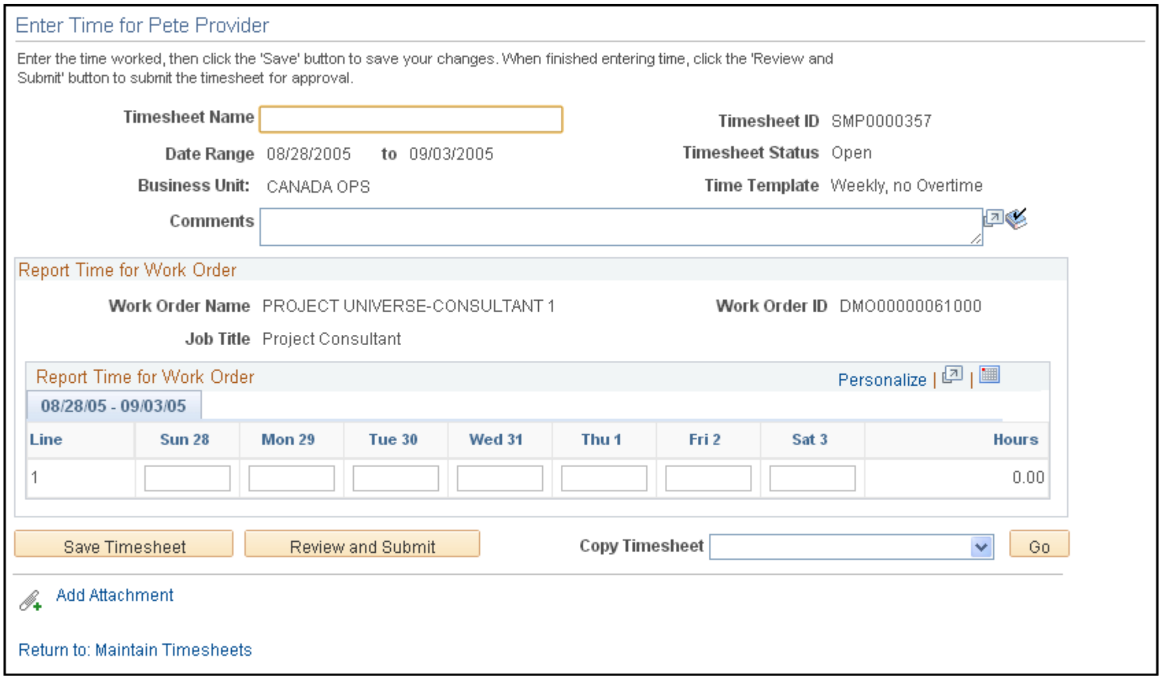
Enter time worked by calendar and 24-hour clock. Enter time against multi-resource work orders.

Navigation:

Click a linked time report on the Manage Timesheets page to view an existing timesheet.

Click the **Create** button on the Manage Timesheets page to enter time on the timesheet.

This example illustrates the fields and controls on the Enter Time for page (1 of 2). You can find definitions for the fields and controls later on this page.



Enter Time for Pete Provider

Enter the time worked, then click the 'Save' button to save your changes. When finished entering time, click the 'Review and Submit' button to submit the timesheet for approval.

Timesheet Name

Timesheet ID SMP0000357

Date Range 08/28/2005 to 09/03/2005

Timesheet Status Open

Business Unit: CANADA OPS

Time Template Weekly, no Overtime

Comments

Report Time for Work Order

Work Order Name PROJECT UNIVERSE-CONSULTANT 1

Work Order ID DMO00000061000

Job Title Project Consultant

Report Time for Work Order

08/28/05 - 09/03/05

Line	Sun 28	Mon 29	Tue 30	Wed 31	Thu 1	Fri 2	Sat 3	Hours
1								0.00

Copy Timesheet

When you are working with multi-resource work orders, each individual service provider reports time and expenses individually for work associated to the same time template. Time approval for service providers can have the same or individual approval workflow.

Consumption is recorded against the overall total for the parent work order as well as the individual service work order.

Approvals and notifications for timesheets are also individual within the work order.

Related Links

Setting Up Multi-Resource Services
Enter Time Page
Enter Time Page

Managing Timesheets

This topic provides an overview of overriding timesheets and discusses how to manage timesheets.

Pages Used to Manage Timesheets

Page Name	***Definition Name***	***Usage***
Manage Timesheets Page	SPA_SP_R_MAIN_PG	View, search, and sort the list of timesheets. Access the timesheet that you want to modify. To add a new timesheet, select a business unit, work order, time template, and date range. Click the **Create** button.
Enter Time Page	SPA_TIME_ENTRY	Enter time and incident information related to assigned work orders, including any associated shift or assignment information, such as time line type or number of incidents.
Review/Adjust Time Page	SPA_TIME_ENTRY	Adjust timesheets.
Maintain Timesheets as Proxy	SPA_SUP_R_MAIN_PG	Manage time on behalf of other users.
Timesheet Details Page	SPA_TIME_DETAILS	View timesheet details, including time category, distribution, and history information. Also included on the page are multi–resource work order IDs, name, job title, and sequence number. Enter Time Page
Review/Override Time Page	SPA_TM_EDIT_TRC	Override time categories on timesheets.
Review Time Page	SPA_TIME_SUBMIT	Review the timesheet summary.

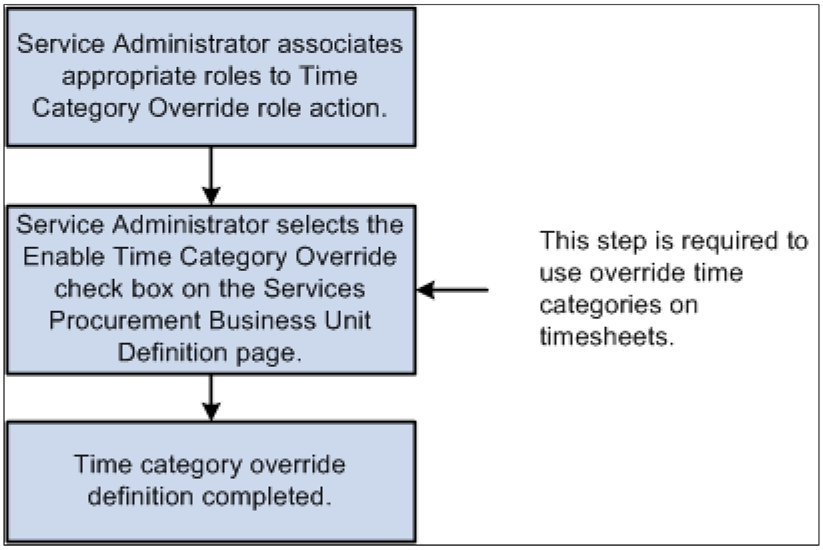
Page Name	***Definition Name***	***Usage***
Timesheet Attachment Page	SPA_TIME_ATTACH	Add, delete, or view an attachment for the timesheet. You can add more than one attachment for each timesheet. Click the plus sign to include more attachments for the timesheet. Enter Time Page
View/Select Work Order Distribution Page	SPA_TIMEWO_DISTRIB	(Optional) Select the appropriate accounting line for the work order. Enter Time Page

Understanding Time Category Overrides

With PeopleSoft Services Procurement, you can override time categories on timesheets. To accomplish this:

- The **Enable Time Categories Override** option must be selected on the Services Procurement Bus Unit definition page.
- The role action of SP_TIME_ADJUST_TRC must be associated with users who will be able to override time categories.

The following diagram illustrates the setup of the time category override feature:



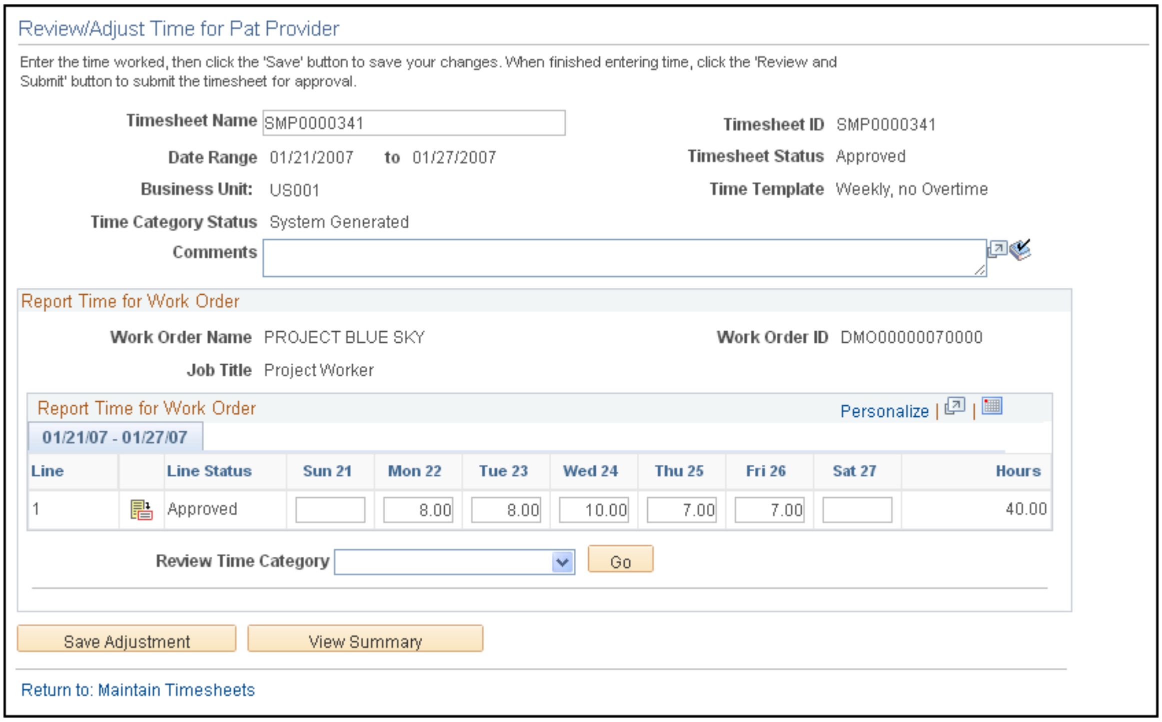
Review/Adjust Time Page

Use the Review/Adjust Time page (SPA_TIME_ENTRY) to adjust timesheets.

Navigation:

Click the **View Summary** button on the Enter Time page

This example illustrates the fields and controls on the Review/Adjust Time page. You can find definitions for the fields and controls later on this page.



Review/Adjust Time for Pat Provider

Enter the time worked, then click the 'Save' button to save your changes. When finished entering time, click the 'Review and Submit' button to submit the timesheet for approval.

Timesheet Name SMP0000341

Timesheet ID SMP0000341

Date Range 01/21/2007 to 01/27/2007

Timesheet Status Approved

Business Unit: US001

Time Template Weekly, no Overtime

Time Category Status System Generated

Comments

Report Time for Work Order

Work Order Name PROJECT BLUE SKY

Work Order ID DMO00000070000

Job Title Project Worker

Report Time for Work Order

01/21/07 - 01/27/07

Line		Line Status	Sun 21	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Hours
1		Approved		8.00	8.00	10.00	7.00	7.00		40.00

Review Time Category

After you make an adjustment to a timesheet, the **View Adjustments** link becomes available for you to review the adjustment or adjustments that have been made to the timesheet. Click the link to access a search page where you can select an adjustment to view.

Note: You cannot change the work order ID if you are adjusting approved timesheets. You can; however, change the distribution, activity ID, shift, assignment, and time fields as required, if they are available.

When you adjust and submit a timesheet against a multi-resource work order, the system:

- Uses the tolerance percentage of the multi-resource work order to validate the timesheet amount.
- Updates the multi-resource work order's consumption, along with the lower-level service work order's consumption.

Report Time for Work Order

If you do not have the appropriate role action to adjust time, the label displays as Review Time for Work Order.

Field or Control	***Description***
(Time Reporting Period)	Revise the number of hours and then click the **Adjust Timesheet** button.

Field or Control	***Description***
Adjust Timesheet	Click this button to update the timesheet and save your changes.
Review/Override Time Category	Select the time period for which you want to override the time category on the Review/Override Time Categories page. The actual navigation that you'll use to access the Review/Override Time Categories page is determined upon which service time template was used to create the timesheet. After you select the time period that you want to override: • For Non 24-Hour clock timesheets, click the **Go** button to access the Review/Override Time Categories page. • For 24-Hour clock timesheets, click the **Review/Override Time Category** button.

Report Incidents for Work Order

This grid box appears if the **Enable Assignments** option is selected on the Services Procurement Bus Unit definition page, if valid assignments are associated with the service during the time period reported, and if the **Based on Incidents** option is selected on the Assignment by Service definition page.

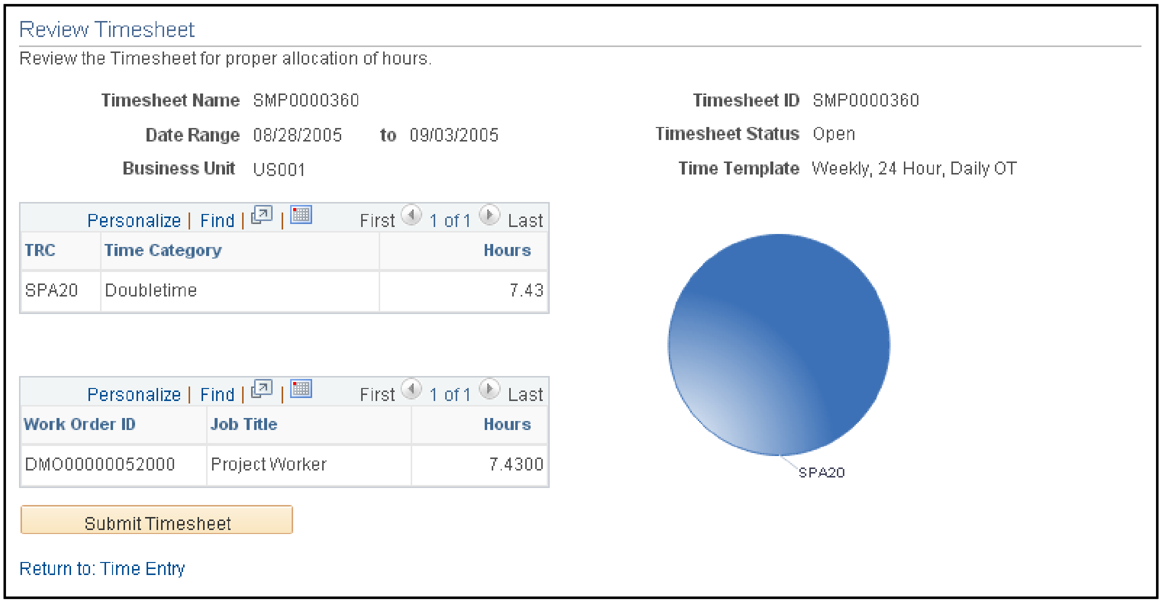
Review Time Page

Use the Review Timesheet page (SPA_TIME_SUBMIT) to review the timesheet summary.

Navigation:

Click the **View Summary** button or the **View and Submit** button on the Enter Time page.

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



Review Timesheet

Review the Timesheet for proper allocation of hours.

Timesheet Name SMP0000360

Date Range 08/28/2005 to 09/03/2005

Business Unit US001

Timesheet ID SMP0000360

Timesheet Status Open

Time Template Weekly, 24 Hour, Daily OT

TRC	Time Category	Hours
SPA20	Doubletime	7.43

Work Order ID	Job Title	Hours
DMO00000052000	Project Worker	7.4300

You can review the timesheet for the correct allocation of time using this page. The page provides basic information about the timesheet, such as the status and the template used to create the timesheet. If you accessed this page using the **Review and Submit** button on the Review/Adjust Time page, the **Submit** button appears for you to submit the timesheet for approval.

The page also provides graphical information about the hours.

Time Sheet Summary by TRC

Use this grid box to review timesheet summaries based on time recording codes.

Note: User roles that have the SP_TIME_HIDE_TRC_SUM role action applied to the roles cannot view the Timesheet Summary by TRC grid box or the related graphical display.

Field or Control	***Description***
TRC (time reporting code)	Displays the time reporting codes that are a part of this timesheet. A time reporting code is a collection of predefined values and rules that determine how the system applies the code.
Time Category	Displays the time category used by the corresponding time reporting code. A time category defines the type of time, such as overtime or standard time.
Hours	Displays the number of hours worked for each time reporting code and time category combination.

Timesheet Summary by Work Order

Use this grid box to review timesheet summaries based on work order.

Field or Control	***Description***
Work Order ID	Displays the work orders that are included on this timesheet.
Job Title	Displays the job title for the person.
Hours	Displays the number of hours applied to the corresponding work order.

Assignment Incidents Summary

Use this grid box to review incidents logged against assignment IDs. The grid appears when time is based on incidents.

Field or Control	***Description***
Assignment ID	Displays the assignments for this timesheet. Assignments are the types and conditions of work.
Incidents	Displays the number of incidents for the assignment during the time period.

Review/Override Time Page

Use the Review/Override Time page (SPA_TM_EDIT_TRC) to override time categories on timesheets.

Navigation:

Select a value in the **Review/Override Time Category** field on the Review/Override Time page.

Note: The title of this page displays as Review Time Categories if the user does not have the appropriate role to override time categories.

Note: Fields on this page will appear differently based on the use of a 24-hour or a non-24-hour clock time template. Differences are discussed.

Field or Control	***Description***
Time Category Status	This field displays the current time category status for the reporting period. Values are: • *System Assigned:* Indicates that no manual override has occurred. • *Approver Override:* Indicates that one of the approvers of the timesheet has manually overridden the system assigned value. • *Manually Assigned:* Indicates that the service provider manually entered the time reporting code. This value is made possible by selecting the **Manually enter Timesheet TRCs** check box on the Service Time/ Progress Template page. The **Enable Time Reporting Override** option on the Services Procurement Bus Unit definition page must be selected for this field to be available.

Field or Control	***Description***
Time Category	If the business unit is not enabled to override time categories, the label for this group box is **Time Category.** In addition, information is display-only.

Report Time for Work Order

If you do not have the appropriate role action to approve time, the label will be Review Time for Work Order and the Review/Override Time Category field will be unavailable.

In addition, if you do not have the appropriate approval role action, you will only be able to review the time information in this section.

Field or Control	***Description***
Review/Override Time Category	Select the time period for which you want to override the time category on the Review/Override Time Categories page. The actual navigation that you will use to access the Review/Override Time Categories page is determined by which service time template was used to create the timesheet. After you select the time period that you want to override: • For non-24-hour clock timesheets, you must select the time period that you want to override in the **Review/Override Time Category** field, and then click Go to access the Edit Time Categories page. • For 24-hour clock timesheets, scroll to the time period that you want to override and then click the **Review/Override Time Category** button to access the Edit Time Categories page.
Adjust Timesheet	Click this button to accept and save the changes. You will receive a confirmation message after the changes are successfully saved. The Timesheet Status changes to *Adjusted.*

Reviewing and Overriding Time Categories

When the Time Category Status is *Approver Override,* a warning will appear if an approver makes a subsequent adjustment to the hours. Clicking the **Adjust Timesheet** button will trigger the warning in this case. You will have an opportunity to cancel the adjustment before the TRC values are recalculated.

Important! If a timesheet has multiple approvers, a warning message will appear to indicate that subsequent changes will affect previous overridden time. For example, if one approver changes the time categories so that overtime will not be charged against a certain work order, another approver may need to make an associated change to pick up the overtime on a different work order.

Adjusting Timesheet After TRCs Have Been Overridden

The system displays a confirmation message when time categories have been successfully overridden.

Field or Control	***Description***
OK	Click to accept the changes. The system returns the approver to the Adjust Timesheet page.

Field or Control	***Description***
Cancel	Click to indicate that the hours should not be changed. The system returns to the Adjust Timesheet page.

Submitting and Approving Timesheets

This topic discusses how to submit and approve timesheets.

Note: Before you can approve timesheets, you must have a role action of SP_TIME_APPROVER.

Pages Used to Approve Timesheets

Page Name	***Definition Name***	***Usage***
Review Timesheet Page	SPA_TIME_SUBMIT	Submit timesheets for approval.
Worklist Page	WORKLIST	View timesheets that require your approval. Approve Timesheet Page
Approve Timesheet Page	SPA_TIME_APPROVE	Approve, deny, and hold timesheets.
Enter Time Page	SPA_TIME_ENTRY	View a list of adjustments entered for the timesheet. Approve Timesheet Page
Edit Time Categories Page	SPA_TM_EDIT_TRC	Edit time categories for a specific time period.
Timesheet Details Page	SPA_TIME_DETAILS	View the details for the timesheet. Approve Timesheet Page
View Timesheet Adjustments Page	SPA_TIME_VWADJUST	View timesheet adjustment history. The **View Adjustments** button is available for a time report when adjustments have been made to a timesheet. Approve Timesheet Page

Related Links

eProcurement Role Actions Page

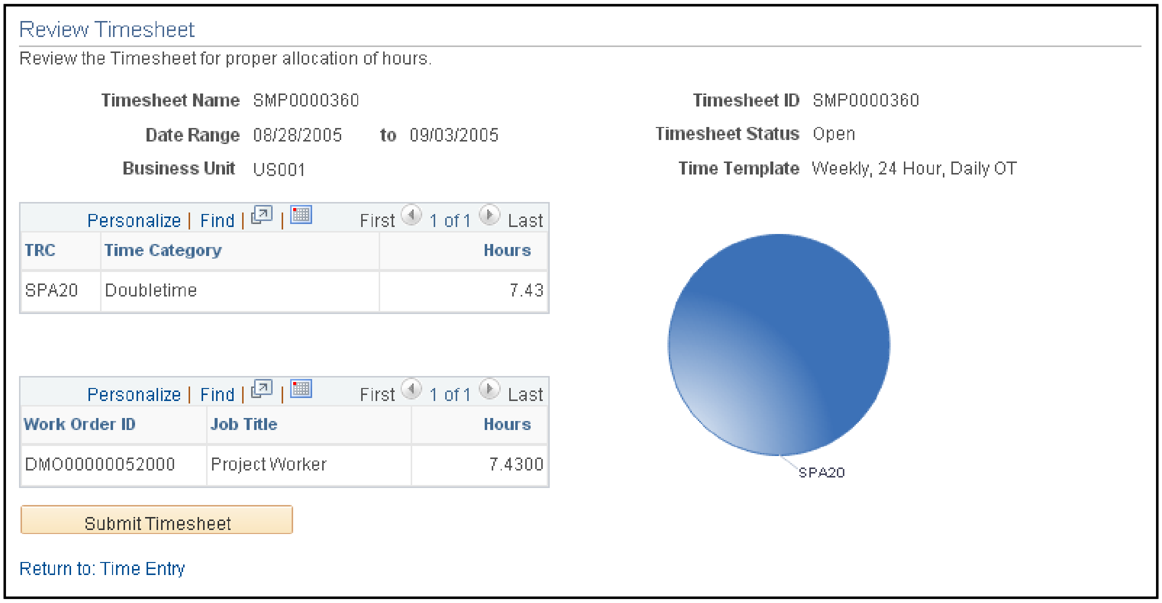
Review Timesheet Page

Use the Review Timesheet page (SPA_TIME_SUBMIT) to submit timesheets for approval.

Navigation:

- Click the **View Summary** button on the Enter Time page.
- Click the **View Summary** button on the Review/Adjust Time page.

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



Review Timesheet

Review the Timesheet for proper allocation of hours.

Timesheet Name SMP0000360 **Timesheet ID** SMP0000360

Date Range 08/28/2005 **to** 09/03/2005 **Timesheet Status** Open

Business Unit US001 **Time Template** Weekly, 24 Hour, Daily OT

TRC	Time Category	Hours
SPA20	Doubletime	7.43

Work Order ID	Job Title	Hours
DMO00000052000	Project Worker	7.4300

Timesheet approvals use the Approval Framework feature to streamline the approval process. Service providers (or service provider contacts by proxy) can self approve a timesheet if the business unit enables timesheet approval and the service provider has been defined for self approval on the approval process definition. After all approvers complete the approval process, the timesheet history indicates that the status of a timesheet is Approved.

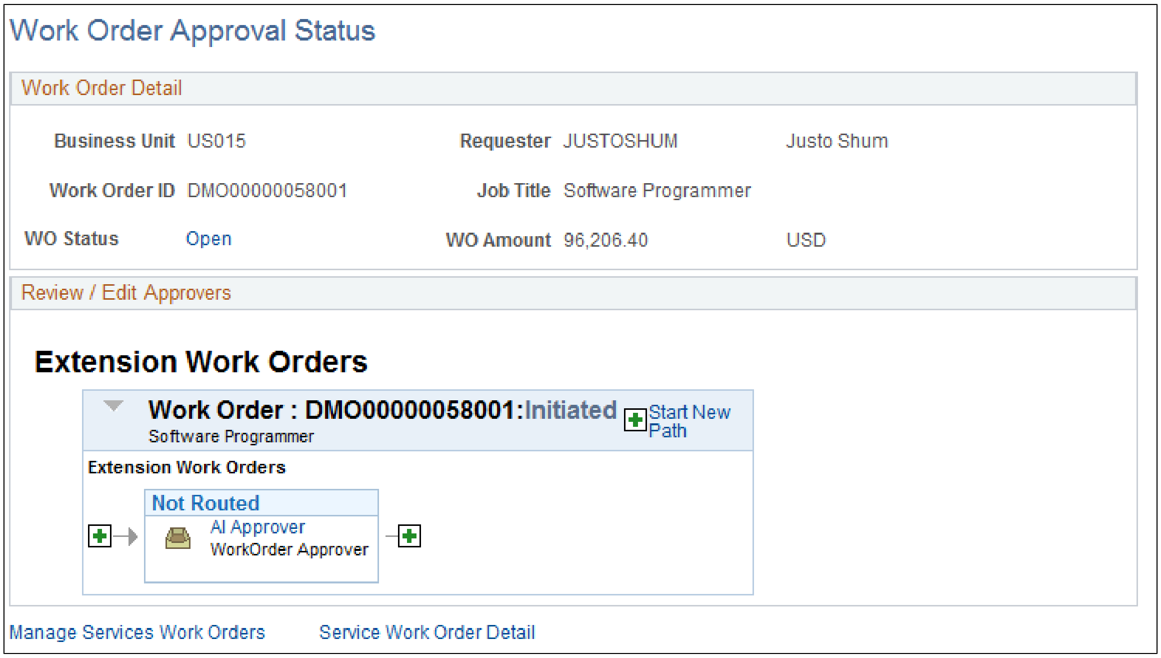
After creating a new timesheet or reviewing timesheets, timesheet approvers and reviewers can be viewed and the timesheet can be submitted for approval. To submit the timesheet without reviewing approvers, click the **Submit Timesheet** button. The system immediately submits the timesheet and displays the Save Confirmation page for the submission.

To preview approvers and then submit timesheets for approval:

1. Click the **Preview Timesheet Approver(s)** button.

   The system displays the Approval Status page. This page provides a graphical map of the workflow. The next example illustrates the timesheet Approval Status page for multi-resource timesheets:

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



Work Order Approval Status

Work Order Detail

Business Unit US015

Requester JUSTOSHUM Justo Shum

Work Order ID DMO00000058001

Job Title Software Programmer

WO Status Open

WO Amount 96,206.40 USD

Review / Edit Approvers

Extension Work Orders

Work Order : DMO00000058001:Initiated

Software Programmer

Extension Work Orders

Not Routed

AI Approver

WorkOrder Approver

The graphical map for the workflow displays timesheet approvers and reviewers and the status of their reviews. It is possible to insert additional approvers or reviewers or create a new approval path for a timesheet. If you insert an ad hoc approver or reviewer is inserted, as an approver or reviewer you can also subsequently remove the ad hoc approver or reviewer.

The title for the workflow is the name of the stage or path defined in the Approval Process Definition. The timesheet thread description is a concatenation of the business unit, timesheet ID, work order ID, and line number. The graphic includes the work order and overall status of the approval. The graphics provide information about individual approvers and the status of their approvals and vary in color depending on the approval status.

2. Click the **Return to: Timesheet** link.

3. Click the **Submit Timesheet** button on the Review Timesheet page.

4. Click **OK** on the Save Confirmation page to complete the submission and go to the Maintain Timesheets page.

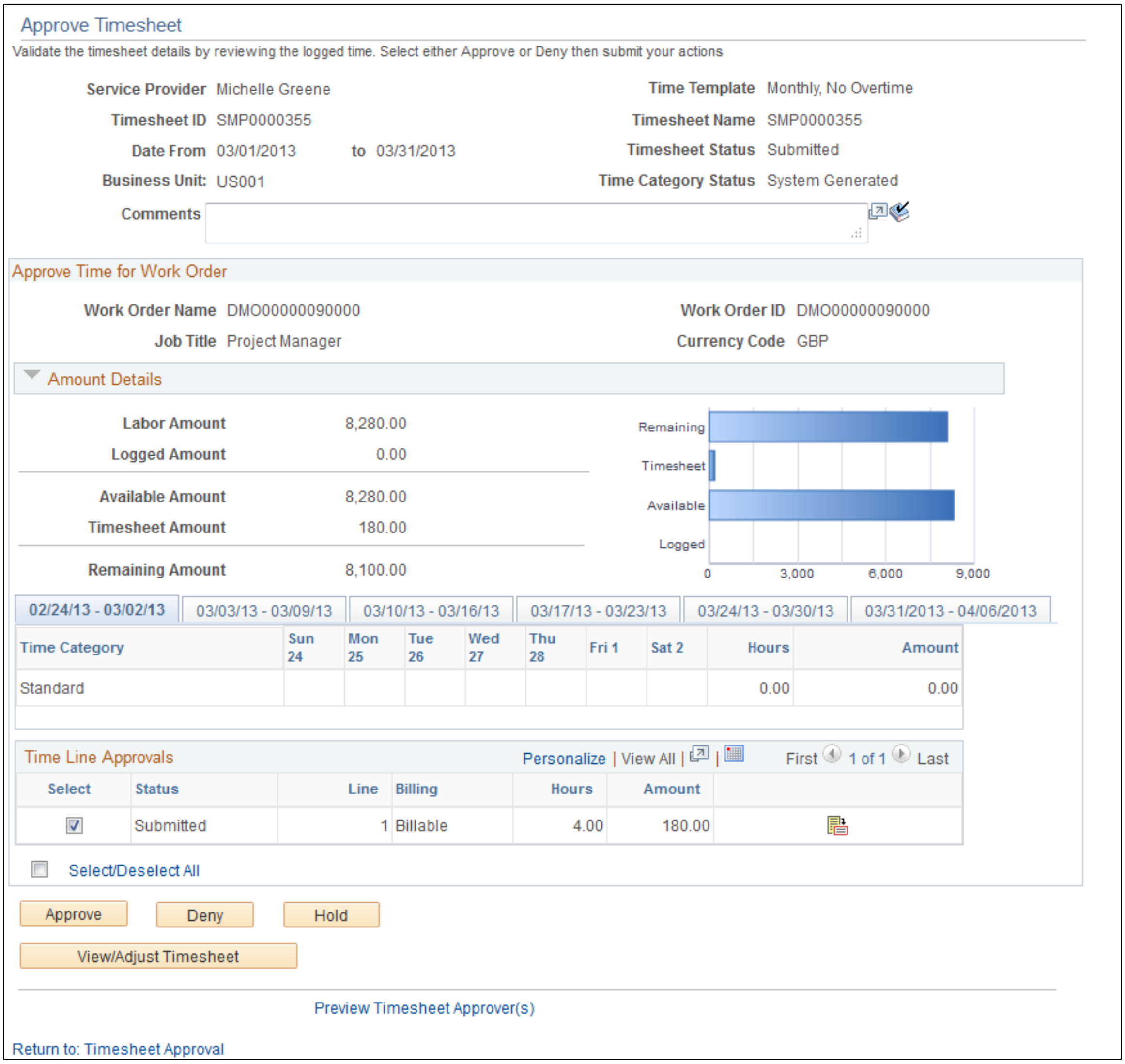
Approve Timesheet Page

Use the Approve Timesheet page (SPA_TIME_APPROVE) to approve, deny, and hold timesheets.

Navigation:

Select timesheets from the Worklist page that require your approval.

This example illustrates the fields and controls on the Approve Timesheet page (1 of 2). You can find definitions for the fields and controls later on this page.



Validate the timesheet details by reviewing the logged time. Select either Approve or Deny then submit your actions

Service Provider	Michelle Greene	**Time Template**	Monthly, No Overtime
Timesheet ID	SMP0000355	**Timesheet Name**	SMP0000355
Date From	03/01/2013 **to** 03/31/2013	**Timesheet Status**	Submitted
Business Unit:	US001	**Time Category Status**	System Generated
Comments			

Work Order Name	DMO00000090000	**Work Order ID**	DMO00000090000
Job Title	Project Manager	**Currency Code**	GBP

Labor Amount	8,280.00
Logged Amount	0.00
Available Amount	8,280.00
Timesheet Amount	180.00
Remaining Amount	8,100.00

Time Category	Sun 24	Mon 25	Tue 26	Wed 27	Thu 28	Fri 1	Sat 2	Hours	Amount
Standard								0.00	0.00

Select	Status	Line	Billing	Hours	Amount	
☑	Submitted	1	Billable	4.00	180.00	

☐ Select/Deselect All

Along with approving, denying, holding, or pushing back a timesheet, you can use this page to review work order and timesheet details. If the work order is a multi-resource work order, the page displays parent work order details and lower-level individual service details. Fields for both are similar. When the **Select** check box indicates that a line has been selected, approval action buttons at the bottom of the page are available for selection. Clicking **Select/Deselect All** below the grid will select or deselect the **Select** check box for all lines of the timesheet. For parent work orders, only the work order ID and name are displayed.

Field or Control	***Description***
Time Template	Displays the template used by the work order.

Field or Control	***Description***
Time Category Status	This display-only field indicates whether the time categories in this timesheet were manually overridden, system assigned, or manually entered by a service provider. This field appears only if the **Enable Time Category Override** check box is selected on the Services Procurement Bus Definition page.
Approve	When you select the **Select** check box, approval actions become available for you to perform. Select **Approve** to approve any time lines selected for the work order. When approving a timesheet, the system changes status the status to *Approved* and makes the timesheet available for invoicing.
Deny	Click to deny the approval of the selected timesheets. The system changes the status to *Denied by Approver.* If you deny the time line, the system might require you to provide a reason code and enter a comment if the business unit is set up to require codes for negative business transactions. When you deny the approval, the system returns the time line to the service provider for modifications and re-submission.
Hold	Click to place the timesheet on hold, indicating that the approve or deny decision is being deferred until further consideration. When you put a timesheet on hold, the system keeps it in your queue awaiting further action.
Pushback	Click to send the submitted timesheet back to the previous approver for more information. The status of the timesheet remains as Submitted.
View/Adjust Timesheet	Click to access the Enter Time page, where you can make adjustments to the timesheet. Use this page to override time categories if the **Enable Time Reporting Override** check box is selected on the Services Procurement Bus Defn page. See Setting Up Business Unit Definitions.
View Attachments	Click to view attachments. This button is available after an attachment has been added to the timesheet. When you click the button, you access the Timesheet Attachments page where you can view information about the attachment and open it for viewing.
Preview Timesheet Approver(s)	Click to view a graphical map of the approval workflow.

Field or Control	***Description***
View Adjustments	Click to view timesheet adjustment history. The button is available when adjustments have been made to a timesheet. You can search for and view specific timesheet line adjustments, comments made about the adjustment and whether the adjustment was made after the timesheet was approved. The View Timesheet Adjustments page also displays timesheet information, such as its basic details and overall status.

Amount Details

Use this section to view a graphical presentation of timesheet amounts, including logged, available, timesheet, and remaining amounts. If you are approving a multi-resource work order with individual services, you can switch graphical views. Click the **View Multi Resource Service Graph** link to view details about the parent work order. Click the **View Individual Service Graph** to view graphical details about lower-level services.

The section also provides tab data that you can use to select the timeframe that includes the timesheet you want to view. After you select the tab, the system populates the grid with time category and calendar information for individual timesheets.

Time Line Approvals

Use this section to approve, deny, hold, or push back timesheet lines. The columns that appear differ depending upon whether assignments are associated with projects for the reported time period.

Note: If any incidents are associated with the time line, the system displays Incidents for Work Order grid.

Field or Control	***Description***
Select	Select to indicate that you want to perform an approval task for a time line. When you select the check box, the system makes the **Approve, Deny, Hold,** and **Pushback** buttons available at the bottom of the page. If the check box is selected, click the check box to deselect the time line. Any lines that are selected when you click an action button will have that action performed for them.
Status	Displays the status of the time line approval.
Amount	Displays the monetary value for this timesheet.
Quantity	This column displays the number of incidents for each time line. This column appears if assignments (based on incidents) are associated with the time reporting period.

Field or Control	***Description***
📋	Click to access the Timesheets Details page, where you can view the details of the timesheet and select the rating for the work that the service provider performed for this time line.
Select/Deselect All	Use this link to select or deselect all the available timesheets.

Incidents for Work Order

This group box appears if time is being reported that is based on assignment incidents. If no incidents are reported for the work order for the timesheet, the group box will not appear.

Field or Control	***Description***
Incidents	This column summarizes and displays the number of incidents per assignment for each work order on the timesheet.
Amount	This column summarizes and displays the total amount of incidents for each assignment for each work order on the timesheet.

Incident Approvals

This group box appears if any assignment incidents are associated with the time being reported. If no incidents are reported for the work order for the timesheet, the group box will not appear.

Field or Control	***Description***
Action	Select an option to approve or deny the incident. Values include: *Approve:* Changes status to *Approved* if no subsequent approvals are needed by other approvers. Once fully approved, the incident is available for invoicing. *Deny:* Changes status to *Denied by Approver.* If you deny the time line, enter a comment to indicate a reason. The time line returns to the service provider for modifications and re-submission. *Hold:* Changes status to On Hold. The time line remains with the current approver awaiting further action.

Edit Time Categories Page

Use the Edit Time Categories page (SPA_TM_EDIT_TRC) to edit time categories for a specific time period.

Navigation:

Click the **View/Adjust Timesheet** button on the Approve Timesheet page.

Select the time period for which you want to override the time category and click the **Go** button.

Note: This page is available only if the **Enable Time Reporting Override** option is selected on the Services Procurement Bus Unit definition page and if the user has the appropriate role action that enables time category overrides.

Field or Control	***Description***
Time Quantity	Enter the new quantity for the time category. You can add additional time quantities for each time reporting code.
Save	Click to save your changes.

Establishing Proxy Time Entry

Service Provider Contacts can create timesheets for service providers within the supplier office location.

When an approver approves, denies, or holds a timesheet, the person who created the timesheet will receive a notification.

When a service provider contact resubmits the timesheet, the denied worklist entry is removed from all other provider contacts within the same supplier office location.

Approving Services Timesheets Using the PeopleSoft Fluid User Interface

This topic provides an overview of the self-service approval pages for services timesheets, and how to access these pages using the PeopleSoft Fluid User Interface. PeopleSoft builds these mobile approval pages on the Enterprise Component Fluid Approvals framework.

Pages Used to Approve Services Timesheets Using PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Pending Approvals - Services Timesheet List Page	EOAWMA_MAIN_FL	View a list of pending approvals for services timesheets. For more information, see the overview of approvals on the PeopleSoft Fluid User Interface: “Pending Approvals Page” (Application Fundamentals).
Services Timesheet Page (Header Approval)	EOAWMA_TXNHDTL_FL	Review header details for a single services timesheet, and approve, deny, pushback or hold the timesheet, depending on role criteria. For more information, see the “Approval Header Detail Page” (Application Fundamentals).
Services Timesheet Page (Line Details)	EOAWMA_TXNLDTL_FL	Review a display-only line summary and details.

Understanding Approvals for Services Timesheets Using the PeopleSoft Fluid User Interface

PeopleSoft provides mobile approvals using the Enterprise Component Fluid Approvals framework. Approvers can take Application Workflow Engine (AWE) actions on select PeopleSoft transactions pending their approval, using a smart phone or tablet. The tablet version is also available for desktop use.

Services Timesheet workflow enables you to complete and submit timesheets for approval after creating a timesheet. Once the services timesheet has been submitted for approval, the Application Workflow Engine runs the timesheet through the defined approval process. For information about registering and defining an approval process for services timesheets, see Setting Up Timesheet Workflow.

Using the PeopleSoft Fluid User Interface, approvers can view a list of pending approvals for various types of transactions, and add comments on the centralized Pending Approvals page. An approver or multiple approvers review the transaction details, including line details. Each approver in the workflow selects an appropriate action, such as Approve, Deny, Pushback, or Hold within the approval pages.

Note: PeopleSoft Services Procurement delivers a permission list EPSP5020 that enable Approvers to Approve, Deny, Pushback, or Hold Services Timesheets.

Services timesheet approvals also support push notifications, a framework delivered in PeopleTools. The flag icon in the Oracle banner shows a counter for new push notifications. Note that the counter disappears once you view the push notification list. The notification link takes you directly to the header approval page for items awaiting your approval.

Delegating Services Timesheet Approvals

You can use the Delegation Framework to delegate services timesheet approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

"Understanding Delegation" (Enterprise Components)

"Configuring Delegation Transactions" (Enterprise Components)

"Working with Self-Service Delegation" (Enterprise Components)

Pending Approvals - Services Timesheet List Page

Use the Pending Approvals - Services Timesheet list page (EOAWMA_MAIN_FL) to view a list of pending approvals for services timesheets.

Navigation:

Employee Self Service > **Approvals**

On the Pending Approvals page, select **Services Timesheet** in the View By - Type pane to view the services timesheets in the right pane.

Smartphone: On the Pending Approvals - View By Type page, select **Services Timesheet** to open a new page that lists the services timesheets.

This example illustrates the fields and controls on the Pending Approvals - Services Timesheet list page. You can find definitions for the fields and controls later on this page.

All	18
Deal Confirmation	2
Purchase Order	4
Requisition	2
Services Progress Log	2
Services Timesheet	1
Supplier	2
Treasury Deals	2
Treasury Settlements	3

Services Timesheet

1 row

☐

☐ **Services Timesheet** 450.00 USD

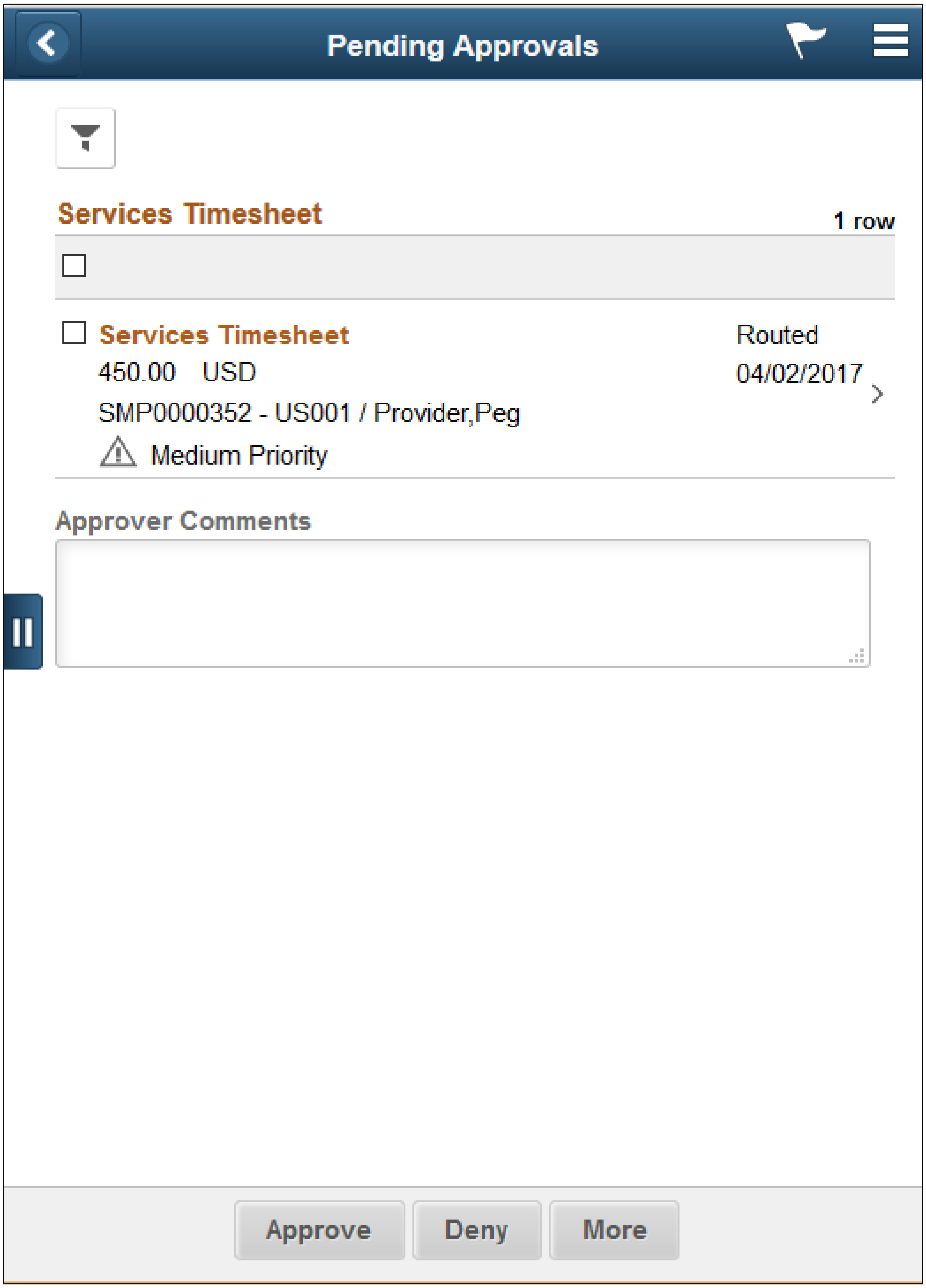
SMP0000352 - US001 / Provider,Peg

Medium Priority

Routed 04/02/2017

Approver Comments

This example illustrates the fields and controls on the Pending Approvals - Services Timesheet list page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



Services Timesheet 1 row

☐

☐ **Services Timesheet** Routed
450.00 USD 04/02/2017
SMP0000352 - US001 / Provider,Peg
⚠ Medium Priority

Approver Comments

From the list page, you can do the following:

- Review header information for the services timesheets currently routed for approval. To access header details for a particular timesheet, select the header row.
- Use the filter to narrow results on the page. For more information about using the filter, see the “Filters Page” (Application Fundamentals).

Field or Control	***Description***
Approver Comments	Enter comments in the text entry field.
Approve, Deny, More	Select an action button. When you select an action button, you have the option to select **Submit** to continue the action, or Cancel to back out of the action. Upon submitting the action, the system generates a message that the action is successful. Select the **More** button to display other action buttons **Pushback** (Return to Submitter) and **Hold**.
‖	Select this button to expand or collapse the View By Type page.

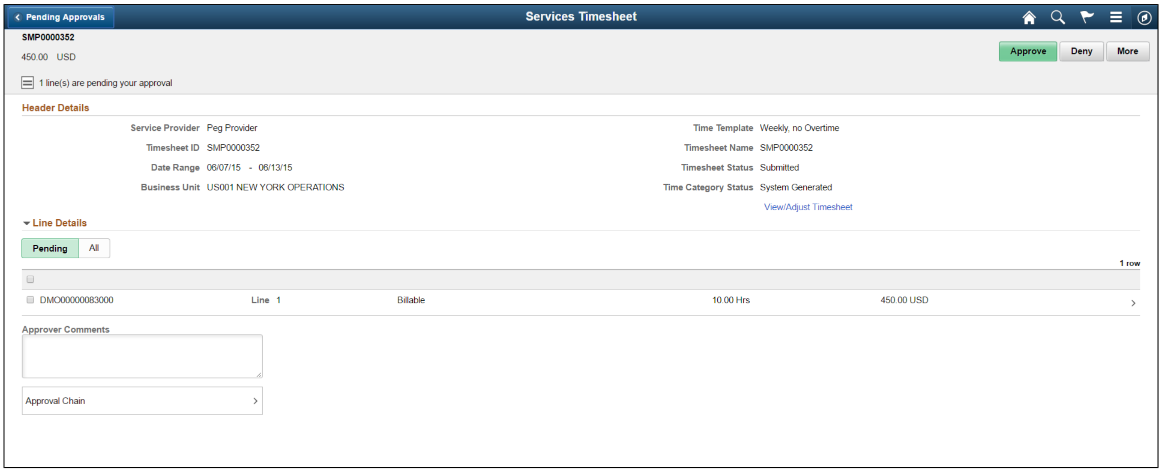
Services Timesheet Page (Header Approval)

Use the Services Timesheet header approval page (EOAWMA_TXNHDTL_FL) to review header details for a single timesheet, and approve, deny, pushback or hold the timesheet, depending on role criteria.

Navigation:

Select a timesheet in the list on the Pending Approvals - Services Timesheet list page.

This example illustrates the fields and controls on the Services Timesheet header approval page. You can find definitions for the fields and controls later on this page.

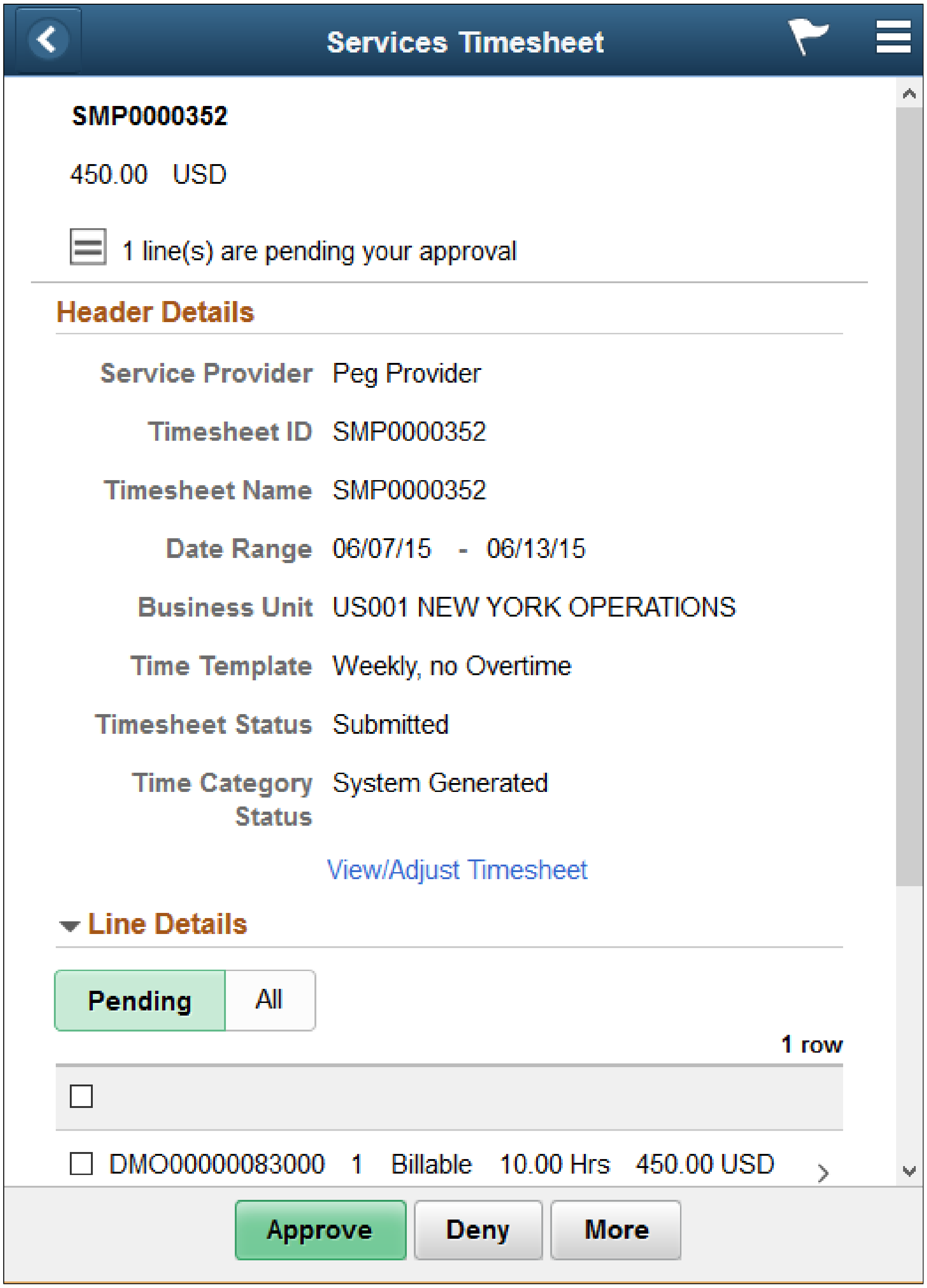


SMP0000352
450.00 USD
1 line(s) are pending your approval

Service Provider Peg Provider
Timesheet ID SMP0000352
Date Range 06/07/15 - 06/13/15
Business Unit US001 NEW YORK OPERATIONS
Time Template Weekly, no Overtime
Timesheet Name SMP0000352
Timesheet Status Submitted
Time Category Status System Generated
View/Adjust Timesheet

☐ DMO00000083000 Line 1 Billable 10.00 Hrs 450.00 USD

This example illustrates the fields and controls on the Services Timesheet header approval page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



SMP0000352

450.00 USD

1 line(s) are pending your approval

Header Details

Service Provider: Peg Provider

Timesheet ID: SMP0000352

Timesheet Name: SMP0000352

Date Range: 06/07/15 - 06/13/15

Business Unit: US001 NEW YORK OPERATIONS

Time Template: Weekly, no Overtime

Timesheet Status: Submitted

Time Category Status: System Generated

1 row

☐

☐ DMO00000083000 1 Billable 10.00 Hrs 450.00 USD

Field or Control	***Description***
View/Adjust Timesheet	Select to adjust the timesheet. The PeopleSoft Classic user interface displays where you can make the adjustments.
Line Details	Select to view timesheet line details.

Field or Control	***Description***
Approver Comments	Enter comments in the text entry field.
Approval Chain	Select to review approval chain information. You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.
Approve, Deny, More	Select an action button. When you select an action button, you have the option to select **Submit** to continue the action, or Cancel to back out of the action. Upon submitting the action, the system generates a message that the action is successful. Select the **More** button to display other action buttons **Pushback** (Return to Submitter) and **Hold**. **Note:** If you deny a services timesheet, you will need to enter a reason code and comment for the denial.

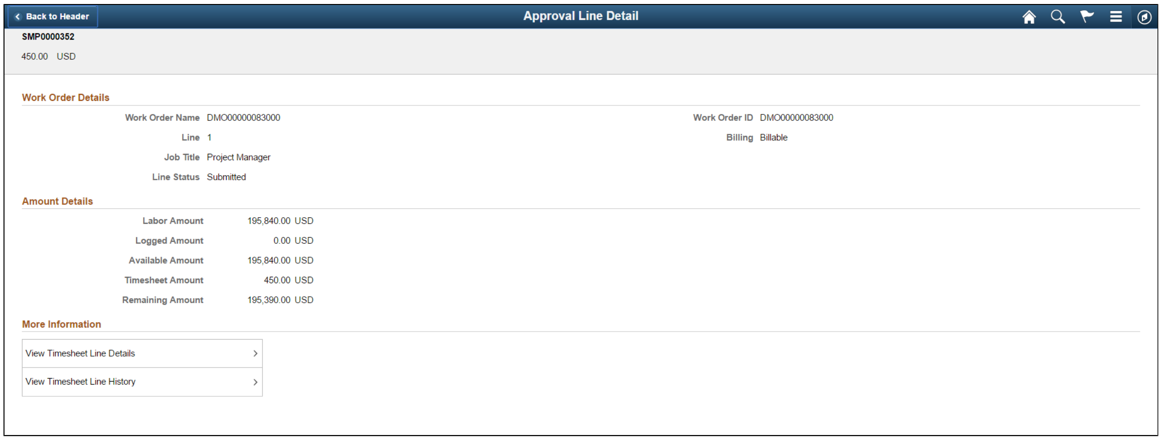
Services Timesheet Page (Line Details)

Use the Services Timesheet line details page (EOAWMA_TXNLDTL_FL) to review a display-only line summary and details.

Navigation:

Select a timesheet line item in the Line Details section on the Services Timesheet header approval page.

This example illustrates the fields and controls on the Services Timesheet line details page. You can find definitions for the fields and controls later on this page.



SMP0000352

450.00 USD

Work Order Details

Work Order Name DMO00000083000

Line 1

Job Title Project Manager

Line Status Submitted

Work Order ID DMO00000083000

Billing Billable

Amount Details

Labor Amount 195,840.00 USD

Logged Amount 0.00 USD

Available Amount 195,840.00 USD

Timesheet Amount 450.00 USD

Remaining Amount 195,390.00 USD

More Information

Field or Control	***Description***
View Timesheet Line Details	Select to view additional timesheet details such as Time Category and Distribution information.

Field or Control	***Description***
View Work Order Distribution	Select to view distribution information for the WorkOrder.
View Timesheet Line History	Select to view history for a Timesheet line.

Manage Timesheet Worklists

This topic discusses how to trigger worklist and email notifications.

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry or email notification based on the definition of the transaction configuration for the SP_TIMESHEET process:

- The service provider receives a worklist entry and an email notification if the timesheet status changes to *Deny.*

  The service provider receives notification if the timesheet status changes to *Approved.*
- The approver receives notification when a timesheet is submitted.
- The user can either access the timesheet using the email link or by navigating using the worklist.

The email notifications contain values from the Enter Time page and a URL that the recipient should use to access the timesheet.

Managing Timesheets from External Sources

This topic provides an overview of external timesheet management.:

Pages Used to Manage Timesheets from External Sources

Page Name	***Definition Name***	***Usage***
Integration Broker Quick Configuration	PTIB_ADMIN	Activate the domain. To process asynchronous messages, one application server domain must be active. See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker," Activating Pub/Sub Server Domains.

Page Name	***Definition Name***	***Usage***
Gateways	IB_GATEWAY	Activate the local gateway. See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker," Defining Integration Gateways and Loading Connectors. See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker, " Configuring Integration Gateway Properties.
Service Configuration	IB_SVCSETUP	Set up the service configuration and listening connector. See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Configuring PeopleSoft Integration Broker for Handling Services." See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker," Defining Integration Gateways and Loading Connectors. See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Using the Delivered Listening Connectors and Target Connectors."
Queue Status	IB_MONITOR_QUEUES	Activate the queue for your message. See documentation *PeopleTools : PeopleSoft Integration Broker,* "Managing Service Operation Queues."
Services Page	IB_SERVICEDEFN	Activate your service, handler, and routing. Setting Up Integration Broker for the SOA for Inbound Timesheets Feature
Transformation Test Page	IB_TRANSFORM_PAGE	Convert XML from a service provider. Importing and Converting Time Data from External Sources

Page Name	***Definition Name***	***Usage***
Handler Tester Page	IB_EVENTTESTER	Use the converted XML to create a timecard. Importing and Converting Time Data from External Sources

Understanding External Timesheet Management

Many PeopleSoft Services Procurement customers use external time tracking and project management tools. This often requires service providers to enter time in two systems: PeopleSoft Services Procurement for billing and the supplier system or other external system to track time for a project. The SOA (Service Oriented Architecture) for Inbound Timesheets feature enables third parties to capture time information on an external web-based system using an industry-standard generic HR-XML 2.5 timecard schema and then send the XML file to your system without having to enter the information directly into Services Procurement. Your system then uses the XML file to generate and submit a timesheet.

The feature includes:

- The ability for service providers to submit time information electronically to your system through a web service.
- A process for converting the time information into XML that can be used to generate a timesheet.
- Processing for timesheets (including approvals and history) that is the same as time processing that is used when you manually enter information into PeopleSoft Services Procurement. The timesheet is processed and invoiced just like a time sheet entered directly in Services Procurement.
- The use of XML schema elements and attributes that map to Services Procurement application fields.

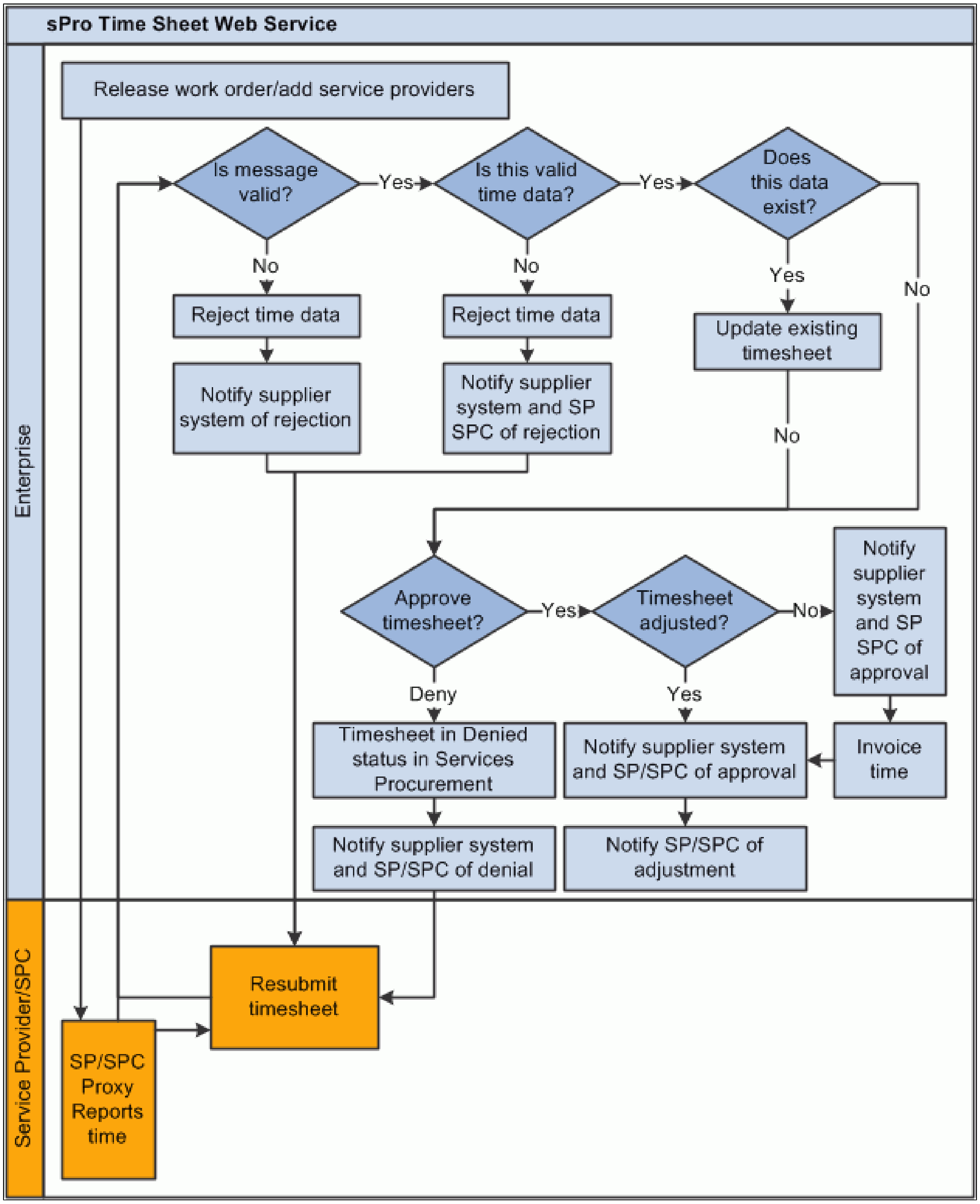
The primary benefit is that service providers can enter time in one system instead of two with little difference in processing time for manually entered timesheets. Specifically, the feature:

- Enables the quick and cost-effective receipt of time reporting data from any external web-based, time-capture system that uses industry-standard generic HR-XML 2.5 timecard schema.
- Is broad enough to be used globally without having to establish, engineer, and implement many separate transformation mechanisms.
- Validates the data and enables sending a response message to the external system for any invalid data.
- Handles the time data the same as it would a timesheet that is entered manually in PeopleSoft Services Procurement after the system accepts the data.
- Provides an email notification to notify the external system of any timesheets that were denied in Services Procurement.
- Provides an email notification to notify the external system of any timesheet adjustments that were made in Services Procurement.

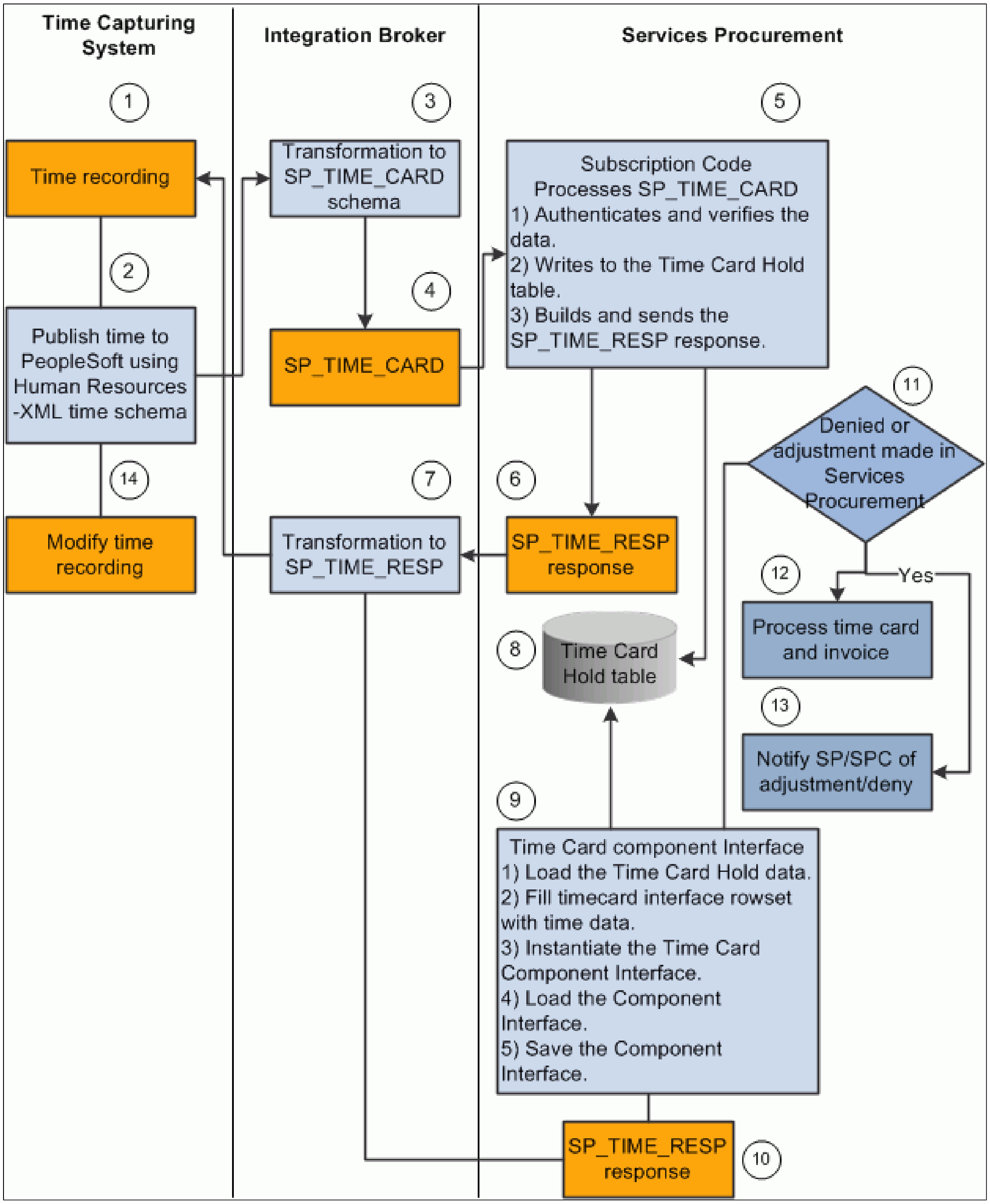
- Receives resubmitted timesheets that were rejected previously or that were changed after being submitted to Services Procurement.

How the SOA for Inbound Timesheets Feature Works

The following diagram shows how data flows between the service provider and PeopleSoft Services Procurement:



The following diagram shows the main components of the SOA for Inbound Timesheets feature and shows how data flows between these components:



The following process is a high-level overview of the steps depicted in the preceding diagrams:

1. Time data is recorded in an external time-capturing system.
2. A message is created in the time-capturing system and sent to your system in the format of the HR-XML 2.5 timecard schema. This message is sent asynchronously two-way (request and response) from the external time-capturing system to the Services Procurement database.

3. The PeopleSoft Integration Broker receives the HR-XML time data and transforms it into the PeopleSoft Message SP_TIME_CARD.
4. The On Notify request handler is invoked to receive the transformed message. The On Notify application class processes the time card message and invokes the SP:SP_INTEGRATION: TimeCard application class.
5. The TimeCard application class validates and verifies the data, and it rejects the invalid data.
6. The TimeCard application class builds and sends a response message for the rejected data.
7. The response message is published to the Gateway.
8. The accepted data is written into the Timecard hold table.
9. Timecard data is loaded into the timecard rowset. The rowset supplies the Timecard Component Interface properties. Timecard Component Interface validates all the business logic and accepts or rejects the time information. It then saves the timesheet for the valid timecard.
10. For rejected timecards, the Timecard Component Interface builds and sends a response message. The response message is published to the Gateway.
11. The timecard is routed to the approver (based on the timesheet status and the timecard approval setting at the business unit level).
12. The service provider SPC is notified of any timesheet adjustments made in PeopleSoft Services Procurement or timesheets that are denied in Services Procurement.
13. Approved timesheets are processed and invoiced.
14. Any updates to the timesheet in the external system are resubmitted to Services Procurement and steps 2 through 13 are repeated.

Condition	***Error or Warning***	***Action***
Invalid message format.	Error : Invalid Time Message.	Reject the TimeCard message.
External ID is missing.	Error: External TimeSheet required.	Reject the TimeCard message.
Business unit is missing.	Error: Business Unit is required.	Reject the TimeCard message.
Work order is missing.	Error: Work Order is required.	Reject the TimeCard message.
Period start and end dates are missing.	Error: Period Start and End Dates are required.	Reject the TimeCard message.
Required fields are missing,	Error: Required "field name" is missing.	Reject the TimeCard message.
Field format or date is invalid.	Error: "Field" format is invalid.	Reject the TimeCard message.

Condition	***Error or Warning***	***Action***
A timesheet already exists for the time period for the provider for the given template.	Warning: TimeSheet exists for the %Time Period.	Send a warning when the action for the incoming time data is Add and the timesheet already exists in Services Procurement for the time period.
The person ID of the service provider is invalid.	Person is not valid in PeopleSoft Services Procurement system.	Send an error message for the invalid service provider.
Work order ID is invalid.	Error : Work order not found.	Reject the TimeCard message.
Work order and purchase order for the time period were missing.	Error : Work order not found for the Time period.	If an overlap occurs in the time period or if the start date and end date are both outside of work order time period, then reject the TimeCard message.
The time date entered for the reported time (time interval, time event) is outside of the work order period.	Error : Reported time is outside of the work order period.	Reject the TimeCard message.
The work order consumption amount is exceeded.	Error : Work order over amount.	Reject the TimeCard message.
The time template period is in error.	Error: The reported time format is wrong for the time template.	Reject the TimeCard message.
An Expense time element was found.	Warning: "Expenses" are currently not supported.	Accept the time message, ignore the expense message, and generate a warning.
For an action code of Change, the Services Procurement timesheet that was sent by the external system was not found in Services Procurement.	Error : Invalid sPro Timesheet id.	Reject the TimeCard message.
For an action code of Change, the status is anything other than Rejected.	Error: Timecard in Raw/Submitted/ Processed/Approved status cannot be processed in Change mode.	Reject the TimeCard message.
For an action code of Add, the status is Processed or Final.	Error: Timecard in Processed/Final status cannot be processed in Add mode.	Reject the TimeCard message.

Condition	***Error or Warning***	***Action***
Any information data sent from the external system is not used by Services Procurement.	Warning message	Accept the time data and generate the warning message for unused data.

Technical Dependencies

To use the SOA for Inbound Timesheets feature, you need:

- Tools Integration Broker web services, release 8.5 or later.
- The new Approval Framework feature implemented for timesheets for release 9.1 of PeopleSoft Software.

Field Mappings

External System Element or Attribute	***Services Procurement Field***
Timecard ID	SP_EXT_TIME_HDR.SP_EXTERNAL_ID SPA_TIME_HDR.SP_EXTERNAL_ID
Reported Resource Person ID	SP_EXT_TIME_HDR.PERSON_ID SPA_TIME_HDR.PERSON_ID
Reported Time Status	SP_EXT_TIME_HDR.SP_EXT_STATUS SPA_TIME_HDR.TIME_HDR_STATUS
Period Start Date	SP_EXT_TIME_HDR.PERIOD_START_DT SPA_TIME_HDR.PERIOD_START_DT
Period End Date	SP_EXT_TIME_HDR.PERIOD_END_DT SPA_TIME_HDR.PERIOD_END_DT
Time Interval Type	SP_EXT_TIME_DTL.SP_TRN_TYPE SPA_TIME_DTL.Activity_id
Time Interval Billable	SP_EXT_TIME_DTL.SPA_BILLING_ACTION SPA_TIME_DTL.SPA_BILLING_ACTION

External System Element or Attribute	***Services Procurement Field***
Time Interval Action Code	SP_EXT_TIME_DTL.SP_ACTION_CODE
Time Interval ID	SP_EXT_TIME_DTL.SP_EXTERNAL_ID SPA_TIME_DTL.SP_EXTERNAL_ID
Start Date Time	SP_EXT_TIME_DTL.STARTDATETIME SPA_TIME_DTL.STARTDATETIME
End Date Time	SP_EXT_TIME_DTL.ENDDATETIME
Duration	SP_EXT_TIME_DTL.SP_TIME_DURATION
Approval Information Person ID	SP_EXT_TIME_DTL.Approval_OPRID
Time Event Type	SP_EXT_TIME_DTL.SP_TRN_TYPE
Time Event Billable	SP_EXT_TIME_DTL.SPA_BILLING_ACTION SPA_TIME_DTL.SPA_BILLING_ACTION
Time Event Action Code	SP_EXT_TIME_DTL.SP_ACTION_CODE
Event DateTime	SP_EXT_TIME_DTL.START_DATETIME (IF clock-in) or SP_EXT_TIME_DTL.ENDDATETIME (IF clock-out)
Expense Billable	SP_EXT_TIME_DTL.SPA_BILLING_ACTION SPA_TIME_DTL.SPA_BILLING_ACTION
Expense Action Code	SP_EXT_TIME_DTL.SP_ACTION_CODE
External Order Number	SP_CUST_REP_SUB.WORK_ORDER_ID SPA_TIME_WO.WORK_ORDER_ID
Customer Reporting Requirements Entity	SP_EXT_TIME_DTL.BUSINESS_UNIT

Setting Up Integration Broker for the SOA for Inbound Timesheets Feature

Before using the SOA for Inbound Timesheets feature, you need to set up PeopleSoft Integration Broker to accept time information from external service providers. This section discusses how to:

- Activate the domain.
- Activate the local gateway.
- Set up the service configuration and listening connector.
- Activate the queue for your message.
- Activate your service, handler, and routing.

For general information about setting up the Integration Broker,

See documentation *PeopleTools PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker."

Activating the Domain

To process asynchronous messages, one application server domain must be active.

See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker," Activating Pub/Sub Server Domains.

Activate the Local Gateway

To activate the local gateway:

See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker," Defining Integration Gateways and Loading Connectors.

See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker," Configuring Integration Gateway Properties.

Setting Up the Service Configuration and Listening Connector

To set up the service configuration and listening connector:

See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Configuring PeopleSoft Integration Broker for Handling Services."

See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Understanding Setting Up PeopleSoft Integration Broker," Defining Integration Gateways and Loading Connectors.

See documentation *PeopleTools : PeopleSoft Integration Broker Administration,* "Using the Delivered Listening Connectors and Target Connectors."

Activating the Queue for Your Message

To activate the queue for your message:

See documentation *PeopleTools : PeopleSoft Integration Broker,* "Managing Service Operation Queues."

Activating Your Service, Handler, and Routing

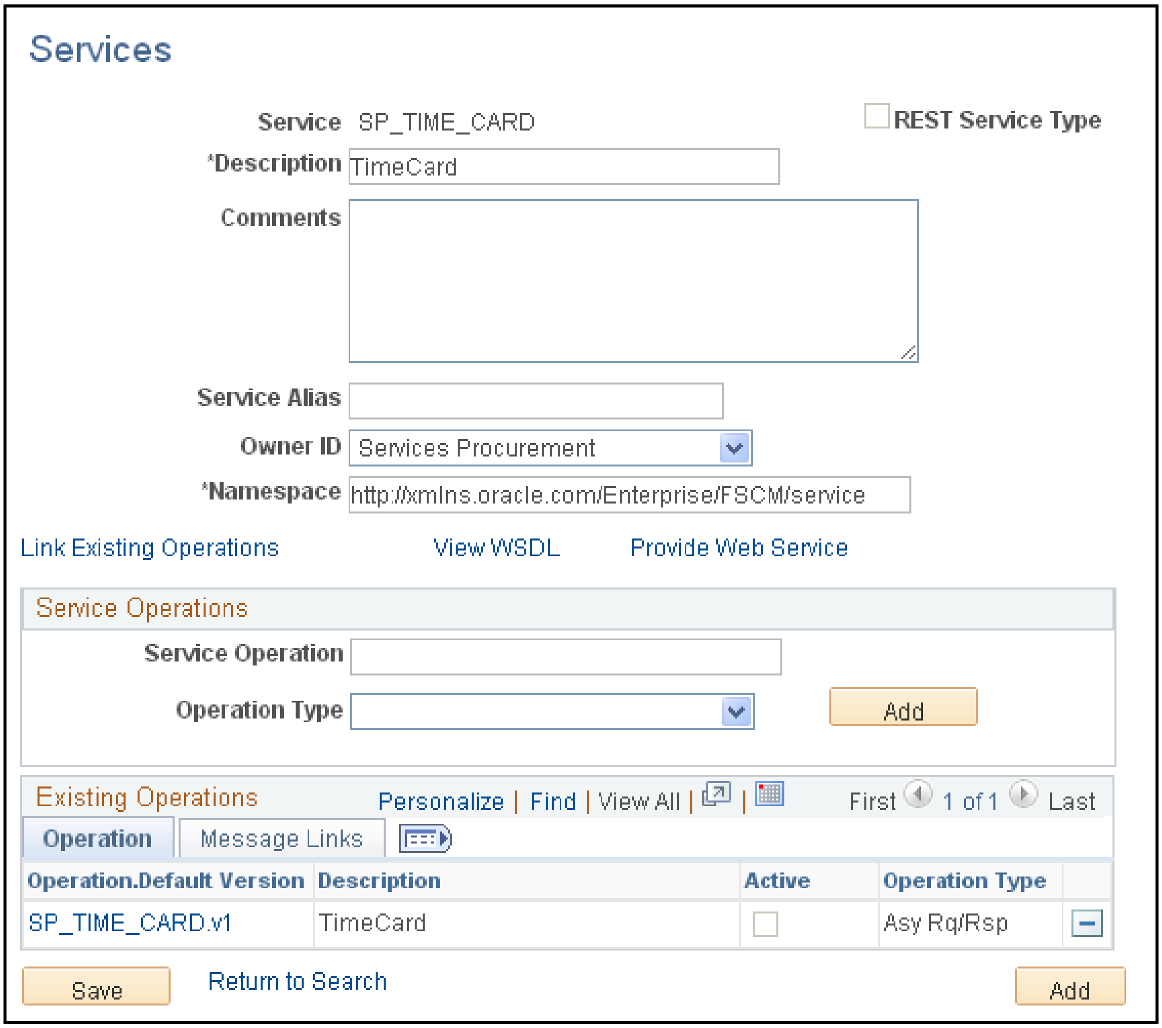
Use the Services page (IB_SERVICEDEFN) to activate your service, handler, and routing.

Navigation:

PeopleTools > **Integration Broker** > **Integration Setup** > **Services**

On the Services search page, enter *SP_TIME_CARD* in the **Service** field and click **Search.**

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



Services

Service SP_TIME_CARD

☐ REST Service Type

*Description TimeCard

Comments

Service Alias

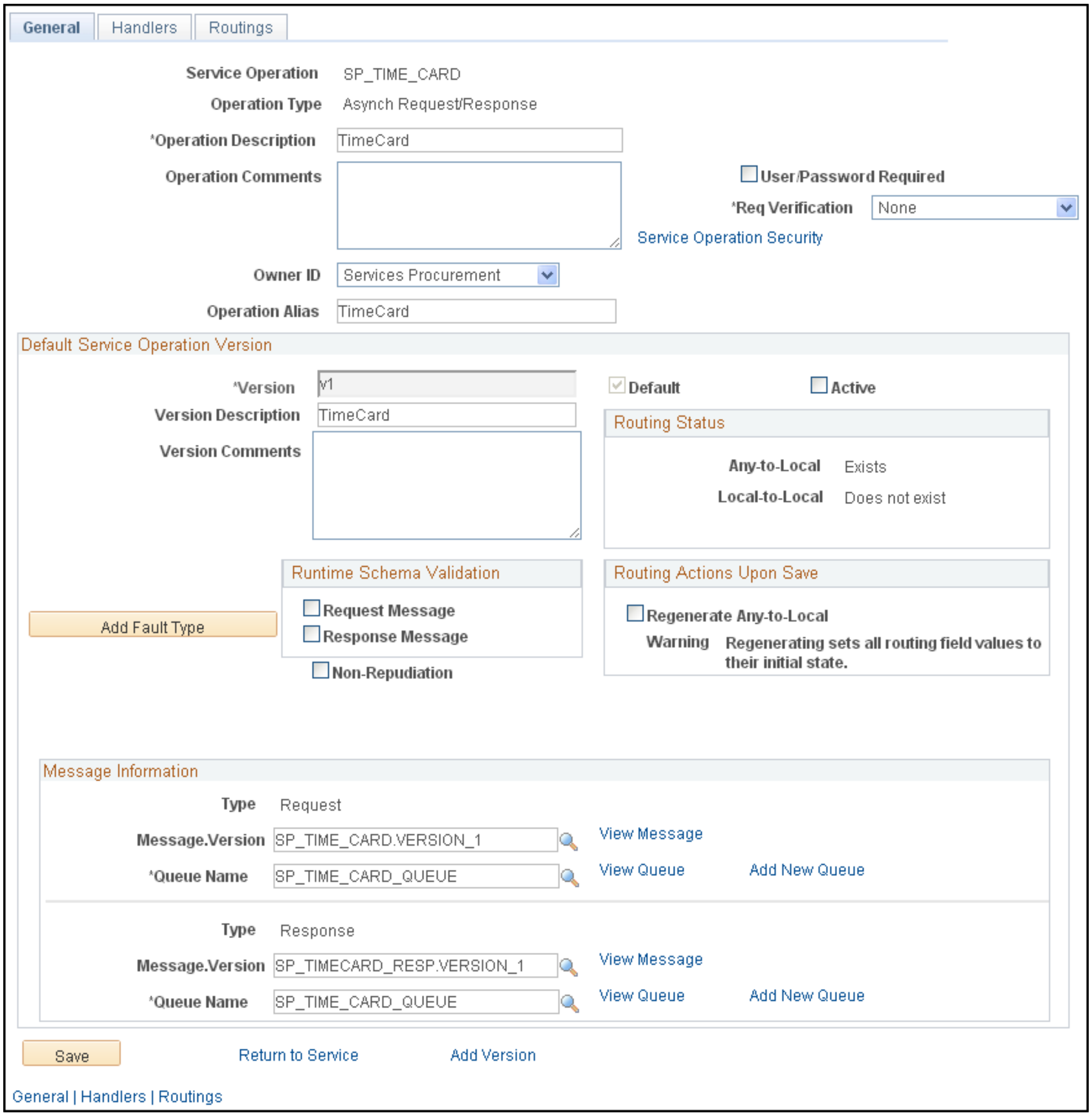
Owner ID Services Procurement

*Namespace http://xmlns.oracle.com/Enterprise/FSCM/service

Operation.Default Version	Description	Active	Operation Type
SP_TIME_CARD.v1	TimeCard	☐	Asy Rq/Rsp

1. On the Services page, select *Services Procurement* in the **Object Owner ID** field.
2. Click the **SP_TIME_CARD.v1** link on the Operation tab at the bottom of the page.

This example illustrates the fields and controls on the Services page General tab. You can find definitions for the fields and controls later on this page.



Service Operation SP_TIME_CARD

Operation Type Asynch Request/Response

*Operation Description TimeCard

Operation Comments

☐ User/Password Required

*Req Verification None

Owner ID Services Procurement

Operation Alias TimeCard

Default Service Operation Version

*Version v1

☑ Default ☐ Active

Version Description TimeCard

Version Comments

Routing Status

Any-to-Local Exists

Local-to-Local Does not exist

Runtime Schema Validation

☐ Request Message

☐ Response Message

☐ Non-Repudiation

Routing Actions Upon Save

☐ Regenerate Any-to-Local

Warning Regenerating sets all routing field values to their initial state.

Message Information

Type Request

Message.Version SP_TIME_CARD.VERSION_1

*Queue Name SP_TIME_CARD_QUEUE

Type Response

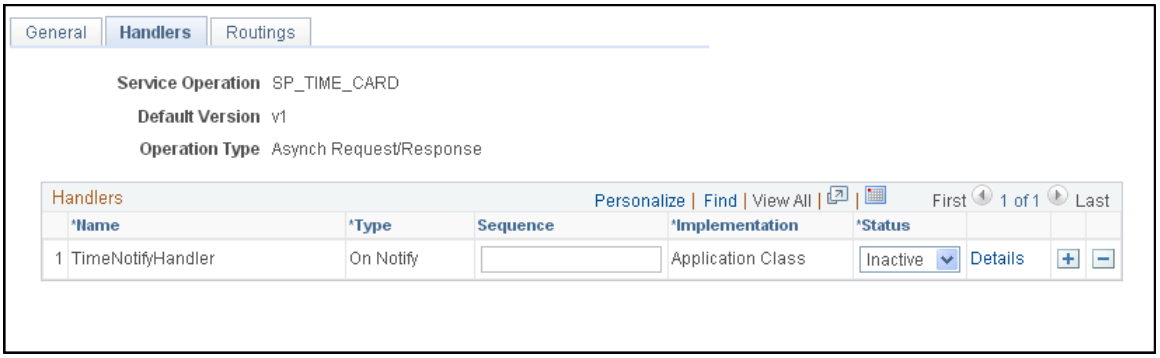
Message.Version SP_TIMECARD_RESP.VERSION_1

*Queue Name SP_TIME_CARD_QUEUE

3. On the General tab, select the **Active** check box in the **Default Service Operation Version** group box.

4. Select the Handlers tab.

This example illustrates the fields and controls on the Services page Handlers tab. You can find definitions for the fields and controls later on this page.



Service Operation SP_TIME_CARD
Default Version v1
Operation Type Asynch Request/Response

Handlers

	*Name	*Type	Sequence	*Implementation	*Status
1	TimeNotifyHandler	On Notify		Application Class	Inactive

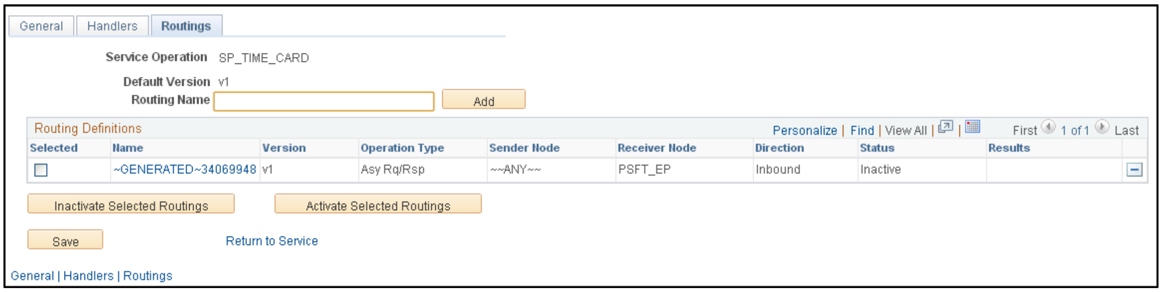
5. Select **Active** from the **Status** drop-down list box.

Note: The handler must be active for the Message subscription PeopleCode/Application package logic to run. If the handler is not active, the message will appear to be done, but nothing will be processed by the code.

---

6. Select the Routings tab.

   This example illustrates the fields and controls on the Services page Routings tab. You can find definitions for the fields and controls later on this page.



Service Operation SP_TIME_CARD
Default Version v1
Routing Name

Routing Definitions

Selected	Name	Version	Operation Type	Sender Node	Receiver Node	Direction	Status	Results
☐	~GENERATED~34069948	v1	Asy Rq/Rsp	~~ANY~~	PSFT_EP	Inbound	Inactive	

7. In the **Routing Definitions** group box, select the check box next to the routing name that you want to use and click **Activate Selected Routings.**

Note: The routing and operation must be active or you will receive a message in the Send Master stating that the routing cannot be found.

See the product documentation for *PeopleTools: Integration Broker Administration*, Configuring PeopleSoft Integration Broker for Handling Services. , Configuring PeopleSoft Integration Broker for Handling Services," Understanding Configuring PeopleSoft Integration Broker for Handling Services, Setting Service Configuration.

PeopleTools: Integration Broker, Managing Services, Managing Service Operation Handlers, Managing Service Operation Routing Definitions," Creating Routing Definitions.

Importing and Converting Time Data from External Sources

The service provider sends time information to your system in HR-XML 2.5 format. Your system then:

- Imports the XML file into PeopleTools.
- Converts the XML from the service provider into XML that can be used to create a timecard.
- Uses the converted XML to create a timecard that can be used in PeopleSoft Services Procurement.

When the timecard is created, it is automatically submitted for approval and a copy is sent to the service provider. This section discusses how to:

- Convert XML from a service provider into XML that can be used to create a timecard.
- Use the converted XML to create a timecard.

Converting XML from a Service Provider

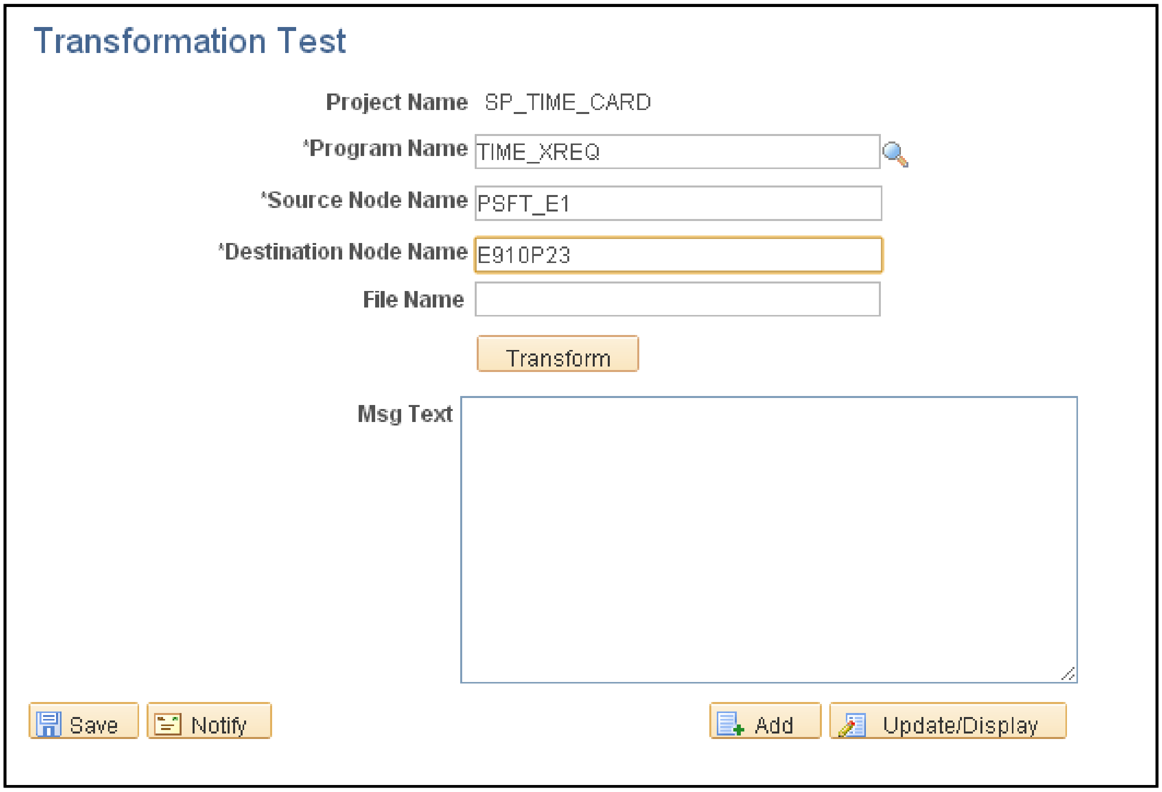
Use the Transformation Test page (IB_TRANSFORM_PAGE) to convert XML from a service provider.

Navigation:

PeopleTools > **Integration Broker** > **Service Utilities** > **Transformation Test**

On the Transform Test Utility search page, enter *SP_TIME_CARD* in the **Search by** field and click **Search.**

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



Transformation Test

Project Name SP_TIME_CARD

*Program Name TIME_XREQ

*Source Node Name PSFT_E1

*Destination Node Name E910P23

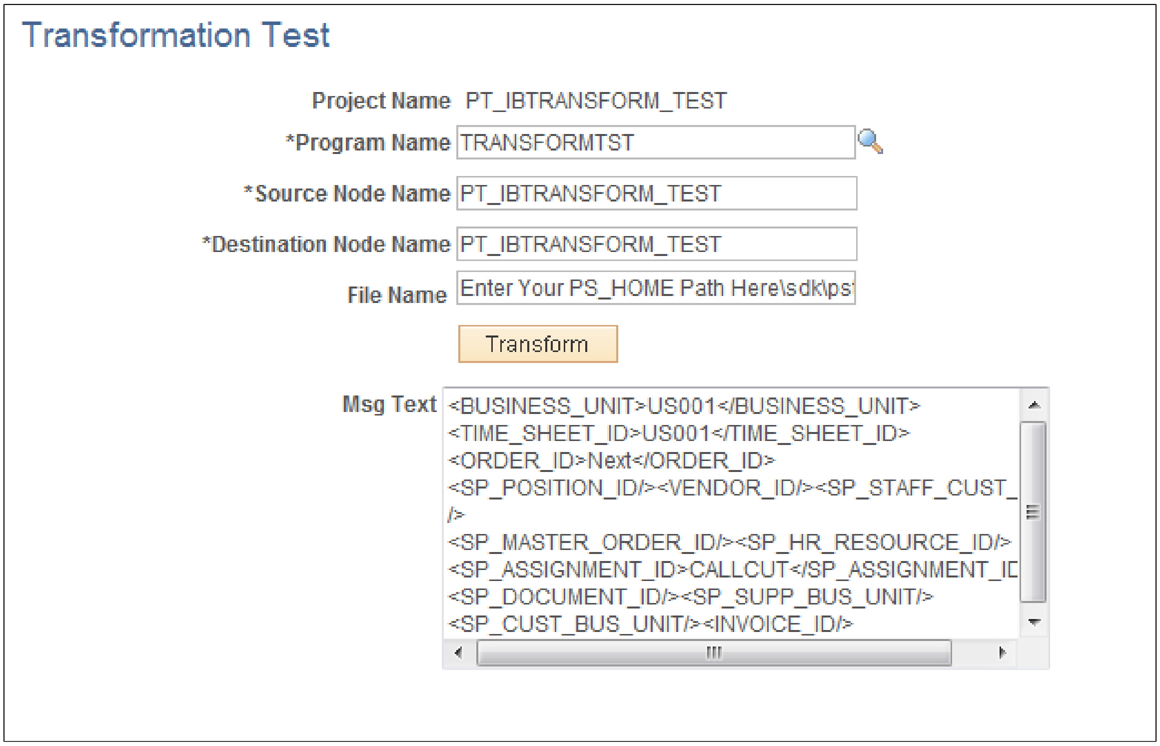
File Name

Msg Text

1. In the **File Name** field, enter the path and file name where the XML from the service provider is stored.
2. Click **Transform.**

The converted XML appears in the **Message Text** text box.

This example illustrates the fields and controls on the Transformation Test page displaying converted XML. You can find definitions for the fields and controls later on this page.



Project Name PT_IBTRANSFORM_TEST

*Program Name TRANSFORMTST

*Source Node Name PT_IBTRANSFORM_TEST

*Destination Node Name PT_IBTRANSFORM_TEST

File Name Enter Your PS_HOME Path Here\sdk\ps

Msg Text

```
<BUSINESS_UNIT>US001</BUSINESS_UNIT>
<TIME_SHEET_ID>US001</TIME_SHEET_ID>
<ORDER_ID>Next</ORDER_ID>
<SP_POSITION_ID/><VENDOR_ID/><SP_STAFF_CUST_
/>
<SP_MASTER_ORDER_ID/><SP_HR_RESOURCE_ID/>
<SP_ASSIGNMENT_ID>CALLCUT</SP_ASSIGNMENT_ID
<SP_DOCUMENT_ID/><SP_SUPP_BUS_UNIT/>
<SP_CUST_BUS_UNIT/><INVOICE_ID/>
```

3. Copy the XML in the **Message Text** text box into your buffer, for example, Notepad.
4. Click **Save.**

Using the Converted XML to Create a Timecard

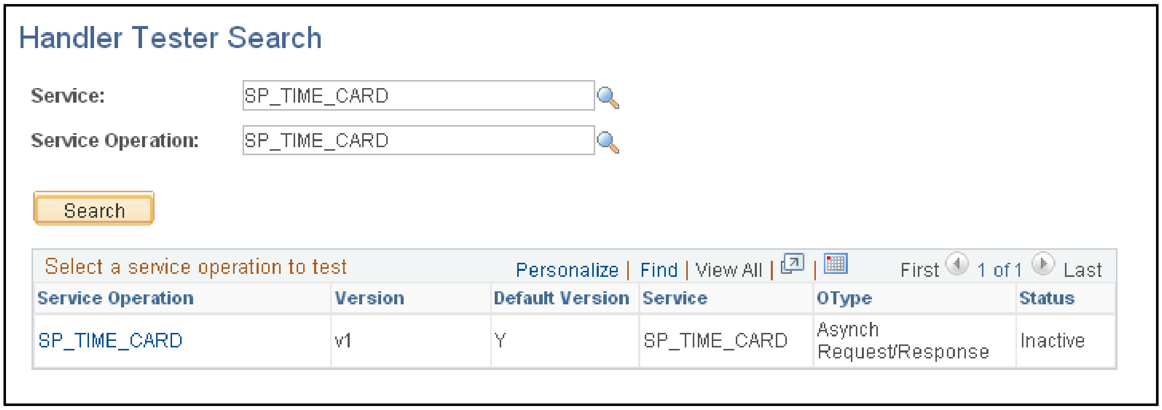
Use the Handler Tester page (IB_EVENTTESTER) to use the converted XML to create a timecard.

Navigation:

PeopleTools > **Integration Broker** > **Service Utilities**

The **Select a service operation to test** group box appears displaying the service operation to test.

This example illustrates the fields and controls on the Handler Tester Search page. You can find definitions for the fields and controls later on this page.



Handler Tester Search

Service: SP_TIME_CARD

Service Operation: SP_TIME_CARD

Service Operation	Version	Default Version	Service	OType	Status
SP_TIME_CARD	v1	Y	SP_TIME_CARD	Asynch Request/Response	Inactive

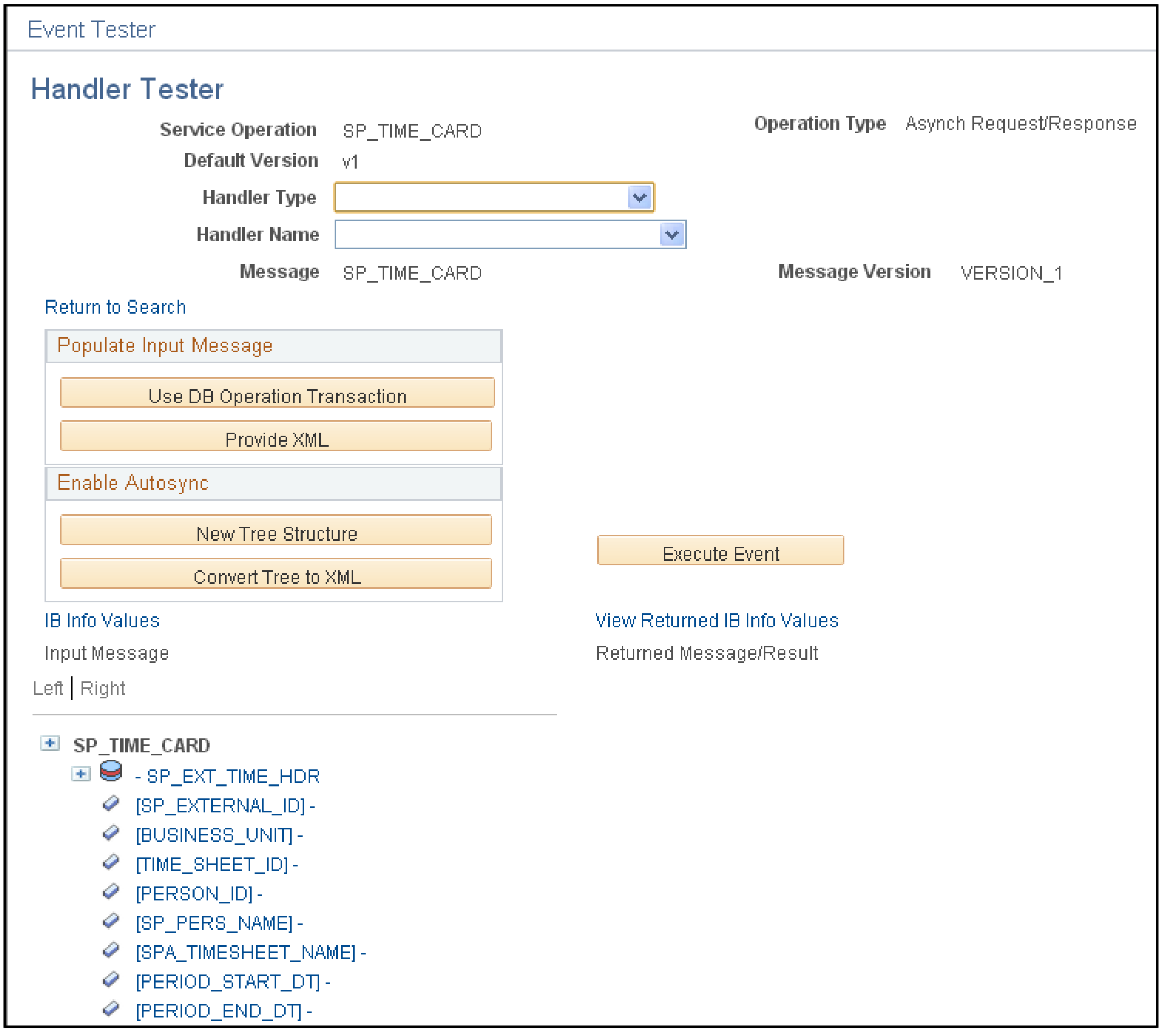
---

Note: This procedure is only one way to perform the conversion. You can also do it using Sendmaster.

See documentation *PeopleTools : Integration Broker Testing Utilities and Tools,* "Using the Handler Tester Utility," Uploading XML Data from Files.

1. Click the SP_TIME_CARD link under Service Operation.

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



Event Tester

Handler Tester

Service Operation SP_TIME_CARD

Default Version v1

Operation Type Asynch Request/Response

Handler Type

Handler Name

Message SP_TIME_CARD

Message Version VERSION_1

SP_TIME_CARD
- SP_EXT_TIME_HDR
  - [SP_EXTERNAL_ID] -
  - [BUSINESS_UNIT] -
  - [TIME_SHEET_ID] -
  - [PERSON_ID] -
  - [SP_PERS_NAME] -
  - [SPA_TIMESHEET_NAME] -
  - [PERIOD_START_DT] -
  - [PERIOD_END_DT] -

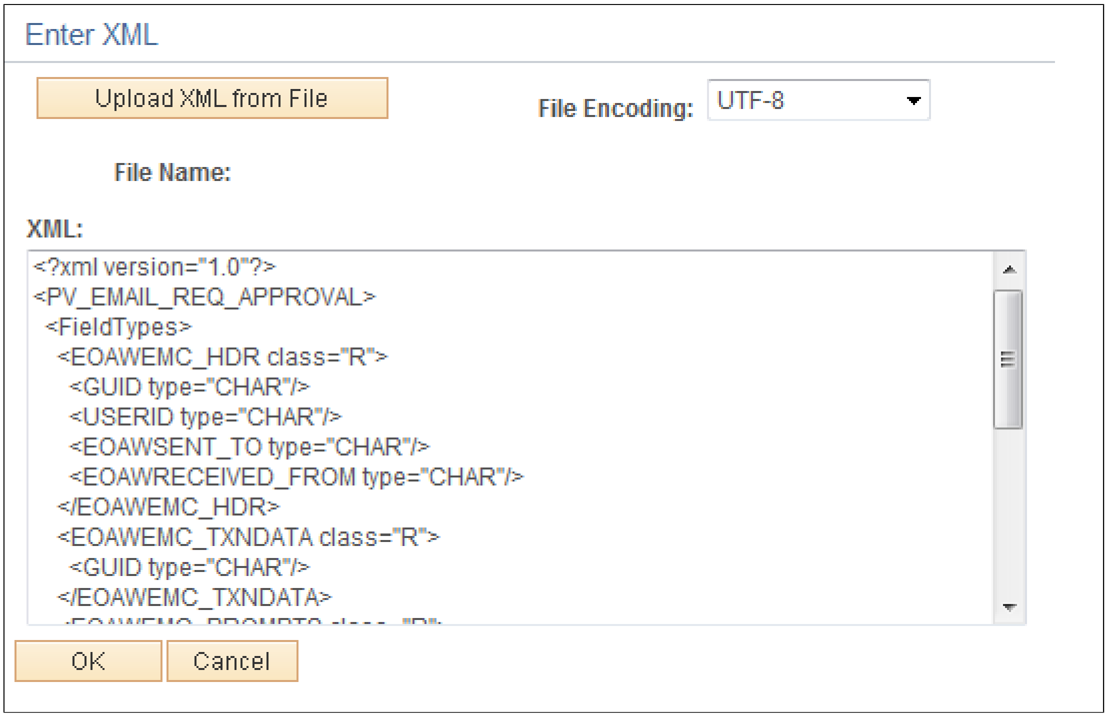
2. Select *On Notify* in the **Handler Type** drop-down list box.

3. Select *TimeNotifyHandler* in the **Handler Name** drop-down list box.

4. Click the **Provide XML** button in the **Populate Input Message** group box.

5. On the Enter XML page, copy the XML from your buffer into the **XML** text box.

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



File Encoding: UTF-8

File Name:

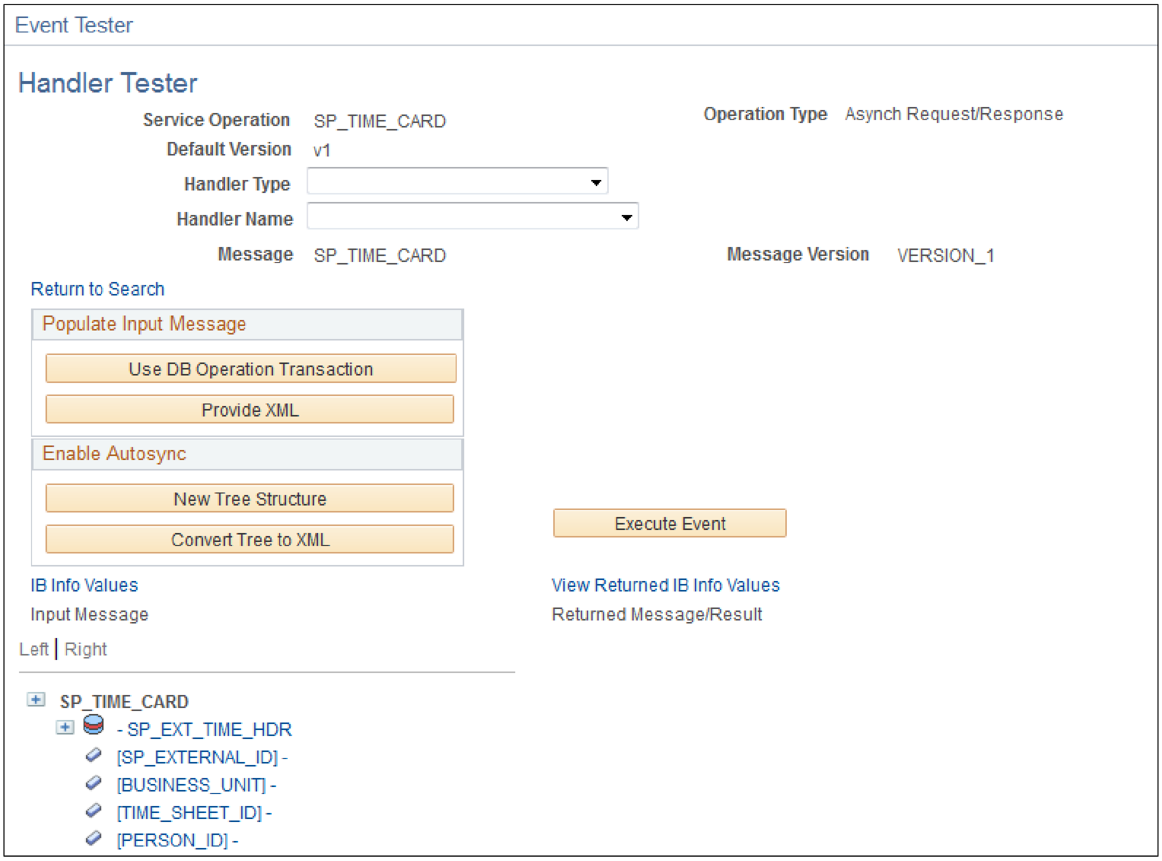
XML:

```
<?xml version="1.0"?>
<PV_EMAIL_REQ_APPROVAL>
 <FieldTypes>
  <EOAWEMC_HDR class="R">
   <GUID type="CHAR"/>
   <USERID type="CHAR"/>
   <EOAWSENT_TO type="CHAR"/>
   <EOAWRECEIVED_FROM type="CHAR"/>
  </EOAWEMC_HDR>
  <EOAWEMC_TXNDATA class="R">
   <GUID type="CHAR"/>
  </EOAWEMC_TXNDATA>
```

6. Click **OK.**

   The Handler Tester page appears with the XML in the **Input Message** text box.

This example illustrates the fields and controls on the Handler Tester page displaying XML in Input Message box. You can find definitions for the fields and controls later on this page.



Service Operation SP_TIME_CARD
Default Version v1
Operation Type Asynch Request/Response
Handler Type
Handler Name
Message SP_TIME_CARD
Message Version VERSION_1

SP_TIME_CARD
- SP_EXT_TIME_HDR
[SP_EXTERNAL_ID] -
[BUSINESS_UNIT] -
[TIME_SHEET_ID] -
[PERSON_ID] -

7. Click **Execute Event.**

   The process creates a timecard that can be used in Services Procurement. It automatically submits the timecard for approval and sends a copy of the time sheet to the service provider to view.

Viewing a Timecard (provider)

When your system generates a timecard for a service provider, the system sends a copy of the timecard to the service provider. The service provider can then view the timecard in PeopleSoft Services Procurement. The imported timecard has a status attached to it.

Status in External System	***Status in Services Procurement***
Raw	Accept in both Add and Update status.
Processed	Accept and submit the timesheet unless status is Final.
Submitted	Accept in both Add and Update status. If status is Update, create an adjustment in Services Procurement.

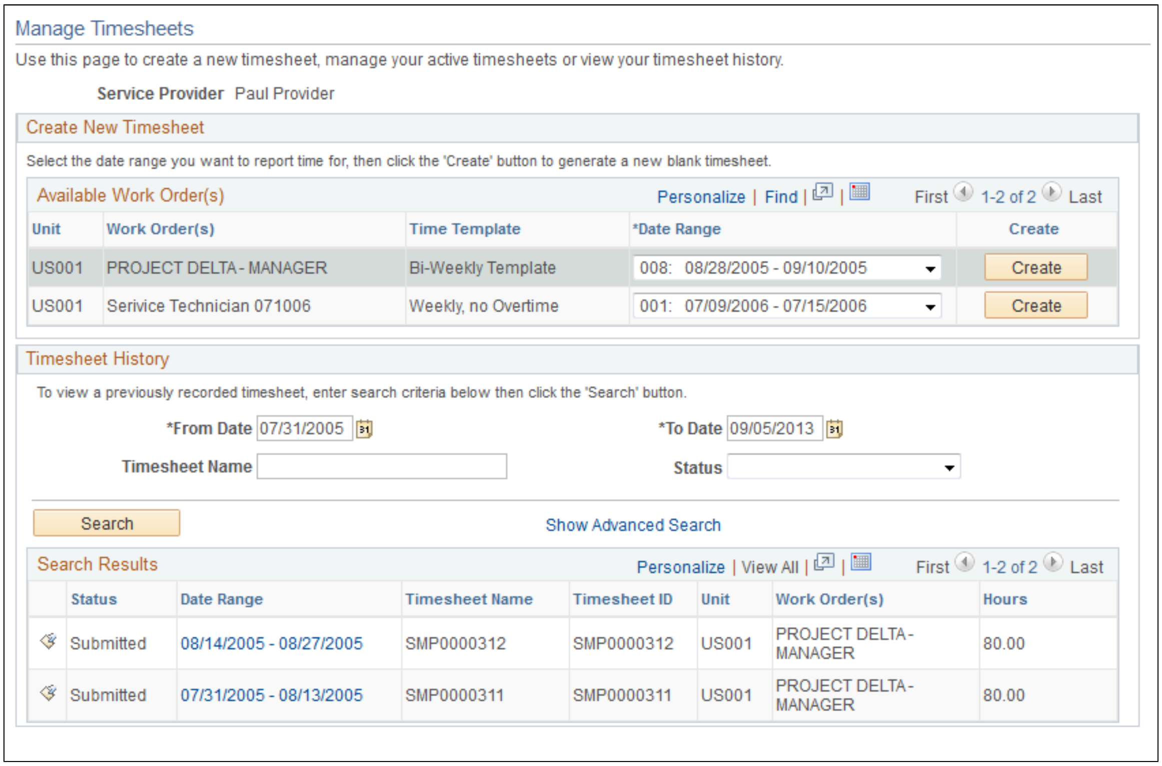
Status in External System	***Status in Services Procurement***
Approved	If the timesheet is passed to Services Procurement already having a status of Approved in the external system, it will not go through the approval process again within Services Procurement. The timesheet will be automatically approved and will be available for invoicing.
Rejected	Reject the timesheet, but accept resubmitted timesheets. For resubmitted timesheets in Update status, create an adjustment row in Services Procurement. Rejected is also a valid status for resubmitted timesheets.

If you are a provider who has had a timecard generated based on XML that you sent to an enterprise for whom you provide services and the timecard has been submitted, to view the timecard:

1. Sign in to the PeopleSoft system.
2. Select **Services Procurement** > **Maintain Timesheets.**

   The Manage Timesheets page appears.

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



Manage Timesheets

Use this page to create a new timesheet, manage your active timesheets or view your timesheet history.

Service Provider Paul Provider

Create New Timesheet

Select the date range you want to report time for, then click the 'Create' button to generate a new blank timesheet.

Available Work Order(s)

Unit	Work Order(s)	Time Template	*Date Range	Create
US001	PROJECT DELTA - MANAGER	Bi-Weekly Template	008: 08/28/2005 - 09/10/2005	Create
US001	Serivice Technician 071006	Weekly, no Overtime	001: 07/09/2006 - 07/15/2006	Create

Timesheet History

To view a previously recorded timesheet, enter search criteria below then click the 'Search' button.

*From Date 07/31/2005

*To Date 09/05/2013

Timesheet Name

Status

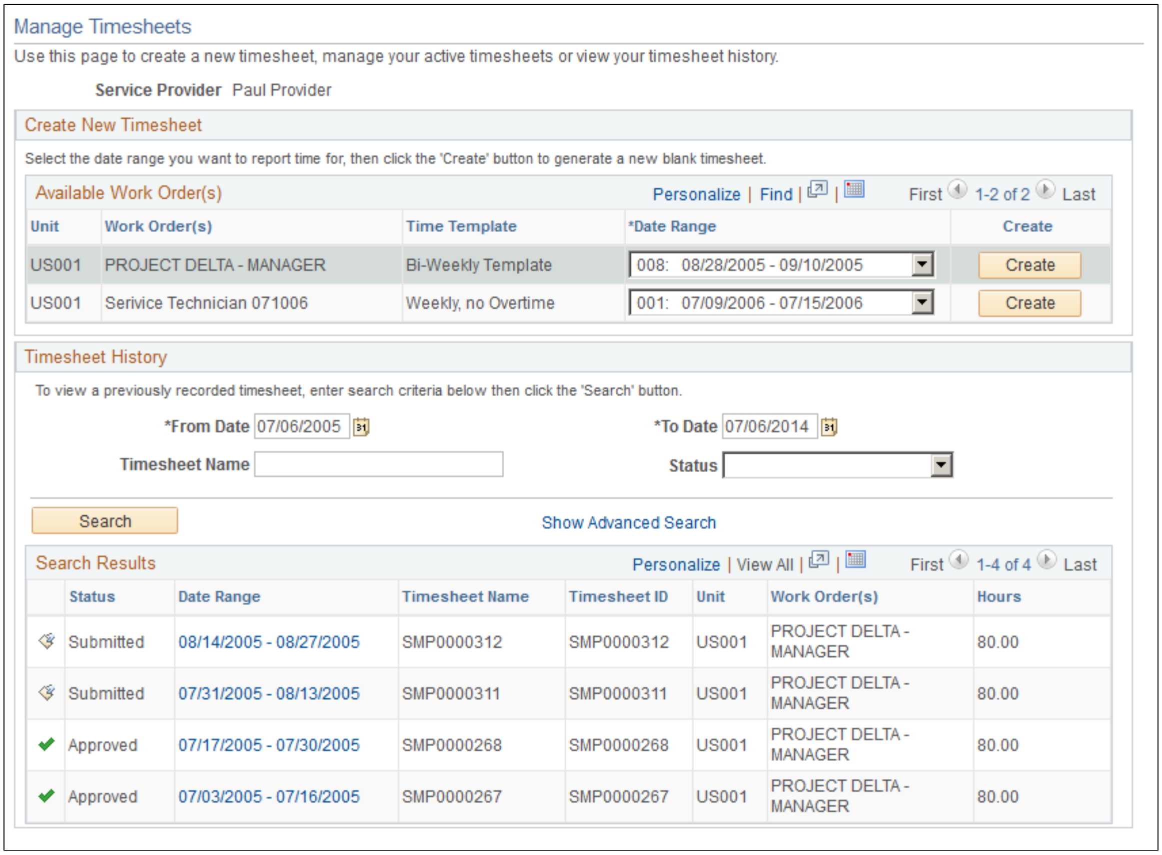
Search Results

	Status	Date Range	Timesheet Name	Timesheet ID	Unit	Work Order(s)	Hours
	Submitted	08/14/2005 - 08/27/2005	SMP0000312	SMP0000312	US001	PROJECT DELTA - MANAGER	80.00
	Submitted	07/31/2005 - 08/13/2005	SMP0000311	SMP0000311	US001	PROJECT DELTA - MANAGER	80.00

3. Click the **Search** button in the **Timesheet History** group box.

   The system displays a list of timesheets.

This example illustrates the fields and controls on the Manage Timesheets page with timesheets listed. You can find definitions for the fields and controls later on this page.



Manage Timesheets

Use this page to create a new timesheet, manage your active timesheets or view your timesheet history.

Service Provider Paul Provider

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Available Work Order(s)

Unit	Work Order(s)	Time Template	*Date Range	Create
US001	PROJECT DELTA - MANAGER	Bi-Weekly Template	008: 08/28/2005 - 09/10/2005	Create
US001	Serivice Technician 071006	Weekly, no Overtime	001: 07/09/2006 - 07/15/2006	Create

Timesheet History

To view a previously recorded timesheet, enter search criteria below then click the 'Search' button.

***From Date** 07/06/2005 ***To Date** 07/06/2014

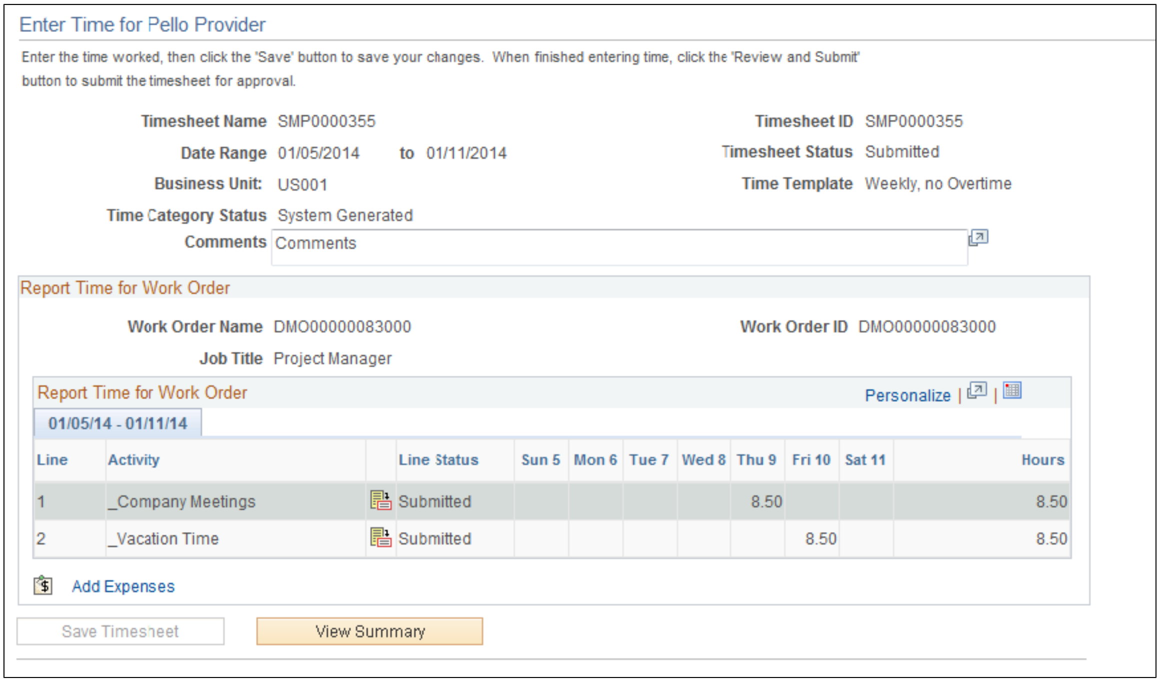
Timesheet Name **Status**

Search Results

	Status	Date Range	Timesheet Name	Timesheet ID	Unit	Work Order(s)	Hours
	Submitted	08/14/2005 - 08/27/2005	SMP0000312	SMP0000312	US001	PROJECT DELTA - MANAGER	80.00
	Submitted	07/31/2005 - 08/13/2005	SMP0000311	SMP0000311	US001	PROJECT DELTA - MANAGER	80.00
✓	Approved	07/17/2005 - 07/30/2005	SMP0000268	SMP0000268	US001	PROJECT DELTA - MANAGER	80.00
✓	Approved	07/03/2005 - 07/16/2005	SMP0000267	SMP0000267	US001	PROJECT DELTA - MANAGER	80.00

4. To view details of a timesheet, click the link for the date range of the timesheet that you want to view.

This example illustrates the fields and controls on the Enter Time for Provider page. You can find definitions for the fields and controls later on this page.



Enter Time for Pello Provider

Enter the time worked, then click the 'Save' button to save your changes. When finished entering time, click the 'Review and Submit' button to submit the timesheet for approval.

Timesheet Name SMP0000355
Timesheet ID SMP0000355
Date Range 01/05/2014 **to** 01/11/2014
Timesheet Status Submitted
Business Unit: US001
Time Template Weekly, no Overtime
Time Category Status System Generated
Comments Comments

Report Time for Work Order

Work Order Name DMO00000083000
Work Order ID DMO00000083000
Job Title Project Manager

Report Time for Work Order

01/05/14 - 01/11/14

Line	Activity		Line Status	Sun 5	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11	Hours
1	_Company Meetings		Submitted					8.50			8.50
2	_Vacation Time		Submitted						8.50		8.50

Chapter 20

Managing Expenses in PeopleSoft Services Procurement

Understanding Expenses

The Expense feature enables you to capture travel and expense information relating to a project. A service provider can enter expenses incurred on a project and submit them to the project manager on an expense report for immediate approval.

Note: Expenses can be entered only if an expense amount is specified on the work order.

When an expense transaction is reported against an individual child service of a multi-resource parent work order, the system uses the tolerance percentage from the parent multi-resource work order and makes consumption updates to both the multi-resource parent work order and to the individual service child work order.

Related Links

Common Elements Used In Services Procurement

Setting Up Multi-Resource Services

Creating and Maintaining Expense Reports

This topic discusses how to create and manage expense reports.

Pages Used to Create Expense Reports

Page Name	***Definition Name***	***Usage***
Manage Expenses Page	SPA_EXP_ROSTER	Manage expenses to include creating new expenses, managing the expenses, and viewing the expense history.
General Information Page	SPA_SHEET_MAIN2	Enter general expense report information including the description, business purpose, and other comments.
Services Expense Report Details page	SPA_SHEET_LINES2	Add expense lines.
Add Expense Page	SPA_SHEET_EXPENSE2	Enter expense line information.

Page Name	***Definition Name***	***Usage***
Exchange Rate Detail Page	EXCH_RT_DTL	View exchange rate information. Add Expense Page
Expense Attachments Page	SPA_EXP_ATTACH	Add attachments to expense reports. Reviewers and approvers can open and view the attachments during the approval process. Service Expense Report Details page
Expense Report Line Adjustment	SPA_SHT_LN_ADJ	View adjusted expense lines.
Expense Report Line Entry Adjustment	SPA_SHT_EXP_ADJ	View adjusted expense line detail information.
Services Expense Report Details	SPA_SHEET_LINES2	Maintain services expense report details.
Manage Expenses (as proxy)	SPA_EXP_SUP_ROST	Manage expenses on behalf of another user.

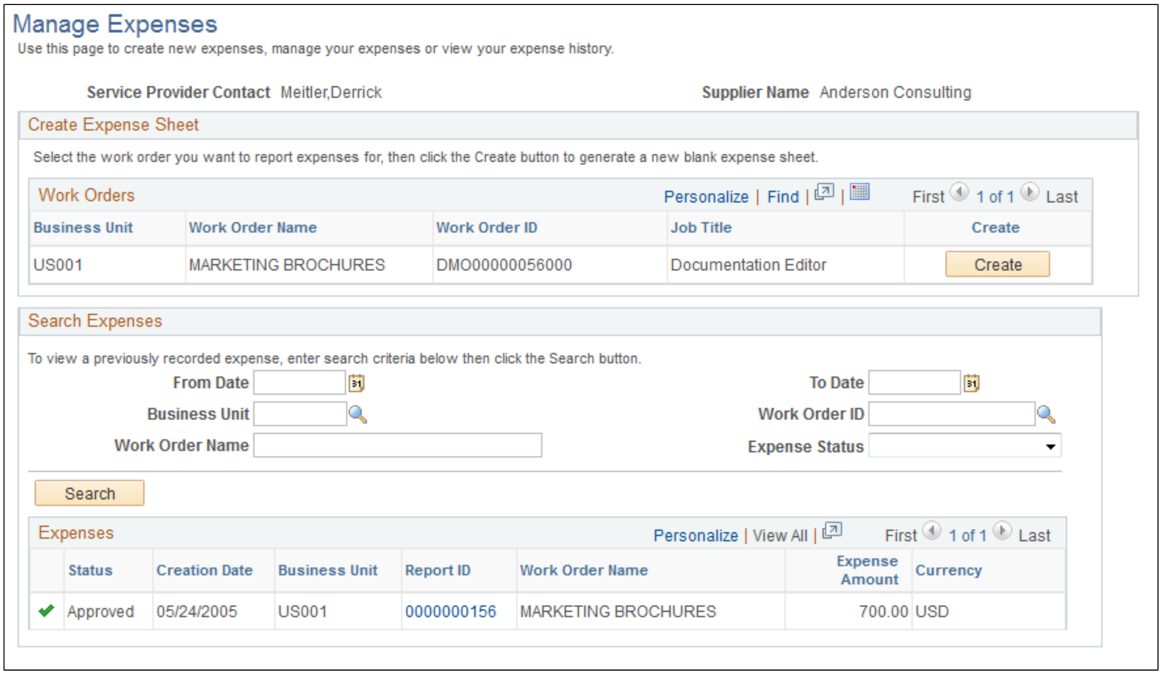
Manage Expenses Page

Use the Manage Expenses page (SPA_EXP_ROSTER) to manage expenses to include creating new expenses, managing the expenses, and viewing the expense history.

Navigation:

Services Procurement > **Manage Expenses**

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



Manage Expenses

Use this page to create new expenses, manage your expenses or view your expense history.

Service Provider Contact Meitler,Derrick **Supplier Name** Anderson Consulting

Create Expense Sheet

Select the work order you want to report expenses for, then click the Create button to generate a new blank expense sheet.

Work Orders

Business Unit	Work Order Name	Work Order ID	Job Title	Create
US001	MARKETING BROCHURES	DMO00000056000	Documentation Editor	Create

Search Expenses

To view a previously recorded expense, enter search criteria below then click the Search button.

Expenses

	Status	Creation Date	Business Unit	Report ID	Work Order Name	Expense Amount	Currency
✓	Approved	05/24/2005	US001	0000000156	MARKETING BROCHURES	700.00	USD

You use this page to manage expenses against work orders. This includes reviewing information about a work order and creating new expense reports for it. You can also limit the search results for existing expense reports that appear on the page and review active reports and their statuses.

Note: To add expense reports, you must be defined as the service provider or service provider contact for a work order. The available work orders appear on this page when you access it.

Create Expense Sheets

Use this section to add expenses to an existing work order. When work orders are associated with a multi-resource order, this page includes the lower-level individual child service resource-based work orders and displays the **Job Title** field so that you can select the work order to which you want to associate the expenses.

Click the **Create** button to access the General Information page where you can add a new expense report.

See Creating and Maintaining Expense Reports.

Search Expenses

The system displays all expenses if search criteria has not been specified. To limit the displayed results, enter search criteria and click **Search.**The search results appear in the Expenses grid.

Expenses

Field or Control	***Description***
Report ID	Click the link to access the Service Expense Report Details page, where you can view the details of previously created expense reports.

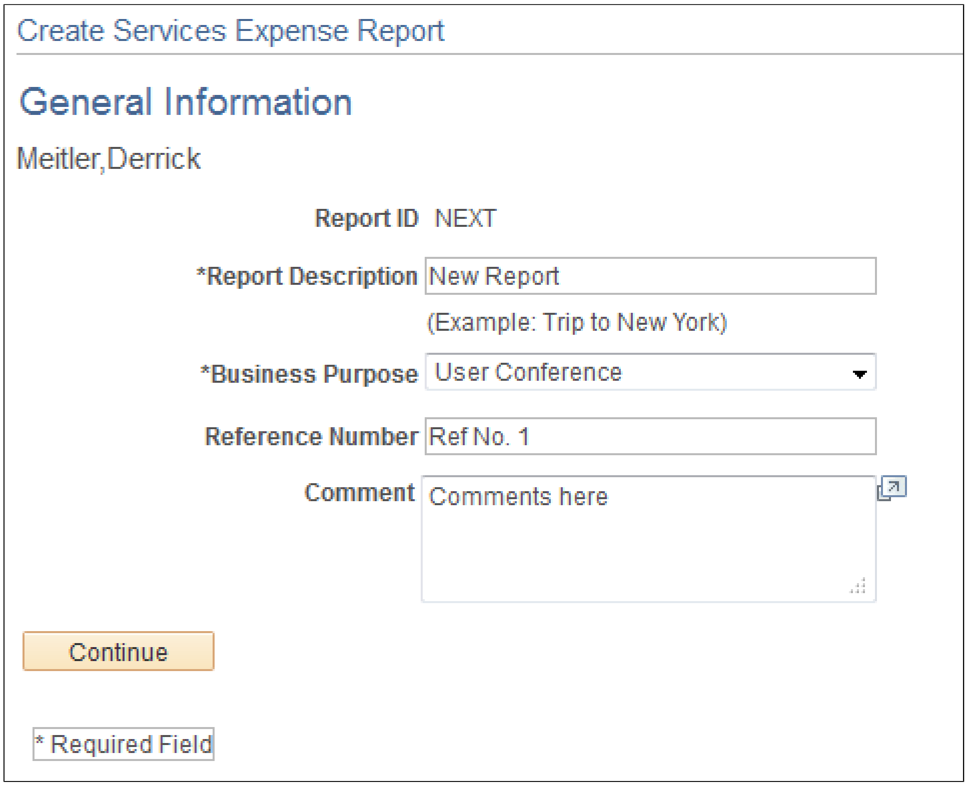
General Information Page

Use the General Information page (SPA_SHEET_MAIN2) to enter general expense report information including the description, business purpose, and other comments.

Navigation:

Click the **Create** button on the Manage Expenses page.

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



Create Services Expense Report

General Information

Meitler,Derrick

Report ID NEXT

*Report Description New Report

(Example: Trip to New York)

*Business Purpose User Conference

Reference Number Ref No. 1

Comment Comments here

Field or Control	***Description***
Report Description	Enter a description of this report (30-character limit).
Business Purpose	Select the business purpose of this trip or activity.

Field or Control	***Description***
Reference	Enter text (10-character limit.)
Comment	Enter general comments regarding the expense sheet.
Continue	Click to access the Services Expense Report Details page and add expense lines.

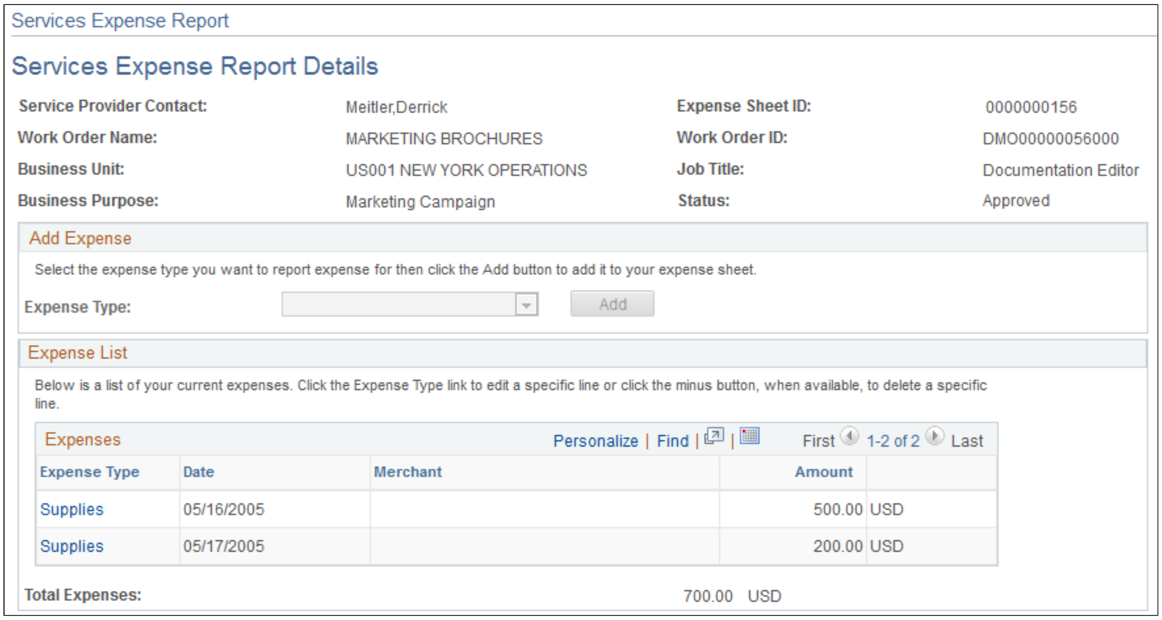
Services Expense Report Details page

Use the Services Expense Report Details page (SPA_SHEET_LINES2) to add expense lines.

Navigation:

Click **Continue** on the General Information page.

This example illustrates the fields and controls on the Services Expense Report Details page. You can find definitions for the fields and controls later on this page.



Service Provider Contact: Meitler,Derrick

Work Order Name: MARKETING BROCHURES

Business Unit: US001 NEW YORK OPERATIONS

Business Purpose: Marketing Campaign

Expense Sheet ID: 0000000156

Work Order ID: DMO00000056000

Job Title: Documentation Editor

Status: Approved

Select the expense type you want to report expense for then click the Add button to add it to your expense sheet.

Below is a list of your current expenses. Click the Expense Type link to edit a specific line or click the minus button, when available, to delete a specific line.

Expense Type	Date	Merchant	Amount	
Supplies	05/16/2005		500.00	USD
Supplies	05/17/2005		200.00	USD

Total Expenses: 700.00 USD

Select an expense type and click **Add** to access the Add Expense page.

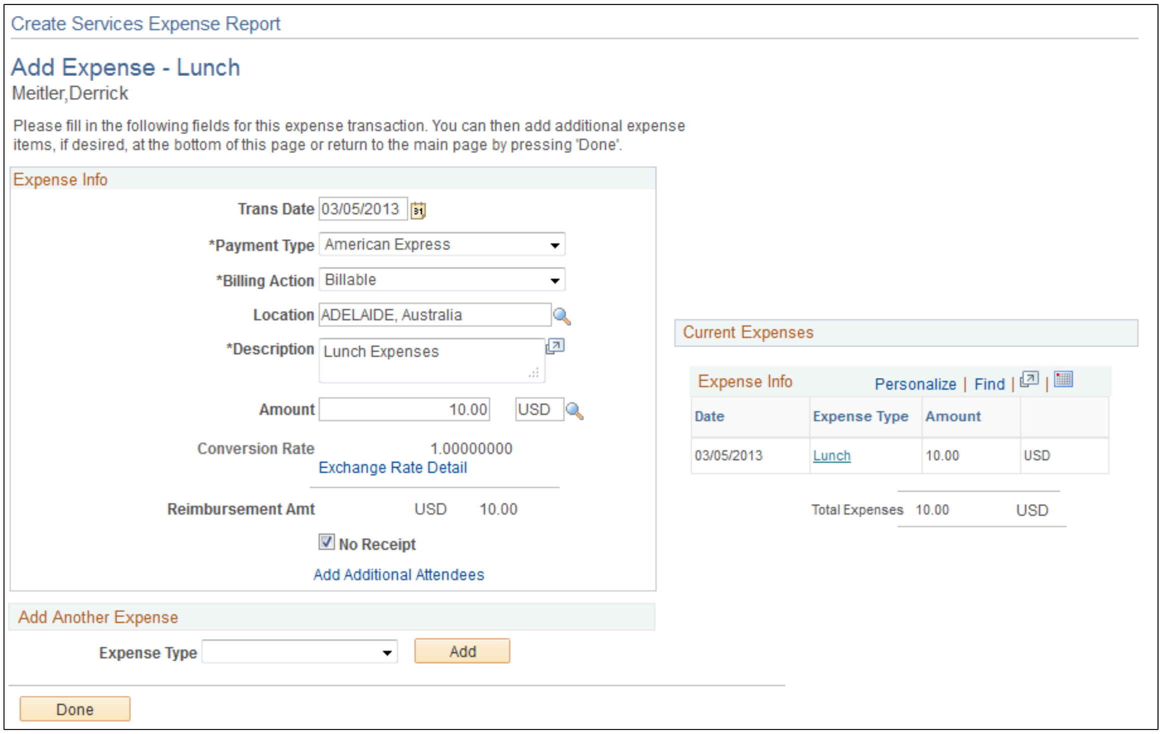
Add Expense Page

Use the Add Expense page (SPA_SHEET_EXPENSE2) to enter expense line information.

Navigation:

Click the **Add** button on the Services Expense Report Details page.

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



Create Services Expense Report

Add Expense - Lunch

Meitler,Derrick

Please fill in the following fields for this expense transaction. You can then add additional expense items, if desired, at the bottom of this page or return to the main page by pressing 'Done'.

Expense Info

Trans Date 03/05/2013

*Payment Type American Express

*Billing Action Billable

Location ADELAIDE, Australia

*Description Lunch Expenses

Amount 10.00 USD

Conversion Rate 1.00000000

Exchange Rate Detail

Reimbursement Amt USD 10.00

☑ No Receipt

Add Additional Attendees

Add Another Expense

Expense Type

Current Expenses

Expense Info

Date	Expense Type	Amount	
03/05/2013	Lunch	10.00	USD

Total Expenses 10.00 USD

Depending on how the organization defines the expense type, you access the Add Expense page to enter more details such as merchant, mileage, or number of nights pertaining to the line item. When you complete the necessary information, the expense appears as a line item on the Services Expense Report Details page.

Generic Fields Included on Several Add Expense Pages

Field or Control	***Description***
Trans Date (transaction date)	Enter the transaction date for this expense.
Payment Type	Select the payment type for this expense.
Billing Code	Select *Billable* or *Nonbillable.*
Merchant: Preferred or Non-preferred	Depending on how the expense type is defined during setup, this field may be required.
Location	Enter where the transaction occurs.
Description	Depending on how expense type is defined during setup, this field may be required.

Field or Control	***Description***
Amount	Enter the expense amount and the currency in which it was purchased. The currency code is available for edit only if the PeopleSoft Purchasing business unit allows multicurrency purchase orders.
Conversion Rate	Appears automatically and cannot be modified.
Reimbursement Amount	Appears in supplier location currency. The supplier location currency appears by default in the **Work Order Supplier Location** field. You can change this value by choosing a different currency in the **Amount** field if the PeopleSoft Purchasing business unit allows multicurrency purchase orders.
Rate Detail	Click to view rate calculation information.
No Receipt	Select this check box if no receipt exists to substantiate an expense item that normally requires a receipt. If a receipt is required, you may need to provide an explanation for this expense.
Done	Click when you have completed the line item details. This returns you to the Services Expense Report Details page.

Specific Fields Included on Some Add Expense Pages

Field or Control	***Description***
Ticket Number	Enter a reference number for the airline ticket.
Miles	Enter the number of miles used to calculate automobile mileage reimbursement.
Add Additional Attendees	For meals, click to add a guest or business associate name, company, and title.
Number of Nights	Enter the number of nights included in the hotel stay.
Start Time and **End Time**	Enter the start and end of the business day.

Field or Control	***Description***
Retrieve Per Diem Amounts	Click for the system to populate the **Amount** field with the allowed per diem reimbursement.
Per Diem Information	Click to navigate to the Per Diem Information page to select meals that were provided by another party such as a lodging establishment. Depending on how the system is set up, the appropriate amount may be deducted from the per diem for that day.
Distribution	Select from the available list of options which includes the description of all the expense distribution lines from the associated work order. If only one expense distribution line is associated, then the value for this field defaults to that particular line. **Note:** Select from the available list of options which includes the description of all the expense distribution lines from the associated work order. If only one expense distribution line is associated, then the value for this field defaults to that particular line.
View Expense Distribution ChartField	Click to access the View/Select Work Order Distribution For: page. Use this page to view the actual ChartField values if the description does not provide enough information to make a selection in the Distribution field. **Note:** This icon is available only when the expense reporting option is “Actual Allocation” for the associated work order.

View/Select Work Order Distribution for Expense Report

Navigation:

Services Procurement > **Manage Expenses** From the Manage Expenses page, click the Create button to access the General Information page. From the General Information page, click the Continue button to access the Services Expense Report Details page. From the Services Expense Report Details page, select an expense type and click the Add button to access the Add Expense - <Expense Type> page. Click the View Expense Distribution ChartField button to access the View/Select Work Order Distribution For: page.

Use this page to select the appropriate distribution line for the Distribution field on the Add Expense page. The system only displays the ChartFields that are selected for display on the business unit.

Select the distribution line and click the OK button to bring the description into the Distribution field on the Add Expense page.

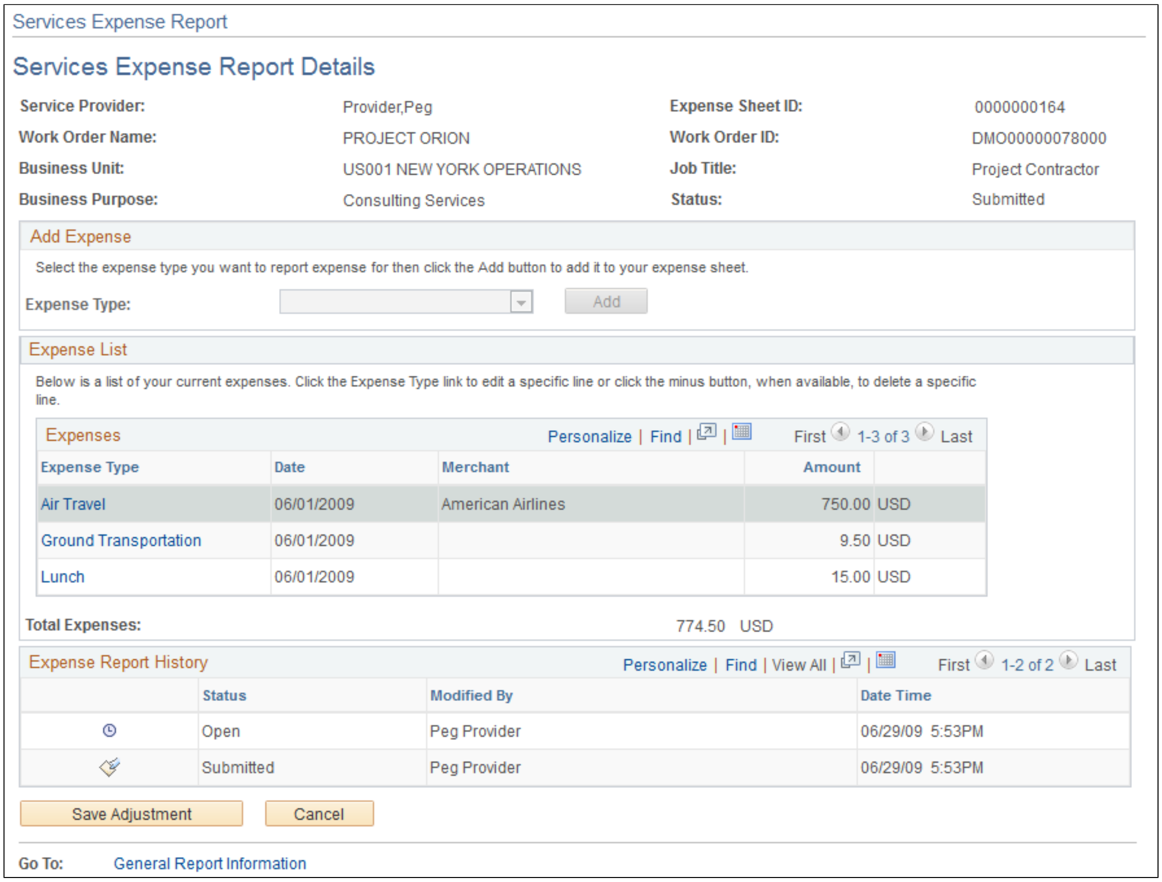
Service Expense Report Details page

Use the Services Expense Report Details page (SPA_SHEET_LINES2) to maintain services expense report details.

Navigation:

Click a **Report ID** link on the Manage Expenses page.

This example illustrates the fields and controls on the Services Expense Report Details page. You can find definitions for the fields and controls later on this page.



Service Provider:	Provider,Peg	**Expense Sheet ID:**	0000000164
Work Order Name:	PROJECT ORION	**Work Order ID:**	DMO00000078000
Business Unit:	US001 NEW YORK OPERATIONS	**Job Title:**	Project Contractor
Business Purpose:	Consulting Services	**Status:**	Submitted

Select the expense type you want to report expense for then click the Add button to add it to your expense sheet.

Below is a list of your current expenses. Click the Expense Type link to edit a specific line or click the minus button, when available, to delete a specific line.

Expense Type	Date	Merchant	Amount	
Air Travel	06/01/2009	American Airlines	750.00	USD
Ground Transportation	06/01/2009		9.50	USD
Lunch	06/01/2009		15.00	USD

Total Expenses: 774.50 USD

	Status	Modified By	Date Time
	Open	Peg Provider	06/29/09 5:53PM
	Submitted	Peg Provider	06/29/09 5:53PM

After you create an expense report, you can use this page to view and update the report. You can also create new expenses for the work order using the Add Expense grid. Select a type of expense and click the **Add** button.

Field or Control	***Description***
Save	Click to save updates to an expense report.
Submit	Click to submit the expense to the expense approver. See Submitting and Approving Expenses.

Field or Control	***Description***
Add Attachment	Click to upload an attachment to the expense report.
Preview Expense Approver(s)	Click to view approvers and reviewers for the expense report. This link is available when the business unit is set to use approval workflow for expenses. See Submitting and Approving Expenses.
General Report Information	Click to access the General Information page where you can view the basic information about the expense.

Expense List

This grid box displays the current expenses for a service provider. Click the **Expense Type** link to update an expense. The total amount of the expenses appears in the **Total Expenses** field.

Expense Report History

This grid box displays the history of expense reports for a service provider along with the status of the expense report. Click the **Expense Type** link to update an expense. The total amount of the expenses appears in the **Total Expenses** field.

Submitting and Approving Expenses

This topic discusses how to submit and approve expenses.

Pages Used to Submit and Approve Expenses

Page Name	***Definition Name***	***Usage***
Services Expense Approval Status Page	SPA_EX_APPR_STATUS	View and update approvers and reviewers for expense approvals. This page is available when expenses are enabled for workflow on the business unit. Service Expense Report Details Page
Submit Expense Sheet Page	SPA_SUBMIT_CONFIRM	Confirm the submission of the expense approval. Click **OK** to submit the expense or **Cancel** to return to the Services Expense Report Details page. Service Expense Report Details Page
Service Expense Report Details Page	SPA_SHEET_LINES2	Adjust expense sheets.

Page Name	***Definition Name***	***Usage***
Monitor Approvals Page	EOAW_ADM_MON_SRC	Monitor approvals using the User Monitor.

Service Expense Report Details Page

Use the Services Expense Report Details page (SPA_SHEET_LINES2) to adjust expense sheets.

Navigation:

(Worklist, Worklist, Filter By *Approval Routing,* select an expense report that requires your approval and click the **Adjust Expense Sheet** button on the Service Expense Report Details page).

Service providers can complete and submit expenses for approval upon completing the expense report or save it and return later using the Manage Expenses page to access the report. You can use the Service Expense Report Details page to view information about the work order against which the expense is applied, add additional expenses, and review existing expenses and expense history.

Note: If you are submitting time against a child for a multi-resource work order, the header information also displays the parent work order ID and name.

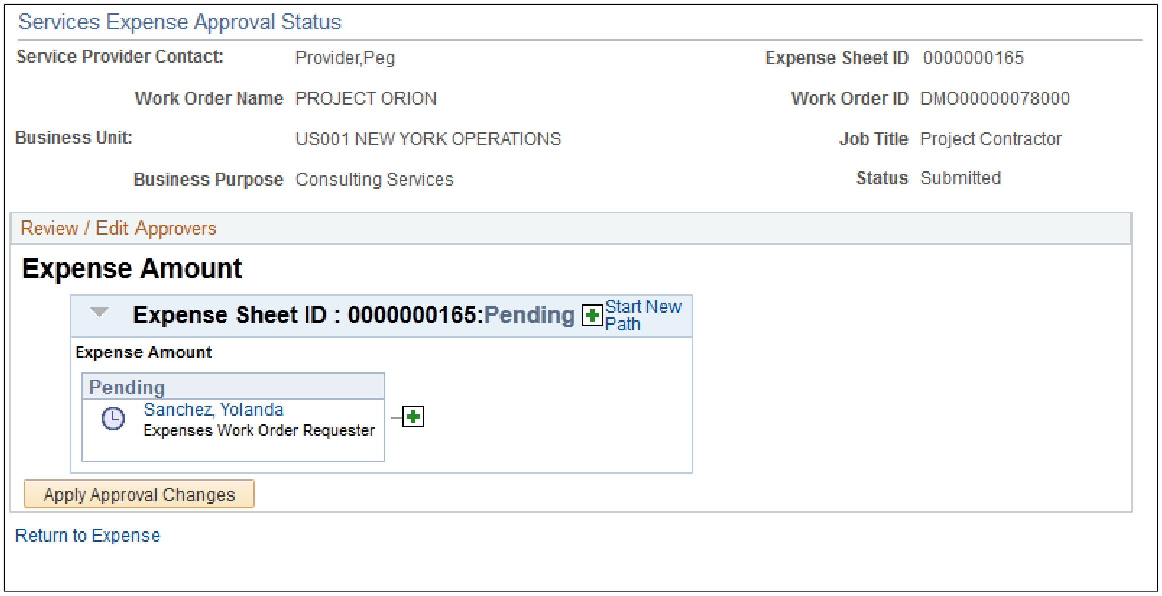
Before you submit an expense report, you can add another expense type. Select an expense type in the **Expense Type** field and click the **Add** button. You can also update expense lines and add new lines to an expense report by clicking the **Expense Type** link in the Expenses grid box.

After creating a new expense report or reviewing expenses, you can view expense approvers and reviewers and submit the expense for approval. To preview and update expense approvers:

1. Click the **Preview Expense Approver(s)** link.

   This link is available if expenses have been enabled for workflow approval for the business unit. The system displays the Services Expense Approval Status page. This page provides a graphical map of the workflow. The next example illustrates how the page appears:

This example illustrates the fields and controls on the Services Expense Approval Status page. You can find definitions for the fields and controls later on this page.



Services Expense Approval Status

Service Provider Contact: Provider,Peg

Expense Sheet ID 0000000165

Work Order Name PROJECT ORION

Work Order ID DMO00000078000

Business Unit: US001 NEW YORK OPERATIONS

Job Title Project Contractor

Business Purpose Consulting Services

Status Submitted

The graphical map for the workflow displays expense approvers and reviewers and the status of their reviews. You can insert additional approvers or reviewers or create a new approval path for an expense. If you insert an ad hoc approver or reviewer, you can also remove the approver or reviewer.

The title for the workflow represents the type of expense that is being processed. This is the expense thread description and consists of unique information for the expense. The graphic includes the expense status and overall status of the expense approval and provides information about individual approvers and the status of their approvals. The individual graphics vary in color depending on the approval status.

2. Click the **Return to Expense** link to return to the Manage Expenses page where you can submit the approval.

To submit an expense report:

1. Click the **Submit** button.

   The system displays the Submit Expense Sheet Confirmation page where you can confirm that you want to continue with the submission.

2. Click **OK** to submit the expense.

   The system displays the Save Confirmation page with the new expense approval status and an updated graphic for the workflow. You can also click **Cancel** to return to the Services Expense Report Details without submitting the expense.

3. Click **OK** to continue.

Related Links

Setting Up Expense Workflow

Services Expense Report Details Page

Use the Services Expense Report Details page (SPA_SHEET_LINES2) to adjust expense sheets.

Navigation:

(Worklist, Worklist, Filter By *Approval Routing,* select an expense report that requires your approval and click the **Adjust Expense Sheet** button on the Service Expense Report Details page).

Expense report approvers use this page to review, approve, deny, or hold expense reports. You can select one or more lines to approve. A status appears for each line.

When approving, denying, or holding expense reports, you can also add comments.

Note: At least one line must be selected to perform an approval task.

To approve or deny expense reports:

1. Click the **Approve** button.

   The system changes the status to *Approved.* The expense report is now available for invoicing.

2. Click the **Deny**

   Changes the status to *Denied by Approver.* If you deny the expense report, enter a comment to indicate a reason. The expense report returns to the service provider or service provider contact for modifications and resubmission.

3. Click the **Hold** button.

   This places the expense report approval on hold and gives the approver time to research an issue and prevents the approval process from going to the next approval step until the previous approver takes action on the expense report. The approval hold is removed when either the approver chooses to approve the expense report or when the report is updated in such a way that the approval process is restarted. When the approval is placed on hold, the system provides a worklist entry for the previous expense report approver. A comment is required when you place an expense report on hold.

   When you click the **Hold** button, the system displays a confirmation page. When you click the **OK** button on that page, the system provides a worklist entry for the person who submitted the expense report or for the previous approver. Using the worklist, the person can address comments from approver.

When all lines are approved, the expense report status changes to *Approved.*

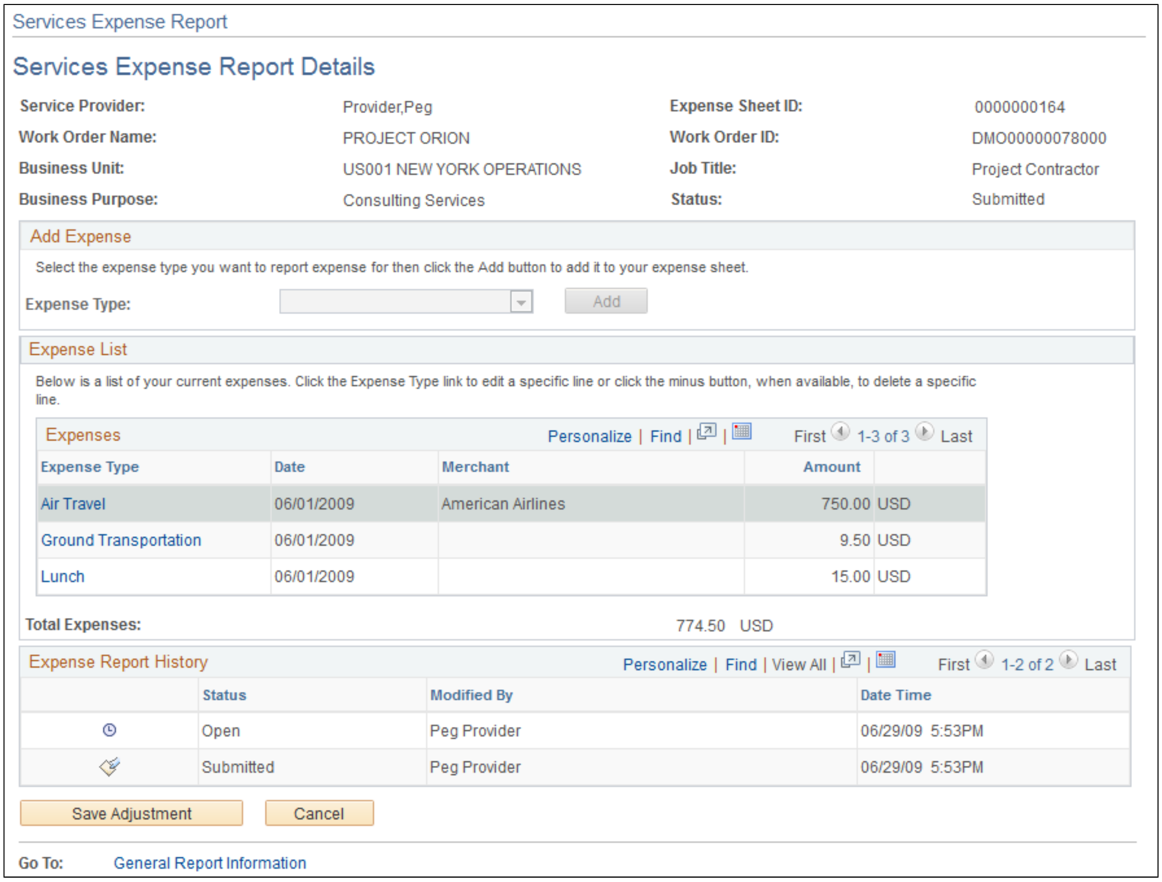
Service Expense Report Details Page

Use the Services Expense Report Details page (SPA_SHEET_LINES2) to adjust expense sheets.

Navigation:

(Worklist, Worklist, Filter By *Approval Routing,* select an expense report that requires your approval and click the **Adjust Expense Sheet** button on the Service Expense Report Details page).

This example illustrates the fields and controls on the Service Expense Report Details page. You can find definitions for the fields and controls later on this page.



Services Expense Report Details

Service Provider:	Provider,Peg	Expense Sheet ID:	0000000164
Work Order Name:	PROJECT ORION	Work Order ID:	DMO00000078000
Business Unit:	US001 NEW YORK OPERATIONS	Job Title:	Project Contractor
Business Purpose:	Consulting Services	Status:	Submitted

Add Expense

Select the expense type you want to report expense for then click the Add button to add it to your expense sheet.

Expense Type:

Expense List

Below is a list of your current expenses. Click the Expense Type link to edit a specific line or click the minus button, when available, to delete a specific line.

Expense Type	Date	Merchant	Amount	
Air Travel	06/01/2009	American Airlines	750.00	USD
Ground Transportation	06/01/2009		9.50	USD
Lunch	06/01/2009		15.00	USD

Total Expenses: 774.50 USD

Expense Report History

	Status	Modified By	Date Time
	Open	Peg Provider	06/29/09 5:53PM
	Submitted	Peg Provider	06/29/09 5:53PM

Go To: General Report Information

To adjust an expense sheet approvers:

1. Click the **Expense Type** link in the Expenses grid.

   The system displays the Services Expense Report Details page where you can make changes to the expense.

2. Click the **Done** button.

   The system returns to the initial Service Expense Report Details page with your updates.

3. Click the **Save Adjustment** button.

   The system displays a confirmation page that the adjustment was saved.

Field or Control	*Description*
Distribution	Select from the available list of options which includes the description of all the expense distribution lines from the associated work order. If only one expense distribution line is associated, then the value for this field defaults to that particular line. **Note:** This field is available only when the expense reporting option is "Actual Allocation" for the associated work order.
View Expense Distribution ChartField	Click to access the View/Select Work Order Distribution For: page. Use this page to view the actual ChartField values if the description does not provide enough information to make a selection in the Distribution field. **Note:** This icon is available only when the expense reporting option is "Actual Allocation" for the associated work order.

Approving Services Expenses Using the PeopleSoft Fluid User Interface

This topic provides an overview of the self-service approval pages for services expenses, and how to access these pages using the PeopleSoft Fluid User Interface. PeopleSoft builds these mobile approval pages on the Enterprise Component Fluid Approvals framework.

Pages Used to Approve Services Expenses Using PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Pending Approvals - Services Expense Page (List)	EOAWMA_MAIN_FL	View a list of pending approvals for services expenses. For more information, see the overview of approvals on the PeopleSoft Fluid User Interface: "Pending Approvals Page" (Application Fundamentals).
Services Expense Page (Header Approval)	EOAWMA_TXNHDTL_FL	Review header details for a single services expense, and approve, deny, hold, or push back the expense, depending on role criteria. For more information, see the "Approval Header Detail Page" (Application Fundamentals).

Page Name	***Definition Name***	***Usage***
Services Expense Page (Line Detail)	SPA_FL_APPR_LN	Review a display-only line summary and details.
Services Expense Report Details page	SPA_SHEET_LINES2	Review Services Expense Report details for the service provider, including current expenses and expense report history. Add an expense to the expense sheet. Access this page through the Services Expense Page (Header Approval).

Understanding Approvals for Services Expenses Using the PeopleSoft Fluid User Interface

PeopleSoft provides mobile approvals using the Enterprise Component Fluid Approvals framework. Approvers can take Application Workflow Engine (AWE) actions on select PeopleSoft transactions pending their approval, using a smart phone or tablet. The tablet version is also available for desktop use.

Services expense workflow enables service providers to complete and submit expenses for approval upon completing a service expense report. Once the service expense report has been submitted for approval, the Application Workflow Engine runs the expense report through the defined approval process. For information about registering and defining an approval process for services expenses, see Setting Up Expense Workflow.

Using the PeopleSoft Fluid User Interface, approvers can view a list of pending approvals for various types of transactions, and add comments on the centralized Pending Approvals page. An approver or multiple approvers review the transaction details, including line details. Each approver in the workflow selects an appropriate action, such as Approve, Deny, Pushback (only available for multiple approvers), or Hold within the approval pages.

Services expense approvals also support push notifications, a framework delivered in PeopleTools. The flag icon in the Oracle banner shows a counter for new push notifications. Note that the counter disappears once you view the push notification list. The notification link takes you directly to the header approval page for items awaiting your approval.

Delegating Services Expense Approvals

You can use the Delegation Framework to delegate services expense approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

“Understanding Delegation” (Enterprise Components)

“Configuring Delegation Transactions” (Enterprise Components)

“Working with Self-Service Delegation” (Enterprise Components)

Pending Approvals - Services Expense Page (List)

Use the Pending Approvals - Services Expense list page (EOAWMA_MAIN_FL) to view a list of pending approvals for services expenses.

Navigation:

Employee Self Service > **Approvals**

On the Pending Approvals page, select **Services Expense** in the View By - Type pane to view the expense reports in the right pane.

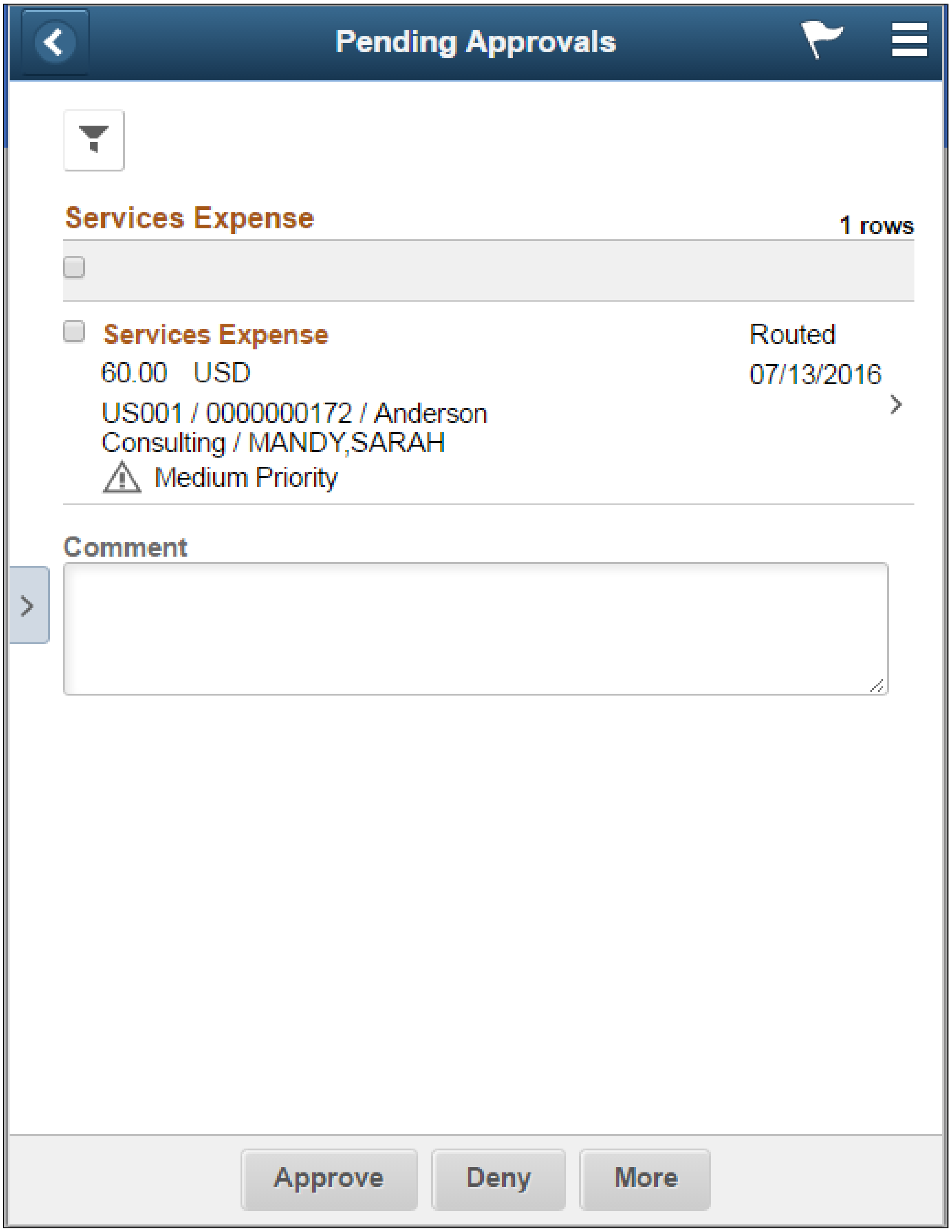
Smartphone: On the Pending Approvals - View By Type page, select **Services Expense** to open a new page that lists the expense reports.

This example illustrates the fields and controls on the Pending Approvals - Services Expense list page. You can find definitions for the fields and controls later on this page.

View By: Type

☐ **Services Expense** 60.00 USD — US001 / 0000000172 / Anderson Consulting / MANDY,SARAH — Medium Priority — Routed 07/13/2016

This example illustrates the fields and controls on the Pending Approvals - Services Expense list page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



From the list page, you can do the following:

- Review header information for the services expense reports currently routed for approval. To access header details for a particular expense report, select the header row.
- Use the filter to narrow results on the page. For more information about using the filter, see the "Filters Page" (Application Fundamentals).

Field or Control	***Description***
Comment	Enter comments in the text entry field.
Approve, Deny, Pushback or **Hold**	Perform a mass action by selecting multiple transactions, and then selecting an approval action button.
‖	Select this button to expand or collapse the View By Type page.

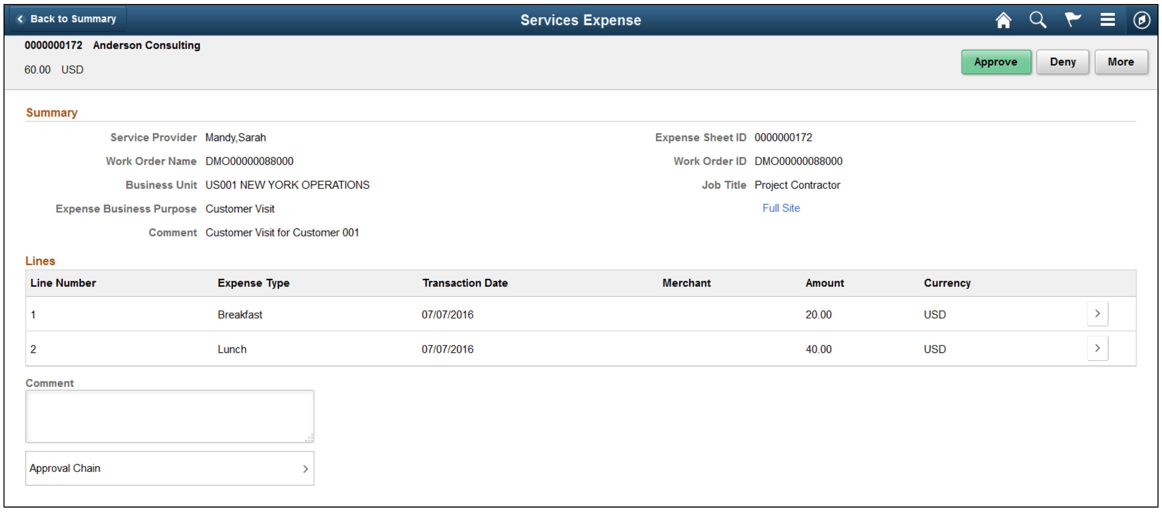
Services Expense Page (Header Approval)

Use the Services Expense header approval page (EOAWMA_TXNHDTL_FL) to review header details for a single expense, and approve, deny, hold, or push back the expense report, depending on role criteria.

Navigation:

Select an expense report in the list on the Pending Approvals - Services Expense list page.

This example illustrates the fields and controls on the Services Expense header approval page.



0000000172 Anderson Consulting

60.00 USD

Summary

Service Provider: Mandy,Sarah

Work Order Name: DMO00000088000

Business Unit: US001 NEW YORK OPERATIONS

Expense Business Purpose: Customer Visit

Comment: Customer Visit for Customer 001

Expense Sheet ID: 0000000172

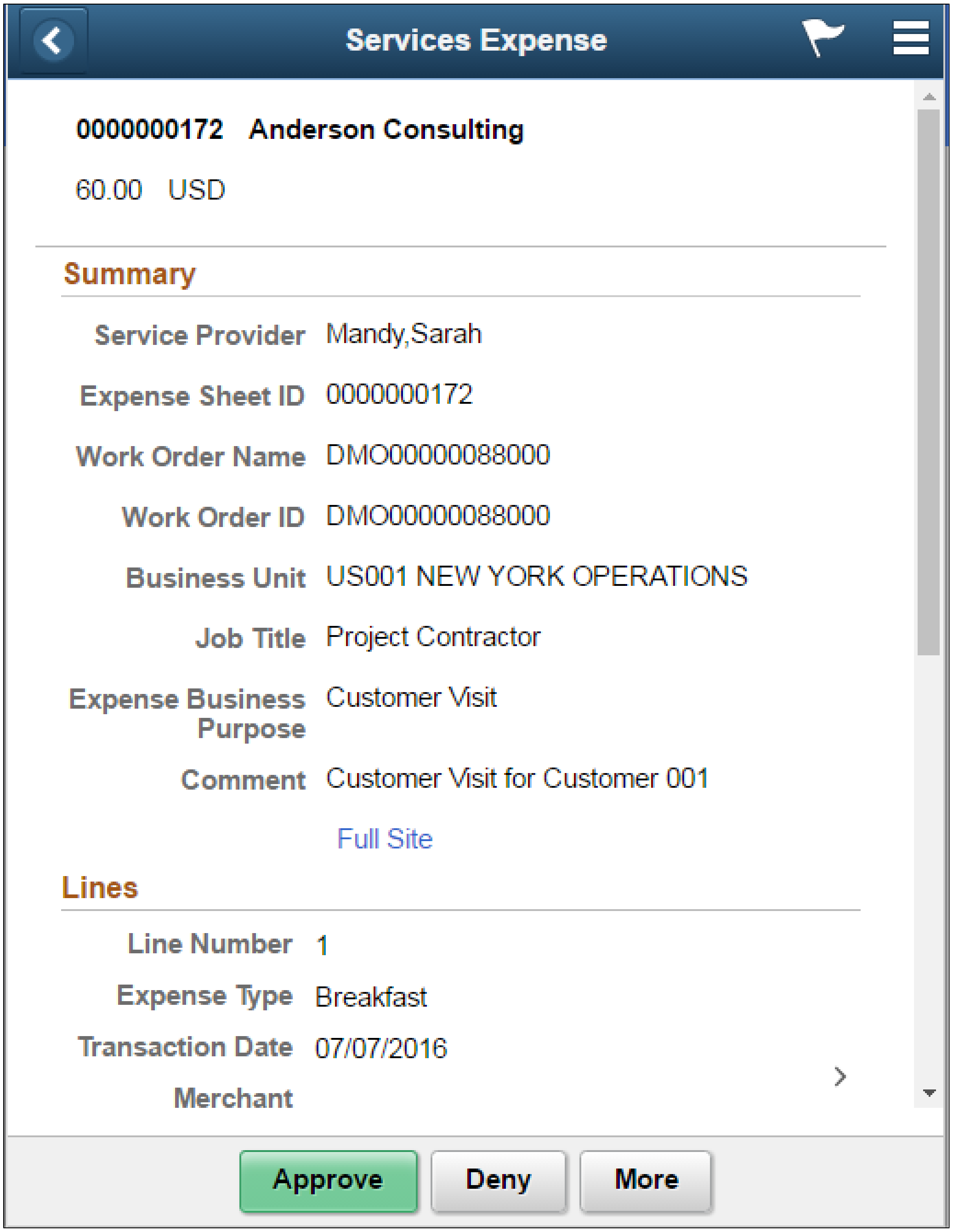
Work Order ID: DMO00000088000

Job Title: Project Contractor

Lines

Line Number	Expense Type	Transaction Date	Merchant	Amount	Currency
1	Breakfast	07/07/2016		20.00	USD
2	Lunch	07/07/2016		40.00	USD

This example illustrates the fields and controls on the Services Expense header approval page as displayed on a smartphone.



0000000172 Anderson Consulting

60.00 USD

Summary

Service Provider: Mandy,Sarah
Expense Sheet ID: 0000000172
Work Order Name: DMO00000088000
Work Order ID: DMO00000088000
Business Unit: US001 NEW YORK OPERATIONS
Job Title: Project Contractor
Expense Business Purpose: Customer Visit
Comment: Customer Visit for Customer 001

Lines

Line Number: 1
Expense Type: Breakfast
Transaction Date: 07/07/2016
Merchant:

When viewing the services expense report on a smartphone, you must scroll down to view more expense lines, approver comments field, and the approval chain.

Field or Control	***Description***
Full Site	Select this link to open the Services Expense Report Details page in the classic interface. Use this link only when accessing the approval pages in PeopleSoft Fluid User Interface on a desktop or laptop. The Services Expense Report Details page is not rendered best when using a smartphone or a tablet. See Services Expense Report Details page
Comment	Enter comments in the text entry field.
Approval Chain	Select to review approval chain information. You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.
Approve , Deny, Pushback or **Hold**	Select an action button. When you select an action button, you have the option to select **Submit** to continue the action or **Cancel** to back out of the action. Upon submitting the action, the system generates a message that the action is successful.

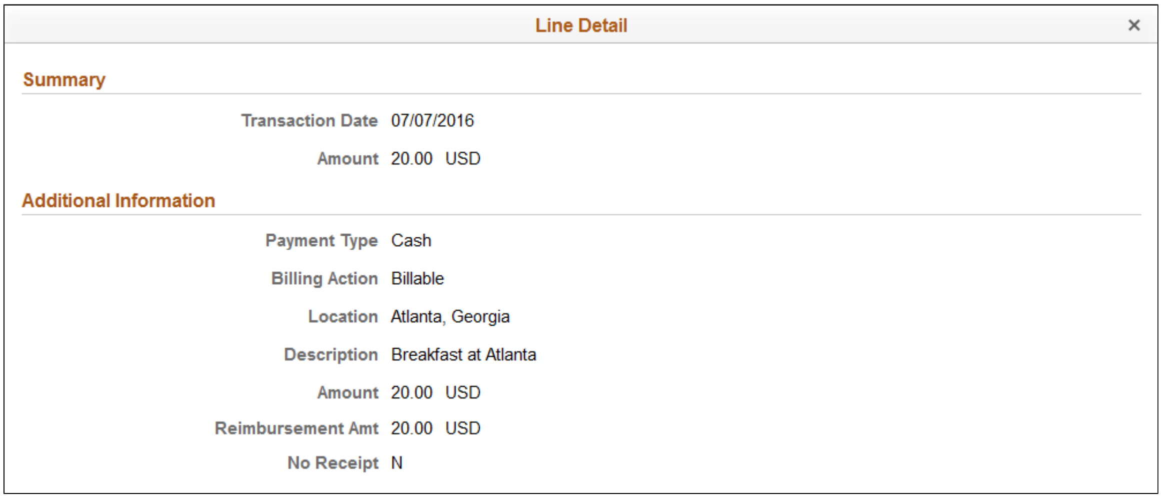
Services Expense Page (Line Detail)

Use the Services Expense line detail page (SPA_FL_APPR_LN) to review a display-only line summary and details.

Navigation:

Select an expense line item in the Lines section on the Services Expense header approval page.

This example illustrates the fields and controls on the Services Expense line detail page.



Transaction Date 07/07/2016

Amount 20.00 USD

Payment Type Cash

Billing Action Billable

Location Atlanta, Georgia

Description Breakfast at Atlanta

Amount 20.00 USD

Reimbursement Amt 20.00 USD

No Receipt N

Managing Expense Report Worklists

This topic discusses how to trigger worklist and email notifications.

Triggering Worklist and Email Notifications

The following status changes can trigger a worklist entry or email notification:

- The service provider receives a notification if the expense status changes to *Approve* or *Deny.*
- The approver receives a notification when an expense report is submitted.

Whether users receive worklist or email notifications depends on the approval workflow definition for the transaction configuration. The email notification contains values from the Manage Expenses page and a URL that the recipient should use to access the expense report.

Chapter 21

Managing Progress Logs

Understanding Progress Logs

The progress log is similar to the timesheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverable work orders to the project manager for immediate, online approval. You can also track and report issues using the progress log. The project manager or progress log approver can provide feedback to the service provider, including performance-rating information through the approval process.

Use the Manage Progress Logs page as the focal point for all deliverables-based activity in PeopleSoft Services Procurement. Use this page to:

- Create, edit, view, or approve progress logs.
- Filter reports by selecting the criteria in the service provider contact, supplier, or status fields.
- Access pages used to modify progress log details.

Related Links

Common Elements Used In Services Procurement

Prerequisites

These attributes must be set up before entering progress log information:

- Services time/progress templates.
- Activities defined as milestone activities.
- Activities defined for rate-based services.

A deliverable - based work order must also be released before progress log transactions can be entered against it.

Related Links

Understanding Services Work Orders

Creating Progress Logs

This topic discusses how to create progress logs.

Pages Used to Create Progress Logs

Page Name	***Definition Name***	***Usage***
Maintain Progress Logs Page	SPA_MANAGE_PLOGS	View and manage progress logs.
Progress Log Summary Page	SPA_PLOG_LINES	Create a progress log.
Progress Log Details Page	SPA_PLOG_DTL	Enter or view progress log details.
Currency Information Page	EXCH_RT_DTL_INQ	View currency information. Progress Log Details Page
Progress Logs by Work Order Page	SPA_PLOG_PRCNT_HST	View previously entered progress logs by work order. Progress Log Details Page

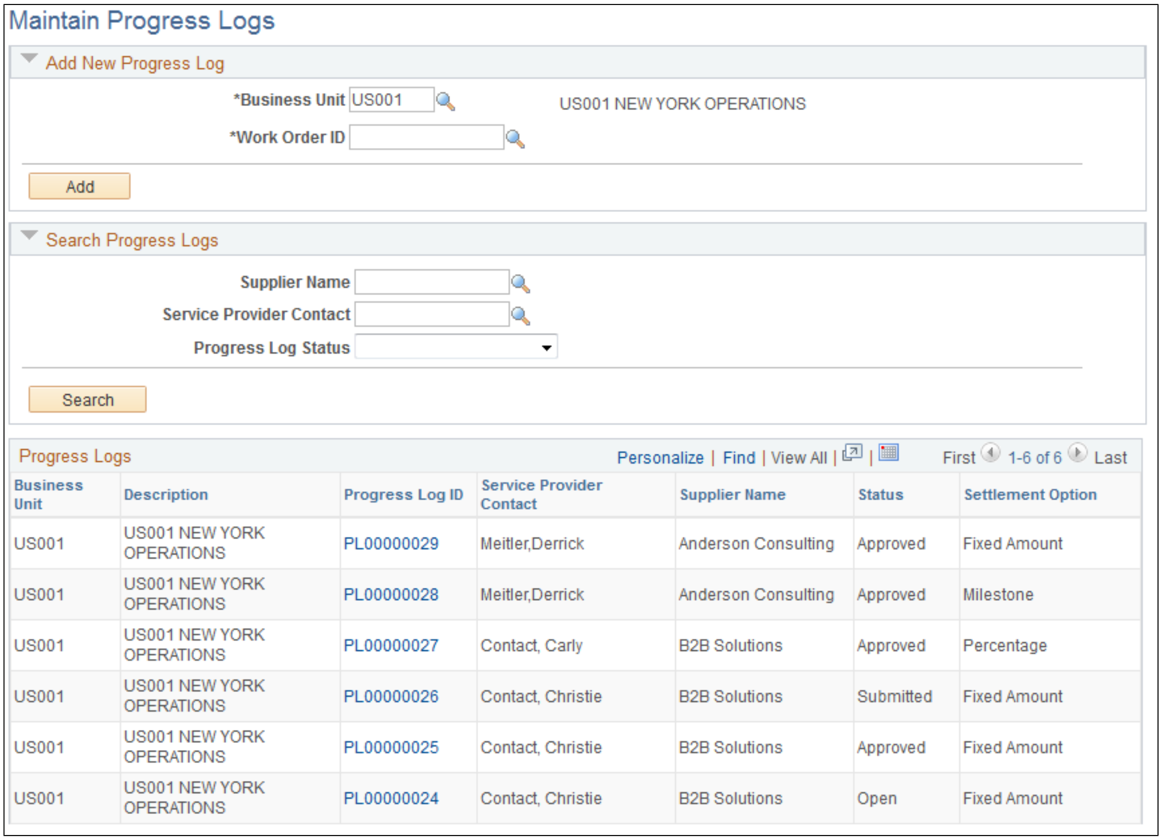
Maintain Progress Logs Page

Use the Maintain Progress Logs page (SPA_MANAGE_PLOGS) to view and manage progress logs.

Navigation:

- **Services Procurement** > **Maintain Services Progress Logs (internal)**
- **Services Procurement** > **Maintain Services Progress Log (external)**

This example illustrates the fields and controls on the Maintain Progress Logs page. You can find definitions for the fields and controls later on this page.



*Business Unit US001 US001 NEW YORK OPERATIONS

*Work Order ID

Supplier Name

Service Provider Contact

Progress Log Status

Business Unit	Description	Progress Log ID	Service Provider Contact	Supplier Name	Status	Settlement Option
US001	US001 NEW YORK OPERATIONS	PL00000029	Meitler,Derrick	Anderson Consulting	Approved	Fixed Amount
US001	US001 NEW YORK OPERATIONS	PL00000028	Meitler,Derrick	Anderson Consulting	Approved	Milestone
US001	US001 NEW YORK OPERATIONS	PL00000027	Contact, Carly	B2B Solutions	Approved	Percentage
US001	US001 NEW YORK OPERATIONS	PL00000026	Contact, Christie	B2B Solutions	Submitted	Fixed Amount
US001	US001 NEW YORK OPERATIONS	PL00000025	Contact, Christie	B2B Solutions	Approved	Fixed Amount
US001	US001 NEW YORK OPERATIONS	PL00000024	Contact, Christie	B2B Solutions	Open	Fixed Amount

External and internal users use this page to begin tasks for progress logs. You can create and maintain progress logs and search for progress logs based on their status.

Add New Progress Log

Use this grid to create a new progress log.

Field or Control	***Description***
Business Unit	Select a business unit on which to search for work orders.
Work Order	Select a work order for which to create a progress log. Only work orders that exists for the user are included in the list of values.
Add	Click to create a progress log using the Progress Log Summary page. See Progress Log Summary Page.

Search Progress Logs

Select a status in the Progress Log Status field on which to search for existing progress logs. Statuses include, for example, Adjusted, Line Denied, and Pending. Click the **Search** button. The search results appear at the bottom of the page.

Progress Logs

This grid box displays the user's progress logs and includes information about

Field or Control	***Description***
Progress Log ID	Click to access the Progress Log Summary page. See Progress Log Summary Page.
Settlement Option	Displays the settlement method on which payments are based. Values include: *Fixed Amount* *Milestone* *Percentage* *Rate Based*

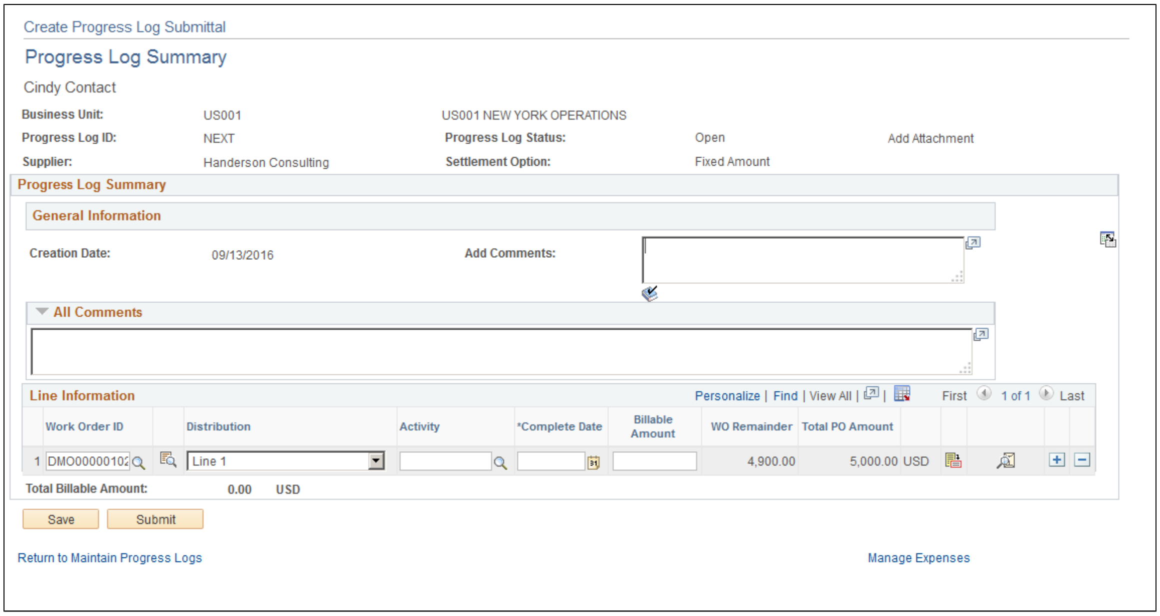
Progress Log Summary Page

Use the Progress Log Summary page (SPA_PLOG_LINES) to create a progress log.

Navigation:

- Click the **Progress Log ID** link on the Maintain Progress Logs page.
- Click the **Add** button from the Maintain Progress Logs page.

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



Cindy Contact

Business Unit: US001 US001 NEW YORK OPERATIONS

Progress Log ID: NEXT

Progress Log Status: Open

Supplier: Handerson Consulting

Settlement Option: Fixed Amount

Creation Date: 09/13/2016

Add Comments:

	Work Order ID	Distribution	Activity	*Complete Date	Billable Amount	WO Remainder	Total PO Amount
1	DMO0000010	Line 1				4,900.00	5,000.00 USD

Total Billable Amount: 0.00 USD

The fields appearing on this page depend on the settlement option that you defined on the work order.

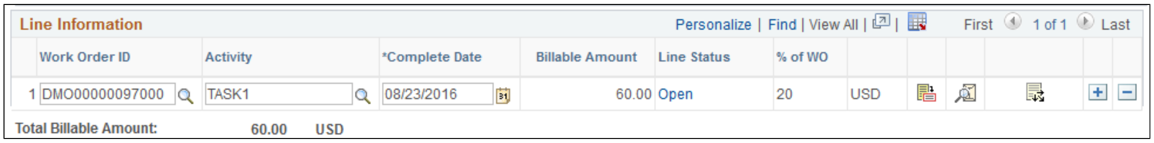
Field or Control	*Description*
Add Comments	Enter comments or concerns for the progress log.
Work Order ID	Select the work order for which progress is being reported.
Billable Amount and **Total PO Amount** (total purchase order amount)	The system displays values associated with the work order. The system displays this value in the work order currency, as well as the base unit currency.
📋	Click the **Details** button to access the Progress Log Details page.
🔍	Click the **History** button to access the Progress Logs by Work Order page.
Total Billable Amount	Displays the sum of the billable amounts.
Save	Click to save the progress log entry for later submission.
Submit for Approval	Click to submit the progress log for approval. The information is automatically submitted to the approver based on the approval workflow process definition, and you can return to the Maintain Progress Logs page.

Field or Control	***Description***
Preview Progress Log Approver(s)	Click to access the Progress Log Approvals pages. This link is available when you select to include progress logs in workflow approval for the business unit.
Manage Expenses	Click to access the Manage Expenses page where you can maintain details for this work order's expense report.

Milestone Settlement Method

These fields appear if you are using a service template with *Milestone* specified for the settlement option. The template is defined on the work order.

This example illustrates the fields and controls on the Milestone Settlement Method. You can find definitions for the fields and controls later on this page.



	Work Order ID	Activity	*Complete Date	Billable Amount	Line Status	% of WO	
1	DMO00000097000	TASK1	08/23/2016	60.00	Open	20	USD

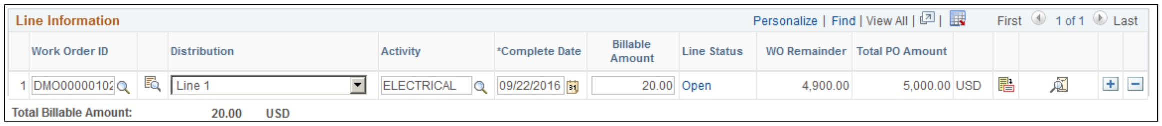
Total Billable Amount: 60.00 USD

Field or Control	***Description***
Activity and **Complete Date**	Select a milestone activity from the available options, which are determined by the work order defined as using the milestone settlement option. **Note:** Once a milestone activity is submitted, you cannot use it again for another progress log entry.
Complete Date	Enter the date the milestone activity was completed.
% of WO (percentage of work order complete)	The system displays this information based on the percentage assignments from the work order.
	Click the **Distribution** button to access the Distribution Allocation page. The Distribution Allocation page displays chartfield related information corresponding to the distribution lines based on the setup in the progress log template page. Use the Distribution Allocation page to validate sum of Distributed amount against the Total Billable amount of Progress Log line.

Fixed Amount Settlement Method

These fields appear if you are using a service template with *Fixed Amount* defined for the settlement option. The fixed amount settlement option is similar to the milestone settlement option in that both record progress against milestone activities. The difference is that fixed amount enables the suppliers to enter the amount they are paid for the activity rather than having the amount defined on the work order. The settlement option is defined on the work order.

This example illustrates the fields and controls on the Fixed Amount Settlement Method. You can find definitions for the fields and controls later on this page.



	Work Order ID		Distribution	Activity	*Complete Date	Billable Amount	Line Status	WO Remainder	Total PO Amount
1	DMO0000010		Line 1	ELECTRICAL	09/22/2016	20.00	Open	4,900.00	5,000.00 USD

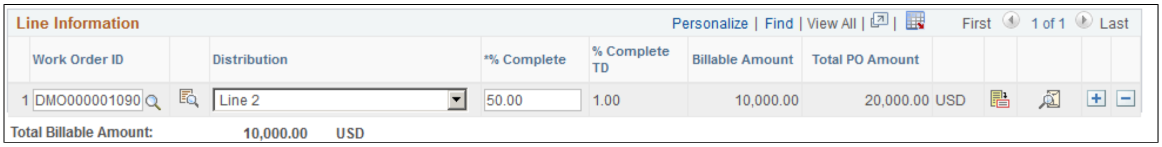
Total Billable Amount: 20.00 USD

Field or Control	***Description***
Distribution	Select a Distribution line. You can select the Distribution line numbers and then allocate an expense amount for that distribution line.
🔍	Click the **Work Order Distribution** button to access the Distribution Information page. You can view the chartfield related distribution information as per the setup in the template page, and then select a distribution line.
Activity	Select a milestone activity that is linked to the project defined on the work order. **Note:** Progress for fixed amount work orders is reported against milestone activities, however unlike the **Milestone Settlement Option,** progress can be recorded multiple times against the same milestone activity with the **Fixed Amount Settlement Option** field.
Complete Date	Enter the date that the progress was completed.
Billable Amount	Enter the billable amount for the deliverable.

Percentage Settlement Method

These fields appear if you are using a service template with *Percentage* specified for the settlement option as defined on the work order.

This example illustrates the fields and controls on the Percentage Settlement Method. You can find definitions for the fields and controls later on this page.



	Work Order ID		Distribution	*% Complete	% Complete TD	Billable Amount	Total PO Amount
1	DMO000001090		Line 2	50.00	1.00	10,000.00	20,000.00 USD

Total Billable Amount: 10,000.00 USD

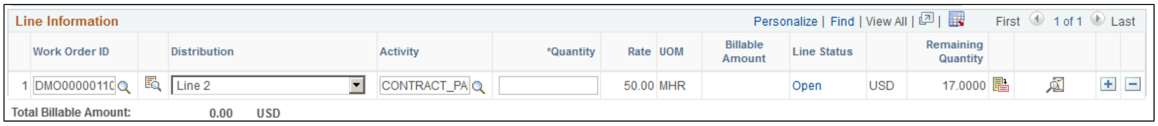
Field or Control	***Description***
Distribution	Select a Distribution line. You can select the Distribution line numbers and then allocate a percentage for that distribution line.
🔍	Click the **Work Order Distribution** button to access the Distribution Information page. You can view the chartfield related distribution information as per the setup in the template page, and then select a distribution line.
% Complete (percentage complete)	Enter the percentage value completed.
% Complete TD (percentage complete to date)	Displays this information based on data submitted to date. The system updates the work order with this information when you save the progress log.

Note: To submit this transaction, the submitted total, when added to previously submitted progress logs, cannot exceed the total purchase order amount on the work order, plus the tolerance percentage defined on the work order.

Rate Based Settlement Method

These fields appear if you are using a service template with *Rate Based* defined for the settlement option. The settlement option is defined on the work order.

This example illustrates the fields and controls on the Rate Based Settlement Method. You can find definitions for the fields and controls later on this page.



	Work Order ID		Distribution	Activity	*Quantity	Rate	UOM	Billable Amount	Line Status		Remaining Quantity
1	DMO00000110		Line 2	CONTRACT_PA		50.00	MHR		Open	USD	17.0000

Total Billable Amount: 0.00 USD

Field or Control	***Description***
Distribution	Select a Distribution line. You can select the Distribution line numbers and then allocate a quantity for that distribution line.
🔍	Click the **Work Order Distribution** button to access the Distribution Information page. You can view the chartfield related distribution information as per the setup in the template page, and then select a distribution line.

Field or Control	***Description***
Activity	Select the activity that you performed. After you select the activity, the rate, unit of measure and billable amount for the activity appear on the page. These fields come from the work order activity definition.
Quantity	Enter the quantity completed.

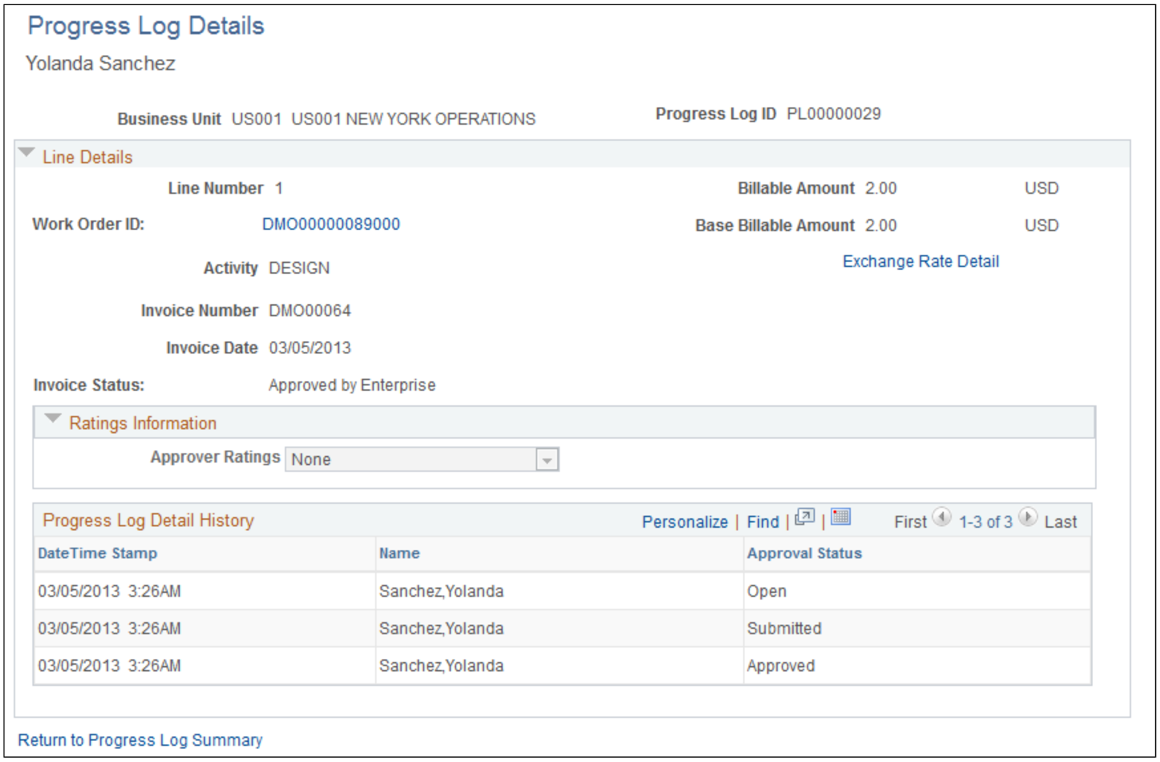
Progress Log Details Page

Use the Progress Log Details page (SPA_PLOG_DTL) to enter or view progress log details.

Navigation:

Click the **Details** button on the Progress Log Summary page.

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



Progress Log Details

Yolanda Sanchez

Business Unit US001 US001 NEW YORK OPERATIONS

Progress Log ID PL00000029

Line Details

Line Number 1

Billable Amount 2.00 USD

Work Order ID: DMO00000089000

Base Billable Amount 2.00 USD

Activity DESIGN

Invoice Number DMO00064

Invoice Date 03/05/2013

Invoice Status: Approved by Enterprise

Ratings Information

Approver Ratings None

Progress Log Detail History

DateTime Stamp	Name	Approval Status
03/05/2013 3:26AM	Sanchez,Yolanda	Open
03/05/2013 3:26AM	Sanchez,Yolanda	Submitted
03/05/2013 3:26AM	Sanchez,Yolanda	Approved

This page displays the progress log ID, line number, work order ID and activity. It also provides the billable and base billable amounts. You can also approve, deny, or place a hold on a work order line progress log.

Field or Control	***Description***
Exchange Rate Detail	Click to access the Currency Information page that displays currency exchange details
Approve	Click to approve the progress log. The system provides a confirmation page for you to continue with or cancel the approval.
Deny	Click to deny the approval of the progress log. The system provides a confirmation page for you to continue with or cancel the approval denial.
Hold	Click to hold the progress log from further processing. The system provides a confirmation page for you to continue with or cancel placing the progress log on hold.
Invoice Status, Invoice Date, and**Invoice Number**	Display after the progress log is included on an invoice.

Progress Log Detail History

This grid box displays the progress log history that includes the service provider and approval status.

Submitting, Approving, and Adjusting Progress Logs

This topic provides an overview of progress logs and discusses how to submit, approve, and adjust progress logs.

Pages Used to Submit, Approve, and Adjust Progress Logs

Page Name	***Definition Name***	***Usage***
Progress Log Summary Page	SPA_PLOG_LINE	Submit and approve progress logs.
Progress Log Approvals Page	SPA_PL_APPR_STATUS	Preview progress log approval workflow.
Save Confirmation Page	SPA_PL_SAVE_CONF	Confirm the approval of a timesheet. Progress Log Approvals Page
Enter Requested Information Page	SPA_PL_INFOADD	Respond to approvals placed on hold.

Understanding Progress Logs

Progress logs that have been approved or adjusted can be exported to PeopleSoft Project Costing for cost collection. If progress logs that were previously exported to Project Costing are adjusted, the original values are reversed and the newly adjusted values are staged for processing.

Related Links

Integrating with PeopleSoft Project Costing

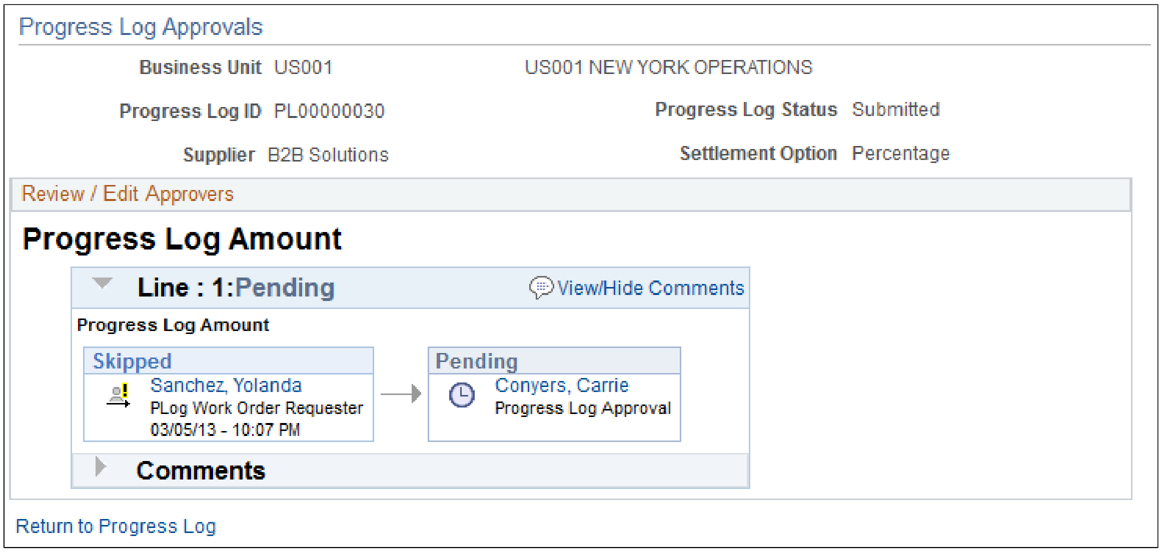
Progress Log Approvals Page

Use the Progress Log Approvals page (SPA_PL_APPR_STATUS) to preview progress log approval workflow.

Navigation:

Click the **Preview Progress Log Approver(s)** link on the Progress Log Summary page

This example illustrates the fields and controls on the Progress Log Approvals page. You can find definitions for the fields and controls later on this page.



Progress Log Approvals

Business Unit US001 US001 NEW YORK OPERATIONS

Progress Log ID PL00000030

Progress Log Status Submitted

Supplier B2B Solutions

Settlement Option Percentage

The Progress Log Approvals page provides a graphical map for the workflow by displaying the approvers and reviewers and the status of their reviews. You can insert additional approvers or reviewers or create a new approval path for a progress log. If you insert an ad hoc approver or reviewer, you can also remove the approver or reviewer. Approver and reviewers that initially appear in the workflow are defined using the approval process definition.

The title for the workflow represents the type of progress log that is being processed. This is the progress log thread description and consists of information that makes the log unique. The graphic includes the progress log ID and overall status of the approval. The graphics provide information about individual approvers and the status of their approvals and vary in color depending on the approval status.

Related Links

Setting Up Progress Log Workflow

PeopleSoft Approval Framework Processing

Submitting Progress Logs for Approval

To submit progress logs for approval:

1. Access the Progress Logs Summary page (Services Procurement, Maintain Services Progress Log, and click the **Progress Log ID** link on the Maintain Progress Logs page).

   The system displays the Progress Log Summary page.

2. Click the **Submit for Approval** link.

3. Click **OK** on the Submit Confirmation page.

   You can click **Cancel** to return to the Progress Log Summary page without submitting the log for approval.

   The system sends the progress log to the first approver in the approval workflow and updates the progress log status to Submitted.

Approve Progress Log Summary Page

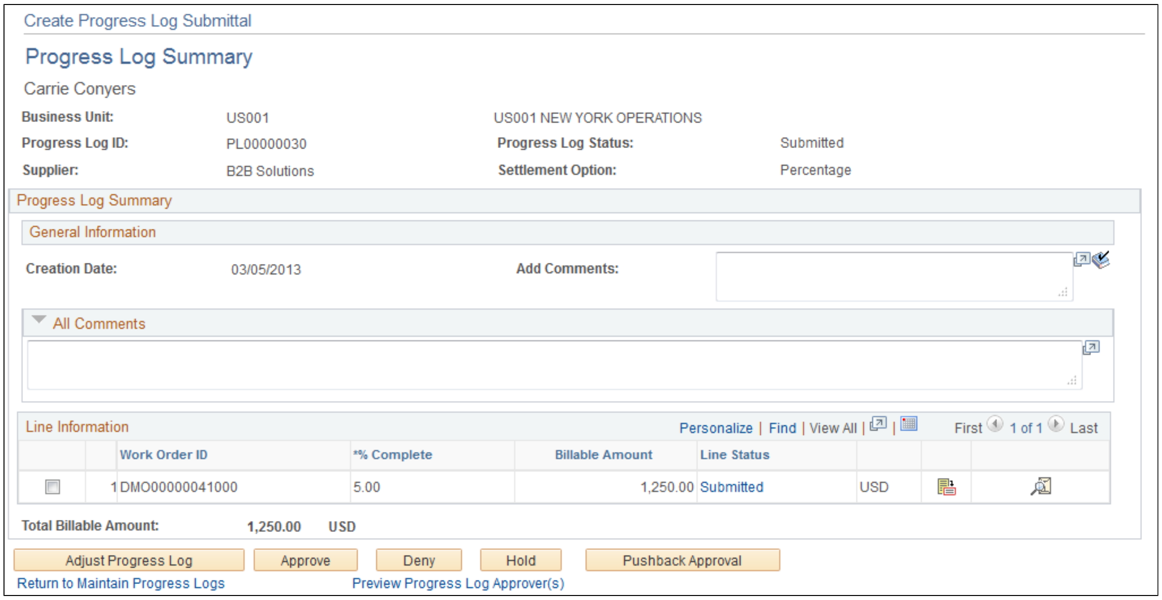
Use the Progress Log Summary page (SPA_PLOG_LINE) to submit and approve progress logs.

Navigation:

Services Procurement > **Maintain Services Progress Log**

Click the progress log that you want to approve.

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



Carrie Conyers

Business Unit: US001 US001 NEW YORK OPERATIONS

Progress Log ID: PL00000030

Progress Log Status: Submitted

Supplier: B2B Solutions

Settlement Option: Percentage

Creation Date: 03/05/2013

Add Comments:

		Work Order ID	*% Complete	Billable Amount	Line Status			
☐	1	DMO00000041000	5.00	1,250.00	Submitted	USD		

Total Billable Amount: 1,250.00 USD

Progress log approvers use this page to review, adjust and approve, deny, or hold progress logs. You can select one or more lines to approve. A status appears for each line.

When approving, denying, or holding progress logs, you can also add comments and ratings.

Note: At least one line must be selected to perform an approval task.

To approve progress logs:

1. Click the **Approve** button.

   The Approve Progress Log Confirmation page appears.

2. Click **OK.**

   The system sends the progress log to the next approver in the approval workflow and updates the progress log status to Pending. If there are no more approvers in the workflow, the system updates the progress log status to Approved. When all lines are approved, the progress log status changes to *Approved.*

   Click **Cancel** to return to the Progress Log Summary page without approving the progress log.

To deny the approval of a progress log, click the **Deny** button. The system will require a reason code and comment for the denial if reason codes are required. The system changes the progress log status to *Denied by Approver*.

To place the approval on hold, click the **Hold** button. The hold action gives the approver time to research an issue and prevents the approval process from going to the next approval step until the previous approver takes action on the progress log. The approval hold is removed when either the approver chooses to approve the progress log or when the log is updated in such a way that the approval process is restarted. When the approval is placed on hold, the system provides a worklist entry for the previous progress log approver

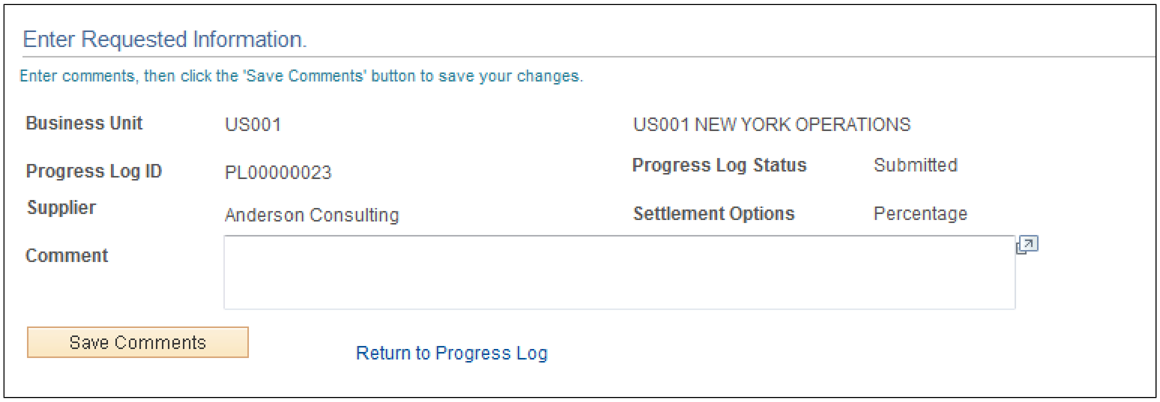
Enter Requested Information Page

Use the Enter Requested Information page (SPA_PL_INFOADD) to respond to approvals placed on hold.

Navigation:

Select the *Approval Request Information* workflow entry for the progress log placed on hold.

This example illustrates the fields and controls on the Enter Requested Information page. You can find definitions for the fields and controls later on this page.



Enter comments, then click the 'Save Comments' button to save your changes.

Business Unit US001 US001 NEW YORK OPERATIONS

Progress Log ID PL00000023 **Progress Log Status** Submitted

Supplier Anderson Consulting **Settlement Options** Percentage

Comment

When a progress log approver places an approval on hold, you can provide additional information to the approver using this page. To provide the information, use the **Comment** field. The field is required. Click the **Save Comments** button to send the progress log approval back to the approver who placed a hold on the approval. The approver can then approve the progress log.

Progress Log Summary Page

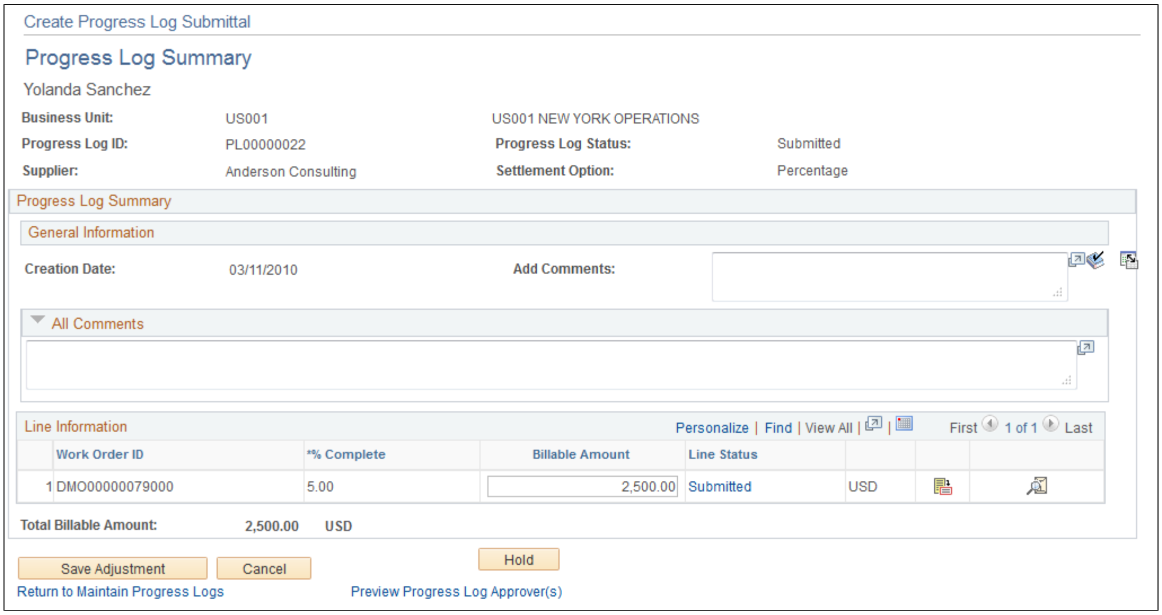
Use the Progress Log Summary page (SPA_PLOG_LINE) to submit and approve progress logs.

Navigation:

Services Procurement > **Maintain Services Progress Log**

Click the progress log that you want to approve.

This example illustrates the fields and controls on the Progress Log Summary page for adjustments. You can find definitions for the fields and controls later on this page.



Yolanda Sanchez

Business Unit: US001 US001 NEW YORK OPERATIONS

Progress Log ID: PL00000022 **Progress Log Status:** Submitted

Supplier: Anderson Consulting **Settlement Option:** Percentage

Creation Date: 03/11/2010 **Add Comments:**

	Work Order ID	*% Complete	Billable Amount	Line Status			
1	DMO00000079000	5.00	2,500.00	Submitted	USD		

Total Billable Amount: 2,500.00 USD

The progress log approver can adjust a submitted or approved progress log by selecting the **Adjust Progress Log** button on the Progress Log Summary page. The approver can adjust the amount and modify comments while performing adjustments. If a submitted progress log is adjusted, the status remains *Submitted.* If an approved progress log is adjusted, the status changes to *Adjusted.* If an invoiced progress log is adjusted, the invoice for that progress log is cancelled. If the progress log was adjusted, a link is available to view adjustments.

Triggering Worklist and Email Notifications

The following status changes can trigger a worklist entry or email notification:

- The service provider contact receives notification if status changes to *Approve, Denied,* or *On Hold.*
- The service provider contact receives notification if status changes to *Denied* or *On Hold.*
- The approver receives notification when a progress log is submitted.

Whether worklist or email notifications are sent depends on the approval workflow transaction configuration. The email notification contains values from the Progress Log Summary page and a URL for the recipient to access the progress log.

Approving Services Progress Logs Using the PeopleSoft Fluid User Interface

This topic provides an overview of the self-service approval pages for services progress logs, and how to access these pages using the PeopleSoft Fluid User Interface. PeopleSoft builds these mobile approval pages on the Enterprise Component Fluid Approvals framework.

Pages Used to Approve Services Progress Logs Using PeopleSoft Fluid User Interface

Page Name	***Definition Name***	***Usage***
Pending Approvals - Services Progress Log List Page	EOAWMA_MAIN_FL	View a list of pending approvals for services progress logs. For more information, see the overview of approvals on the PeopleSoft Fluid User Interface: “Pending Approvals Page” (Application Fundamentals).
Services Progress Log Page (Header Approval)	EOAWMA_TXNHDTL_FL	Review header details for a single services progress log, and approve, deny, pushback or hold the progress log, depending on role criteria. For more information, see the “Approval Header Detail Page” (Application Fundamentals).

Page Name	***Definition Name***	***Usage***
Services Progress Log Page (Line Detail)	EOAWMA_TXNLDTL_FL	Review line summary and details.

Understanding Approvals for Services Progress logs Using the PeopleSoft Fluid User Interface

PeopleSoft provides mobile approvals using the Enterprise Component Fluid Approvals framework. Approvers can take Application Workflow Engine (AWE) actions on select PeopleSoft transactions pending their approval, using a smart phone or tablet. The tablet version is also available for desktop use.

Progress log workflow approval enables you to approve progress on deliverable work orders. Once the services progress log has been submitted for approval, the Application Workflow Engine runs the progress log through the defined approval process. For information about defining an approval process for services progress logs, see .Setting Up Progress Log Workflow

Using the PeopleSoft Fluid User Interface, approvers can view a list of pending approvals for various types of transactions, and add comments on the centralized Pending Approvals page. An approver or multiple approvers review the transaction details, including line details. Each approver in the workflow selects an appropriate action, such as Approve, Deny, Pushback, or Hold within the approval pages.

Note: PeopleSoft Services Procurement delivers a permission list EPSP5030 that enable Approvers to Approve, Deny, Pushback, or Hold Services Progress Logs.

Services progress log approvals also support push notifications, a framework delivered in PeopleTools. The flag icon in the Oracle banner shows a counter for new push notifications. Note that the counter disappears once you view the push notification list. The notification link takes you directly to the header approval page for items awaiting your approval.

Delegating Services Progress Log Approvals

You can use the Delegation Framework to delegate services progress log approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

“Understanding Delegation” (Enterprise Components)

“Configuring Delegation Transactions” (Enterprise Components)

“Working with Self-Service Delegation” (Enterprise Components)

Pending Approvals - Services Progress Log List Page

Use the Pending Approvals - Services Progress Log list page (EOAWMA_MAIN_FL) to view a list of pending approvals for services progress logs.

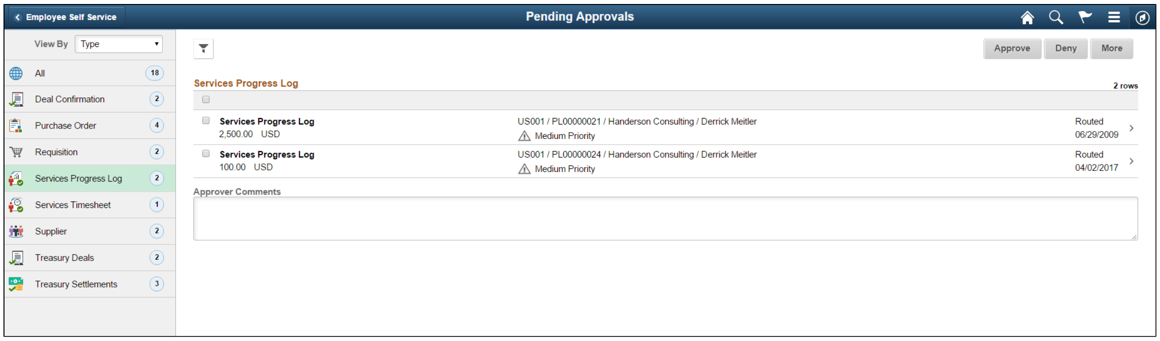
Navigation:

Employee Self Service > **Approvals**

On the Pending Approvals page, select **Services Progress Log** in the View By - Type pane to view the service progress logs in the right pane.

Smartphone: On the Pending Approvals - View By Type page, select **Services Progress Log** to open a new page that lists the services progress logs.

This example illustrates the fields and controls on the Pending Approvals - Services Progress Log list page. You can find definitions for the fields and controls later on this page.



Services Progress Log

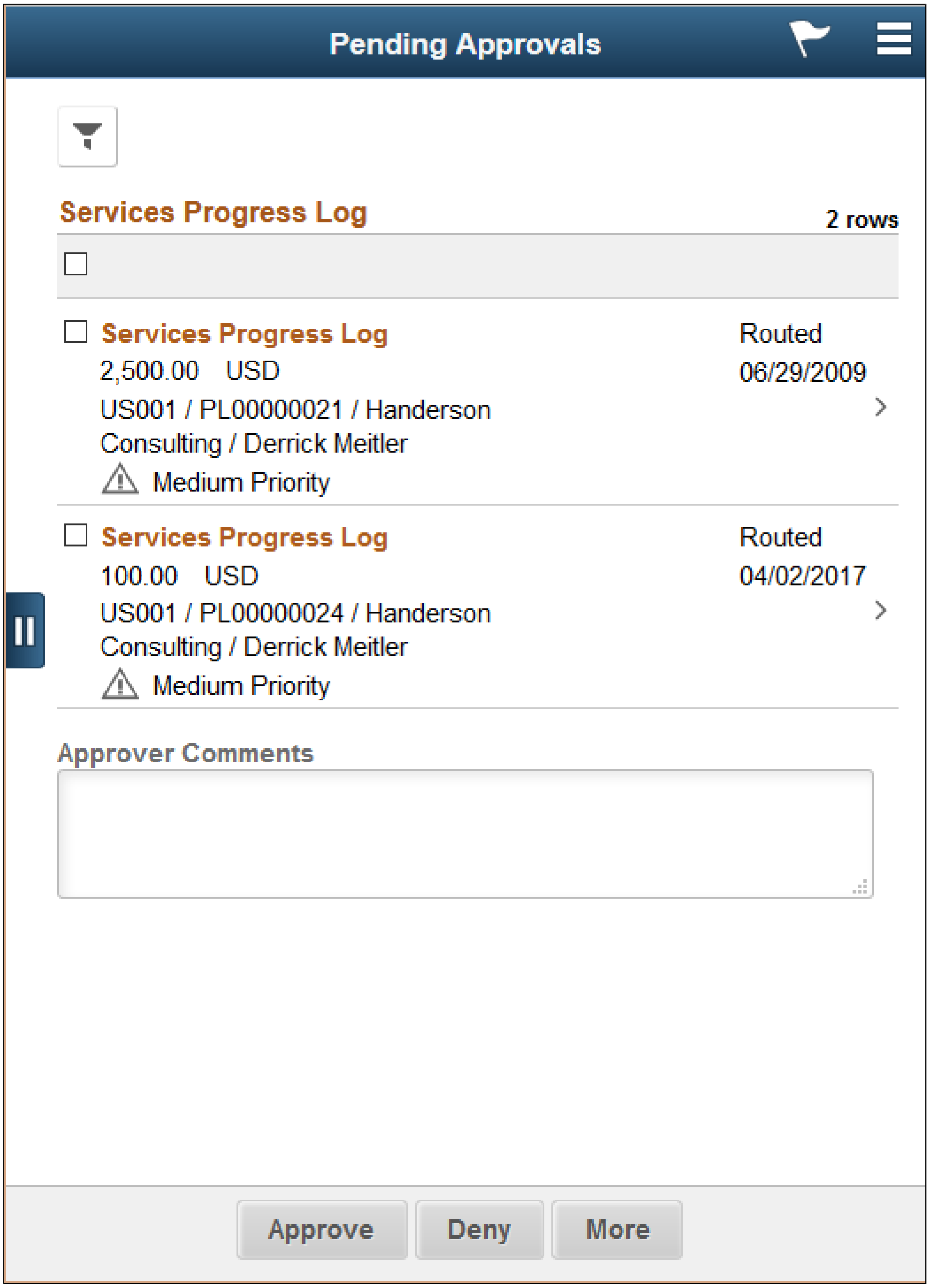
2 rows

☐

☐ Services Progress Log
2,500.00 USD
US001 / PL00000021 / Handerson Consulting / Derrick Meitler
Medium Priority
Routed
06/29/2009

☐ Services Progress Log
100.00 USD
US001 / PL00000024 / Handerson Consulting / Derrick Meitler
Medium Priority
Routed
04/02/2017

This example illustrates the fields and controls on the Pending Approvals - Services Progress Log list page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



Services Progress Log 2 rows

☐

☐ Services Progress Log Routed
2,500.00 USD 06/29/2009
US001 / PL00000021 / Handerson Consulting / Derrick Meitler
⚠ Medium Priority

☐ Services Progress Log Routed
100.00 USD 04/02/2017
US001 / PL00000024 / Handerson Consulting / Derrick Meitler
⚠ Medium Priority

Approver Comments

From the list page, you can do the following:

- Review header information for the services progress logs currently routed for approval. To access header details for a particular progress log, select the header row.
- Use the filter to narrow results on the page. For more information about using the filter, see the “Filters Page” (Application Fundamentals).

Field or Control	***Description***
Approver Comments	Enter comments in the text entry field.
Approve, Deny, More	Select an action button. When you select an action button, you have the option to select **Submit** to continue the action, or Cancel to back out of the action. Upon submitting the action, the system generates a message that the action is successful. Select the **More** button to display other action buttons **Pushback** (Return to Submitter) and **Hold**.
‖	Select this button to expand or collapse the View By Type page.

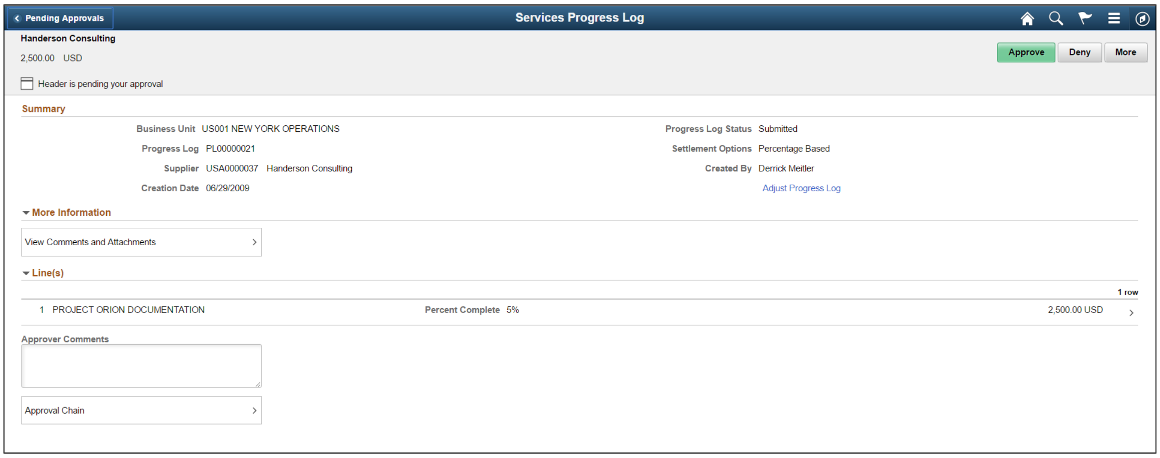
Services Progress Log Page (Header Approval)

Use the Services Progress Log header approval page (EOAWMA_TXNHDTL_FL) to review header details for a single progress log, and approve, deny, pushback or hold the progress log, depending on role criteria.

Navigation:

Select an progress log in the list on the Pending Approvals - Services Progress Log list page.

This example illustrates the fields and controls on the Services Progress Log header approval page. You can find definitions for the fields and controls later on this page.



Handerson Consulting

2,500.00 USD

Header is pending your approval

Business Unit US001 NEW YORK OPERATIONS

Progress Log PL00000021

Supplier USA0000037 Handerson Consulting

Creation Date 06/29/2009

Progress Log Status Submitted

Settlement Options Percentage Based

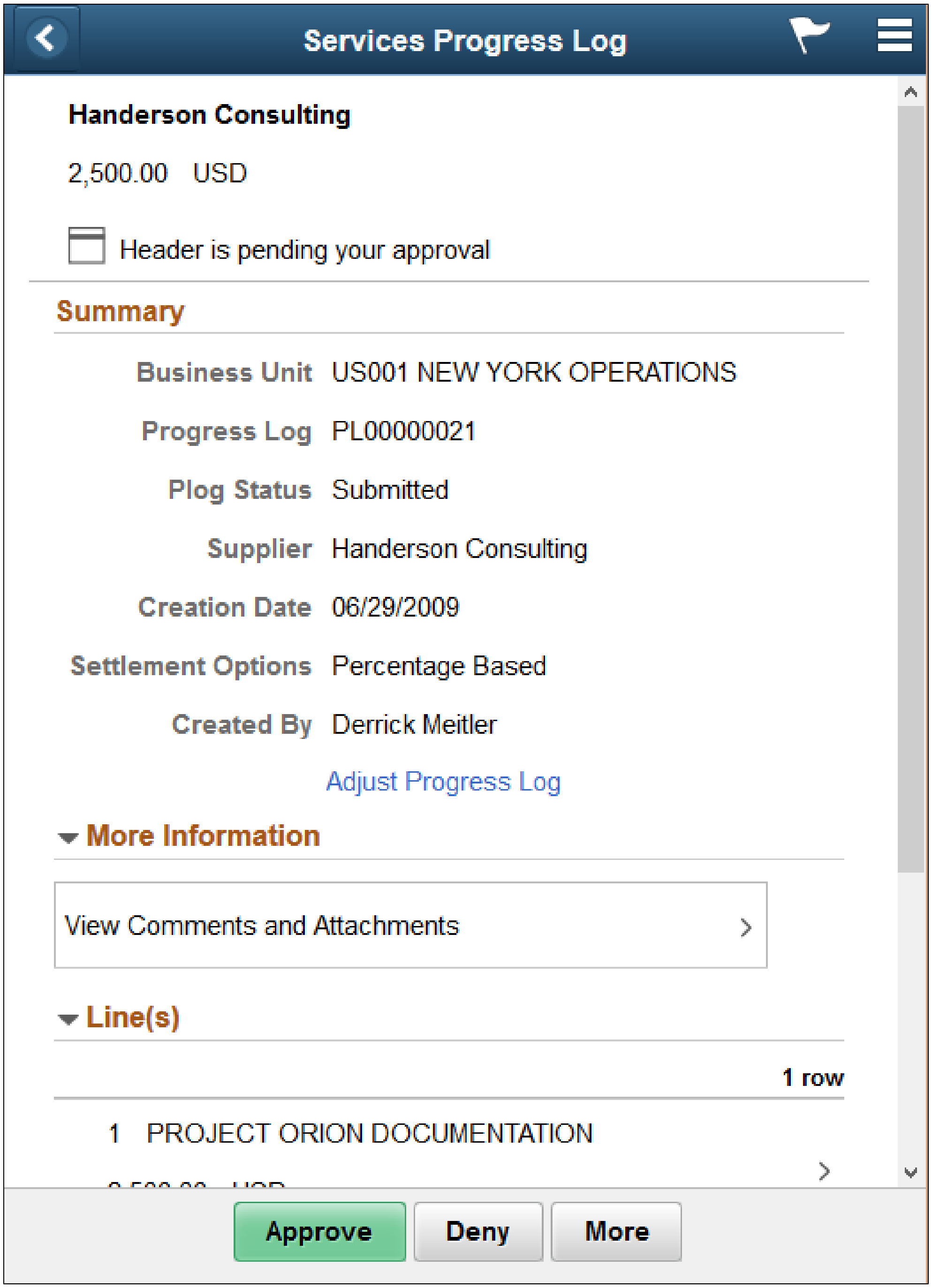
Created By Derrick Meitler

Adjust Progress Log

1 row

1 PROJECT ORION DOCUMENTATION Percent Complete 5% 2,500.00 USD

This example illustrates the fields and controls on the Services Progress Log header approval page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



Handerson Consulting

2,500.00 USD

☐ Header is pending your approval

Summary

Business Unit	US001 NEW YORK OPERATIONS
Progress Log	PL00000021
Plog Status	Submitted
Supplier	Handerson Consulting
Creation Date	06/29/2009
Settlement Options	Percentage Based
Created By	Derrick Meitler

1 PROJECT ORION DOCUMENTATION

Field or Control	***Description***
Adjust Progress Log	Select to adjust the expense amounts or modify comments. The PeopleSoft Classic user interface displays where you can make the adjustments.

Field or Control	***Description***
More Information	Select to view comments and attachments associated with the progress log. If there are no comments or attachments associated with the progress log, this link will be hidden.
Line(s)	Select to view progress log line details.
Approver Comments	Enter comments in the text entry field.
Approval Chain	Select to review approval chain information. You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.
Approve, Deny, More	Select an action button. When you select an action button, you have the option to select **Submit** to continue the action, or Cancel to back out of the action. Upon submitting the action, the system generates a message that the action is successful. Select the **More** button to display other action buttons **Pushback** (Return to Submitter) and **Hold**. **Note:** If you deny a services progress log, you will need to enter a reason code and comment for the denial.

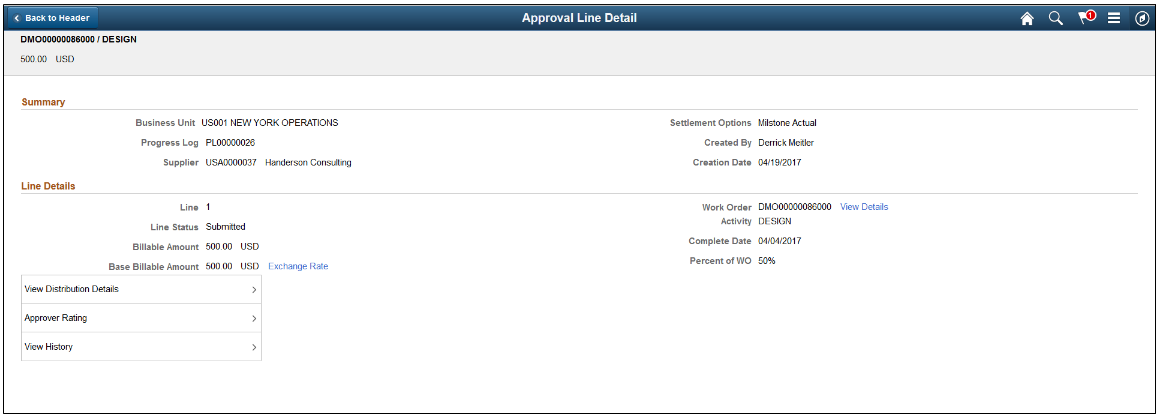
Services Progress Log Page (Line Detail)

Use the Services Progress Log line detail page (EOAWMA_TXNLDTL_FL) to review line summary and details.

Navigation:

Select an progress log line item in the Lines section on the Services Progress Log header approval page.

This example illustrates the fields and controls on the Services Progress Log line detail page. You can find definitions for the fields and controls later on this page.



DMO00000086000 / DESIGN

500.00 USD

Summary

Business Unit US001 NEW YORK OPERATIONS

Progress Log PL00000026

Supplier USA0000037 Handerson Consulting

Settlement Options Milstone Actual

Created By Derrick Meitler

Creation Date 04/19/2017

Line Details

Line 1

Line Status Submitted

Billable Amount 500.00 USD

Base Billable Amount 500.00 USD Exchange Rate

Work Order DMO00000086000 View Details

Activity DESIGN

Complete Date 04/04/2017

Percent of WO 50%

Field or Control	***Description***
Exchange Rate	Select to view currency and exchange rate information.
View Details	Select to view the work order details in the PeopleSoft Classic user interface.
View Distribution Details	Select to view the distribution details of the line item. This link is available only if the work order associated to the progress log is based on Actual Allocation and the Settlement option is Milestone. Otherwise, this link is hidden.
Approver Rating	Select to view approver's rating in the Classic user interface — Progress Log Summary page. This link will be hidden if Approval rating setup is not set up in the Services Procurement Bus Unit Page.
View History	Select to view status history for a progress log line.

Chapter 22

Managing Settlements

Understanding Settlements in PeopleSoft Services Procurement

Managing settlements with PeopleSoft Services Procurement enables individuals who have appropriate permissions to create consolidated proforma invoices. The proforma invoice process can be optionally configured to include or exclude suppliers in the invoice approval process, based on the supplier's setup. Specific time sheets, expenses, or progress logs lines can be added or removed prior to submitting the invoice for approval. After approval, the proforma invoice is viewed online and printed, included in a file for export, or both.

You can grant permissions for each of these functions:

- Automatic invoice generation.
- Manual invoice creation.
- Invoice management.
- Invoice approval.
- Supplier invoice approval.
- Invoice printing and processing.

With PeopleSoft Services Procurement Settlement, you can:

- Manage the invoicing and settlement process.
- Invoice at varying frequencies.
- Select approved time sheets, expenses, or progress logs for an invoice.
- Manage invoice submittal, approval, and processing.

Invoice Adjustments

The Settlement feature in Services Procurement provides a self-invoicing capability that can create invoices based on approved timesheets, progress logs, and expenses. You can create new invoices manually, review existing invoices, edit invoices, view statuses of invoices, cancel invoices, track invoice adjustments, and submit selected invoices for approval.

The Manage Invoice page is the central location and starting point for maintaining invoices. Use the search and sort features to streamline the search results. After you enter search criteria, access the roster area, where you can view invoice details, edit the invoice, submit invoices, or cancel invoices.

To track adjustments made to invoice lines, an Adjusted status is available for the invoice. When an adjustment is made to an invoice line amount, the system provides an entry in the Invoice Adjustment table. This lets you know that an adjustment has been made to an invoice line. If multiple adjustments are made to an invoice line, the Invoice Line Adjustment Detail page displays all the adjustments that were made to the invoice line.

When a supplier adjusts the amount on an invoice line, the invoice line **Line Status** field is set to Adjusted by Supplier, and the invoice header Invoice Status field is set to *Adjusted by Supplier.*

When an enterprise approver adjusts the amount on an invoice line, the invoice line **Line Status** field is set to *Adjusted by Enterprise* and the invoice header **Invoice Status** field is set to *Adjusted.*

When an adjustment has been made to an invoice by a supplier or the enterprise, a check box displays on the Manage Invoice - Line Summary page that indicates whether an invoice line has adjusted by a supplier, the enterprise, or by both. The check box is only visible if adjustments have been made to any of the invoice lines for an invoice.

When an invoice line is adjusted by the Supplier, the user (enterprise invoice approver or requester) can see the invoice line status of 'Adjusted by Supplier' in the invoice line information grid after navigating to the Line Summary page. If an invoice is adjusted by the enterprise, the invoice line status displays 'Adjusted by Enterprise'. The user can drill down into the invoice line level to view the adjustments.

The Invoice History grid displays the status history for an invoice line. If an invoice line was adjusted, the history grid will have an entry indicating who adjusted the invoice line . This appears on all the invoice line detail pages, where the status history is being displayed.

On the Manage Invoice Approval page, an indicator 'Adjusted' is added to the Invoice Roster grid . This is the page that the enterprise invoice approver navigates to, to approve an invoice. The grid indicates if an invoice line has been adjusted by the supplier for an invoice. The 'Adjusted' indicator will also be displayed on the Manage Invoice page .

Whenever an adjustment is made to the invoice line, an email notification is sent. If the supplier approver makes the adjustment, the enterprise invoice approver and the requester are notified. If the enterprise approver makes the adjustment, the supplier approver and the requester are notified.

Related Links

Common Elements Used In Services Procurement

Prerequisites

You must define these attributes before invoicing a time sheet, expense, or progress log:

- Define invoice authorizations.
- Define whether suppliers are included in the invoice approval process.
- Define addresses.
- Define payment terms.
- Define the accounts payable interface.

Creating Invoices Manually

This topic discusses how to create invoices manually.

Pages Used to Create Invoices Manually

Page Name	***Definition Name***	***Usage***
Manage Invoices Page	SPF_INV_MANAGE	Add invoices, search existing invoices, submit invoices, or cancel invoices. The **From Date** and **Date To** fields by default are the last 30 days. You may need to change the date fields to see previous invoices.
Create Invoice Page	SPF_INV_HDR_ADD	Create invoices.
Add Lines to Invoice Page	SPF_INV_TE_DTLS	Add and view lines in invoices, including all noninvoiced time sheets, expenses, and progress logs for the supplier or service provider.
Manage Invoices - Line Summary Page	SPF_INV_LN_DTLS	Modify the selected invoice.
Invoice Process Detail Page	SPF_INV_PROCES_DTL	View invoice processing details. Manage Invoices - Line Summary Page
Invoice To Address Page	SPF_ADDRESS	View the invoice to address. Manage Invoices - Line Summary Page
Remit To Address Page	SPF_ADDRESS	View the remit to address. Manage Invoices - Line Summary Page
Currency Information Page	EXCH_RT_DTL_INQ	View multicurrency information. Manage Invoices - Line Summary Page
Manage Invoices - Line Detail Page	SPF_INV_TIME_DTL	View time sheet and expense invoice line details, make adjustments, or both.
Manage Invoices - Line Detail Page	SPF_INV_PLOG_DTL	View progress log and expense invoice line details and make adjustments. Manage Invoices - Line Summary Page

Page Name	***Definition Name***	***Usage***
Work Order Details Page	SPF_WORDER_DETAIL	View details of the work order related to the invoice. Manage Invoices - Line Detail Page
Purchase Order Inquiry - Purchase Order Page	PO_LINE_INQ	View details of the purchase order related to the invoice. Manage Invoices - Line Detail Page
Approve Timesheet Page	SPA_TIME_APPROVE	View time reports. Manage Invoices - Line Detail Page
Services Expense Report - Services Expense Report Details Page	SPA_SHEET_LINES2	View expense reports. Manage Invoices - Line Detail Page
Progress Log Summary Page	SPA_PLOG_LINES	View progress reports. Manage Invoices - Line Detail Page

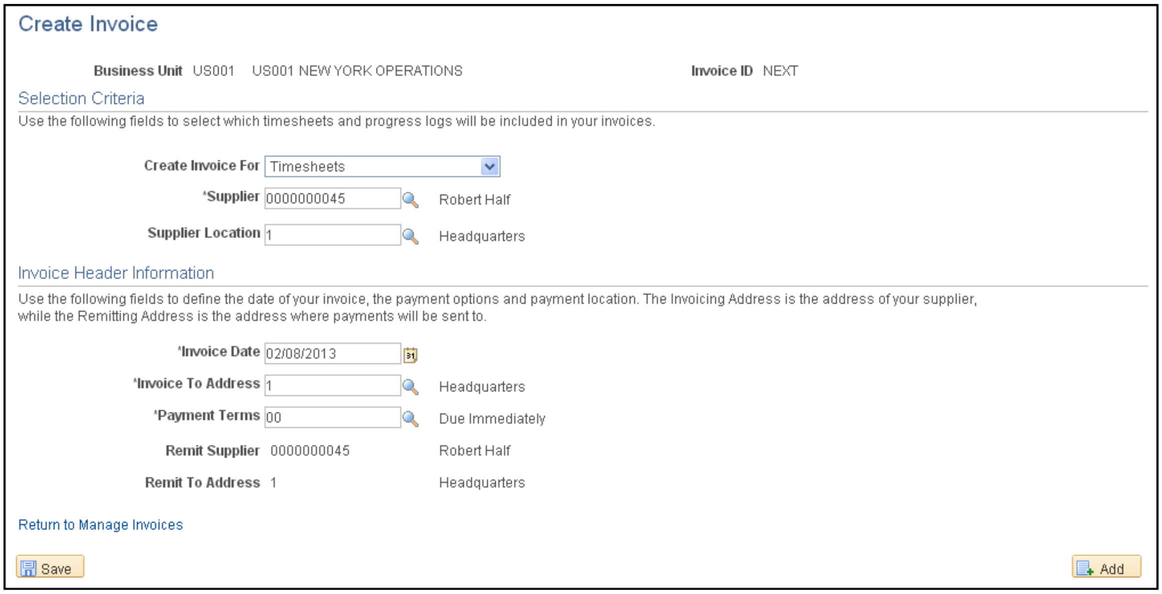
Create Invoice Page

Use the Create Invoice page (SPF_INV_HDR_ADD) to create invoices.

Navigation:

Enter the business unit, invoice ID, or both, and click the **Add** button on the Manage Invoices page.

This example illustrates the fields and controls on the Create Invoice Page. You can find definitions for the fields and controls later on this page.



Create Invoice

Business Unit US001 US001 NEW YORK OPERATIONS

Invoice ID NEXT

Selection Criteria

Use the following fields to select which timesheets and progress logs will be included in your invoices.

Create Invoice For Timesheets

*Supplier 0000000045 Robert Half

Supplier Location 1 Headquarters

Invoice Header Information

Use the following fields to define the date of your invoice, the payment options and payment location. The Invoicing Address is the address of your supplier, while the Remitting Address is the address where payments will be sent to.

*Invoice Date 02/08/2013

*Invoice To Address 1 Headquarters

*Payment Terms 00 Due Immediately

Remit Supplier 0000000045 Robert Half

Remit To Address 1 Headquarters

Field or Control	***Description***
Create Invoice For	Select a basis on which you want to create an invoice. To create invoices for resource-based work orders, select *Timesheets*. To create invoices for deliverables-based work orders, select *Progress Logs*. The selected invoice basis determines the fields that appear on the invoicing pages. **Note:** Invoices created for timesheets will include timesheets for resource-based and multi-resource work orders.
VMS Managed (supplier-managed service managed)	This option is available when the MSP (managed services provider) installation is not selected on the Services Procurement Installation Option page and the supplier selected on the Create Invoice page is identified as a VMS (supplier managed supplier) supplier for a business unit or service type. When you select this option, the invoice includes only time sheets, expenses, or progress logs for work orders under VMS management for which the selected supplier is the VMS supplier. When this option is not selected, the invoice includes only time sheets or progress logs for which the selected supplier is the end supplier actually providing the service. **Note:** The supplier type of the VMS supplier is not a factor for VMS invoices; only the supplier type of the end supplier is considered.

Field or Control	***Description***
Internal Supplier	This option is available only when the MSP installation is selected on the Services Procurement Installation Options page. When you select this option, the invoice includes only time sheets, expenses, or progress logs for work orders for which the selected supplier is identified as an internal supplier. When this option is not selected, the invoice includes only time sheets or progress logs for which the selected supplier is not identified as an internal supplier.
Invoice To Address	Enter the address of the supplier.
Payment Terms	Select a payment term from the available values defined on the Single Payment Terms page.
Remit To Supplier	View the supplier who receives payment.
Remit To Address	View the address where the payments are sent.

Note: When you select or change a supplier, the **Supplier Location, Invoice To Address, Remit to Supplier,** and **Remit to Address** field values are supplied by default from the supplier base tables.

Note: The **Payment Terms** field value is supplied by default from the Services Supplier Information page. If no value is defined at that level, the system supplies default values defined on the supplier base tables.

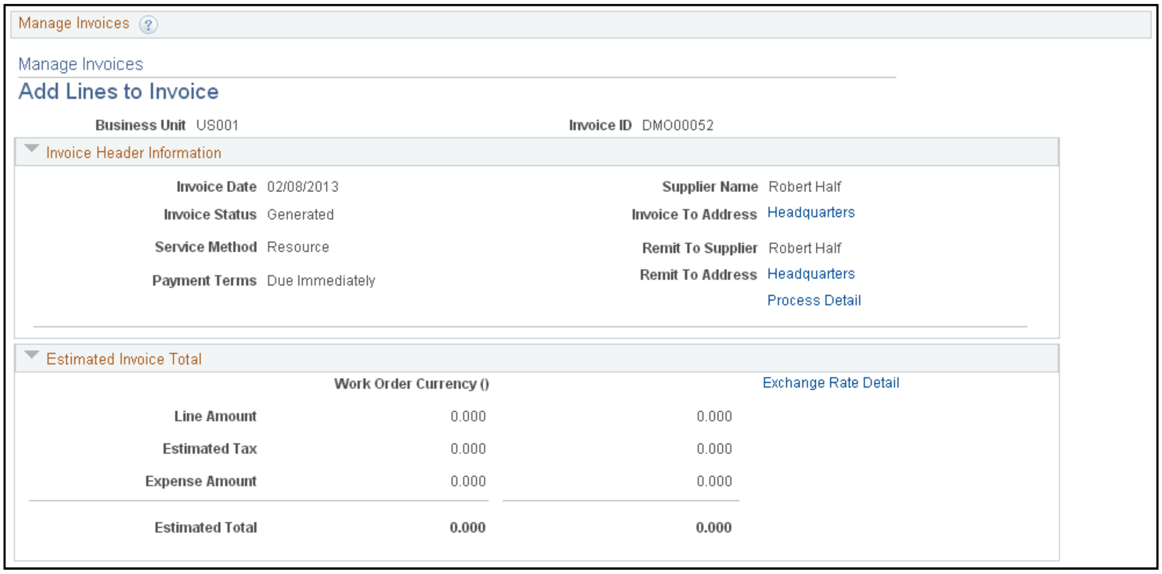
Add Lines to Invoice Page

Use the Manage Invoices - Add Lines To Invoice page (SPF_INV_TE_DTLS) to add and view lines in invoices, including all noninvoiced time sheets, expenses, and progress logs for the supplier or service provider.

Navigation:

Save an invoice on the Create Invoice page.

This example illustrates the fields and controls on the Add Lines to Invoice page (1 of 2). You can find definitions for the fields and controls later on this page.

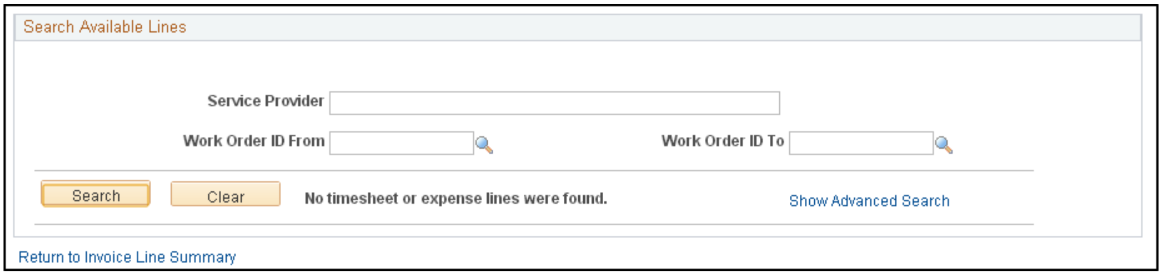


Business Unit US001
Invoice ID DMO00052

Invoice Date 02/08/2013
Invoice Status Generated
Service Method Resource
Payment Terms Due Immediately
Supplier Name Robert Half
Invoice To Address Headquarters
Remit To Supplier Robert Half
Remit To Address Headquarters

	Work Order Currency ()	
Line Amount	0.000	0.000
Estimated Tax	0.000	0.000
Expense Amount	0.000	0.000
Estimated Total	0.000	0.000

This example illustrates the fields and controls on the Add Lines to Invoice page (2 or 2). You can find definitions for the fields and controls later on this page.



No timesheet or expense lines were found.

Use this page to add individual time, progress, or expense lines to invoices. When a time sheet or progress log expense or progress log is added to an invoice, the correct time sheet line, expense line or progress log line is updated with the invoice information.

To add lines to an invoice:

1. Select the progress log and expense lines or time report and expense lines to include in the invoice.
2. Click the **Add Selected Line(s)** button.

   Use the **Select/Deselect All** check box if you want to select or deselect all the lines at one time.

Note: The available time sheets, progress log, assignment incidents, and expense lines for invoicing are limited to work orders that have a supplier location that matches the location specified on the Create Invoice page.

Generating and Printing Invoices Automatically

This topic discusses how to generate and print invoices automatically.

Pages Used to Generate and Print Invoices Automatically

Page Name	***Definition Name***	***Usage***
Create Batch Invoices Page	SPF_GEN_CLINV	Generate invoices for approval and printing.
Print Invoices Page	SPF_GEN_CINP	Print invoices that you've generated and approved.

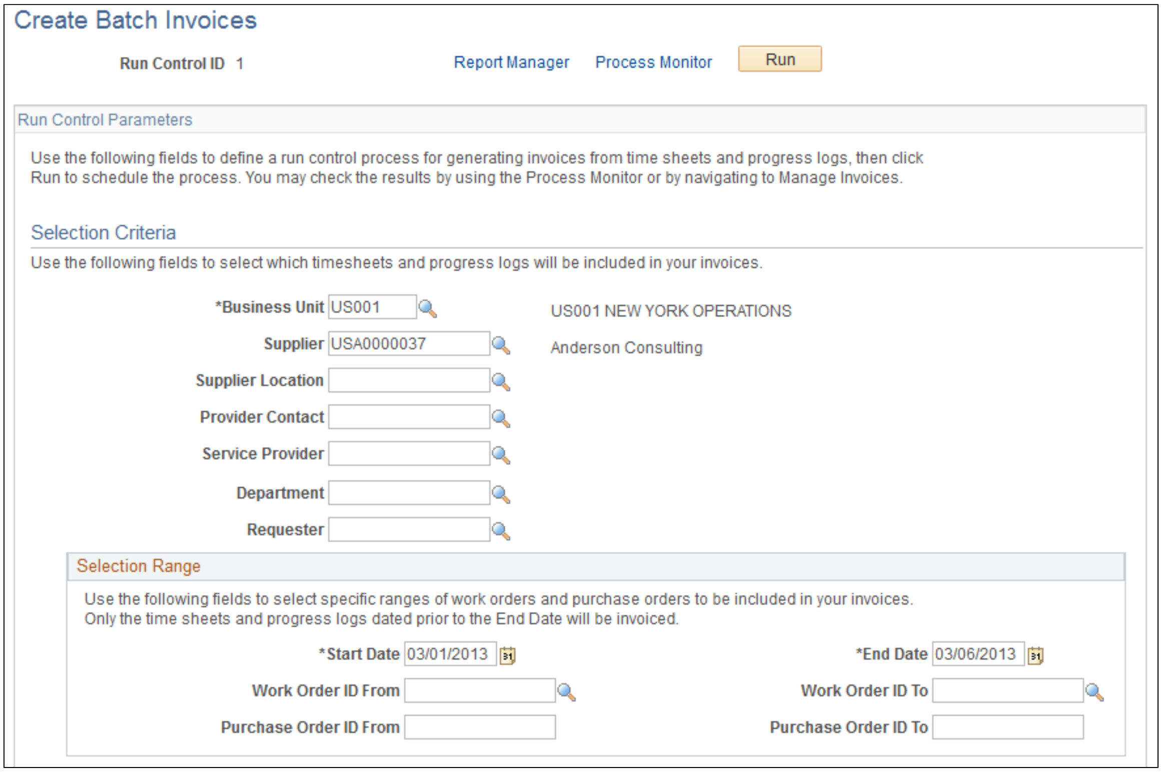
Create Batch Invoices Page

Use the Create Batch Invoices page (SPF_GEN_CLINV) to generate invoices for approval and printing.

Navigation:

Services Procurement > **Services Settlement** > **Create Batch Invoices**

This example illustrates the fields and controls on the Create Batch Invoices page (1 of 2). You can find definitions for the fields and controls later on this page.



Run Control ID 1

Use the following fields to define a run control process for generating invoices from time sheets and progress logs, then click Run to schedule the process. You may check the results by using the Process Monitor or by navigating to Manage Invoices.

Use the following fields to select which timesheets and progress logs will be included in your invoices.

*Business Unit US001 US001 NEW YORK OPERATIONS

Supplier USA0000037 Anderson Consulting

Supplier Location

Provider Contact

Service Provider

Department

Requester

Use the following fields to select specific ranges of work orders and purchase orders to be included in your invoices. Only the time sheets and progress logs dated prior to the End Date will be invoiced.

*Start Date 03/01/2013

*End Date 03/06/2013

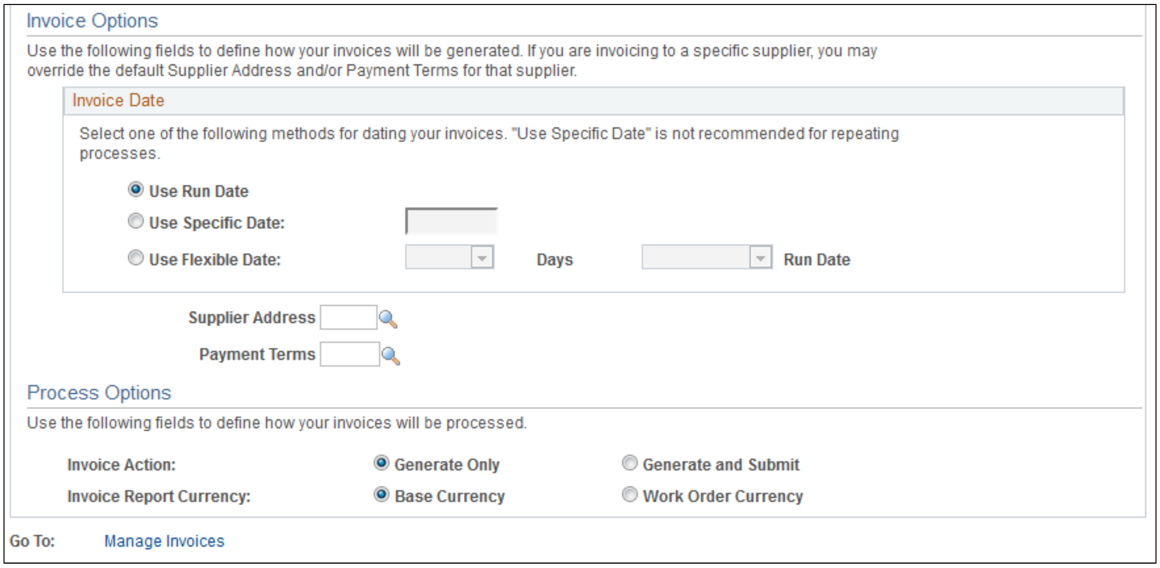
Work Order ID From

Work Order ID To

Purchase Order ID From

Purchase Order ID To

This example illustrates the fields and controls on the Create Batch Invoices page (2 of 2). You can find definitions for the fields and controls later on this page.



Invoice Options

Use the following fields to define how your invoices will be generated. If you are invoicing to a specific supplier, you may override the default Supplier Address and/or Payment Terms for that supplier.

Invoice Date

Select one of the following methods for dating your invoices. "Use Specific Date" is not recommended for repeating processes.

● Use Run Date
○ Use Specific Date:
○ Use Flexible Date: Days Run Date

Supplier Address
Payment Terms

Process Options

Use the following fields to define how your invoices will be processed.

Invoice Action: ● Generate Only ○ Generate and Submit
Invoice Report Currency: ● Base Currency ○ Work Order Currency

Go To: Manage Invoices

Enter the run control parameters for the invoice process.

Field or Control	***Description***
Business Unit	Select the business unit for which invoices are generated.
Supplier	Select a specific supplier to receive an invoice. **Note:** If you leave this field blank, the **Supplier Location, Supplier Address,** and **Payment Terms** fields are hidden, and the process generates invoices for all suppliers associated with active work orders that meet the selection criteria. When you select a specific supplier, the supplier location, supplier address, payment terms, and service provider fields are editable. For VMS-managed work orders, select a VMS supplier. All time sheets, progress logs, and expenses associated with the end suppliers are combined on the VMS supplier's invoice.
Supplier Location	Select to filter out time sheets and progress logs the work orders of which have the same supplier and supplier location. **Note:** This field is available only when a value is in the **Supplier** field.
Provider Contact	Enter the name of the supplier provider contact who receives the invoice. **Note:** If you do not enter a name, the provider contact who is associated with the work order receives the invoice.

Field or Control	Description
Service Provider	Select the service provider for whom invoices are generated. **Note:** If the supplier is resource-based, the lookup for service providers displays service providers. If the supplier is deliverables-based, the lookup for service providers displays provider contacts. If the supplier is both resource-based and deliverables-based, the lookup for service providers displays both service providers and provider contacts. **Note:** This field is available only when a value is in the **Supplier** field.

Field or Control	Description
Department	Select the department for which invoices are generated.

Field or Control	Description
Requester	Select the requester for whom invoices are generated.

Selection Range

Use this section to further define generation values for the information you selected in the header.

Note: The work order ID range displays lower-level service work orders in addition to resource- and deliverables-based work orders.

Field or Control	***Description***
Start Date and **End Date**	Enter the range of dates for time sheets, progress logs, or expenses that are included in the invoices that you generate. The date range is also used to determine active work orders and their associated time sheets, expenses, and progress logs. **Note:** The end date is used to compare different date values depending on invoicing time, expense date, or progress log completion date. For time sheets, the end date is compared to the period end date. For expenses, the transaction date is used for the comparison. For progress logs, the creation date is used for the comparison when the settlement option is *Percentage* or *Rate Based,* and the completion date is used when the settlement option is *Fixed Cost* or *Milestone.* **Note:** To generate invoices for time sheets, expense reports, and progress logs that fall within a specific time period, you must enter an end date that is equal to or greater than the last end date. For example, if you have a progress log with a completion date of July 15, 2010, a time sheet with period end date of June 29, 2010, and an expenses report with a transaction date of July 10, 2010, and you enter an end date of July 10, 2010 on the run control page, the progress log invoice is not generated.
Work Order ID From and **Work Order ID To**	Enter the IDs of the beginning and ending work orders for which you want to generate invoices.
Purchase Order ID From and **Purchase Order ID To**	Enter the beginning and ending purchase orders for which you want to generate invoices.

Invoice Options

You create invoices using a batch process that can be scheduled to run offline.

Field or Control	***Description***
Use Run Date	Select to indicate that when the run control is scheduled to run on a recurring basis (when you use the recurrence definition), the invoice date is assigned the date of the scheduled run. If this option is selected, the current date at run time will be used as the invoice date. This is the default option. This option is appropriate for both ad hoc and recurring process runs. **Note:** This option is selected by default. Refer to PeopleTools documentation for details on how to set up a recurrence definition.
Use Specific Date	Select to define the specific invoice date. This date is used regardless of the scheduled run date. If this option is selected, the user must specify a date to be used as the invoice date. This option is more appropriate for single batch process runs than for a recurring batch process run. When you select this option, the current date is supplied by defaults. Do not select this option if you are using a recurrence definition and you want to have different invoice dates at different run times. Refer to PeopleTools documentation for details on how to set up a recurrence definition.
Use Flexible Date	Select to define invoice dates that are a specific number of days before or after a scheduled run date. If this option is selected, the user must specify the number of days before or after the run date to be used as the invoice date. For example, if the scheduled run date is the 15th day of every month (for example, May 15) and the user specified 10 days before the run date, then the invoice date is set to May 5th. **Note:** When you select this option, the default is 10 days before the scheduled run date. Refer to PeopleTools documentation for details on how to set up a recurrence definition.
Supplier Address	Select a supplier address for the invoice. **Note:** When you select a specific supplier, the supplier's address can be edited. If you do not select a supplier, the field is unavailable for entry and is blank. However, the invoice process picks up the default supplier address for each supplier at run time.

Field or Control	*Description*
Payment Terms	Select payment terms for the invoice. **Note:** When you select a specific supplier, the payment terms can be edited. If you do not select a supplier, the field is unavailable for entry and is blank. However, the invoice process picks up the default payment terms for each supplier at run time.

Process Options

Field or Control	*Description*
Invoice Report Currency	Select whether the invoice should be created in the base currency or the work order currency. The field is disabled if the Purchasing business unit does not allow multicurrency purchase orders.

Process Results

You can run the Generate Invoice Report process (SPINV002) to generate a report about the invoices that you are processing.

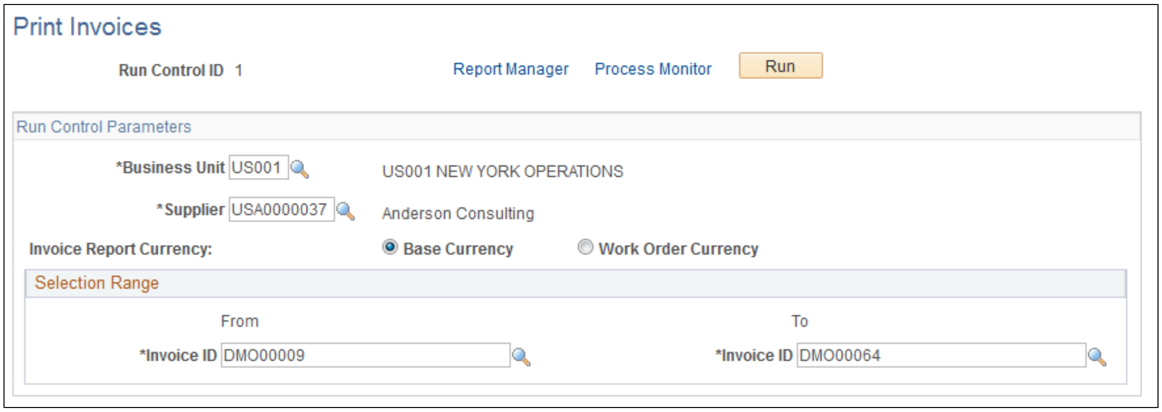
Print Invoices Page

Use the Print Invoices page (SPF_GEN_CINP) to print invoices that you've generated and approved.

Navigation:

Services Procurement > **Services Settlement** > **Print Invoices**

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



Run Control ID 1

*Business Unit US001 US001 NEW YORK OPERATIONS

*Supplier USA0000037 Anderson Consulting

Invoice Report Currency: ● Base Currency ○ Work Order Currency

From *Invoice ID DMO00009

To *Invoice ID DMO00064

Enter the run control parameters for the invoice printing process.

Field or Control	***Description***
Supplier	Select the supplier for whom invoices are to be printed. **Note:** For VMS-managed work orders, the VMS supplier should be selected. All time sheets, progress logs, and expenses associated with the end suppliers are combined on the VMS supplier's invoice.
Invoice Report Currency	Select to print in either the base or work order currency. The field is disabled if the Purchasing business unit does not allow multicurrency purchase orders.

Field or Control	***Description***
From and To and **Invoice ID**	Select the range of invoices that you want to print.

Assignment Pay Based on Number of Incidents

If any assignment pay is based on the number of incidents, a separate section is included on the printed invoice.

Process Results

The Process Invoice Application Engine process (SPF_PRNTINV) processes invoices that have been generated and approved. It prints the pro forma invoice to be sent to the suppliers. This process also adds any manually created invoices to the invoice report table so that invoices can be printed.

Managing Invoices

Use the Manage Invoice page to create new invoices manually, review existing invoices, edit invoices, view statuses of invoices, cancel invoices, or submit selected invoices for approval. The Manage Invoice page is the central location and starting point for maintaining invoices. Use the search and sort features to streamline the search results. After you enter search criteria, access the roster area, where you can view invoice details, edit the invoice, submit invoices, or cancel invoices.

Note: This page displays invoices created by the sign-in user. Invoices generated by other users do not appear in this roster.

This topic discusses how to manage invoices.

Pages Used to Manage Invoices

Page Name	***Definition Name***	***Usage***
Manage Invoices Page	SPF_INV_MANAGE	Add invoices, search existing invoices, submit invoices, or cancel invoices. The values for the **From Date** and **Date To** fields are by default the last 30 days. You may need to change the date fields to see previous invoices.
Create Invoice Page	SPF_INV_HDR_ADD	Create invoice header information.
Add Lines to Invoice Page	SPF_INV_TE_DTLS	View all noninvoiced time sheets, progress logs, and expenses for the supplier or service provider.
Manage Invoices - Line Summary Page	SPF_INV_LN_DTLS	Modify the selected invoice.
Invoice Process Detail Page	SPF_INV_PROCES_DTL	View invoice details. Manage Invoices - Line Summary Page
Invoice To Address Page	SPF_ADDRESS	View the invoice to address. Manage Invoices - Line Summary Page
Remit To Address Page	SPF_ADDRESS	View the remit to address. Manage Invoices - Line Summary Page
Currency Information Page	EXCH_RT_DTL_INQ	View multicurrency information. Manage Invoices - Line Summary Page
Work Order Details Page	SPF_WORDER_DETAIL	View details of the work order that is related to the invoice. Manage Invoices - Line Detail Page
Manage Invoices - Line Detail Page	SPF_INV_TIME_DTL	View invoice line details, make adjustments, or both.
Manage Invoices - Line Detail Page	SPF_INV_PLOG_DTL	View invoice line details, make adjustments, or both. Manage Invoices - Line Summary Page

Page Name	***Definition Name***	***Usage***
Purchase Order Inquiry - Purchase Order Page	PO_LINE_INQ	View details of the purchase order that is related to the invoice. Manage Invoices - Line Detail Page
Approve Timesheet Page	SPA_TIME_APPROVE	View time reports.
Services Expense Report Details page	SPA_SHEET_LINES2	View expense reports.
Progress Log Summary Page	SPA_PLOG_LINES	View progress log reports.

Related Links

Creating Invoices Manually

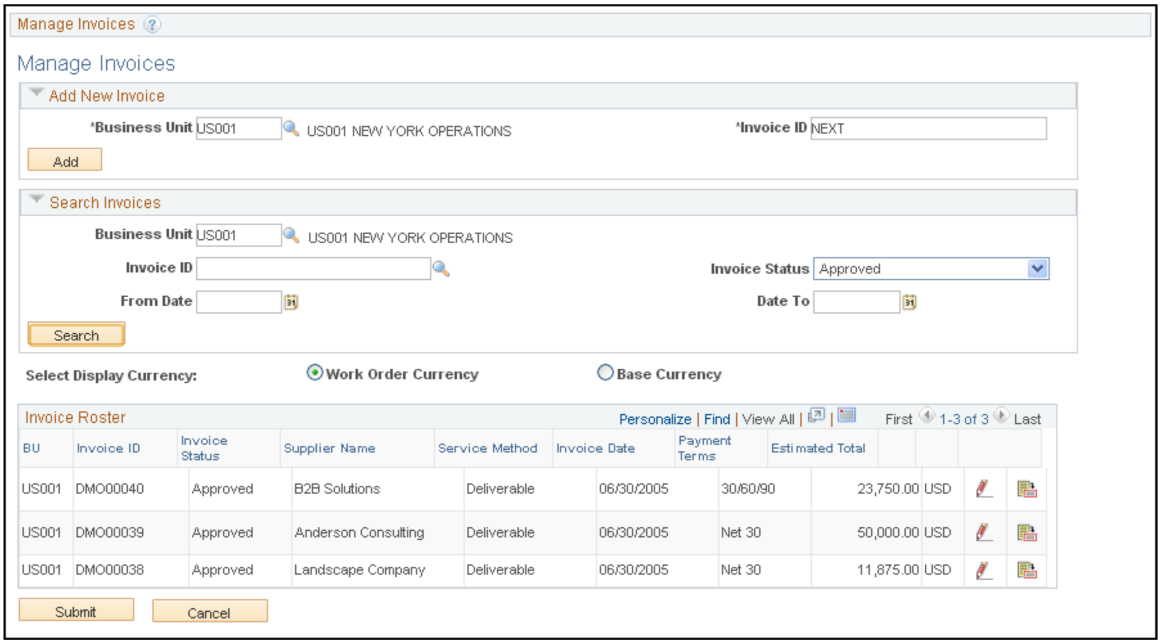
Manage Invoices Page

Use the Manage Invoices page (SPF_INV_MANAGE) to add invoices, search existing invoices, submit invoices, or cancel invoices.

Navigation:

Services Procurement > **Manage Invoices**

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



*Business Unit US001 US001 NEW YORK OPERATIONS
*Invoice ID NEXT

Business Unit US001 US001 NEW YORK OPERATIONS
Invoice ID
Invoice Status Approved
From Date
Date To

Select Display Currency: ● Work Order Currency ○ Base Currency

BU	Invoice ID	Invoice Status	Supplier Name	Service Method	Invoice Date	Payment Terms	Estimated Total
US001	DMO00040	Approved	B2B Solutions	Deliverable	06/30/2005	30/60/90	23,750.00 USD
US001	DMO00039	Approved	Anderson Consulting	Deliverable	06/30/2005	Net 30	50,000.00 USD
US001	DMO00038	Approved	Landscape Company	Deliverable	06/30/2005	Net 30	11,875.00 USD

You can access this page when you sign in as the PeopleSoft Services Procurement invoice manager.

Search Invoices

Enter search criteria to use to retrieve, edit, and view invoices.

Select Currency

Displays amounts in either base or work-order currency. The **Select Currency** field is available only if **Allow Multicurrency** is selected on the Services Procurement business unit page.

See Setting Up Business Unit Definitions.

Note: Invoices are generated in both base and work-order currency.

Invoice Roster

Field or Control	***Description***
Estimated Total	Displays the estimated total, including expenses and estimated prorated tax. **Note:** The sales and use tax (SUT) included in the estimated total includes only the sales tax. The use tax is displayed as a separate line item on the Invoice Detail page.
✎	Click the **Edit** icon to access the Manage Invoice Line Summary page, where you can review and edit invoice lines.
📋	Click the **View Entry** icon to access the Invoice Process Detail page, where you can review invoice processing information.
Submit	Click to submit selected invoices for approval.
Cancel	Click to cancel selected invoices. Canceling invoices releases the time sheet, progress log, or expense associated with that invoice so that it can be invoiced again.

Note: You can adjust invoices by adjusting the associated time sheets, progress logs, or expense amounts. If the adjusted time sheet, progress log, or expense is included in an invoice, the status of the invoice line associated with the adjustment is changed to *Canceled* and the invoice header status is changed to *Adjusted.* You can also adjust invoices after the invoice has been generated by adjusting the amounts on the Manage Invoice Line Detail page. Adjusting invoices in this manner does not change existing time sheets, progress logs, or expenses. Adjustments can be made prior to invoices being approved by either the supplier invoice approver or the enterprise invoice approver.

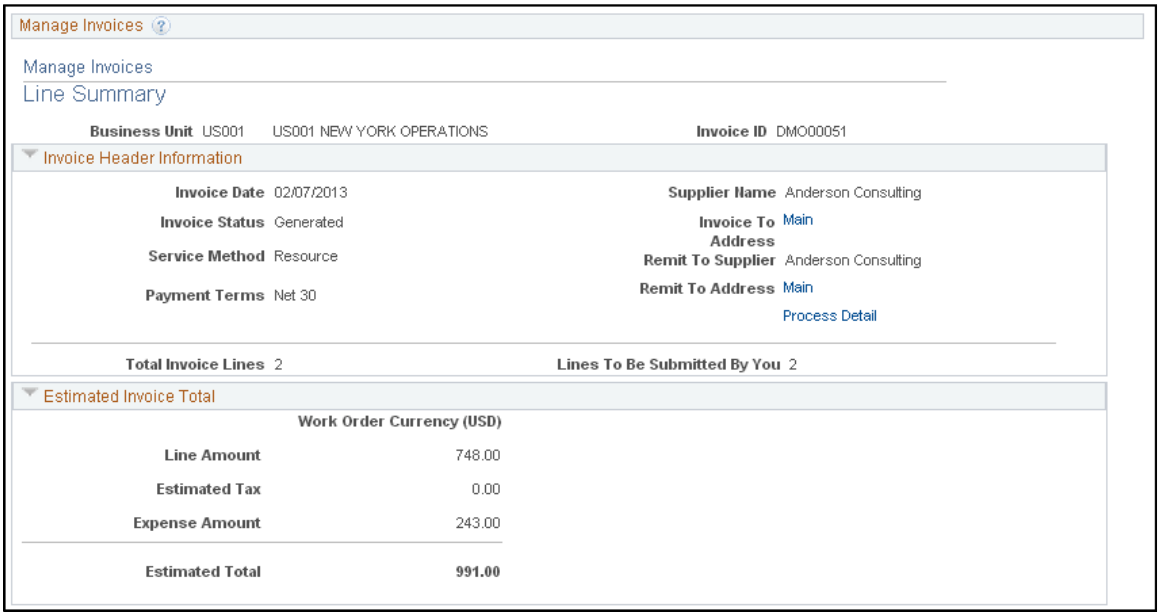
Manage Invoices - Line Summary Page

Use the Manage Invoices - Line Summary page (SPF_INV_LN_DTLS) to modify the selected invoice.

Navigation:

Click the **Edit** button for an invoice on the Manage Invoices page.

This example illustrates the fields and controls on the Manage Invoice - Line Summary page (1 of 2). You can find definitions for the fields and controls later on this page.



Manage Invoices

Line Summary

Business Unit US001 US001 NEW YORK OPERATIONS

Invoice ID DMO00051

Invoice Header Information

Invoice Date 02/07/2013

Invoice Status Generated

Service Method Resource

Payment Terms Net 30

Supplier Name Anderson Consulting

Invoice To Address Main

Remit To Supplier Anderson Consulting

Remit To Address Main

Process Detail

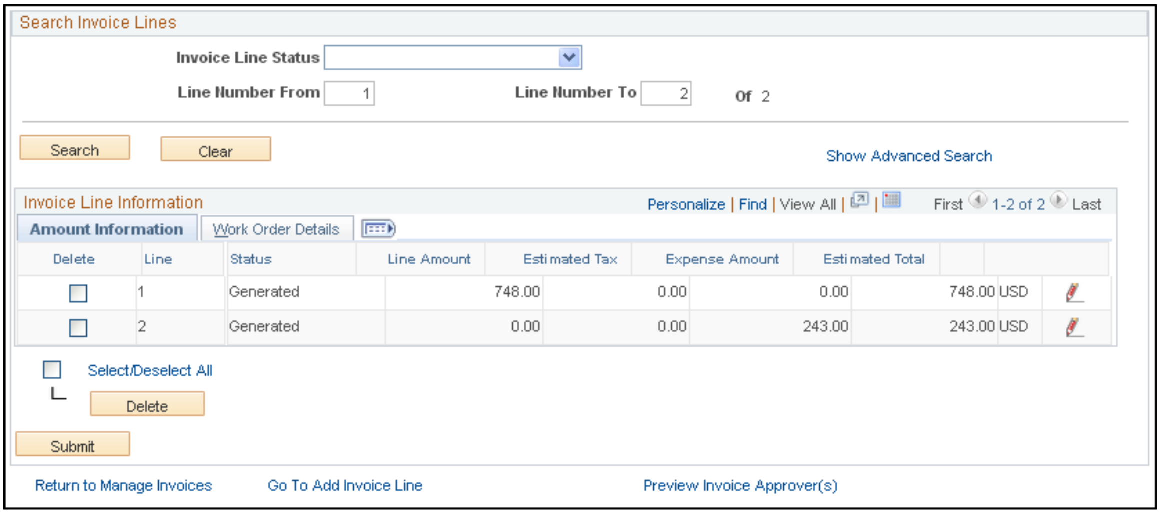
Total Invoice Lines 2

Lines To Be Submitted By You 2

Estimated Invoice Total

	Work Order Currency (USD)
Line Amount	748.00
Estimated Tax	0.00
Expense Amount	243.00
Estimated Total	991.00

This example illustrates the fields and controls on the Manage Invoice - Line Summary page (2 of 2). You can find definitions for the fields and controls later on this page.



Search Invoice Lines

Invoice Line Status

Line Number From 1

Line Number To 2

Of 2

Invoice Line Information

Delete	Line	Status	Line Amount	Estimated Tax	Expense Amount	Estimated Total		
☐	1	Generated	748.00	0.00	0.00	748.00	USD	✎
☐	2	Generated	0.00	0.00	243.00	243.00	USD	✎

☐ Select/Deselect All

The data appearing in the **Invoice Header Information** and **Estimated Invoice Total** sections depends on whether the invoice is for VMS services.

Field or Control	***Description***
Business Unit	Displays the business unit associated with the invoice.

Field or Control	***Description***
Invoice ID	Displays the number automatically or manually assigned to the invoice when it is created.

Invoice Header Information

Field or Control	***Description***
Invoice Date	Displays the creation date of the invoice.

Field or Control	***Description***
Invoice Status	Displays the current status of the invoice. Values are: • *Adjusted by Supplier:* When a supplier adjusts the amount on an invoice line, the system sets the invoice line status to *Adjusted by Supplier,* and the invoice header to *Adjusted.* When an enterprise approver adjusts the amount on an invoice line, the system sets the invoice line status to *Adjusted by Ent Approver* and the invoice header status to *Adjusted.* When invoice manager adjusts amount on an invoice line, the system sets the invoice line to *Adjusted by Enterprise* and the Invoice Header status to *Adjusted* . • *Approved by Supplier:* The supplier invoice approver has approved all lines, and the invoice has not been processed. • *Approved :* The invoice approver has approved all lines, and the invoice has not been processed. • *Canceled:* The invoice has been canceled and the related time sheets, progress logs, or expenses have been released to be re-invoiced. • *Generated:* The line has been created but not yet submitted for approval. • *Processed:* All lines have been approved and the invoice has been processed. • *Submitted to Enterprise:* The invoice has been submitted for approval, but the line has not yet been approved or denied. • *Submitted to Supplier:* The invoice has been submitted for approval to the supplier, but the line has not yet been approved or denied. • *Denied by Enterprise:* The approver has denied the line. • *Denied by Supplier:* The supplier invoice approver has denied the line.
Payment Terms	Displays the payment terms assigned to the invoice.

Field or Control	*Description*
Supplier	Displays the end supplier who performed the service. This option appears only in the Invoice Header Information section when invoices are not VMS-managed. The supplier appears at the line level when invoices are VMS-managed.
VMS Suppler	Displays the VMS supplier that manages the work orders for time and progress invoices. This option appears only in the Invoice Header Information section for VMS invoices.

Estimated Invoice Total

Field or Control	*Description*
Line Amount	Displays the total invoice amount in base or work-order currency. Any assignment pay based on time is included with the base pay in the line amount. Any assignment pay based on number of incidents is displayed in the **Time/Expense Details** group box, and is not included in the line amount.
Estimated Tax	Displays the total estimated tax for the invoice.
Expense Amount	Displays the total expense amount in base or work-order currency.
Estimated Total	Displays the estimated total for the invoice.
VMS Fee	Displays the amount paid to the VMS suppler for managing the service. The data appearing in the **Invoice Line Information** grid depends on the selected service method and whether the invoice is for VMS services. Select the **Base Currency** or **Work Order Currency** option to display amounts. View the estimated tax and estimated total amount for the invoice. **Note:** This option appears and is included only in the Estimated Invoice Total for VMS invoices.

Field or Control	***Description***
MSP Fee	Displays the amount paid to the MSP supplier for managing the service. **Note:** This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers can view MSP fees; however, the fee is not included in the estimated total.

Invoice Line Information: Amount Information

Select the Amount Information tab.

Field or Control	***Description***
▤	Click the **Line Details** icon to access the line details.

Invoice Line Information: Work Order Details

Select the Work Order Details tab.

Field or Control	***Description***
Work Order	Links to the related work order for viewing more details. If the work order is for a multi-resource service, the individual child work order is listed here. The related parent work order appears in the **Parent Work Order** field.
Parent Work Order	Links to the parent work order for multi-resource work orders.
Supplier	Displays the end supplier who performed the service. This option appears only for VMS invoices.
Provider Contact	Displays the provider contact for the work order.
Time Sheet ID	Displays the time sheet for the invoice line and has a value only for time sheet lines.
Expense Sheet ID	Displays the expense sheet for the invoice line and has a value for expense lines.

Field or Control	***Description***
Progress Log ID	Displays the progress log for the invoice line. Appears only for deliverable invoices and has a value only for progress lines.
Activity	Displays the activity for the invoice line. This option appears only for deliverable invoices. **Note:** For deliverables-based requisitions, the rate-based activity is displayed in the **Invoice Line Information** region.
Submit	Click to submit the eligible invoice lines for approval. **Note:** Until all lines have been submitted for approval, the invoice header status remains *Generated.*
Delete	Click to remove the selected line from the invoice. Deleting the invoice line releases the time sheet, progress log, or expense associated with that invoice so that it can be invoiced again.

Field or Control	***Description***
View Invoice Approver(s)	Click to view a graphical map of the approval workflow. The link is available prior to submission of the invoice for approval, to preview the approvers to whom it will be routed. Invoice lines for approval are displayed in chunks depending on the value set in the **Invoice Approval Monitor** field in the Services Procurement Installation Options page. If the **Enable Approval Chunking** check box in the Services Procurement Installation Options page is selected and the **Invoice Approval Monitor** value is set to, for example 3, then the invoice lines are displayed in chunks of 3. Enter a value (as per the range set in **Invoice Approval Monitor**) and then click **Retrieve** to display the next chunk of invoice lines.

Related Links

Setting Up Business Unit Definitions

Understanding VMS

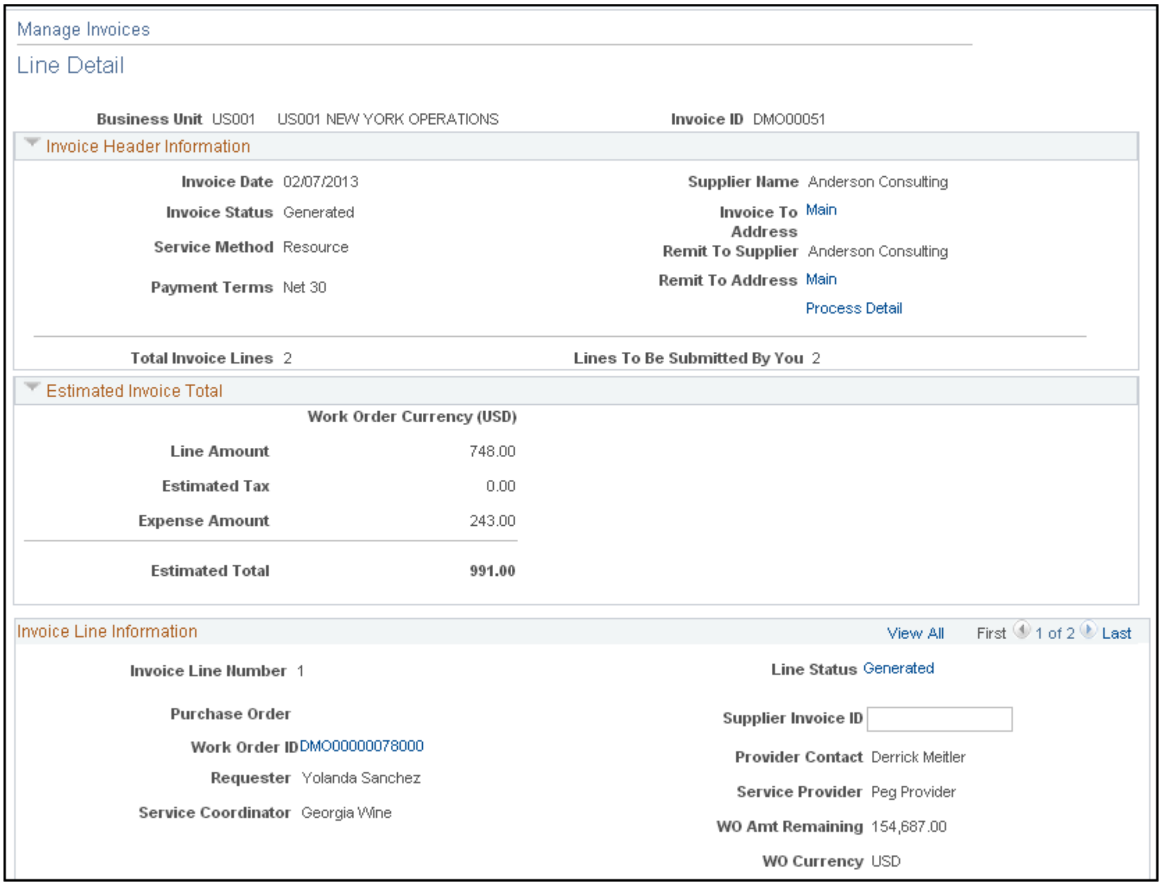
Manage Invoices - Line Detail Page

Use the Manage Invoices - Line Detail page (SPF_INV_TIME_DTL) to view invoice line details, make adjustments, or both.

Navigation:

For resource-based invoices, click the **Edit** button on the Manage Invoices - Line Summary page.

This example illustrates the fields and controls on the Manage Invoices - Line Detail page (1 of 2). You can find definitions for the fields and controls later on this page.



Manage Invoices

Line Detail

Business Unit US001 US001 NEW YORK OPERATIONS

Invoice ID DMO00051

Invoice Header Information

Invoice Date 02/07/2013

Invoice Status Generated

Service Method Resource

Payment Terms Net 30

Supplier Name Anderson Consulting

Invoice To Address Main

Remit To Supplier Anderson Consulting

Remit To Address Main

Process Detail

Total Invoice Lines 2

Lines To Be Submitted By You 2

Estimated Invoice Total

	Work Order Currency (USD)
Line Amount	748.00
Estimated Tax	0.00
Expense Amount	243.00
Estimated Total	991.00

Invoice Line Information

Invoice Line Number 1

Purchase Order

Work Order ID DMO00000078000

Requester Yolanda Sanchez

Service Coordinator Georgia Wine

Line Status Generated

Supplier Invoice ID

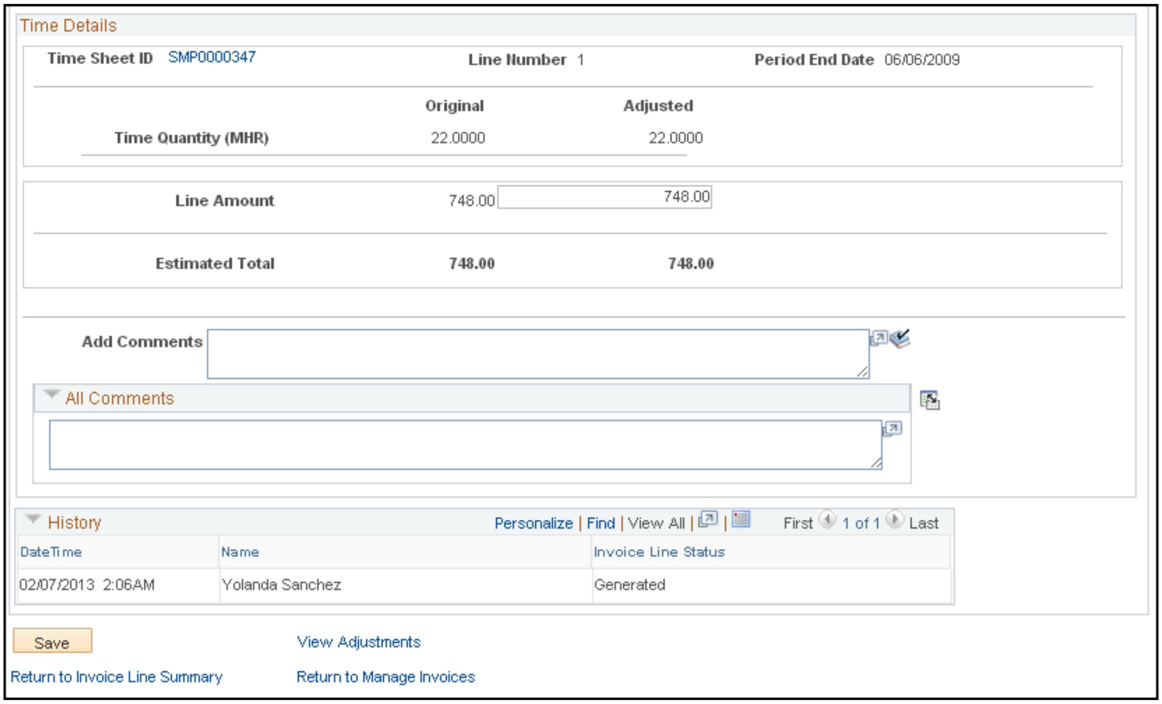
Provider Contact Derrick Meitler

Service Provider Peg Provider

WO Amt Remaining 154,687.00

WO Currency USD

This example illustrates the fields and controls on the Manage Invoices - Line Detail page (2 of 2). You can find definitions for the fields and controls later on this page.



Time Sheet ID SMP0000347

Line Number 1

Period End Date 06/06/2009

	Original	Adjusted
Time Quantity (MHR)	22.0000	22.0000
Line Amount	748.00	748.00
Estimated Total	748.00	748.00

DateTime	Name	Invoice Line Status
02/07/2013 2:06AM	Yolanda Sanchez	Generated

The information appearing on this page depends on the selected service method. Click the **View Adjustments** link to access details about the adjustments that have been made to an invoice line.

For multi-resource work orders, this page displays only the header work order ID in the invoice line information section. You can click the **Parent Work Order ID** link to access the work order header page. Click the **Work Order ID** link to access the lower-level service associated to the work order for an invoice line.

Invoice Line Information

Field or Control	***Description***
Invoice Line Number	Displays the number automatically assigned to the invoice line when it is created. Allows adjustments to the progress log line amount.

Field or Control	***Description***
Line Status	Displays the current status of the invoice line. Values are: • *Generated:* The line has been created but not yet submitted for approval. • *Submitted:* The invoice has been submitted for approval, but the line has not yet been approved or denied. • *Submitted to Supplier:* The invoice has been submitted for approval to the supplier, but the line has not yet been approved or denied. • *Denied by Supplier:* The supplier approver has denied the line • *Denied by Enterprise:* The Enterprise approver has denied the line • *Adjusted by Enterprise:* The invoice manager has adjusted the amount on an invoice line, the invoice line status is set to *Adjusted by Enterprise*and the Invoice Header status is set to *Adjusted*. • *Adjusted by Ent Approver:* The enterprise approver has adjusted the amount on an invoice line, the invoice line status is set to *Adjusted by Ent Approver*, and the invoice header status is set to Adjusted. • *Adjusted by Supplier:* The supplier has adjusted the amount on an invoice line, the invoice line status is set to Adjusted by Supplier, and the invoice header status is set to Adjusted. • *Approved by Supplier:* The supplier has approved the invoice line. • *Approved by Enterprise:* The invoice approver has approved the invoice line.
Purchase Order	Click to view the purchase order assigned to the work order associated with the services included on the invoice line. **Note:** The button is available only if the **PO Work Order Integration** (purchase order work order integration) check box is selected on the Services Procurement Installation Options page.

Field or Control	***Description***
Supplier Invoice ID	Enter the supplier's invoice ID for each invoice line. This field is for reference only in the event that the supplier uses a different invoice ID.
Work Order ID	Click to view the work order associated with the services included on the invoice line.
Provider Contact	Displays the provider contact assigned to the work order associated with the services included on the invoice line.
Requester	Displays the requester assigned to the work order associated with the services included on the invoice line.
WO Amount Remaining (work order amount remaining)	Displays the amount still available for the work order. This amount is updated when invoices are approved. This field does not appear for multi-resource work orders.
Service Provider	Displays the name of the individual service provider associated with the services included on the invoice line. **Note:** This value displays for resource-based engagements only.

Time/Expense Details - Resource-Based Invoices

Adjustments can be made after the invoice has been generated and not yet approved. Once approved, invoices cannot be adjusted.

Field or Control	***Description***
Timesheet ID or **Expense Sheet ID**	Displays the time sheet or expense associated with the invoice line. Click to view the time sheet or expense details.
Period End Date	Displays the period end date of the time sheet associated with the invoice line.
VAT Applicability (value-added tax applicability)	Indicates whether value-added tax (VAT) applies to this invoice. If **VAT Applicability** is *Taxable,* the system displays the VAT percentage and VAT amount information.

Field or Control	***Description***
SUT Applicability (sales tax or use tax applicability)	Indicates whether sales tax or use tax (SUT) applies to this invoice. If **SUT Applicability** is *Sales Tax* or *Direct Pay/ Sales Tax,* then the **Sale Tax %** and **Sales Tax Amount** fields appear. If the value is *Use Tax,* then the system displays the use tax percentage and the use tax amounts. **Note:** Use tax is not included in the invoice total and is displayed for informational purposes only. Suppliers can view only the sales tax, not the use tax.
Original/Adjusted Time Quantity	Displays the original and adjusted time quantity for resource-based invoices. No manual adjustments are allowed for this field.
Original/Adjusted Line Amount	Displays the amounts based on the original and adjusted time quantity. You can adjust the line amount in the work order currency and the system automatically converts to base currency if the multicurrency option applies.
Original/Adjusted MSP Fee (original/adjusted managed services provider fee)	Displays the MSP fee. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers will have the MSP fee shown, but not included in the estimated invoice total. No manual adjustments are allowed for this field, but any adjustments made to the line amount recalculates the adjusted MSP fee.
Original/Adjusted VMS Fee (original/adjusted supplier-managed service fee)	Displays the VMS fee. This option appears only for VMS invoices. No manual adjustments are allowed for this field, but any adjustments made to the line amount recalculates the adjusted VMS fee.
Original/Adjusted Expenses	Displays the original and adjusted expenses from the expense sheet associated with the invoice line. You can enter adjustments prior to approval, but the adjustment must be made in the work order currency. The system automatically converts to base currency.
Original/Adjusted Total	Displays the total of the original and adjusted line amount, the original and adjusted expenses, and any associated fees and taxes.

Field or Control	***Description***
VAT Percent (value-added tax percent)	Displays the actual VAT percentage. You can adjust the original VAT percentage for resource-based invoices. **Note:** The field is not available if VAT is not applicable.
Estimated VAT (estimated value-added tax)	Displays the estimated VAT amount. Adjusting the line amount or VAT percentage recalculates the estimated VAT amount. **Note:** The field is hidden if VAT is not applicable.
Sales Tax Percent/Use Tax Percent	Displays the estimated sales tax percentage if the tax applicability is sales tax or direct pay. If tax applicability is use tax, then the system displays the estimated use tax percent. You can adjust the tax percentage, which recalculates the estimated SUT amounts. **Note:** The field is not available if **SUT Applicability** value is not *Sales Tax* or *Direct Pay/Sales Tax.*
Includes VAT (includes value-added tax)	Indicates whether the estimated VAT amount is to be added to the line amount before SUT is calculated. If yes, the VAT amount is added to the line amount before SUT is calculated. Otherwise, the line amount is used for VAT calculations. **Note:** The field is not available if VAT and SUT are not applicable.
Estimated Sales Tax	Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the **Includes VAT** option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount. **Note:** The field is not available if **SUT Applicability** value is not *Sales Tax* or *Direct Pay/Sales Tax.*
Original/Adjusted Assignment Incidents	Displays the number of assignments based on incidents associated with the invoice.
Line Amount	Displays the sum of all items associated with the invoice line.
Estimated Total	Displays the sum of the line amount, expense amount, VMS or MSP fees, and VAT or sales tax.

Field or Control	***Description***
Estimated Use Tax	Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the **Includes VAT** option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount. **Note:** The field is not available if **SUT Applicability** is not *Use Tax*.

Progress Log Details - Deliverables Based Invoices

Field or Control	***Description***
Progress Log ID or **Expense Sheet ID**	Displays the progress log or expense associated with the invoice line. Click to view the progress log or expense details.
Activity	Displays the activity associated with the invoice line. **Note:** This field is not visible if the settlement option on the work order associated with the invoice line is set to *Percentage.*
% Complete (percent complete)	Displays the total percent completed. **Note:** This field is visible only if the settlement option on the work order associated with the invoice line is set to *Percentage.*
Rate	Displays the rate from the work order associated with the invoice line. **Note:** This field is visible only if the settlement option on the work order associated with the invoice line is set to *Rate Based.*
UOM (unit of measure)	The unit of measure that is defined for the rate. **Note:** This field is visible only if the settlement option on the work order associated with the invoice line is set to *Rate Based.*

Field or Control	***Description***
Quantity	Displays the number of units being billed on the invoice line. **Note:** This field is visible only if the settlement option on the work order associated with the invoice line is set to *Rate Based.*
VAT Applicability (value-added tax applicability)	Indicates whether VAT applies to this invoice. If **VAT Applicability** is *Taxable,* the system displays the VAT percentage and VAT amount information.
SUT Applicability (sales and use tax applicability)	Indicates whether SUT applies to this invoice. If **SUT Applicability** is *Sales Tax* or *Direct Pay/Sales Tax,* then the **Sale Tax %** and **Sales Tax Amount** fields appear. If the value is *Use Tax,* then the system displays the use tax percentage and the use tax amounts. **Note:** Use tax is not included in the invoice total and is displayed for informational purposes only. Suppliers can view the sales tax only, not the use tax.
Original/Adjusted Line Amount	Displays the amounts based on the original and adjusted progress log for this invoice line. You can adjust the line amount in the work order currency and the system automatically converts to base currency if the multicurrency option applies.
Original/Adjusted MSP Fee (original/adjusted managed services provider fee)	Displays the MSP fee. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers can view MSP fees; however, the fee is not included in the estimated invoice total. No manual adjustments are allowed for this field. Any adjustments made to the line amount recalculate the adjusted MSP fee.
Original/Adjusted VMS Fee (original/adjusted supplier-managed service fee)	Displays the VMS fee. This option appears only for VMS invoices. No manual adjustments are allowed for this field. Any adjustments made to the line amount recalculate the adjusted VMS fee.

Field or Control	***Description***
Original/Adjusted Expenses	Displays the original and adjusted expenses from the expense sheet associated with the invoice line. You can enter adjustments prior to approval, but the adjustment must be made in the work order currency. The system automatically converts to base currency.
Original/Adjusted Total	Displays the total of the original and adjusted line amount, the original and adjusted expenses, and any associated fees and taxes.
VAT Percent (value-added tax percent)	Displays the actual VAT percentage. Enables you to adjust the actual VAT percentage for resource-based invoices. **Note:** The field is hidden if VAT is not applicable.
Estimated VAT (estimated value-added tax)	Displays the estimated VAT amount. Adjusting the line amount or VAT percentage recalculates the estimated VAT amount **Note:** The field is hidden if VAT is not applicable.
Sales Tax Percent/Use Tax Percent	Displays estimated sales tax percentage if tax applicability is sales tax or direct pay. If tax applicability is use tax, then the system displays the estimated use tax percent. You can adjust the tax percentage, which recalculates the estimated SUT amounts. **Note:** This field is visible only if **SUT Applicability** is not *Sales Tax* or *Direct Pay/Sales Tax.*
Includes VAT (includes value-added tax)	Indicates whether the estimated VAT amount is to be added to the line amount before SUT is calculated. If yes, the VAT amount is added to the line amount before SUT is calculated. Otherwise, the line amount is used for VAT calculations. **Note:** This field is not available if VAT and SUT are not applicable.
Estimated Sales Tax	Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the **Includes VAT** option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount.

Field or Control	***Description***
Estimated Total	Displays the sum of the line amount, expense amount, VMS or MSP fees, and VAT or sales tax.
Estimated Use Tax	Displays the estimated sales tax. Adjusting the line amount or SUT percentage recalculates the estimated sales tax amount. If the **Includes VAT** option is yes, then adjusting the VAT percentage also recalculates the estimated sales tax amount. **Note:** The field is not available if **SUT Applicability** is not *Use Tax.*

Approving Invoices

Approvers can open invoice by navigation from Worklist in order to open Line Summary page.

Note: Similar approval pages are provided for the supplier role.

This topic discusses how to approve invoices.

Pages Used to Approve Invoices

Page Name	***Definition Name***	***Usage***
Manage Invoice Approval - Line Summary Page	SPF_INV_APR_LNDTL	View invoice lines that you are authorized to approve.
Manage Invoice Approval - Line Detail Page	SPF_INV_APR_TIME_D SPF_INV_APR_PLOG_D	View invoice line details, make adjustments to line amounts, expenses, and tax percentages, and enter comments before approving or denying the invoice line. Manage Invoice Approval - Line Summary Page
Manage Invoice Approval – Invoice Line Adjustment Detail Page	SPF_INV_TIME_ADJ SPF_INV_PLOG_ADJ	View adjustment history Manage Invoice Approval - Line Summary Page
Invoice To Address Page	SPF_ADDRESS	View the supplier's invoice to address. Manage Invoice Approval - Line Summary Page

Page Name	***Definition Name***	***Usage***
Remit To Address Page	SPF_ADDRESS	View the supplier's remit to address. Manage Invoice Approval - Line Summary Page
Currency Information Page	EXCH_RT_DTL_INQ	View multicurrency information. Manage Invoice Approval - Line Summary Page
Work Order Details Page	SPF_WO_REQ_VEN_DT	View details of the work order related to the invoice. Manage Invoice Approval - Line Summary Page
Purchase Order Inquiry - Purchase Order Page	PO_LINE_INQ	View details of the purchase order related to the invoice. Manage Invoice Approval - Line Detail Page
Approve Timesheet Page	SPA_TIME_APPROVE	View time reports. Manage Invoice Approval - Line Detail Page
Services Expense Report - Services Expense Report Details Page	SPA_SHEET_LINES2	View expense reports. Manage Invoice Approval - Line Detail Page
Create Progress Log Submittal - Progress Log Summary Page	SPA_PLOG_LINES	View progress log reports. Manage Invoice Approval - Line Detail Page

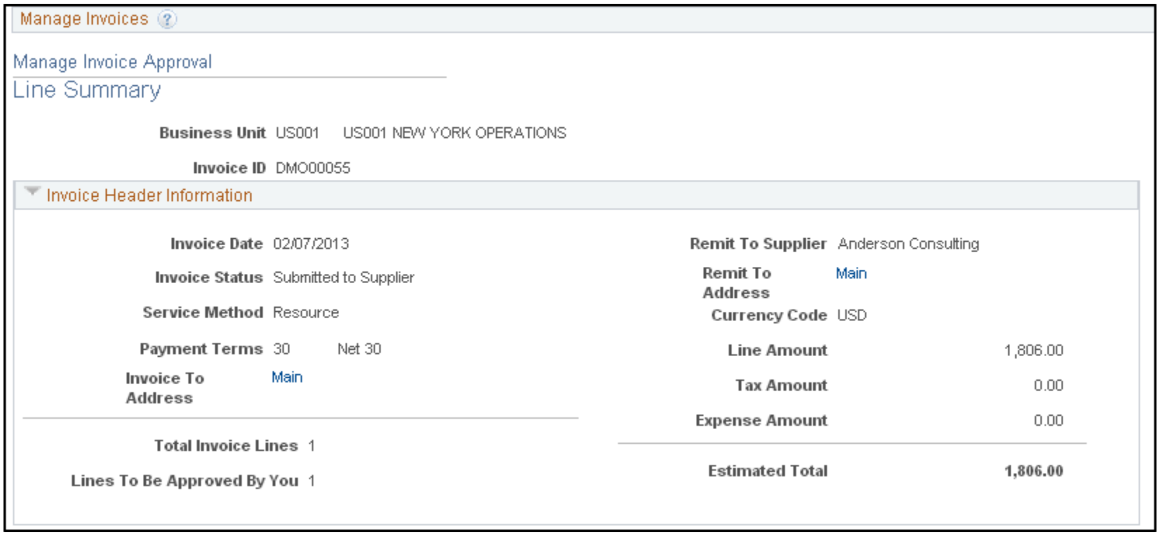
Manage Invoice Approval - Line Summary Page

Use the Manage Invoice Approval - Line Summary page (SPF_INV_APR_LNDTL) to view invoice lines that you are authorized to approve.

Navigation:

Click the **worklist** , select the worklist entry for an invoice.

This example illustrates the fields and controls on the Manage Invoice Approval - Line Summary page (1 of 2). You can find definitions for the fields and controls later on this page.



Business Unit US001 US001 NEW YORK OPERATIONS

Invoice ID DMO00055

Invoice Date 02/07/2013

Invoice Status Submitted to Supplier

Service Method Resource

Payment Terms 30 Net 30

Invoice To Address Main

Total Invoice Lines 1

Lines To Be Approved By You 1

Remit To Supplier Anderson Consulting

Remit To Address Main

Currency Code USD

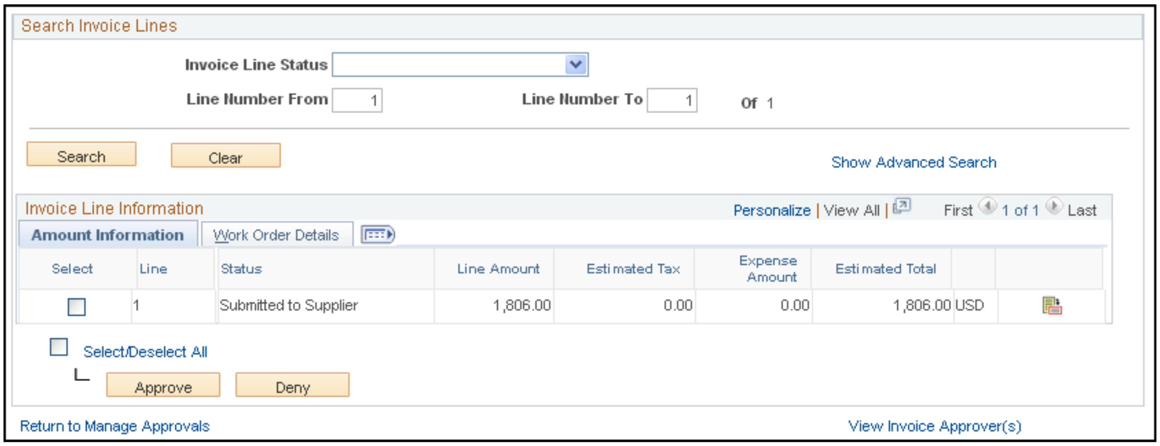
Line Amount 1,806.00

Tax Amount 0.00

Expense Amount 0.00

Estimated Total 1,806.00

This example illustrates the fields and controls on the Manage Invoice Approval - Line Summary page (2 of 2). You can find definitions for the fields and controls later on this page.



Invoice Line Status

Line Number From 1 Line Number To 1 Of 1

Select	Line	Status	Line Amount	Estimated Tax	Expense Amount	Estimated Total		
☐	1	Submitted to Supplier	1,806.00	0.00	0.00	1,806.00	USD	

You can access this page when you sign in as a PeopleSoft Services Procurement approver and click the **Worklist** and worklist entry

Field or Control	***Description***
Line Amount	Displays the total amount for the invoice line, excluding expenses and taxes.
MSP Fee (managed service provider fee)	Displays the amount paid to the MSP supplier for managing the service. This option appears and is included in the estimated invoice total only if MSP is installed and the supplier is an internal supplier. External suppliers have the MSP fee shown, but it is not included in the estimated invoice total.

Field or Control	*Description*
VMS Fee (supplier-managed service fee)	Displays the amount paid to the VMS suppler for managing the service. This option appears and is included only in the estimated invoice total for VMS invoices.
Expense Amount	Displays the total expense amount in base or work order currency.
Estimated Tax	Includes VAT and sales tax, but not use tax.
Estimated Total	Displays the sum of the line amount, expense amount, MSP or VMS fee, and estimated tax.
Work Order Details	The Work Order Details tab in the **Invoice Line Information** grid shows the information related to the work order.
View Work Order	Click to view additional work order details.
Supplier	Displays the end supplier for invoices that are under-VMS-managed. This field is shown only when VMS applies on the work order.
Service Provider	Displays the service provider associated with the work order. This is displayed only for resource-based invoices.
Timesheet ID	Displays the time sheet associated with the invoice line. This is displayed only for resource-based invoices.
Period End Date	Displays the period end date for the time sheet associated with the invoice line. This is displayed only for resource-based invoices.
Expense Sheet ID	Displays the expense sheet associated with the invoice line if one exists.
Amount Information	The Amount Information tab in the **Invoice Line Information** grid shows the amounts for the invoice line.

Deliverables Based Invoice Approval

Field or Control	*Description*
Progress Log ID	Displays the progress log ID associated with the invoice line.

Field or Control	***Description***
Activity	This field appears for deliverables-based requisitions for rate-based and milestone-based activities.
Percent Complete	This field does not appear for milestone, fixed-amount, and rate-based progress logs.

Field or Control	***Description***
View Invoice Approver(s)	Click to view a graphical map of the approval workflow. The graphical map for the workflow displays invoice approvers. The title for the workflow is the name of the stage or path defined in the Approval Process Definition. The invoice thread description shows the Invoice Line number and its approval status. The graphics provide information about individual approvers and the status of their approvals, and vary in color depending on the approval status.

Related Links

Understanding the MSP Environment

Manage Invoice Approval - Line Detail Page

Use the Manage Invoice Approval - Line Detail page to view invoice line details, make any adjustments or both

Access adjustment history.

Navigation:

Click the Details Icon for a line in the Invoice Approval Line Summary page.

The information appearing on this page depends on the selected service method and is similar to the information appearing on the Invoice Line Detail page.

You can view invoice lines that you are authorized to approve, and enter comments before approving or denying invoice lines.

Field or Control	***Description***
Timesheet ID, **Expense Sheet ID,** and **Progress Log ID**	Displays the time sheet, expense, or progress log associated with the invoice line. Click to view the time sheet, expense, or progress log details.

Field or Control	*Description*
Period End Date	Displays the period end date of the time sheet associated with the invoice line.
View Adjustments	Click to view adjustments. When you make an adjustment to an invoice line amount, the system creates an entry for the Invoice Adjustment table. This provides a history of changes for invoices.

Related Links

Manage Invoices - Line Detail Page

Approving Services Invoices Using the PeopleSoft Fluid User Interface

This topic provides an overview of the self-service approval pages for services invoices, and how to access these pages using the PeopleSoft Fluid User Interface. PeopleSoft builds these mobile approval pages on the Enterprise Component Fluid Approvals framework.

Pages Used to Approve Services Invoices Using PeopleSoft Fluid User Interface

Page Name	*Definition Name*	*Usage*
Pending Approvals - Services Invoice Page (List)	EOAWMA_MAIN_FL	View a list of pending approvals for services invoices. For more information, see the overview of approvals on the PeopleSoft Fluid User Interface: “Pending Approvals Page” (Application Fundamentals).
Services Invoice Page (Header Approval)	EOAWMA_TXNHDTL_FL	Review header details for a single services invoice, and approve or deny the invoice, depending on role criteria. For more information, see the “Approval Header Detail Page” (Application Fundamentals).
Services Invoice Page (Line Detail)	EOAWMA_TXNLDTL_FL	Review a display-only line summary and details.

Understanding Approvals for Services Invoices Using the PeopleSoft Fluid User Interface

PeopleSoft provides mobile approvals using the Enterprise Component Fluid Approvals framework. Approvers can take Application Workflow Engine (AWE) actions on select PeopleSoft transactions pending their approval, using a smart phone or tablet. The tablet version is also available for desktop use.

Services Invoice workflow enables suppliers to complete and submit invoices for approval upon completing a service. Once the service invoice has been submitted for approval, the Application Workflow Engine runs the invoices through the defined approval process. For information about registering and defining an approval process for services invoices, see Setting Up Invoice Approval Workflow.

Using the PeopleSoft Fluid User Interface, approvers can view a list of pending approvals for various types of transactions, and add comments on the centralized Pending Approvals page. An approver or multiple approvers review the transaction details, including line details. Each approver in the workflow selects an appropriate action, such as Approve or Deny within the approval pages.

Note: PeopleSoft Services Procurement delivers a permission list EPSP5040 (for Employee) and EPSP8100 (for Supplier) that enable Approvers to Approve, Deny, Pushback, or Hold Services Invoices.

Services invoice approvals also support push notifications, a framework delivered in PeopleTools. The flag icon in the Oracle banner shows a counter for new push notifications. Note that the counter disappears once you view the push notification list. The notification link takes you directly to the header approval page for items awaiting your approval.

Delegating Services Invoice Approvals

You can use the Delegation Framework to delegate services invoice approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

“Understanding Delegation” (Enterprise Components)

“Configuring Delegation Transactions” (Enterprise Components)

“Working with Self-Service Delegation” (Enterprise Components)

Pending Approvals - Services Invoice Page (List)

Use the Pending Approvals - Services Invoice list page (EOAWMA_MAIN_FL) to view a list of pending approvals for services invoices.

Navigation:

Employee Self Service > **Approvals**

On the Pending Approvals page, select **Services Invoice** in the View By - Type pane to view the service invoices in the right pane.

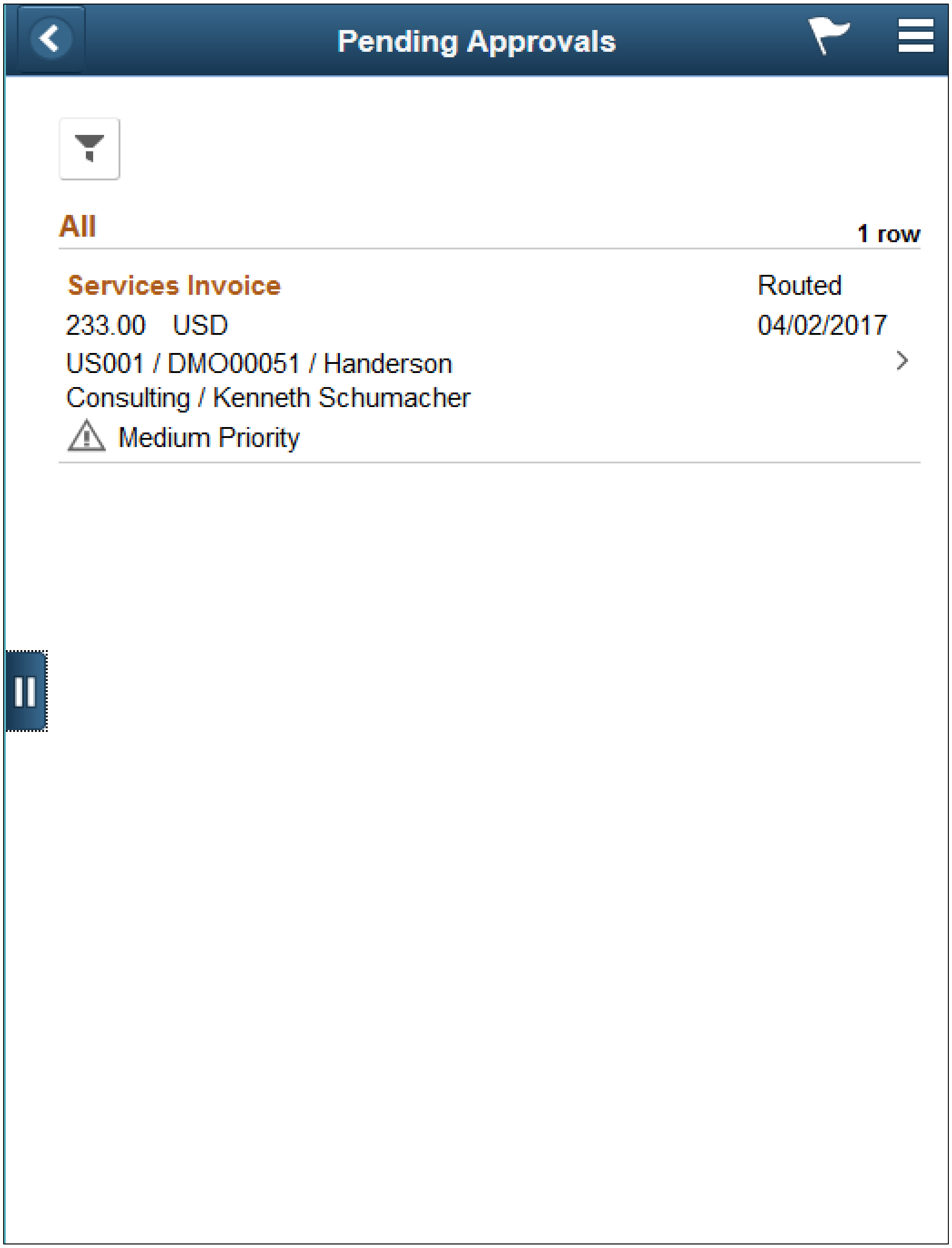
Smartphone: On the Pending Approvals - View By Type page, select **Services Invoice** to open a new page that lists the service invoices.

This example illustrates the fields and controls on the Pending Approvals - Services Invoice list page. You can find definitions for the fields and controls later on this page.

☐ Services Invoice 233.00 USD — US001 / DMO00051 / Handerson Consulting / Kenneth Schumacher — Medium Priority — Routed 04/02/2017

Approver Comments

This example illustrates the fields and controls on the Pending Approvals - Services Invoice list page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



All 1 row

Services Invoice Routed

233.00 USD 04/02/2017

US001 / DMO00051 / Handerson Consulting / Kenneth Schumacher

Medium Priority

From the list page, you can do the following:

- Review header information for the services invoices currently routed for approval. To access header details for a particular invoice report, select the header row.
- Use the filter to narrow results on the page. For more information about using the filter, see the “Filters Page” (Application Fundamentals).

Field or Control	*Description*
Approver Comments	Enter comments in the text entry field.
Approve or **Deny**	Perform a mass action by selecting multiple transactions, and then selecting an approval action button.
‖	Select this button to expand or collapse the View By Type page.

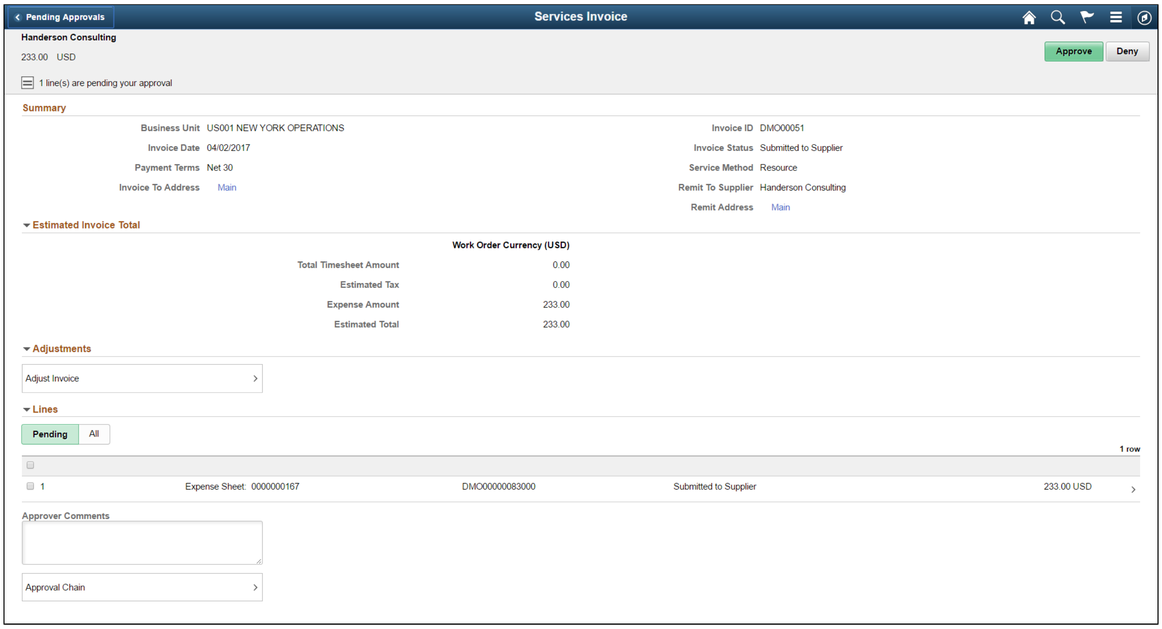
Services Invoice Page (Header Approval)

Use the Services Invoice header approval page (EOAWMA_TXNHDTL_FL) to review header details for a single invoice, and approve or deny the invoice, depending on role criteria.

Navigation:

Select an invoice in the list on the Pending Approvals - Services Invoice list page.

This example illustrates the fields and controls on the Services Invoice header approval page. You can find definitions for the fields and controls later on this page.



Handerson Consulting

233.00 USD

1 line(s) are pending your approval

Business Unit US001 NEW YORK OPERATIONS

Invoice Date 04/02/2017

Payment Terms Net 30

Invoice To Address Main

Invoice ID DMO00051

Invoice Status Submitted to Supplier

Service Method Resource

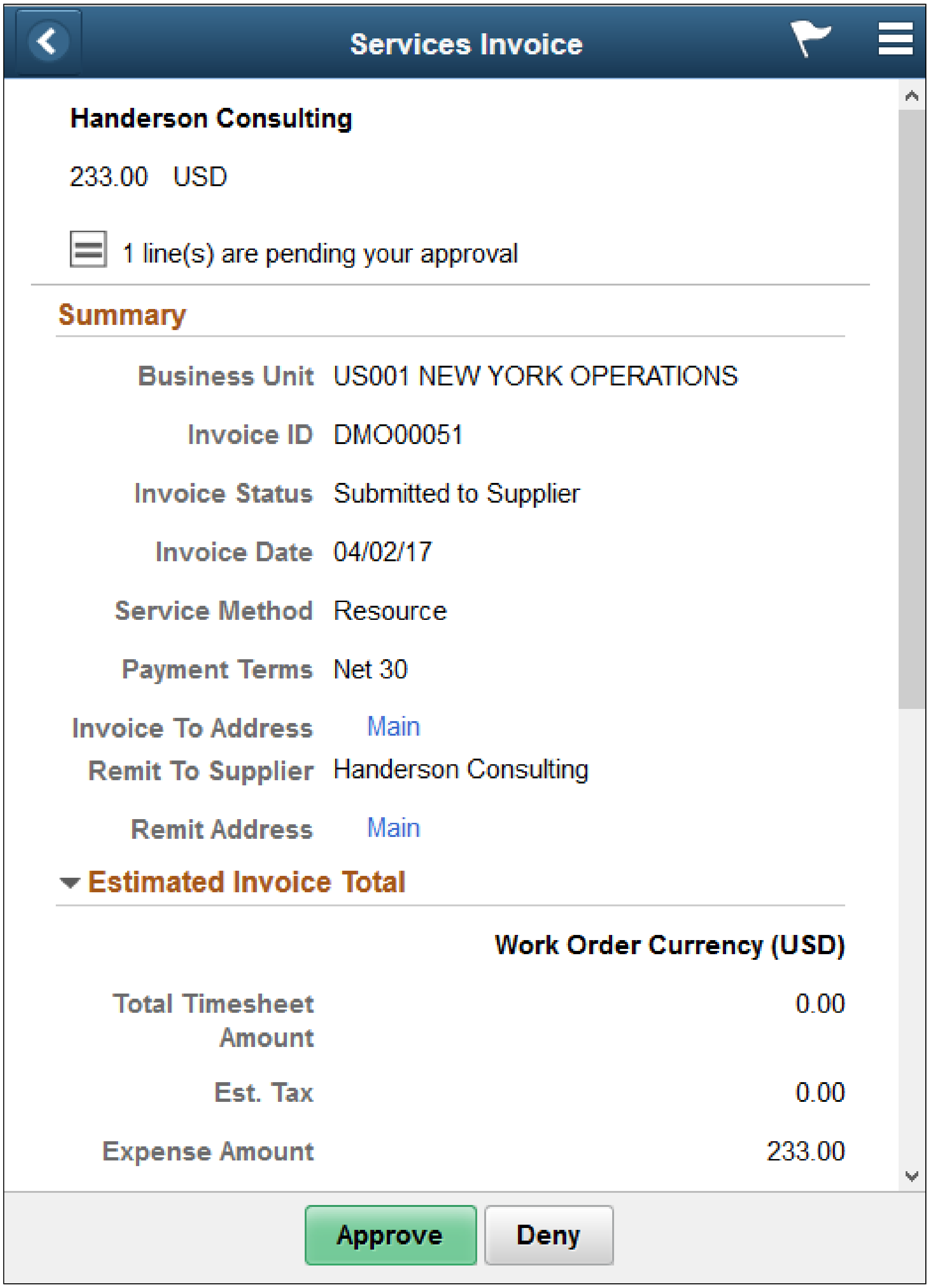
Remit To Supplier Handerson Consulting

Remit Address Main

	Work Order Currency (USD)
Total Timesheet Amount	0.00
Estimated Tax	0.00
Expense Amount	233.00
Estimated Total	233.00

☐	1	Expense Sheet: 0000000167	DMO00000083000	Submitted to Supplier	233.00 USD

This example illustrates the fields and controls on the Services Invoice header approval page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.



Handerson Consulting

233.00 USD

1 line(s) are pending your approval

Summary

Business Unit US001 NEW YORK OPERATIONS

Invoice ID DMO00051

Invoice Status Submitted to Supplier

Invoice Date 04/02/17

Service Method Resource

Payment Terms Net 30

Invoice To Address Main

Remit To Supplier Handerson Consulting

Remit Address Main

Estimated Invoice Total

	Work Order Currency (USD)
Total Timesheet Amount	0.00
Est. Tax	0.00
Expense Amount	233.00

Field or Control	***Description***
Exchange Rate Details	Select to view currency and exchange rate information.
Invoice To Address	Select to view the invoice address.
Remit Address	Select to view the address where the payments are sent..

Field or Control	***Description***
Estimated Invoice Total	Displays the estimated total including expenses and estimated prorated tax.
Adjust Invoice	Select to adjust the expense amounts. The PeopleSoft Classic user interface displays where you can make the adjustments.
Lines	Select to view invoice line details or make any adjustments.
Approver Comments	Enter comments in the text entry field.
Approval Chain	Select to review approval chain information. You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.
Approve or **Deny**	Select an action button. When you select an action button, you have the option to select **Submit** to continue the action or **Cancel** to back out of the action. Upon submitting the action, the system generates a message that the action is successful. **Note:** If you deny a service invoice, you will need to enter a reason code and comment for the denial.

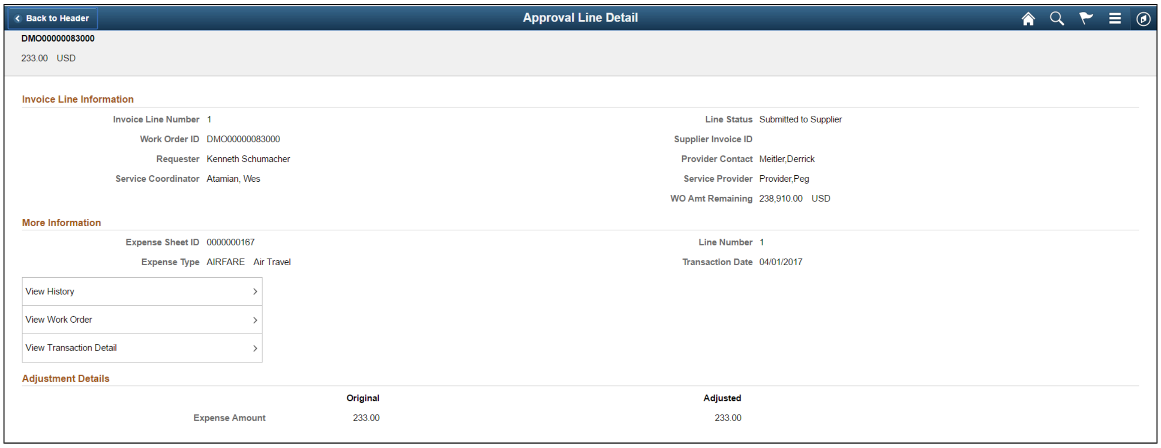
Services Invoice Page (Line Detail)

Use the Services Invoice line detail page (EOAWMA_TXNLDTL_FL) to review a display-only line summary and details.

Navigation:

Select an invoice line item in the Lines section on the Services Invoice header approval page.

This example illustrates the fields and controls on the Services Invoice line detail page. You can find definitions for the fields and controls later on this page.



DMO00000083000

233.00 USD

Invoice Line Information

Invoice Line Number 1
Work Order ID DMO00000083000
Requester Kenneth Schumacher
Service Coordinator Atamian, Wes
Line Status Submitted to Supplier
Supplier Invoice ID
Provider Contact Meitler,Derrick
Service Provider Provider,Peg
WO Amt Remaining 238,910.00 USD

More Information

Expense Sheet ID 0000000167
Expense Type AIRFARE Air Travel
Line Number 1
Transaction Date 04/01/2017

Adjustment Details

	Original	Adjusted
Expense Amount	233.00	233.00

Field or Control	***Description***
View History	Select to view status history for an invoice line.
View Work Order	Select to view additional work order details in PeopleSoft Classic user interface.
View Transaction Detail	Select to view the corresponding transaction details in the PeopleSoft Classic user interface.

Managing Invoice Approval for Suppliers

This topic discusses how to manage Invoice approval for Suppliers.

Note: Many of the field definitions mentioned in the Approving Invoices section also apply to this topic.

See Approving Invoices.

Pages Used to Manage Invoice Approval for Suppliers

Page Name	***Definition Name***	***Usage***
Manage Invoice Approval - Line Summary Page	SPA_MG_SUP_INV_APR	Review, accept, or deny invoice approvals as a supplier invoice approver.
Manage Invoice Approval - Line Summary page	SPA_SUP_INV_APR_LN	View invoice lines that you are authorized to approve as a supplier invoice approver.

Page Name	***Definition Name***	***Usage***
Work Order Details	SPF_WORDER_DETAIL	View details of the work order related to the invoice. Manage Invoice Approval - Line Summary page
Invoice Approval Line Detail Page	SPA_SUP_INVAP_TIME SPA_SUP_INVAP_PLOG	View approvals for invoice line summaries, and enter comments before approving or denying the invoice line as a service provider. Manage Invoice Approval - Line Summary page
Manage Invoice Approval – Invoice Line Adjustment Detail Page	SPA_SUP_INVTIM_ADJ SPA_SUP_INVPLG_ADJ	View adjustment history Manage Invoice Approval - Line Summary page
Approve Timesheet Page	SPA_TIME_APPROVE	View time reports.
Services Expense Report Details page	SPA_SHEET_LINES2	View expense reports.
Progress Log Summary Page	SPA_PLOG_LINES	View time reports.

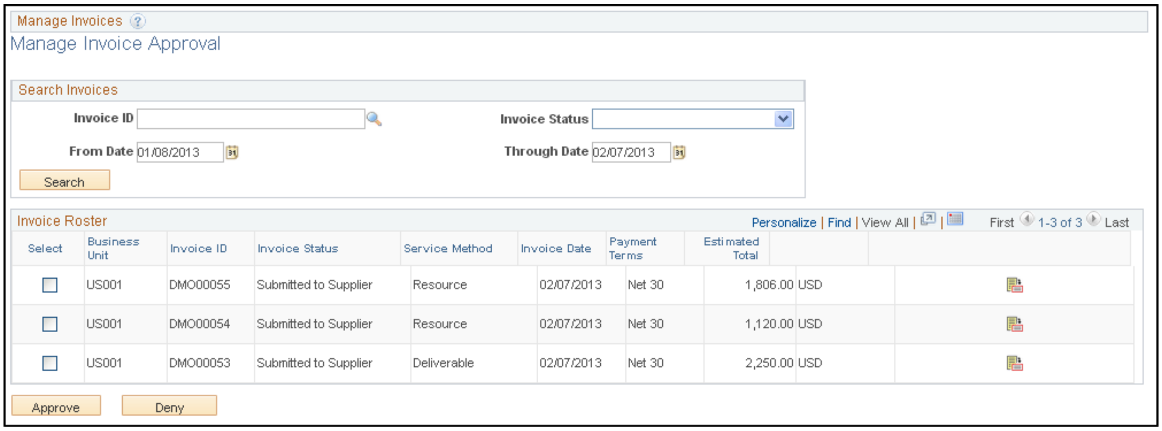
Manage Invoice Approval - Line Summary Page

Use the Manage Invoice Approval - Line Summary page (SPA_MG_SUP_INV_APR) to review, accept, or deny invoice approvals as a supplier invoice approver.

Navigation:

Service Procurement > **Approve Service Invoices (external)**

This example illustrates the fields and controls on the Manage Invoice Approval. You can find definitions for the fields and controls later on this page.



Manage Invoice Approval

Search Invoices

Invoice ID

Invoice Status

From Date 01/08/2013

Through Date 02/07/2013

Invoice Roster

Select	Business Unit	Invoice ID	Invoice Status	Service Method	Invoice Date	Payment Terms	Estimated Total		
☐	US001	DMO00055	Submitted to Supplier	Resource	02/07/2013	Net 30	1,806.00	USD	
☐	US001	DMO00054	Submitted to Supplier	Resource	02/07/2013	Net 30	1,120.00	USD	
☐	US001	DMO00053	Submitted to Supplier	Deliverable	02/07/2013	Net 30	2,250.00	USD	

Supplier users use this page to approve or deny invoices that have been submitted. Select an invoice to approve.

Manage Invoice Approval - Line Summary page

Use the Manage Invoice Approval - Line Summary page (SPA_SUP_INV_APR_LN) to view invoice lines that you are authorized to approve as a supplier invoice approver.

Navigation:

Click the **Invoice Approval Line Summary** button on the Manage Invoice Approval page.

Select the invoice line to approve.

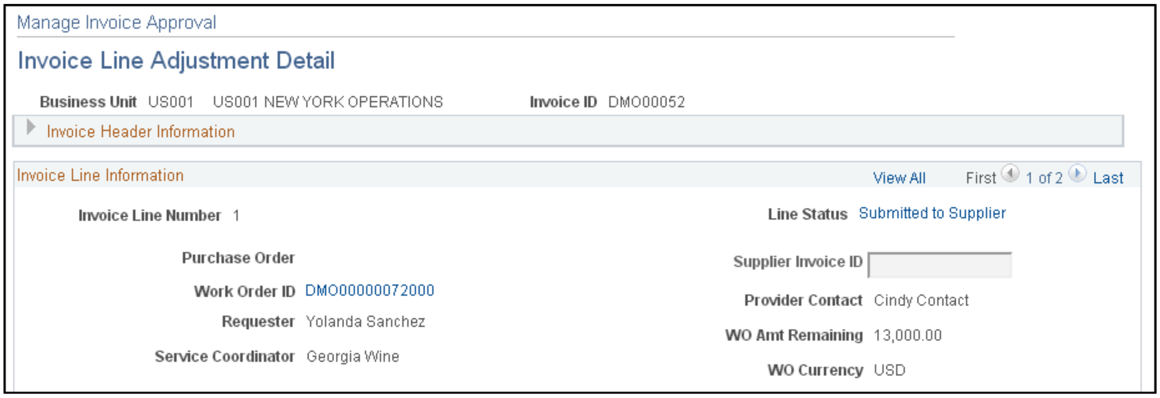
Manage Invoice Approval – Invoice Line Adjustment Detail page

Use the Manage Invoice Approval – Invoice Line Adjustment Detail page to view the Adjustment history.

Navigation:

Services Procurement > **Approve Services Invoices** > **Supplier's Approve Invoices – Line Detail page** click the View Adjustment link.

This example illustrates the fields and controls on the Manage Invoice Approval – Invoice Line Adjustment Detail Page (1 of 2).



Manage Invoice Approval

Invoice Line Adjustment Detail

Business Unit US001 US001 NEW YORK OPERATIONS

Invoice ID DMO00052

Invoice Line Number 1

Line Status Submitted to Supplier

Purchase Order

Supplier Invoice ID

Work Order ID DMO00000072000

Provider Contact Cindy Contact

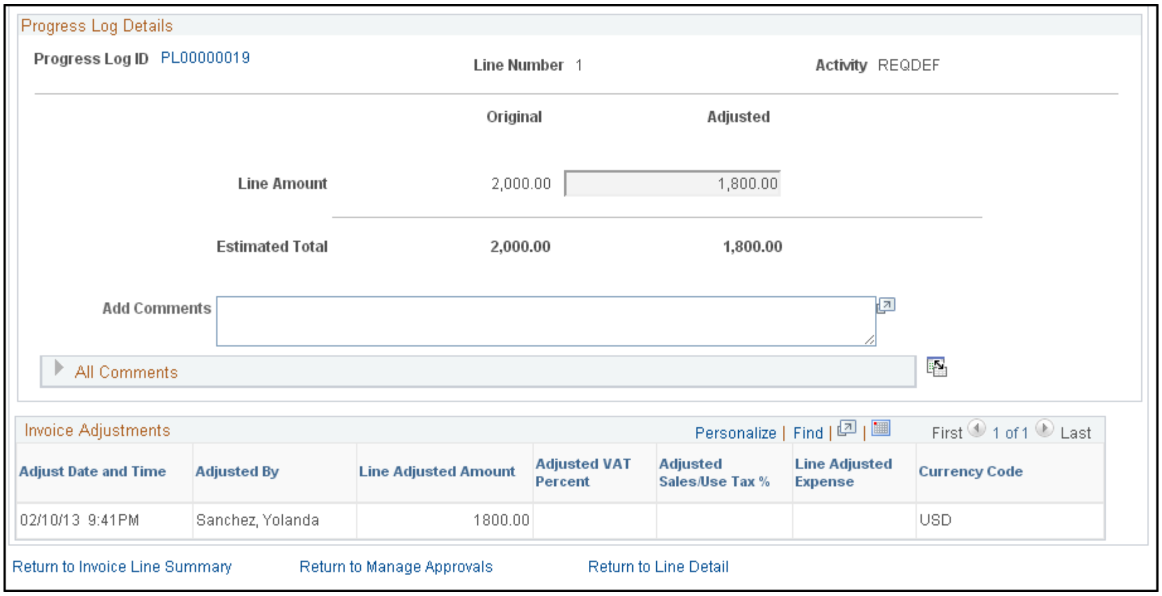
Requester Yolanda Sanchez

WO Amt Remaining 13,000.00

Service Coordinator Georgia Wine

WO Currency USD

This example illustrates the fields and controls on the Manage Invoice Approval – Invoice Line Adjustment Detail Page (2 of 2).



Progress Log Details

Progress Log ID PL00000019

Line Number 1

Activity REQDEF

	Original	Adjusted
Line Amount	2,000.00	1,800.00
Estimated Total	2,000.00	1,800.00

Add Comments

Adjust Date and Time	Adjusted By	Line Adjusted Amount	Adjusted VAT Percent	Adjusted Sales/Use Tax %	Line Adjusted Expense	Currency Code
02/10/13 9:41PM	Sanchez, Yolanda	1800.00				USD

Triggering Worklist and Email Notifications

The following status changes trigger a worklist entry and an email notification:

- The invoice manager receives a worklist entry and an email notification if the invoice status changes to *Denied by Supplier or Denied by Enterprise.*
- The invoice approver indicated on the work order receives a worklist entry and an email notification when the invoice status changes to *Submitted to Enterprise* or *Approved by Supplier.*
- The supplier invoice approver for each service provider receives a worklist entry and an email notification when an invoice is submitted to a supplier.

Chapter 23

Using Surveys in PeopleSoft Services Procurement

Understanding Surveys in PeopleSoft Services Procurement

PeopleSoft Services Procurement enables enterprise users to create performance surveys that are sent to recipients once their work orders are complete, canceled, or terminated. Enterprise users can create, edit, and send surveys to individual recipients, or distribute surveys to a list of recipients. Surveys are sent both automatically and manually, depending on the configuration of the work order environment. Once the survey is received and completed by the recipient, enterprise users can view survey responses.

Setting Up Surveys

To set up surveys, use the Setup Surveys (SP_SUR_DEFN) component. To define format and answer choices for work order survey questions, use the Response Type (SP_SUR_RESTYP) component. To set up surveys by service type, use the Survey by Service Type (SP_SURVEY_BY_SVTYP) component.

This topic discusses how to set up surveys.

Pages Used to Define Surveys

Page Name	***Definition Name***	***Usage***
Services Procurement Business Units Options Page	BUS_UNIT_TBL_SP	Define PeopleSoft Services Procurement business units.
Work Order Settings Page	BUS_UNIT_TBL_SP_WO	Define work order alerts and settings.
Service Types Page	SPB_ROLE_TYPE	Define service types options for surveys.
Role Distribution List Page	SP_DSTRLST	Set up role distribution lists to use with performance surveys.
Response Type Page	SP_SUR_RESTYP	Define formats and answer choices for work order survey questions.
Setup Survey Page	SP_SUR_DEFN	Define titles, question sequence, and response types for work order surveys.

Page Name	***Definition Name***	***Usage***
Survey Setup - Service Type Page	SP_SUR_DEFN_SVTYP	View the service types related to the survey.
Surveys by Service Type Page	SP_SURVEY_BY_SVTYP	Associate service type with one or more surveys.

Work Order Settings Page

Use the Work Order Settings page (BUS_UNIT_TBL_SP_WO) to define work order alerts and settings.

Navigation:

Services Procurement > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Services Procurement options**

Click the Work Order Settings tab.

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

Related Links

Services Procurement Bus Unit Page

Service Types Page

Use the Service Types page (SPB_ROLE_TYPE) to define service types options for surveys.

Navigation:

- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Service Types/Roles** > **Define Service Types**
- **Services Procurement** > **Define Services Procurement** > **Service Setup** > **Service Type Setup** > **Service Types**

Field or Control	***Description***
Require Survey by Default	Select to indicate that surveys are mandatory for work orders that are associated with the specified service type. If you select this check box, surveys must be complete before the work order is finalized. **Note:** You can change the status of a mandatory survey on a work order.
Automatically Send Survey	Select to indicate that surveys will be automatically sent to recipients at the time the work order is terminated, closed, or canceled. If surveys are not sent automatically, then you must click the **Send Survey to Recipients** button on the work order. **Note:** If a survey is automatic, it is sent to all recipients that are tied to the role action that is specified on the distribution list.

Related Links

Service Types Page

Role Distribution List Page

Access Role Distribution List page (Set Up Financials/Supply Chain, Product Related, Services Procurement, Role Distribution Lists).

Field or Control	***Description***
Role Distribution List	Indicates the name of the new distribution list.
Role Action Description	Add role actions to the survey distribution list.

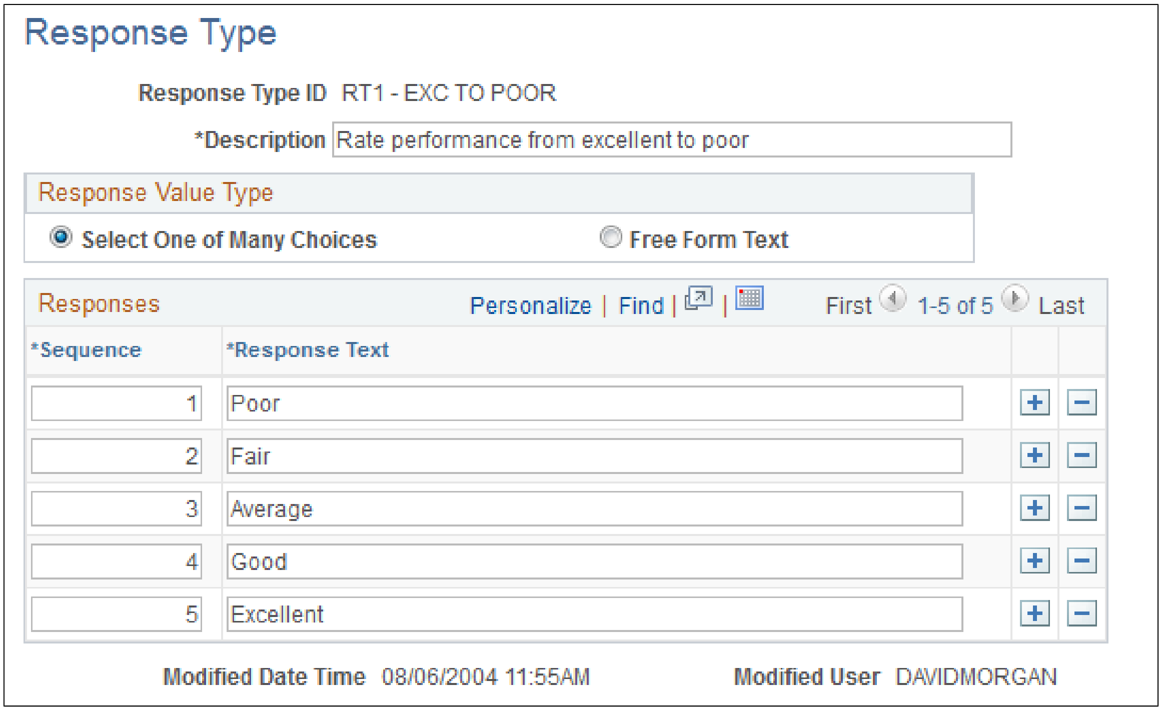
Response Type Page

Use the Response Type page (SP_SUR_RESTYP) to define formats and answer choices for work order survey questions.

Navigation:

- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Surveys** > **Create Survey Response Types**
- **Services Procurement** > **Define Services Procurement** > **Services Setup** > **Survey Setup** > **Response Types**

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



Response Type ID RT1 - EXC TO POOR

*Description Rate performance from excellent to poor

Response Value Type

● Select One of Many Choices ○ Free Form Text

Responses

*Sequence	*Response Text
1	Poor
2	Fair
3	Average
4	Good
5	Excellent

Modified Date Time 08/06/2004 11:55AM Modified User DAVIDMORGAN

Field or Control	***Description***
Response Type ID	Name of the response type. Response types are used to define a set of appropriate responses that can be associated to multiple questions within or across surveys.
Select One of Many Choices	Select to indicate that a question is limited to only one response.
Free Form Text	Select to indicate that a recipient can respond to a question as free-form text.
Sequence	Enter the order that responses appear to recipients. **Note:** This option is for single choice selections only.
Response Text	Enter the text for the response. The response texts for a response type are shown to survey recipients as the list of available answers to a survey question.

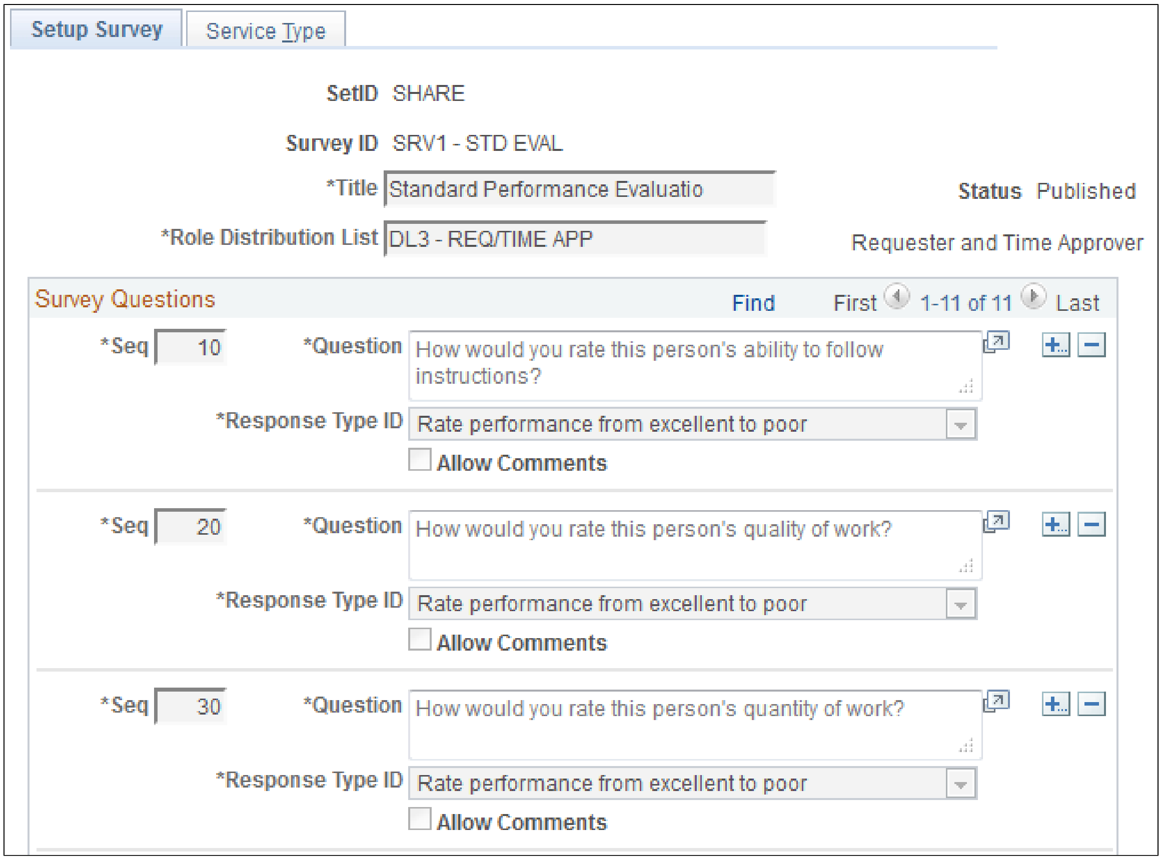
Setup Survey Page

Use the Setup Survey page (SP_SUR_DEFN) to define titles, question sequence, and response types for work order surveys.

Navigation:

- **Set Up Financials/Supply Chain > Product Related > Services Procurement > Surveys > Create a Work Order Survey**
- **Services Procurement > Define Services Procurement > Services Setup > Survey Setup > Survey Setup**

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



SetID SHARE

Survey ID SRV1 - STD EVAL

*Title Standard Performance Evaluatio

Status Published

*Role Distribution List DL3 - REQ/TIME APP

Requester and Time Approver

*Seq 10

*Question How would you rate this person's ability to follow instructions?

*Response Type ID Rate performance from excellent to poor

☐ Allow Comments

*Seq 20

*Question How would you rate this person's quality of work?

*Response Type ID Rate performance from excellent to poor

☐ Allow Comments

*Seq 30

*Question How would you rate this person's quantity of work?

*Response Type ID Rate performance from excellent to poor

☐ Allow Comments

Field or Control	***Description***
Survey ID	Displays the name of the survey. **Note:** This field is keyed by SetID upon entering the page.
Title	Enter the title of the survey.
Copy	Click to copy an existing survey to a new survey. When you click this button, the system enables you to copy from a prior survey SetID and survey ID. **Note:** This button only appears if you are creating a new survey.

Field or Control	***Description***
Status	View the predefined statues of a survey. Statuses include *Draft, Publish,* and *Retired.* *Draft:* This is the initial status of a survey that is assigned when the survey is created and saved. *Published:* The system changes the status from Draft to Publish once you select the Publish Survey button. **Note:** Once you click the **Publish Survey** button, the **Save Draft** button is no longer available. You can only select published surveys as a work order survey. *Retired:* This status indicates that the survey is retired, and the survey does not show up on the work order selection. The survey, however, is viewable in the survey results. It is possible to republish a retired survey. **Note:** You cannot retire a survey that is the default for a service type unless you change the default first.
Sequence	Determines the order in which the questions will be displayed to the survey recipients.
Role Distribution List	Select a survey distribution list to associate with the survey.
Question	Enter a survey question.
Response Type ID	Select a response type to associate with the question on the survey.
Allow Comments	Select to provide a comments text box to recipients for the survey question.
Retire Survey	Click to retire a survey. **Note:** When you retire the survey, the survey is removed from the work order selection. It is possible to republish a retired survey.
Preview Survey	Click to view a survey before it is published.

Survey Setup - Service Type Page

Use the Survey Setup - Service Type page (SP_SUR_DEFN_SVTYP) to view the service types related to the survey.

Navigation:

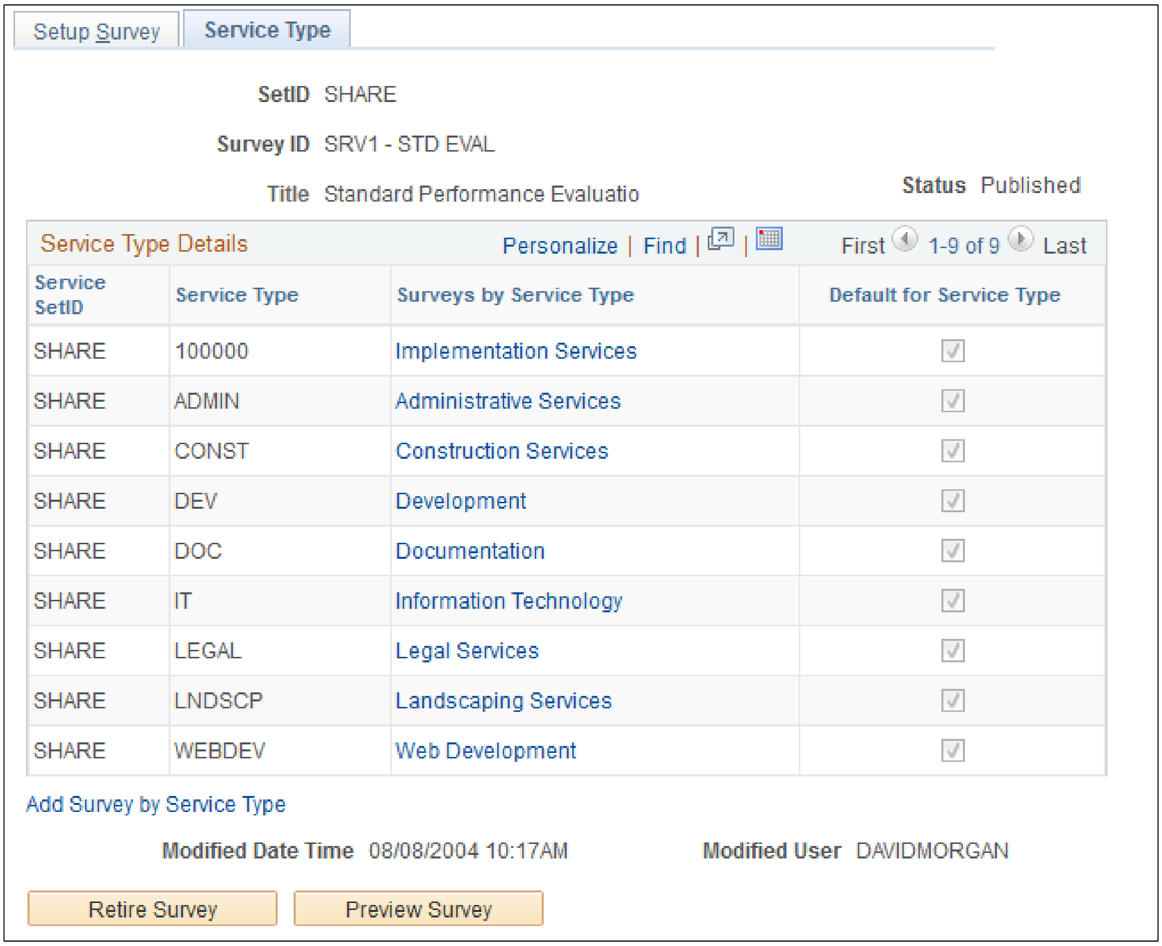
- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Surveys** > **Setup Survey**

  Select the Service Type tab.

- **Services Procurement** > **Define Services Procurement** > **Services Setup** > **Survey Setup** > **Survey Setup**

  Select the Service Type tab.

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



SetID SHARE

Survey ID SRV1 - STD EVAL

Title Standard Performance Evaluatio

Status Published

Service SetID	Service Type	Surveys by Service Type	Default for Service Type
SHARE	100000	Implementation Services	☑
SHARE	ADMIN	Administrative Services	☑
SHARE	CONST	Construction Services	☑
SHARE	DEV	Development	☑
SHARE	DOC	Documentation	☑
SHARE	IT	Information Technology	☑
SHARE	LEGAL	Legal Services	☑
SHARE	LNDSCP	Landscaping Services	☑
SHARE	WEBDEV	Web Development	☑

Modified Date Time 08/08/2004 10:17AM

Modified User DAVIDMORGAN

Field or Control	***Description***
Service SetID	View the service SetID that is associated with the survey.
Service Type	View the service types that are related to the survey.
Surveys by Service Type	Click to access the Survey by Service Type page for the specific Service Type. You can add and delete surveys for the service type, as well as select the default survey.

Field or Control	***Description***
Default for Service Type	Indicates that the survey is the default survey for the specified service type when a work order is created and requires a performance survey.
Add Survey by Service Type	Click to access the Survey by Service Type page, where you can add and delete surveys for Service Types, as well as select the default survey for the service types. The system will prompt you for the Service Type.

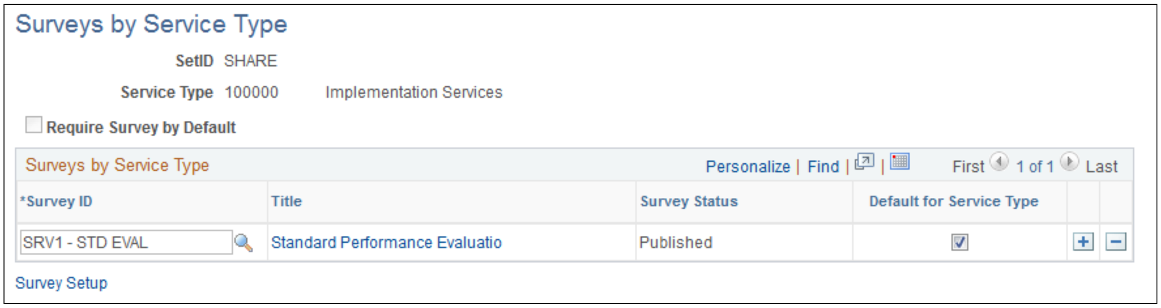
Surveys by Service Type Page

Use the Survey by Service Type page (SP_SURVEY_BY_SVTYP) to associate service type with one or more surveys.

Navigation:

- **Set Up Financials/Supply Chain** > **Product Related** > **Services Procurement** > **Surveys** > **Surveys by Service Type**
- **Services Procurement** > **Define Services Procurement** > **Services Setup** > **Survey Setup** > **Surveys by Service Type**

This example illustrates the fields and controls on the Surveys by Service Type page. You can find definitions for the fields and controls later on this page.



Surveys by Service Type

SetID SHARE

Service Type 100000 Implementation Services

☐ Require Survey by Default

*Survey ID	Title	Survey Status	Default for Service Type
SRV1 - STD EVAL	Standard Performance Evaluatio	Published	☑

Field or Control	***Description***
Survey ID	Add and delete survey IDs that are associated to a service type.
Title	Click to access the Setup Survey - Service Type page for the survey title that is visible. You can view all service types associated to the survey.
Survey Status	View the status of the survey that is associated to a service type.

Field or Control	***Description***
Default for Service Type	Indicates whether a particular survey is the default survey for service type when the service type is entered on a work order and the business unit uses surveys. The default survey is used to initially populate the work order survey field.

Editing and Submitting Work Order Surveys

This topic discusses how to edit and submit work order surveys.

Page Used to Edit and Submit Work Order Surveys

Page Name	***Definition Name***	***Usage***
Manage Work Orders - Surveys Page	SPF_WO_SUR_USR	Include survey details and send surveys to the appropriate recipients.

Manage Work Orders - Surveys Page

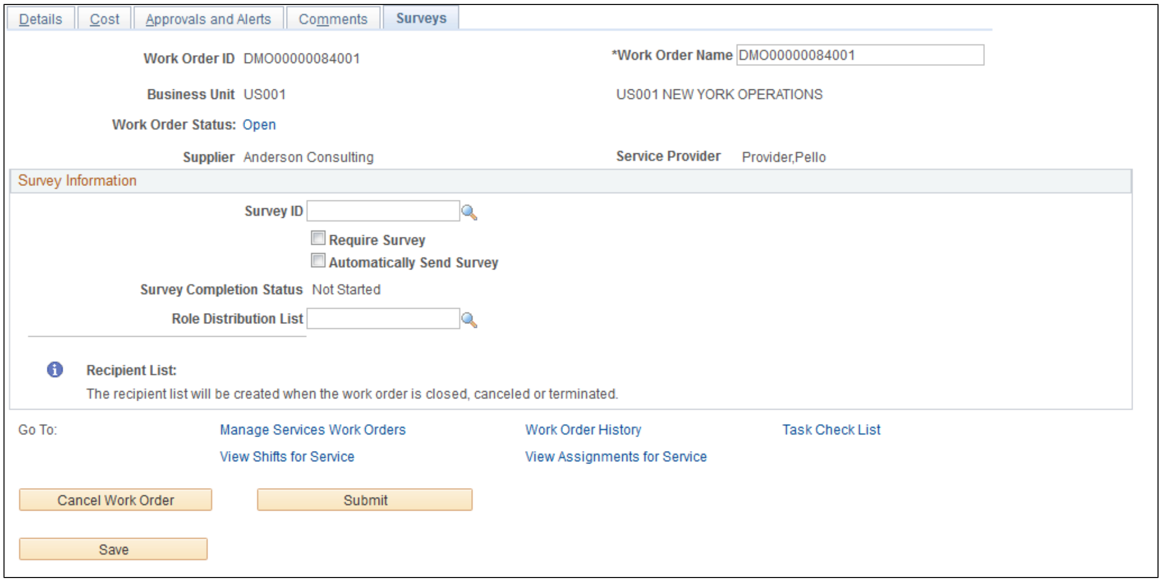
Use the Manage Work Orders - Surveys page (SPF_WO_SUR_USR) to include survey details and send surveys to the appropriate recipients.

Navigation:

Services Procurement > **Manage Services Work Order**

Select the Survey tab.

This example illustrates the fields and controls on the Manage Work Order - Surveys page. You can find definitions for the fields and controls later on this page.



Work Order ID DMO00000084001

*Work Order Name DMO00000084001

Business Unit US001

US001 NEW YORK OPERATIONS

Work Order Status: Open

Supplier Anderson Consulting

Service Provider Provider,Pello

Survey Information

Survey ID

☐ Require Survey

☐ Automatically Send Survey

Survey Completion Status Not Started

Role Distribution List

Recipient List:

The recipient list will be created when the work order is closed, canceled or terminated.

Field or Control	***Description***
Require Survey	Indicates that a survey is mandatory for the work order that is associated with the specified service type. **Note:** This value defaults from the service type associated with the survey. You can modify this value before sending the survey.
Automatically Send Survey	Indicates that a survey will be automatically sent to a recipient at the time the work order is terminated, closed, or canceled. All recipients listed on the survey distribution list will receive notification. **Note:** This value defaults from the service type associated with the survey. You can modify this value before sending the survey.
Distribution List Roles	Work order-related role actions that are included in the distribution list that you select for the work order survey.

Note: After sending a survey, users may only cancel a survey. Use the + and - buttons to add a new survey recipient or remove a recipient if the survey has not yet been sent.

If a survey is mandatory, all recipients must complete and submit the survey before the work order can be finalized. The survey status changes to complete once the survey is submitted.

Related Links

Understanding Services Work Orders

Viewing Surveys

This topic discusses how to view my survey summary.

Page Used to View Surveys

Page Name	***Definition Name***	***Usage***
My Survey Summary Page	SP_SUR_FILL_ROSTER	Search for your work order performance surveys.

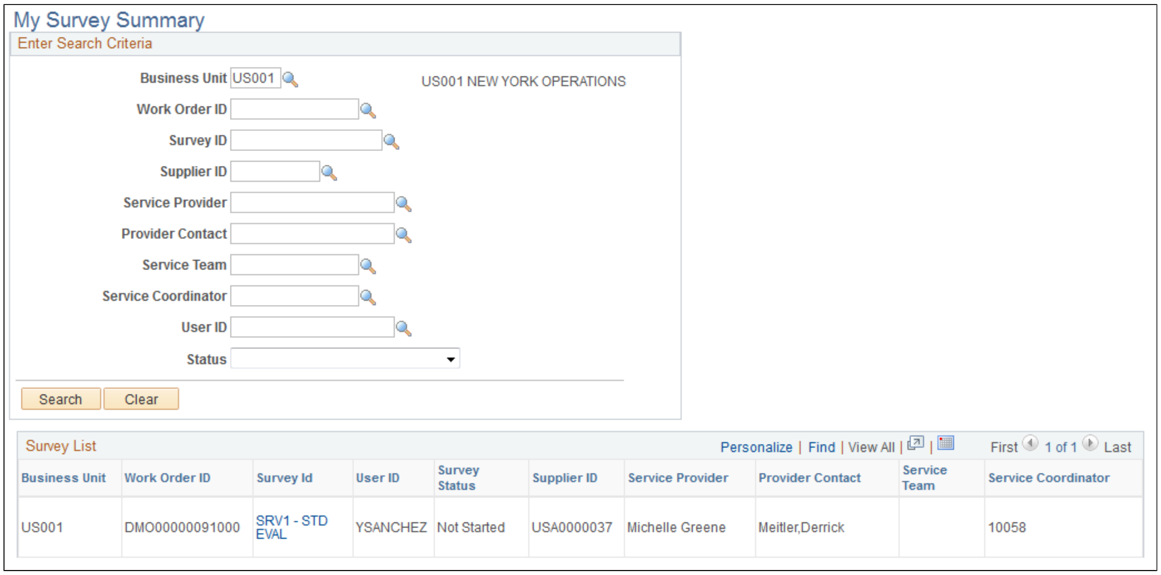
My Survey Summary Page

Use the My Survey Summary page (SP_SUR_FILL_ROSTER) to search for your work order performance surveys.

Navigation:

Services Procurement > **Respond/View Survey** > **My Survey Summary**

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



Business Unit US001 US001 NEW YORK OPERATIONS

Work Order ID

Survey ID

Supplier ID

Service Provider

Provider Contact

Service Team

Service Coordinator

User ID

Status

Business Unit	Work Order ID	Survey Id	User ID	Survey Status	Supplier ID	Service Provider	Provider Contact	Service Team	Service Coordinator
US001	DMO00000091000	SRV1 - STD EVAL	YSANCHEZ	Not Started	USA0000037	Michelle Greene	Meitler,Derrick		10058

Enter a specific business unit, work order ID, survey ID, supplier ID, service provider, service contact, user ID (survey recipient), or status to restrict the surveys to only those that match. Or leave those fields blank to pick up all values. Click the **Search** button to return valid surveys that a user can complete for himself or on behalf of another user.

The **Status** field displays work order surveys that are not started, in progress, or canceled. Initially only those particular surveys that a user must complete as the survey recipient appear in the Survey List.

Field or Control	***Description***
Survey ID	Click to access the Respond to Survey page, where you can respond to and view the work order surveys.

Responding to Surveys

This topic discusses how to respond to surveys.

Page Used to Respond to Surveys

Page Name	***Definition Name***	***Usage***
Respond To Survey Page	SP_SUR_FILL	Respond to and review your work order surveys.

Respond To Survey Page

Use the Respond To Survey page (SP_SUR_FILL) to respond to and review your work order surveys.

Navigation:

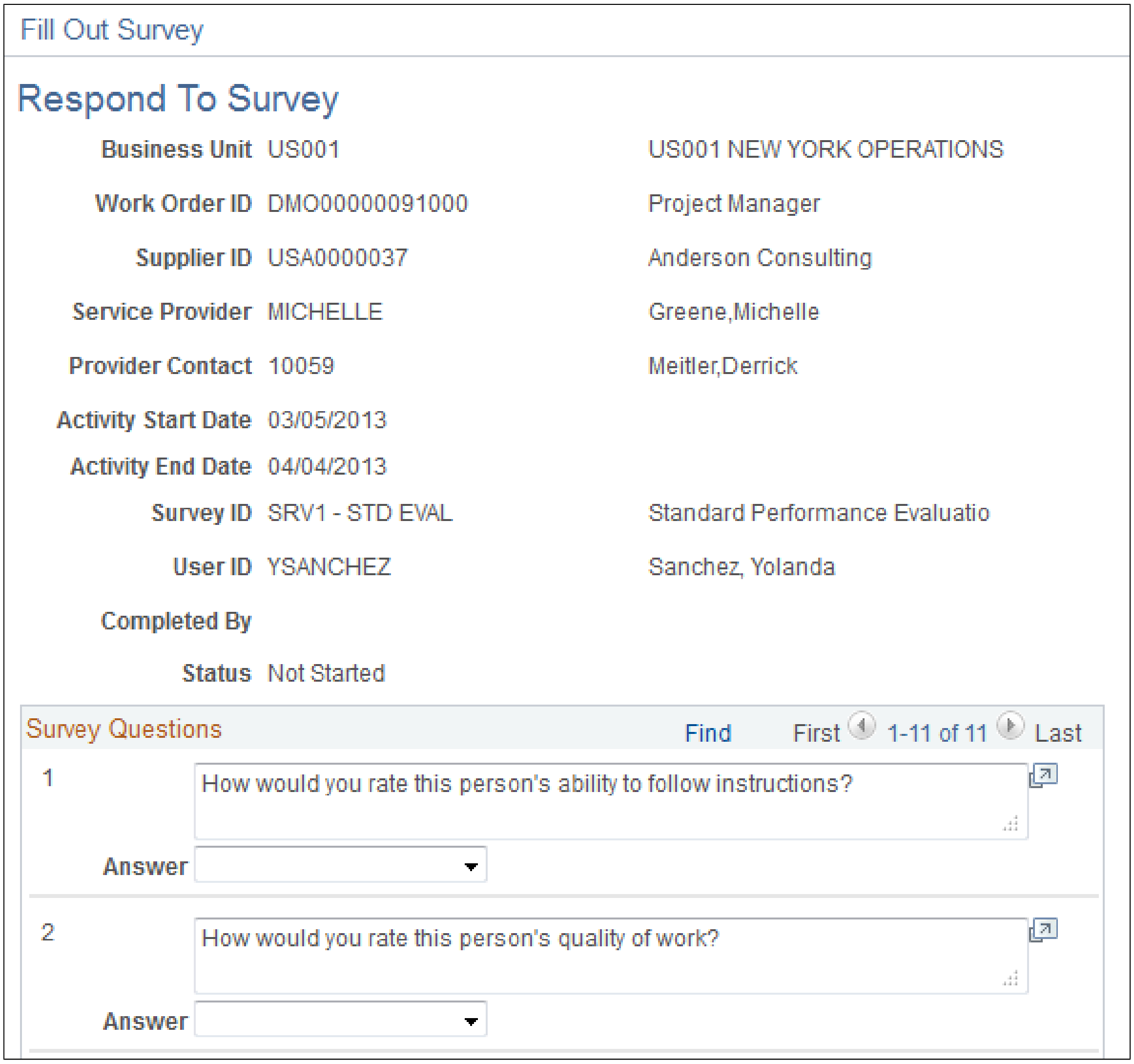
- **Services Procurement** > **Respond/View Survey** > **My Survey Summary**

  Click the **Search** button to locate your surveys.

- **Worklist** > **Filter on Survey Routing**

  Click **Survey.**

This example illustrates the fields and controls on the Respond to Survey page. You can find definitions for the fields and controls later on this page.



Business Unit	US001	US001 NEW YORK OPERATIONS
Work Order ID	DMO00000091000	Project Manager
Supplier ID	USA0000037	Anderson Consulting
Service Provider	MICHELLE	Greene,Michelle
Provider Contact	10059	Meitler,Derrick
Activity Start Date	03/05/2013	
Activity End Date	04/04/2013	
Survey ID	SRV1 - STD EVAL	Standard Performance Evaluatio
User ID	YSANCHEZ	Sanchez, Yolanda
Completed By		
Status	Not Started	

1 How would you rate this person's ability to follow instructions?

Answer

2 How would you rate this person's quality of work?

Answer

Field or Control	***Description***
User ID	Review the survey recipient user name.
Completed By	Review name of the person that filled out the survey. This may differ from the recipient user name. The service coordinator, requester, and other service team members have the ability to respond to the survey on behalf of recipients. This field is blank if the survey is not complete.
Survey Question	View the questions for the survey.
Answer	Provide answers to the survey questions.

Field or Control	***Description***
Submit Survey	Click to submit the survey to the survey reviewer. **Note:** This action disallows further changes to the survey, marks the survey as complete for the user, and removes the worklist entry.
Save for Later	Click to save the survey. Once you save the survey, you can access and complete it at a later time.

Reviewing the Survey

This topic discusses how to review the survey.

Pages Used to Review the Survey

Page Name	***Definition Name***	***Usage***
Review Survey Summary Page	SP_SUR_REV_ROSTER	Search for completed surveys to review.
Review Survey User Responses Page	SP_SUR_USR_RES	Review work order evaluation summaries.

Review Survey Summary Page

Use the Review Survey Summary page (SP_SUR_REV_ROSTER) to search for completed surveys to review.

Navigation:

Services Procurement > **Respond/View Survey** > **Review Survey Summary**

Enter a specific business unit, work order ID, survey ID, supplier ID, service provider, service contact, user ID (survey recipient), or status to restrict the surveys to only those that match. Or leave those fields blank to pick up all values. Click the **Search** button to return surveys that a user can complete for himself or on behalf of another user

The **Status** field displays work order surveys that are completed. Initially only those particular surveys that a user must complete as the survey recipient appear in the Survey List.

Field or Control	***Description***
Survey ID	Click to access the Review Survey User Responses page, where you can review completed work order evaluation summaries.

Review Survey User Responses Page

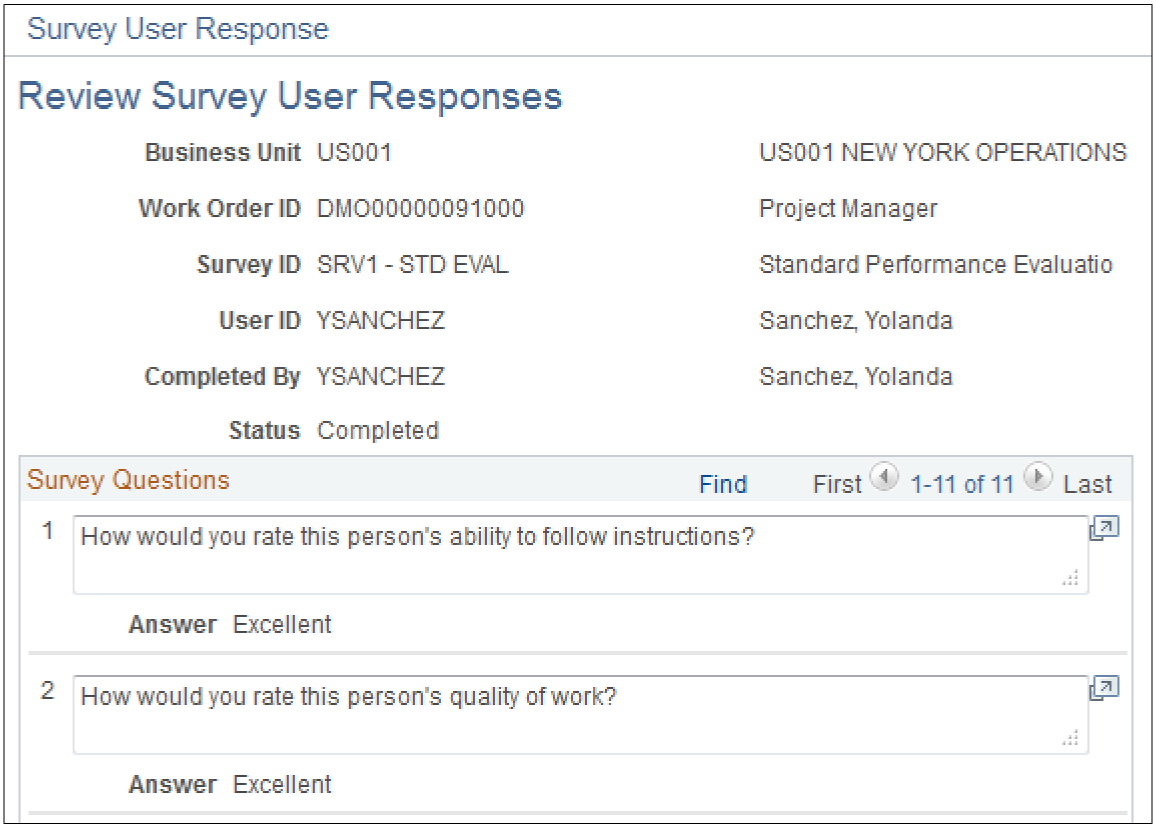
Use the Review Survey User Responses page (SP_SUR_USR_RES) to review work order evaluation summaries.

Navigation:

Services Procurement > **Respond/View Survey** > **Review Survey Summary**

Click the **Search** button to locate survey responses.

This example illustrates the fields and controls on the Review Survey User Responses page. You can find definitions for the fields and controls later on this page.



Review Survey User Responses

Business Unit US001 US001 NEW YORK OPERATIONS

Work Order ID DMO00000091000 Project Manager

Survey ID SRV1 - STD EVAL Standard Performance Evaluatio

User ID YSANCHEZ Sanchez, Yolanda

Completed By YSANCHEZ Sanchez, Yolanda

Status Completed

Survey Questions

1 How would you rate this person's ability to follow instructions?

Answer Excellent

2 How would you rate this person's quality of work?

Answer Excellent

Field or Control	***Description***
User ID	Review the name of the survey recipient.

Field or Control	***Description***
Completed By	Review name of the recipient that filled out the survey. This may differ from the user name.
Status	View completed surveys. Use the My Survey Summary page to view surveys that are not started, in progress, or canceled.

Chapter 24

Interactive Reports in PeopleSoft Services Procurement

Understanding Interactive Reports

PeopleSoft Services Procurement provides metrics on service providers, expenses, and suppliers to help you manage, measure, and analyze process and cost information across all aspects of the services procurement life cycle. The PeopleSoft system delivers standard analysis pages that cover the most common user requirements.

Related Links

Common Elements Used In Services Procurement

Service Provider Metrics

Service provider metrics provide information on service providers broken out by department, manager, purchase order, and supplier:

- The service provider performance includes service provider rating information.

  Note: Service provider performance metrics are not broken out by purchase order.

- Service provider length of stay includes service provider continuous assignment information.

Expense Metrics

Expense metrics provide information on amounts committed, expended, and forecast on requisitions, work orders, and invoices:

- Expense life cycle includes expenses that are incurred throughout the various stages of the expense cycle, including entry, submission, approval, invoiced but not approved, invoiced and approved by supplier, and invoiced and approved.

  You can access expense life cycle data broken out by account, department, manager, supplier, and work order. For each dimension, you can also view the data by expense status.

- Expense variance includes forecast versus actual expense information.

  You can access expense variance data broken out by department, manager, purchase order, and supplier.

Supplier Metrics

Supplier metrics provide information on performance and rate comparisons by supplier and role:

- Supplier performance includes requisitions sourced, candidates submitted, requisitions filled, and positions filled.
- Supplier rate comparison includes rates that various suppliers charge for the same job role.
- Minority-owned suppliers include the number of bids that a minority-owned supplier receives and the number of work orders that are awarded to each of these suppliers.

  Minority-owned supplier metrics are analyzed by role.

Populating the Data Mart

You must populate the data mart before accessing the interactive report pages.

Note: If the data mart contains no data, a search page appears when you try to access an interactive reports page, but you can't progress from there.

This topic discusses how to populate the data mart.

Page Used to Populate the Data Mart

Page Name	***Definition Name***	***Usage***
Analysis Datamart Page	RUN_SPR_DM	Enter parameters that are used to run the PeopleSoft Application Engine that populates the data mart for analysis purposes.

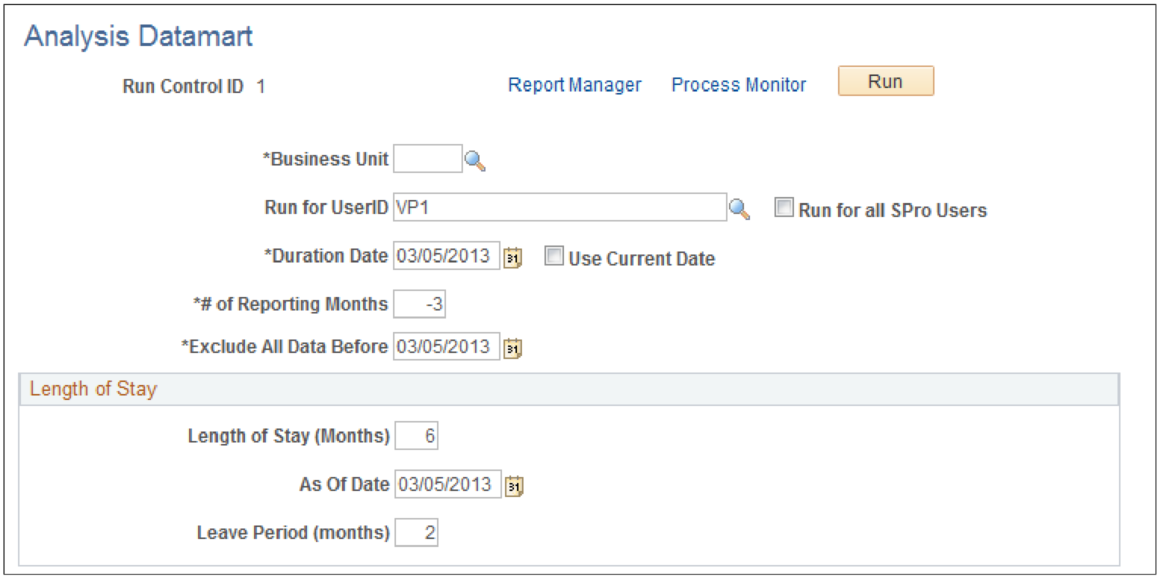
Analysis Datamart Page

Use the Analysis Datamart page (RUN_SPR_DM) to enter parameters that are used to run the PeopleSoft Application Engine that populates the data mart for analysis purposes.

Navigation:

Services Procurement > **Interactive Reports** > **Analysis Datamart Engine**

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



Analysis Datamart

Run Control ID 1

*Business Unit

Run for UserID VP1

☐ Run for all SPro Users

*Duration Date 03/05/2013

☐ Use Current Date

*# of Reporting Months -3

*Exclude All Data Before 03/05/2013

Length of Stay

Length of Stay (Months) 6

As Of Date 03/05/2013

Leave Period (months) 2

Field or Control	***Description***
Business Unit	Define the business unit for which you want to retrieve interactive report data.
Run for UserID and **Run for all Spro Users**	The system retrieves data and populates the data mart with data that is specific to the selected user. Select the **Run for all Spro Users** check box to retrieve data for all users. The current user appears as the default value in the **Run for UserID** field.
Duration Date and **# of Reporting Months**	The system uses the duration date in conjunction with the number of reporting months to determine the time period that is used to retrieve the interactive report data. Enter the number of reporting months to define the number of months before or after the duration date for which you want to retrieve data. Enter a positive value for number of reporting months to indicate the number of months starting from the duration date that are to be included in the process. Use a negative number to indicate the number of months prior to the duration date that are to be included in the process. **Note:** The system does not retrieve dates prior to the entered start date regardless of the entered duration date and number of reporting months.
Use Current Date	Select to define duration date as the current system date. If this check box is selected, the system uses the number of reporting months that are relative to the current system date for each process instance.

Length of Stay

You enter data in the **Length of Stay** group box to define the parameters that are used to retrieve data for the length-of-stay interactive report pages.

Field or Control	***Description***
Length of Stay (Months)	Enter the duration that a service provider can stay on assignment in accordance with the laws that govern the organization's labor practices. The system default is six months. The system uses this value for analysis calculations, including determining the excess duration on the length-of-stay interactive report pages.
As Of Date	Select the date for which the service provider is considered active.
Leave Period (months)	Enter the maximum allowable period between the end of a project and the start of the next project. This is used to determine the service provider's start date.

Process Results

The Process Analysis Datamart Application Engine process (SPR_DATAMART) retrieves data from transaction tables and copies it to a fact table that is used during analysis.

Note: You can define a regular processing schedule by using the Process Scheduler page.

See the product documentation for *PeopleTools: Process Scheduler*

Analyzing Service Provider Rosters

You use the service provider roster to analyze total service provider count by department, manager, purchase order, or supplier.

Note: This topic uses the service provider roster department summary and details as an example. Similar functionality applies to the other dimensions (manager, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Service Provider Rosters

Page Name	***Definition Name***	***Usage***
Service Provider Roster (summary) Page	SPR_CONROS_DASH_PG	View service provider roster summary graphs and data. Access detail pages.
Service Provider - Department Roster Page	SPR_CONSROSDR_PG	View the department details. Service Provider Roster (summary) Page
Service Provider Roster - Department Details Page	SPR_CONROS_DASH_PG	View detailed service provider roster information for a selected department.
Service Provider Roster - Manager Details Page	SPR_CONROS_DASH_PG	View detail service provider roster information for a selected manager. Service Provider Roster (summary) Page
Service Provider Roster - Purchase Order Details Page	SPR_CONROS_DASH_PG	View detailed service provider roster information for a selected purchase order. Service Provider Roster (summary) Page
Service Provider Roster - Supplier Details Page	SPR_CONROS_DASH_PG	View detail service provider roster information for a selected supplier. Service Provider Roster (summary) Page

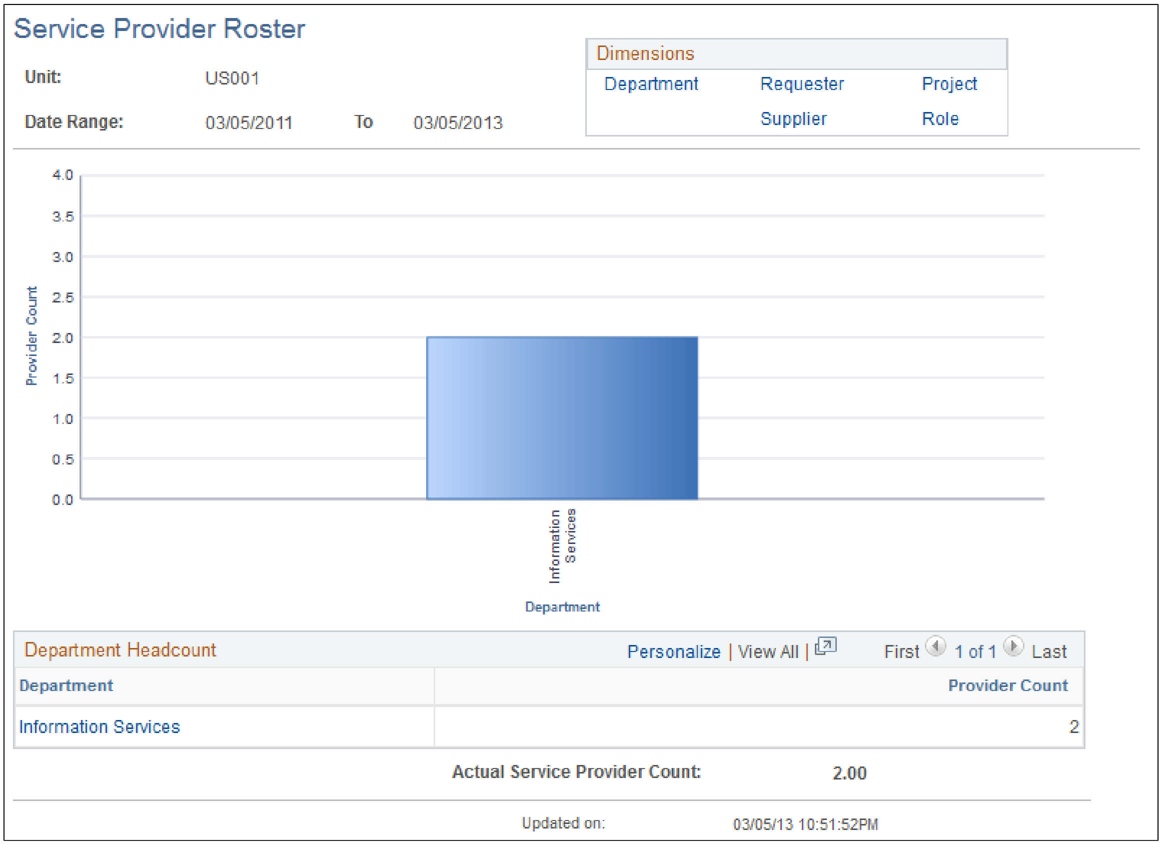
Service Provider Roster (summary) Page

Use the Service Provider Roster (summary) page (SPR_CONROS_DASH_PG) to view service provider roster summary graphs and data.

Navigation:

Services Procurement > **Interactive Reports** > **Provider Roster**

This example illustrates the fields and controls on the Service Provider Roster (summary) page. You can find definitions for the fields and controls later on this page.



Service Provider Roster

Unit: US001

Date Range: 03/05/2011 To 03/05/2013

Department Headcount

Department	Provider Count
Information Services	2

Actual Service Provider Count: 2.00

Updated on: 03/05/13 10:51:52PM

Field or Control	***Description***
Department, Manager, Purchase Order, and **Supplier**	Click the link at the top of the page to have the system display the service provider roster graph and data by department, manager, purchase order, or supplier.
Provider Count	Displays for each department the total number of service providers.

Service Provider Roster - Department Details Page

Use the Service Provider Roster - Department Details page (SPR_CONROS_DASH_PG) to view detailed service provider roster information for a selected department.

Navigation:

Click the **Department** link on the Service Provider Roster (summary) page for department.

The system displays detailed information about the service providers for the selected department.

Field or Control	***Description***
📄	Click to view the requisition or work order.

Dimensions

Select the Dimensions tab.

In the example above, the system displays the procurement details for the department. Breakout by Manager, PO, or Supplier is also available

Analyzing Service Provider Performance

You use the service provider performance pages to analyze service provider performance by department, manager, or supplier.

Note: You use the service provider performance pages similar to the way that you use the service provider roster pages.

This topic discusses how to view service provider performance summary information.

Pages Used to Analyze Service Provider Performance

Page Name	***Definition Name***	***Usage***
Service Provider Performance (summary) Page	SPR_CONPER_DASH_PG	View service provider performance summary graphs and data. Access detail pages.
Service Provider Performance - Department Details Page	SPR_CONSPERDR_PG	View detailed service provider performance information for a selected department. Service Provider Performance (summary) Page
Service Provider Performance - Manager Details Page	SPR_CONSPERMR_PG	View detailed service provider performance information for a selected manager. Service Provider Performance (summary) Page

Page Name	***Definition Name***	***Usage***
Service Provider Performance - Supplier Details Page	SPR_CONSPERVR_PG	View detailed service provider performance information for a selected supplier. Service Provider Performance (summary) Page

Related Links

Analyzing Service Provider Rosters

Service Provider Performance (summary) Page

Use the Service Provider Performance (summary) page (SPR_CONPER_DASH_PG) to view service provider performance summary graphs and data.

Access detail pages.

Navigation:

Services Procurement > **Interactive Reports** > **Provider Performance**

Field or Control	***Description***
Rating (Avg)	Displays the average approver rating for the total number of service providers for the business unit for each department, manager, or supplier, depending on the dimension that you view.

Analyzing Service Provider Length of Stay

You use the service provider length-of-stay pages to analyze how long service providers have been on assignment by department, manager, purchase order, or supplier.

Note: This topic uses the service provider length-of-stay manager summary and details as an example. Similar functionality applies to the other dimensions (department, purchase order, and supplier) and respective detail pages.

Pages Used to Analyze Service Provider Length of Stay

Page Name	***Definition Name***	***Usage***
Service Provider Length of Stay (summary) Page	SPR_CONLOS_DASH_PG	View service provider length-of-stay summary graphs and data. Access detail pages.

Page Name	***Definition Name***	***Usage***
Service Provider Length of Stay - Department Details Page	SPR_CONSLOSDR_PG	View detailed service provider length-of-stay information for a selected department. Service Provider Length of Stay (summary) Page
Service Provider Length of Stay - Manager Details Page	SPR_CONSLOSMR_PG	View detailed service provider length-of-stay information for a selected manager.
Service Provider Length of Stay - Purchase Order Details Page	SPR_CONSLOSOR_PG	View detail service provider length-of-stay information for a selected purchase order. Service Provider Length of Stay (summary) Page
Service Provider Length of Stay - Supplier Details Page	SPR_CONSLOSVR_PG	View detailed service provider length-of-stay information for a selected supplier. Service Provider Length of Stay (summary) Page

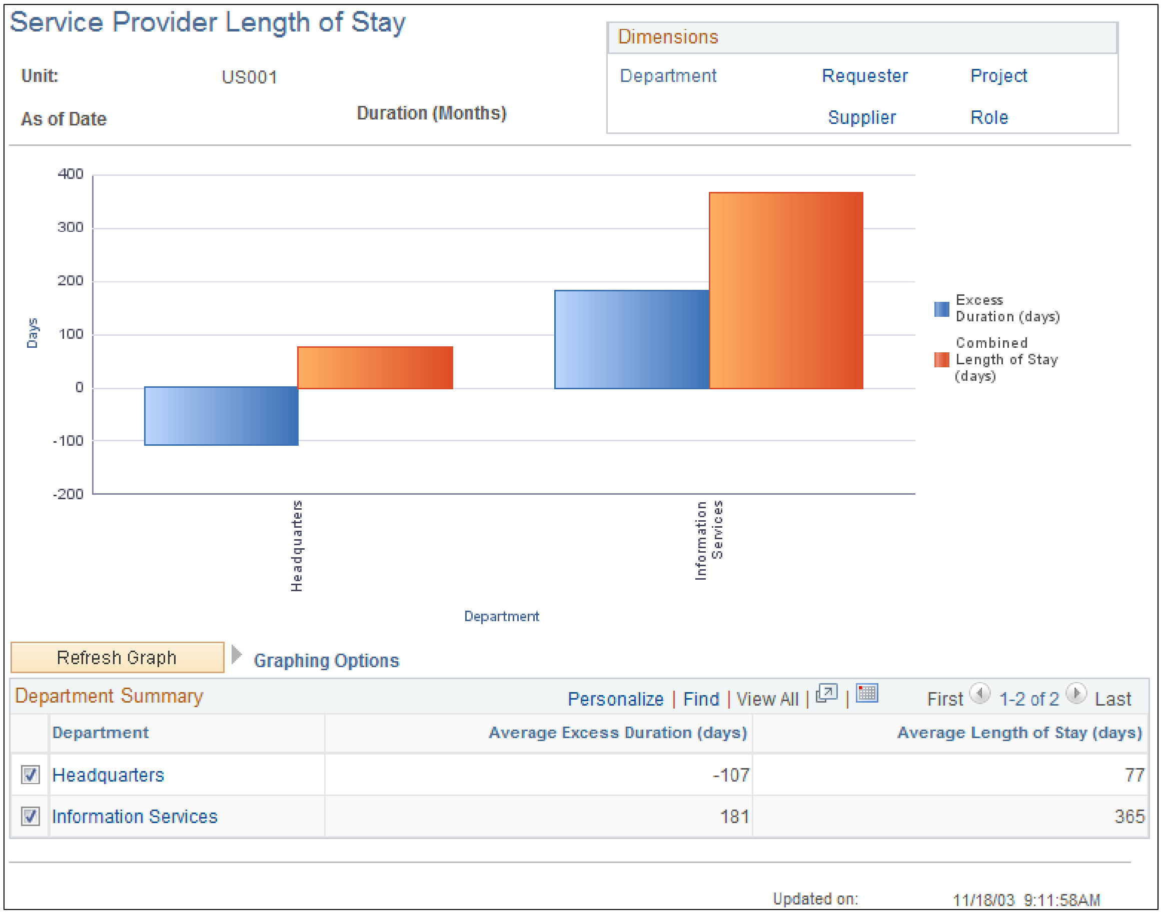
Service Provider Length of Stay (summary) Page

Use the Service Provider Length of Stay (summary) page (SPR_CONLOS_DASH_PG) to view service provider length-of-stay summary graphs and data.

Navigation:

Services Procurement > Interactive Reports > Define Length of Provider Stay

This example illustrates the fields and controls on the Service Provider Length of Stay (summary) page. You can find definitions for the fields and controls later on this page.



Unit: US001

As of Date

Duration (Months)

Department Summary

	Department	Average Excess Duration (days)	Average Length of Stay (days)
☑	Headquarters	-107	77
☑	Information Services	181	365

Updated on: 11/18/03 9:11:58AM

Field or Control	***Description***
Department, Manager, Purchase Order, and **Supplier**	Click the link at the top of the page to have the system display the service provider length-of-stay graph and data by department, manager, purchase order, or supplier.
Graphing Options	Select the options in the collapsible **Graphing Options** group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on time and another based on count. The system displays an error message if you select parameters of different measurement types.

Field or Control	***Description***
Refresh Graph	Click to display the graph by using the selected graphing options and data points. **Note:** Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph. By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.
Average Excess Duration (days)	Displays the resulting calculation of the average projected end date less the start date for all service providers for the business unit by manager. A positive value indicates the number of days in excess of the length of stay (in months) that is entered on the Analysis Datamart page, including Saturdays, Sundays, and holidays. **Note:** The conversion from length of stay entered in months to excess duration appearing in days is based on using an average 30.4 days for a month.
Average Length of Stay (days)	Displays the resulting calculation of the average start date less end date for all service providers for the business unit by manager.

Service Provider Length of Stay - Manager Details Page

Use the Service Provider Length of Stay - Manager Details page (SPR_CONSLOSMR_PG) to view detailed service provider length-of-stay information for a selected manager.

Navigation:

Click the **Manager** link on the Service Provider Length of Stay (summary) page for manager.

The system displays detailed information about service providers for the manager.

Field or Control	***Description***
Start Date	Displays the service provider's earliest start date, taking into account the leave period that is defined on the Analysis Datamart page. A service provider's start date may not be his or her earliest start date with the organization. If the service provider has left the organization and returned after a period of time that exceeds the leave period that you define on the Analysis Datamart page, then the service provider's start date is the date of his or her return to the organization.

Field or Control	***Description***
Projected End Date	Displays the start date plus the length of stay that is defined on the Analysis Datamart page.
End Date	Displays the end date that is associated with the work order ID.
Excess Duration (days)	Displays the resulting calculation of projected end date less the start date for the service provider and work order. A positive value indicates the number of days in excess of the length of stay that is entered on the Analysis Datamart page, including Saturdays, Sundays, and holidays. **Note:** The conversion from length of stay entered in months to excess duration in days is based on an average 30.4 days for a month.
Combined Length of Stay (days)	Displays the resulting calculation of start date less end date for all service providers for the service provider and work order.

Analyzing Expense Life Cycles

You use the expense life cycle pages to analyze expenses at each stage of the expense cycle and by account, department, manager, supplier, or work order.

Note: This topic uses the expense life cycle work order summary and details as an example. Similar functionality applies to the other dimensions (account, department, manager, supplier, and work order) and respective detail pages.

Pages Used to Analyze Expense Life Cycles

Page Name	***Definition Name***	***Usage***
Expense Life Cycle (summary) Page	SPR_EXPCYC_DASH_PG	View expense life cycle summary graphs and data. Access detail pages.
Expense Life Cycle - Account by Status Page	SPR_EXPCYCAM_PG	View expenses that are incurred by account and status. Expense Life Cycle (summary) Page
Expense Life Cycle - Account Details Page	SPR_EXPCYCAR_PG	View account details of expenses that are incurred by selected status. Expense Life Cycle (summary) Page

Page Name	***Definition Name***	***Usage***
Expense Life Cycle - Department by Status Page	SPR_EXPCYCDM_PG	View expenses that are incurred by department and status. Expense Life Cycle (summary) Page
Expense Life Cycle - Department Details Page	SPR_EXPCYCDR_PG	View department details of expenses that are incurred by selected status.
Expense Life Cycle - Manager by Status Page	SPR_EXPCYCMM_PG	View expenses that are incurred by manager and status. Expense Life Cycle (summary) Page
Expense Life Cycle - Manager Details Page	SPR_EXPCYCMR_PG	View manager details of expenses that are incurred by selected status. Expense Life Cycle (summary) Page
Expense Life Cycle - Supplier by Status Page	SPR_EXPCYCVM_PG	View expenses that are incurred by supplier and status. Expense Life Cycle (summary) Page
Expense Life Cycle - Supplier Details Page	SPR_EXPCYCVR_PG	View supplier details of expenses that are incurred by selected status. Expense Life Cycle (summary) Page
Expense Life Cycle - Work Order by Status Page	SPR_EXPCYCWM_PG	View expenses that are incurred by work order and status.
Expense Life Cycle (details) Page	SPR_EXPCYCWR_PG	View work order details of expenses that are incurred by selected status.

Understanding Expense Life Cycle Statuses

The PeopleSoft system delivers expenses organized in these status categories:

Status	***Description***
Entered.	Timesheets and progress logs that are entered but not approved. These include timesheets and progress logs that are pending or denied status.
Submitted.	Timesheets and progress logs that are submitted by a service provider, but are not approved.

Status	***Description***
Approved.	Timesheets and progress logs that are approved but not invoiced.
Invoiced - Not Approved.	Timesheets and progress logs that are invoiced but pending approval. These include invoices that are generated, submitted to manager for approval, submitted to supplier for approval, rejected, rejected by supplier, and in adjusted status.
Invoiced - Supplier Approved.	Timesheets and progress logs that are invoiced and approved by the supplier.
Invoice Approved - Not Processed.	Timesheets and progress logs that are invoiced and approved, but not processed for billing.
Invoice Processed.	Invoices that are approved and processed.

The expense life cycle calculations include expenses from timesheets, progress logs, and invoices. For purposes of analysis, the PeopleSoft system delivers mapping for each expense life cycle status category as defined in these tables.

Timesheets

Transaction Translate Value	***Transaction Translate Value Description***	***Expense Life Cycle Status***
ADJ	Adjusted	Approved
DEN	Denied	Entered
HLD	Hold	Submitted
PND	Pending	Entered
RAP	Approved	Approved
SUB	Submitted	Submitted

Note: Timesheet entries are mapped for analysis purposes at the detailed level.

Progress Logs

Transaction Translate Value	***Transaction Translate Value Description***	***Expense Life Cycle Status***
APR	Approved	Approved
DEN	Denied	Entered
HLD	Hold	Submitted
PND	Pending	Entered
SUB	Submitted	Submitted

Note: Progress log entries are mapped for analysis purposes at the detailed level.

Invoices

Invoice Status	***Expense Life Cycle Status***
Generated.	Invoiced - Not Approved.
Approved.	Invoice Approved - Not Processed.
Processed.	Invoice Processed.
Submitted.	Invoiced - Not Approved.
Rejected.	Invoiced - Not Approved.
Submitted to Supplier.	Invoiced - Not Approved.
Approved by Supplier.	Invoiced - Supplier Approved.
Rejected by Supplier.	Invoiced - Not Approved.
Canceled.	Not applicable.
Adjusted.	Invoiced - Not Approved.

Note: Invoice entries are mapped for analysis purposes at the header level.

Expense Life Cycle (summary) Page

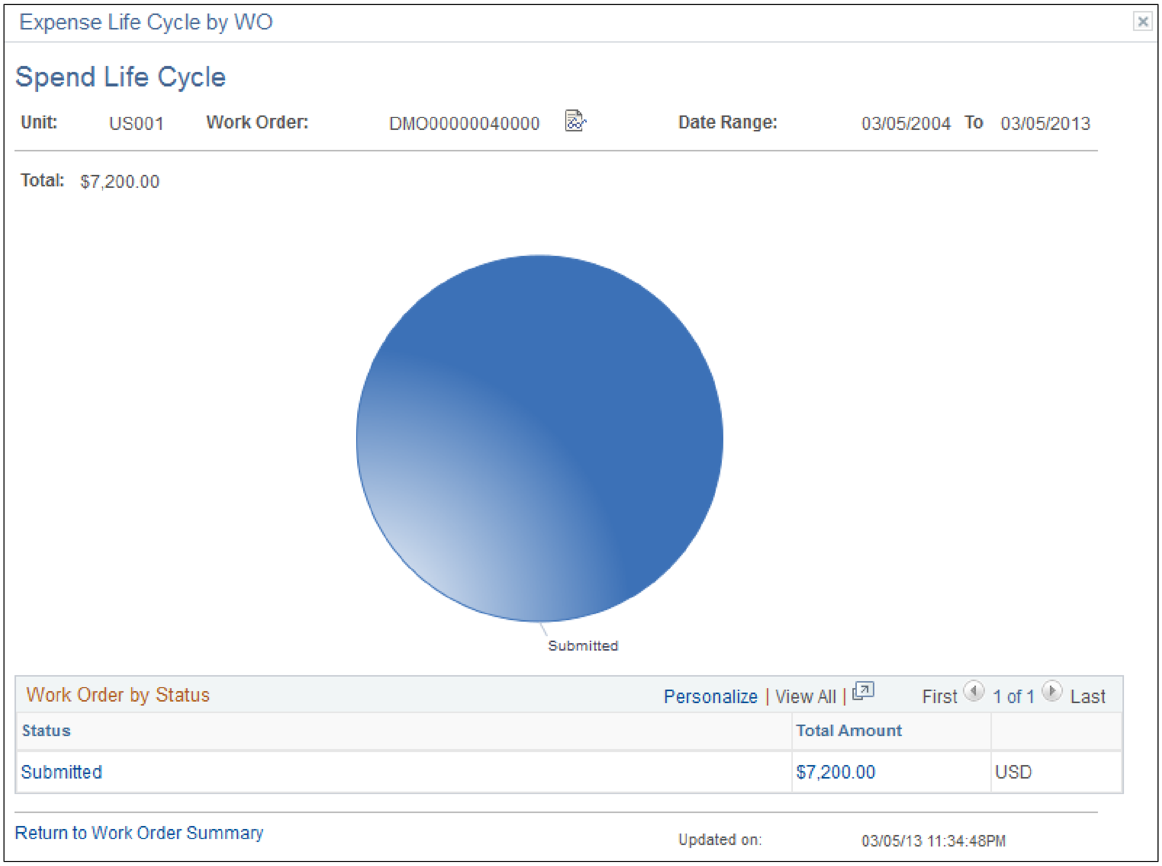
Use the Expense Life Cycle (summary) page (SPR_EXPCYC_DASH_PG) to view expense life cycle summary graphs and data.

Access detail pages.

Navigation:

Services Procurement > **Interactive Reports** > **Expense Life Cycle**

This example illustrates the fields and controls on the Expense Life Cycle - Work Order by Status page. You can find definitions for the fields and controls later on this page.



Unit: US001 Work Order: DMO00000040000 Date Range: 03/05/2004 To 03/05/2013

Total: $7,200.00

Work Order by Status

Status	Total Amount	
Submitted	$7,200.00	USD

Updated on: 03/05/13 11:34:48PM

Field or Control	*Description*
Total Amount	Displays total costs from time, expenses, and progress logs, including those in the various processing stages, by work order.

Expense Life Cycle - Work Order by Status Page

Use the Expense Life Cycle - Work Order by Status page (SPR_EXPCYCWM_PG) to view expenses that are incurred by work order and status.

Navigation:

Click the **Work Order** link on the Expense Life Cycle (summary) page for work order.

Field or Control	***Description***
Total Amount	Displays the total costs from time, expenses, and progress logs for all work orders by status.

Expense Life Cycle (details) Page

Use the Expense Life Cycle (details) page for a dimension and status.

The system displays detailed information about the work order for the selected status.

Analyzing Expense Variance

You use the expense variance pages to analyze expense variance by department, manager, purchase order, or supplier.

Pages Used to Analyze Expense Variance

Page Name	***Definition Name***	***Usage***
Spend Variance (summary) Page	SPR_EXPVAR_DASH_PG	View expense variance summary graphs and data. Modify parameters that are used to create the graphs. Access detail pages.
Expense Variance - Department Details Page	SPR_EXPVARDR_PG	View detailed expense variance information for a selected department. Spend Variance (summary) Page
Expense Variance - Manager Details Page	SPR_EXPVARMR_PG	View detailed expense variance information for a selected manager. Spend Variance (summary) Page

Page Name	***Definition Name***	***Usage***
Expense Variance - Purchase Order Details Page	SPR_EXPVAROR_PG	View detailed expense variance information for a selected purchase order. Spend Variance (summary) Page
Expense Variance - Supplier Details Page	SPR_EXPVARSR_PG	View detailed expense variance information for a selected supplier. Spend Variance (summary) Page

Spend Variance (summary) Page

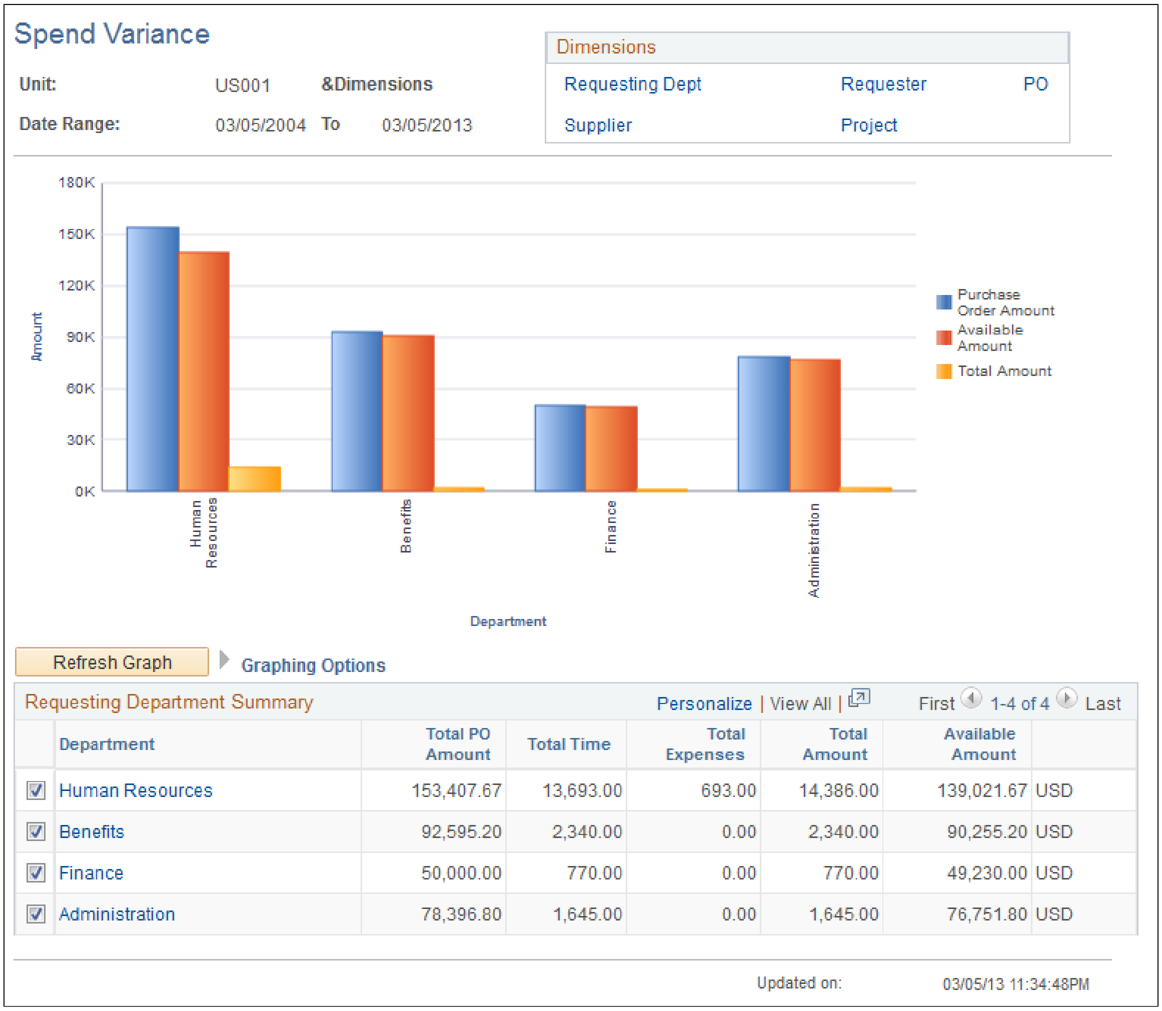
Use the Spend Variance (summary) page (SPR_EXPVAR_DASH_PG) to view spend variance summary graphs and data.

Modify parameters that are used to create the graphs. Access detail pages.

Navigation:

Services Procurement > **Interactive Reports** > **Review Spend Variance**

This example illustrates the fields and controls on the Spend Variance (summary) page. You can find definitions for the fields and controls later on this page.



Unit: US001 **&Dimensions**

Date Range: 03/05/2004 **To** 03/05/2013

Requesting Department Summary

	Department	Total PO Amount	Total Time	Total Expenses	Total Amount	Available Amount	
☑	Human Resources	153,407.67	13,693.00	693.00	14,386.00	139,021.67	USD
☑	Benefits	92,595.20	2,340.00	0.00	2,340.00	90,255.20	USD
☑	Finance	50,000.00	770.00	0.00	770.00	49,230.00	USD
☑	Administration	78,396.80	1,645.00	0.00	1,645.00	76,751.80	USD

Updated on: 03/05/13 11:34:48PM

Field or Control	***Description***
Graphing Options	Select the options in the collapsible **Graphing Options** group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on time and another based on count. The system displays an error message if you select parameters that are of different measurement types.
Refresh Graph	Click to display the graph by using the selected graphing options and data points. **Note:** Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph. By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Field or Control	*Description*
Variance Amount	Displays the difference between the total purchase order amount and forecast total.

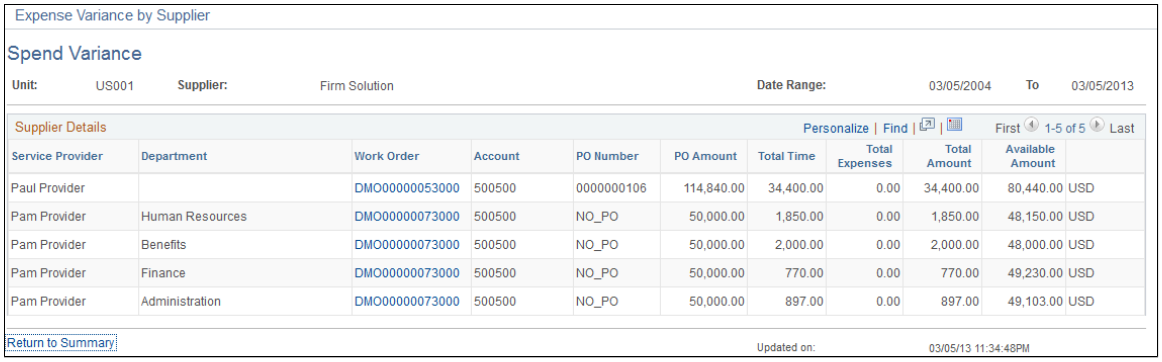
Spend Variance — Additional Info Page

Use the Spend Variance - Additional Info page to view additional information for a selected department.

Navigation:

Click the **Additional Info** link on the Spend Variance (summary) page for department.

This example illustrates the fields and controls on the Spend Variance page: Additional Info .



Spend Variance

Unit: US001 Supplier: Firm Solution Date Range: 03/05/2004 To 03/05/2013

Supplier Details

Service Provider	Department	Work Order	Account	PO Number	PO Amount	Total Time	Total Expenses	Total Amount	Available Amount	
Paul Provider		DMO00000053000	500500	0000000106	114,840.00	34,400.00	0.00	34,400.00	80,440.00	USD
Pam Provider	Human Resources	DMO00000073000	500500	NO_PO	50,000.00	1,850.00	0.00	1,850.00	48,150.00	USD
Pam Provider	Benefits	DMO00000073000	500500	NO_PO	50,000.00	2,000.00	0.00	2,000.00	48,000.00	USD
Pam Provider	Finance	DMO00000073000	500500	NO_PO	50,000.00	770.00	0.00	770.00	49,230.00	USD
Pam Provider	Administration	DMO00000073000	500500	NO_PO	50,000.00	897.00	0.00	897.00	49,103.00	USD

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Field or Control	*Description*
▦	Click the **Show All Columns** button to view data from both the Expense Info (expense information) tab.

Analyzing Supplier Performance

You use the supplier performance pages to analyze supplier performance by supplier or role.

Note: This topic uses the supplier performance supplier summary and details as an example. Similar functionality applies to the role summary and detail pages.

Pages Used to Analyze Supplier Performance

Page Name	***Definition Name***	***Usage***
Service Supplier Performance (summary) Page	SPR_SUP_S_PG	View supplier performance summary graphs and data. Modify parameters that are used to create the graphs. Access detail pages.
Service Supplier Performance - Supplier Details Page	SPR_SUP_SR_PG	View requisition and candidate statistics by supplier.
Service Supplier Performance - Role Details Page	SPR_SUP_RR_PG	View requisition and candidate statistics for this role. Service Supplier Performance (summary) Page

Service Supplier Performance (summary) Page

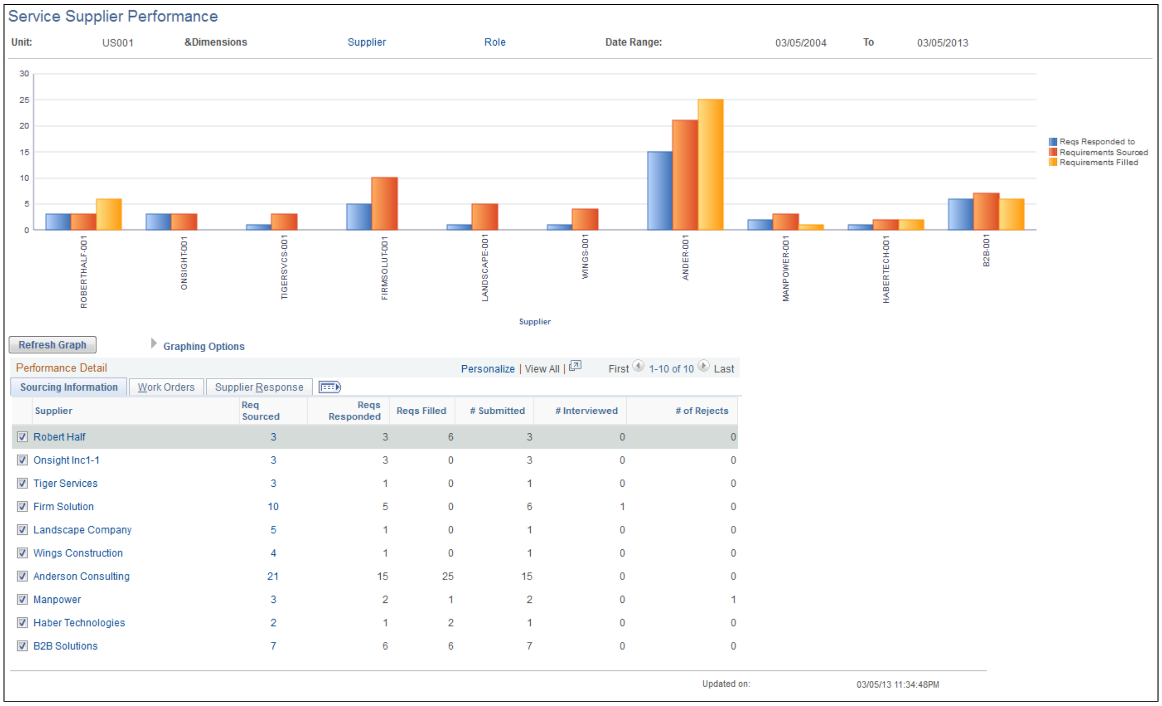
Use the Service Supplier Performance (summary) page (SPR_SUP_S_PG) to view supplier performance summary graphs and data.

Modify parameters that are used to create the graphs. Access detail pages.

Navigation:

Services Procurement > **Interactive Reports** > **Supplier Performance**

This example illustrates the fields and controls on the Service Supplier Performance (summary) page. You can find definitions for the fields and controls later on this page.



Unit: US001 &Dimensions Supplier Role Date Range: 03/05/2004 To 03/05/2013

	Supplier	Req Sourced	Reqs Responded	Reqs Filled	# Submitted	# Interviewed	# of Rejects
☑	Robert Half	3	3	6	3	0	0
☑	Onsight Inc1-1	3	3	0	3	0	0
☑	Tiger Services	3	1	0	1	0	0
☑	Firm Solution	10	5	0	6	1	0
☑	Landscape Company	5	1	0	1	0	0
☑	Wings Construction	4	1	0	1	0	0
☑	Anderson Consulting	21	15	25	15	0	0
☑	Manpower	3	2	1	2	0	1
☑	Haber Technologies	2	1	2	1	0	0
☑	B2B Solutions	7	6	6	7	0	0

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Field or Control	***Description***
Graphing Options	Select the options in the collapsible **Graphing Options** group box to define the parameters that are used for the graph. You must select parameters of like measurements. For example, you cannot select one measurement based on amount, such as purchase order amount, and another based on count, such as work orders filled. The system displays an error message if you select parameters of different measurement types.
Refresh Graph	Click to display the graph by using the selected graphing options and data points. **Note:** Each row of data with a selected check box that appears on the bottom of the page is used as a data point for the graph. By default, the system graphs the first five selected data rows that appear in the grid. You can select more than five rows, but the information appears smaller on the graph.

Work Orders

Select the Work Orders tab.

View work order summary information for each supplier for the business unit.

Supplier Response

Select the Supplier Response tab.

View supplier response time summary information by supplier for the business unit.

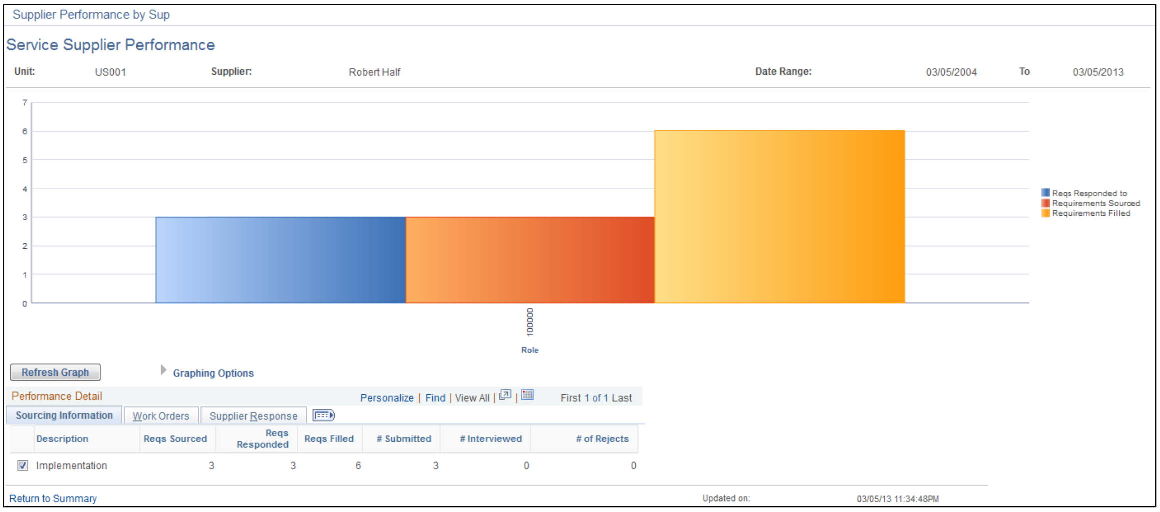
Service Supplier Performance - Supplier Details Page

Use the Service Supplier Performance - Supplier Details page (SPR_SUP_SR_PG) to view requisition and candidate statistics by supplier.

Navigation:

Click the **Supplier** link on the Service Supplier Performance summary page.

This example illustrates the fields and controls on the Service Supplier Performance - Supplier Details page. You can find definitions for the fields and controls later on this page.



Service Supplier Performance

Unit: US001 Supplier: Robert Half Date Range: 03/05/2004 To 03/05/2013

Performance Detail

	Description	Reqs Sourced	Reqs Responded	Reqs Filled	# Submitted	# Interviewed	# of Rejects
☑	Implementation	3	3	6	3	0	0

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Sourcing Information

View requisition details by project role for a selected supplier.

Work Orders

Select the Work Orders tab.

View work order details by project role for a selected supplier.

Supplier Response

Select the Supplier Response tab.

View supplier response time details by project role for a selected supplier.

Comparing Supplier Rates

You use the supplier rate comparison pages to analyze average rates of suppliers by supplier or role.

Note: You use the supplier rate comparison pages similar to how you use the expense life cycle pages.

This topic lists the pages used to compare supplier rates.

Pages Used to Compare Supplier Rates

Page Name	***Definition Name***	***Usage***
Supplier Rate Comparison (summary)	SPR_SRTCMP_DASH_PG	View supplier rate comparison summary graphs and data. Access detail pages.
Supplier Rate Comparison - Supplier Details	SPR_SRTCMPSM_PG	View average rates by role for this supplier.
Supplier Rate Comparison - Role Details	SPR_SRTCMPRM_PG	View average rates by supplier for this role.
Supplier Rate Comparison - Service Providers for Supplier and Role	SPR_SRTCMPSD_PG	View service providers by supplier for a selected role.
Supplier Rate Comparison - Service Providers for Role and Supplier	SPR_SRTCMPRD_PG	View service providers by role for a selected supplier.

Related Links

Analyzing Expense Life Cycles

Analyzing Minority-Owned Suppliers

The Minority Owned Suppliers page shows a summary of the number of bids that minority-owned suppliers receive and the number of work orders that are awarded to each category for the business unit.

This topic discusses how to view minority-owned supplier summary information.

Page Used to Analyze Minority-Owned Suppliers

Page Name	***Definition Name***	***Usage***
Minority-Owned Suppliers Page	SPR_MOS_PG	View the number of bids that are received and the number of work orders that are awarded for each minority-owned supplier.

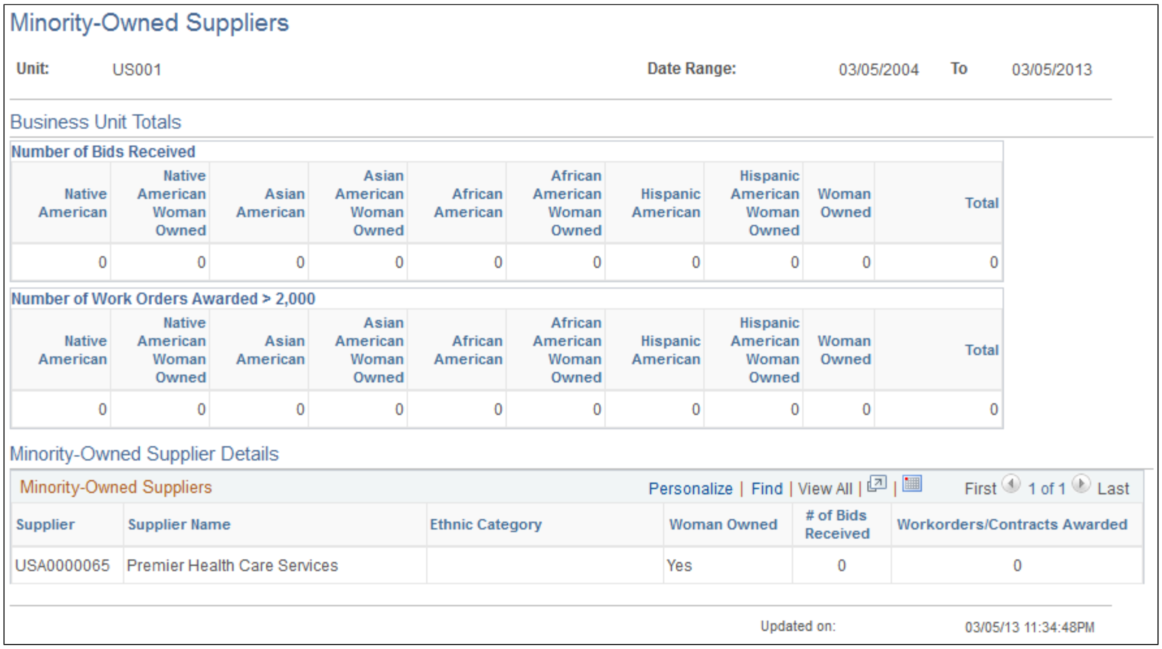
Minority-Owned Suppliers Page

Use the Minority-Owned Suppliers page (SPR_MOS_PG) to view the number of bids that are received and the number of work orders that are awarded for each minority-owned supplier.

Navigation:

Services Procurement > **Interactive Reports** > **Define Minority-Owned Business**

This example illustrates the fields and controls on the Minority-Owned Suppliers page. You can find definitions for the fields and controls later on this page.



Minority-Owned Suppliers

Unit: US001 **Date Range:** 03/05/2004 **To** 03/05/2013

Business Unit Totals

Number of Bids Received

Native American	Native American Woman Owned	Asian American	Asian American Woman Owned	African American	African American Woman Owned	Hispanic American	Hispanic American Woman Owned	Woman Owned	Total
0	0	0	0	0	0	0	0	0	0

Number of Work Orders Awarded > 2,000

Native American	Native American Woman Owned	Asian American	Asian American Woman Owned	African American	African American Woman Owned	Hispanic American	Hispanic American Woman Owned	Woman Owned	Total
0	0	0	0	0	0	0	0	0	0

Minority-Owned Supplier Details

Minority-Owned Suppliers

Supplier	Supplier Name	Ethnic Category	Woman Owned	# of Bids Received	Workorders/Contracts Awarded
USA0000065	Premier Health Care Services		Yes	0	0

Updated on: 03/05/13 11:34:48PM

Chapter 25

Supplier Scoring for PeopleSoft Services Procurement

Understanding Supplier Scoring for PeopleSoft Services Procurement

Supplier scoring for PeopleSoft Services Procurement provides you with supplier metrics to help score, analyze, and compare suppliers across the requisition life cycle. Use supplier scoring to determine the best suppliers that meet the requisition requirements. Standard scoring setup pages are provided to assist you in creating the own enterprise metrics for scoring suppliers.

Use supplier scoring to:

- Define performance level codes to determine the various levels at which suppliers perform.
- Analyze and compare performance metrics and performance level codes across the requisition life cycle.
- Source requisitions to qualified suppliers that meet the scoring requirements.
- Define supplier scoring parameters, such as rule score, start date, and duration start date.

  Use the Service Procurement Business Unit page to schedule time intervals for retrieving score data from the PeopleSoft Services Procurement database.

The Supplier Scoring Process

This is the basic task flow of the service scoring process:

1. Access the Supplier Performance Level Codes page to set up supplier performance level codes.
2. Use the Supplier Scoring Rules page to set up supplier scoring rules.
3. Access the Services Procurement Business Units page to set up supplier scoring parameters.

   You can also use this page to identify the scoring rule, define a specific period of time for gathering scoring data, and calculate supplier scores.
4. Use supplier scoring logic within the Scoring component.

Common Elements Used to Understand Supplier Scoring for PeopleSoft Services Procurement

Field or Control	***Description***
Performance Level Codes	Determines various levels at which suppliers perform. Use the Performance Level Codes page to create specific performance codes to help evaluate suppliers' performance. Each performance code has four levels that are used to determine a range for evaluation. For example, you might create the performance level code RESPONSE_TIME to determine the average response time of suppliers. Or, you might create performance level CAND_SUB_PER_REQ to determine the average number of candidates that suppliers submit per requisition. The performance range for the CAND_SUB_PER_REQ level code might include the following levels: Level One = 2, Level Two = 4, Level Three = 6, and Level Four = 8, to represent the number of candidates that are submitted per requisition. **Note:** Reverse performance levels as needed. The combined level amount can equal more than 100 percent.
Supplier Scoring Rules	User-defined rule that calculates supplier performance metrics, level codes, weight, and performance-level ranges.
Supplier Performance Element	Essential performance factors (such as total candidates submitted, total positions filled, or total work orders rejected).
Supplier Performance Metrics	Measurement of supplier performance based on specific predefined elements.
Services Supplier Score	Overall supplier score. **Note:** This score is the supplier total weight (or score) divided by the total weight of the supplier rule.

Setting Up Performance Level Codes

To set up performance level codes, use the Performance Level Codes (SPB_LVL_CD) component.

This topic discusses how to set up performance level codes.

Page Used to Set Up Performance Level Codes

Page Name	***Definition Name***	***Usage***
Performance Level Code Page	SPB_LVL_CD	Determine various levels at which suppliers perform.

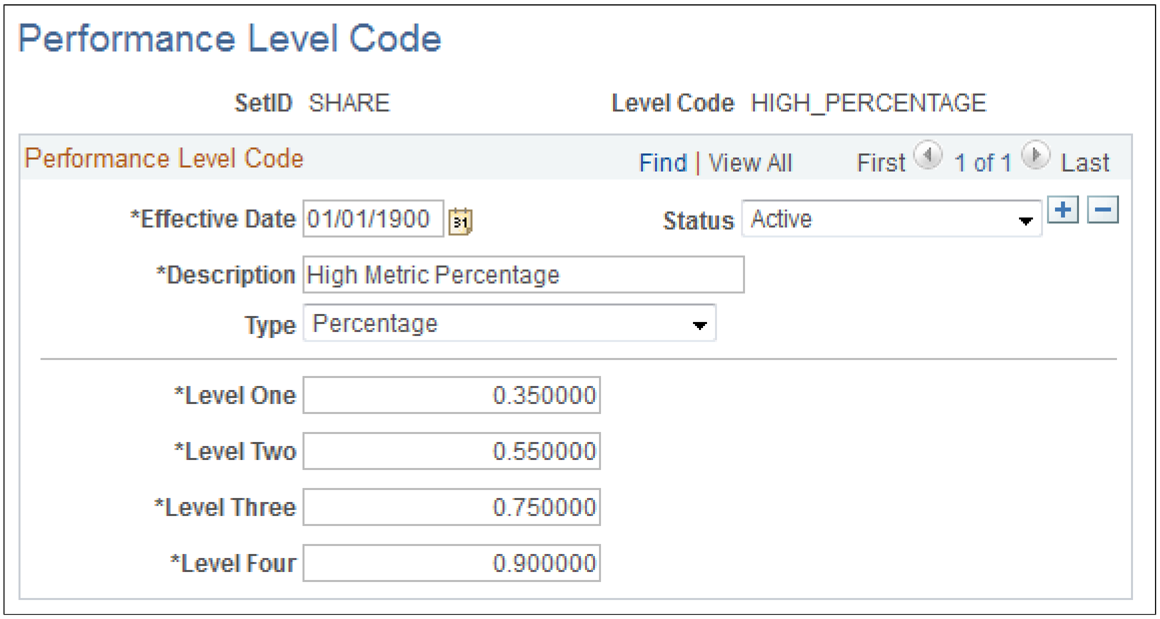
Performance Level Code Page

Use the Performance Level Code page (SPB_LVL_CD) to determine various levels at which suppliers perform.

Navigation:

Services Procurement > **Define Services Procurement** > **Sourcing Setup** > **Supplier Scoring Setup** > **Define Performance Codes Srcng**

This example illustrates the fields and controls on the Performance Level Code page. You can find definitions for the fields and controls later on this page.



Performance Level Code

SetID SHARE

Level Code HIGH_PERCENTAGE

Performance Level Code

*Effective Date 01/01/1900

Status Active

*Description High Metric Percentage

Type Percentage

*Level One 0.350000

*Level Two 0.550000

*Level Three 0.750000

*Level Four 0.900000

Field or Control	***Description***
Type	Select *Absolute Value.*

Field or Control	*Description*
Level One, **Level Two,** **Level Three,** and **Level Four**	Enter four maximum range values for the performance level that you create. Use these values to determine the range for evaluating supplier performance levels. For example, you might create performance level code INTERVIEW to determine the number of candidate interviews that a supplier is scheduled for per requisition. The performance levels for the INTERVIEW performance code might include the following levels: Level One = 2, Level Two = 4, Level Three = 6, and Level Four = 8. In this example, level four represents the best possible score and level one represents the worst possible score. **Note:** Reverse levels as needed.

Setting Up Supplier Scoring Rules

To set up supplier scoring rules, use the Supplier Scoring Rules (SPB_SUP_SCORE_RULE) component.

This topic discusses how to set up supplier scoring rules.

Pages Used to Set Up Supplier Scoring Rules

Page Name	*Definition Name*	*Usage*
Supplier Scoring Rule Page	SPB_SUP_SCORE_RULE	Define a supplier scoring rule that calculates supplier scoring metrics, level codes, weight, and performance-level ranges.

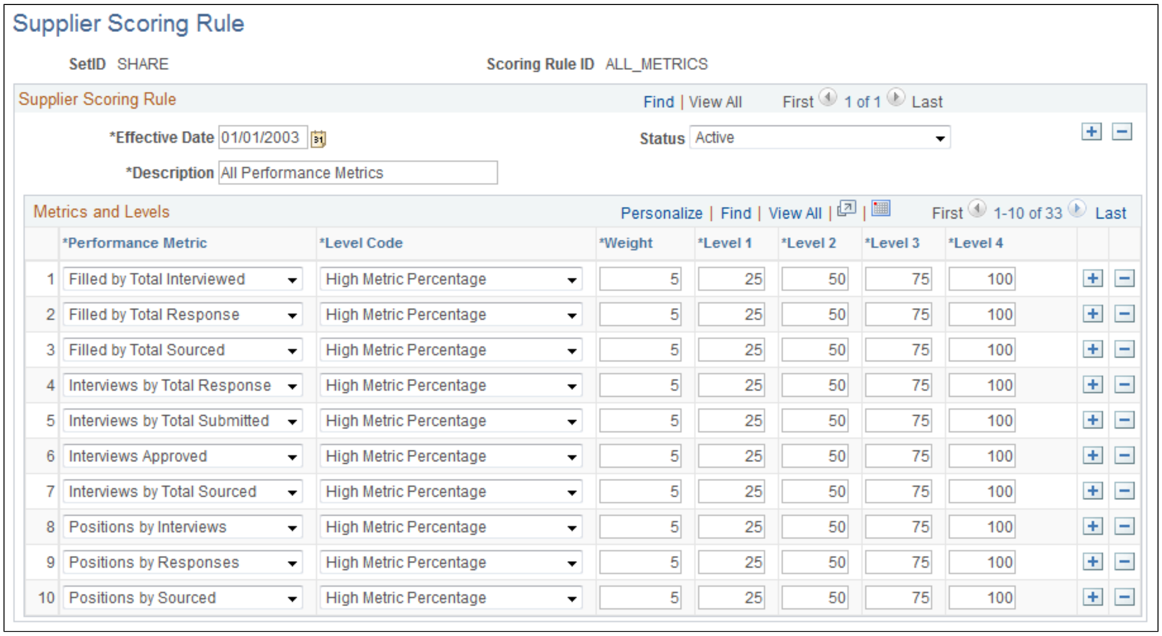
Supplier Scoring Rule Page

Use the Supplier Scoring Rule page (SPB_SUP_SCORE_RULE) to define a supplier scoring rule that calculates supplier scoring metrics, level codes, weight, and performance-level ranges.

Navigation:

Services Procurement > **Define Services Procurement** > **Sourcing Setup** > **Supplier Scoring Setup** > **Define Supplier Scoring Rules**

This example illustrates the fields and controls on the Supplier Scoring Rules page. You can find definitions for the fields and controls later on this page.



Supplier Scoring Rule

SetID SHARE

Scoring Rule ID ALL_METRICS

Supplier Scoring Rule

*Effective Date 01/01/2003

Status Active

*Description All Performance Metrics

Metrics and Levels

	*Performance Metric	*Level Code	*Weight	*Level 1	*Level 2	*Level 3	*Level 4
1	Filled by Total Interviewed	High Metric Percentage	5	25	50	75	100
2	Filled by Total Response	High Metric Percentage	5	25	50	75	100
3	Filled by Total Sourced	High Metric Percentage	5	25	50	75	100
4	Interviews by Total Response	High Metric Percentage	5	25	50	75	100
5	Interviews by Total Submitted	High Metric Percentage	5	25	50	75	100
6	Interviews Approved	High Metric Percentage	5	25	50	75	100
7	Interviews by Total Sourced	High Metric Percentage	5	25	50	75	100
8	Positions by Interviews	High Metric Percentage	5	25	50	75	100
9	Positions by Responses	High Metric Percentage	5	25	50	75	100
10	Positions by Sourced	High Metric Percentage	5	25	50	75	100

Field or Control	***Description***
Performance Metric	Select one or more performance elements to calculate the supplier score.
Weight	Enter the best possible weight that you want suppliers to receive. The weightings reflect the relative importance for each metric included in the rule. **Note:** Enter desired weighting amount. The weight value need not equal 100 percent.

Setting Up Supplier Scoring Parameters

This topic discusses how to set up supplier scoring parameters.

Page Used to Set Up Supplier Scoring Parameters

Page Name	***Definition Name***	***Usage***
Services Procurement Business Units Options Page	BUS_UNIT_TBL_SP	Define consolidation structures for accounting and reporting purposes.

Services Procurement Business Units Options Page

Use the Services Procurement Business Unit Options page (BUS_UNIT_TBL_SP) to define consolidation structures for accounting and reporting purposes.

Navigation:

Services Procurement > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Services Procurement Defn** > **Services Procurement Definition**

Supplier Scoring

Field or Control	***Description***
Minimum Supplier Score	Enter the minimum score that a supplier must have in order to bid on a requisition. Supplier must have this score or higher to meet the requisition requirements and appear on the sourcing selection page. Suppliers below the score do not appear on the sourcing selection page. **Note:** It is also possible to define a minimum supplier score at the service type level. If a minimum score is defined, it takes precedence over the minimum score setting of the BU.
Scoring Rule ID	Enter the scoring rule (group of metrics) that is used to score suppliers.
Use Current Date	Select to define duration date as the current system date. If selected, the system uses the number of reporting months relative to the current system date for each process instance.
Duration Date	Enter the date that is used to determine the ending date for the analysis data. Score processing includes the duration defined by the specified number of months going backward or forward from this date. **Note:** This field is only available when the **Use Current Date** is not selected.

Field or Control	***Description***
Exclude All Data Before	Enter the date that is used to determine the absolute begin date of the analysis data. The system retrieves data from this date forward. The default is the current system date. **Note:** If the values that you enter for duration date and number of reporting months define a date before the entered start date, the system does not retrieve data prior to the entered start date. For example, if the start date is January 1, 2010, the duration date is June 30, 2010, and number of reporting months is 12, indicating that you want 12 months of data prior to June 30, 2010, then the system retrieves data only for the period between January 1, 2006 and June 30, 2010. Data prior to January 1, 2010, or in this example between July 1, 2009 and December 31, 2009, is not retrieved.
# of Reporting Months (number of reporting months)	The system uses the duration date in conjunction with the number of reporting months to determine the time period that is used to retrieve the analysis data. Enter the number of reporting months to define the number of months before or after the duration date for which you want to retrieve data. Enter a positive value for number of reporting months to indicate the number of months starting from the duration date to be included in the process. Use a negative number to indicate the number of months prior to the duration date to include in the process. **Note:** The system does not retrieve data prior to the entered start date regardless of the entered duration date and number of reporting months.

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

Related Links

Setting Up Business Unit Definitions

Maintaining Service Setup

Viewing PeopleSoft Services Procurement Pages That Use Supplier Scoring

This topic provides you with a table of PeopleSoft Services Procurement pages that use supplier scoring.

Table of Pages That Use Supplier Scoring

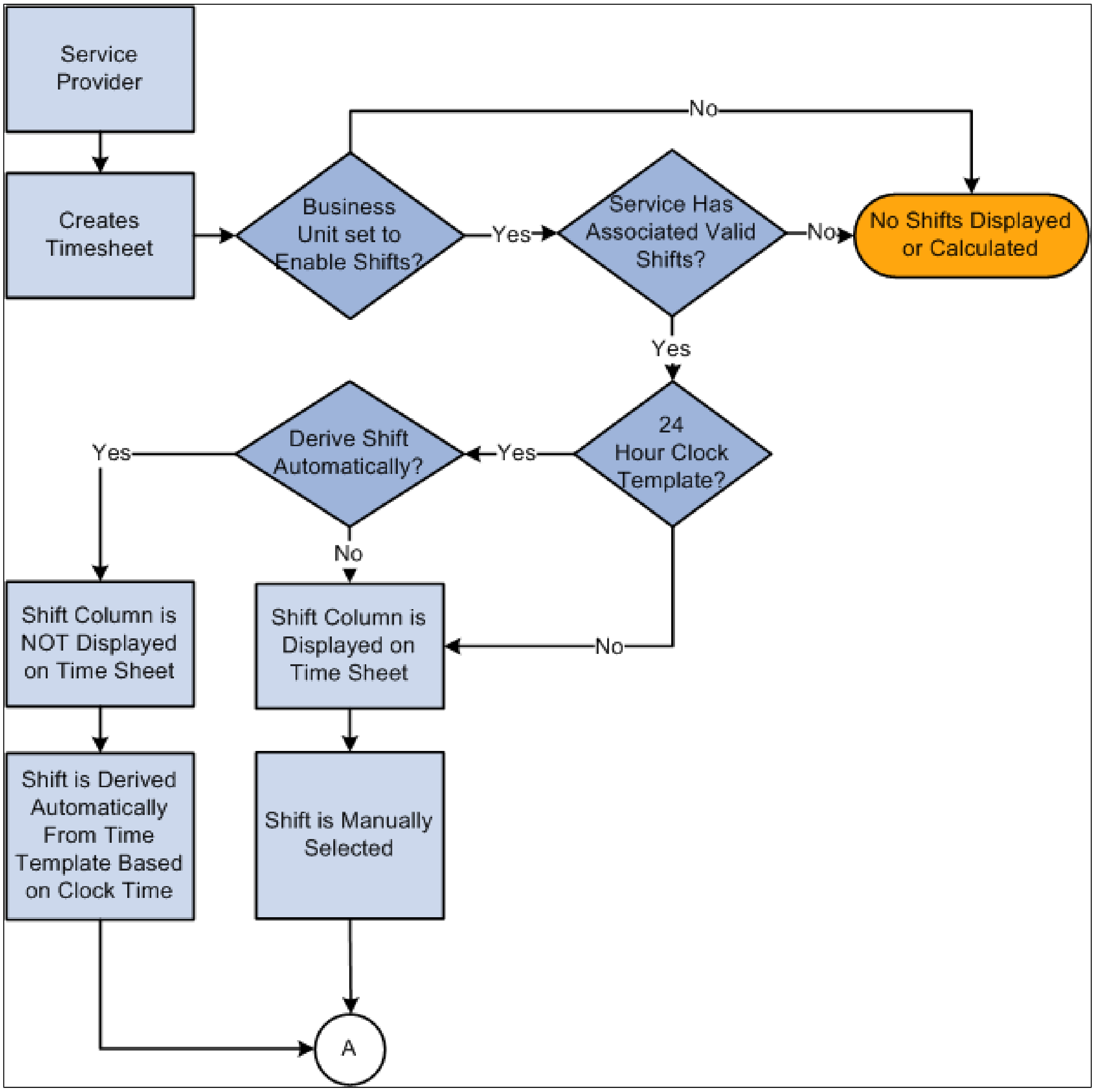
Page Name	***Navigation***	***Usage***
Sourcing Selection	**Services Procurement** > **Review and Source Requisitions** Click the sourcing selection icon that corresponds with the requisition ID and line that you want to source. **Home** > **Worklist** Click the link that corresponds with the requisition ID and line that you want to source.	Enter sourcing requirements.
Supplier Scoring Results	Click the **Score Analysis** button on the Sourcing Selections page.	View the supplier score.
Services Procurement Business Unit Option	**Services Procurement** > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Services Procurement Defn (Services Procurement Definition)**	Set up sourcing parameters.

Chapter 26

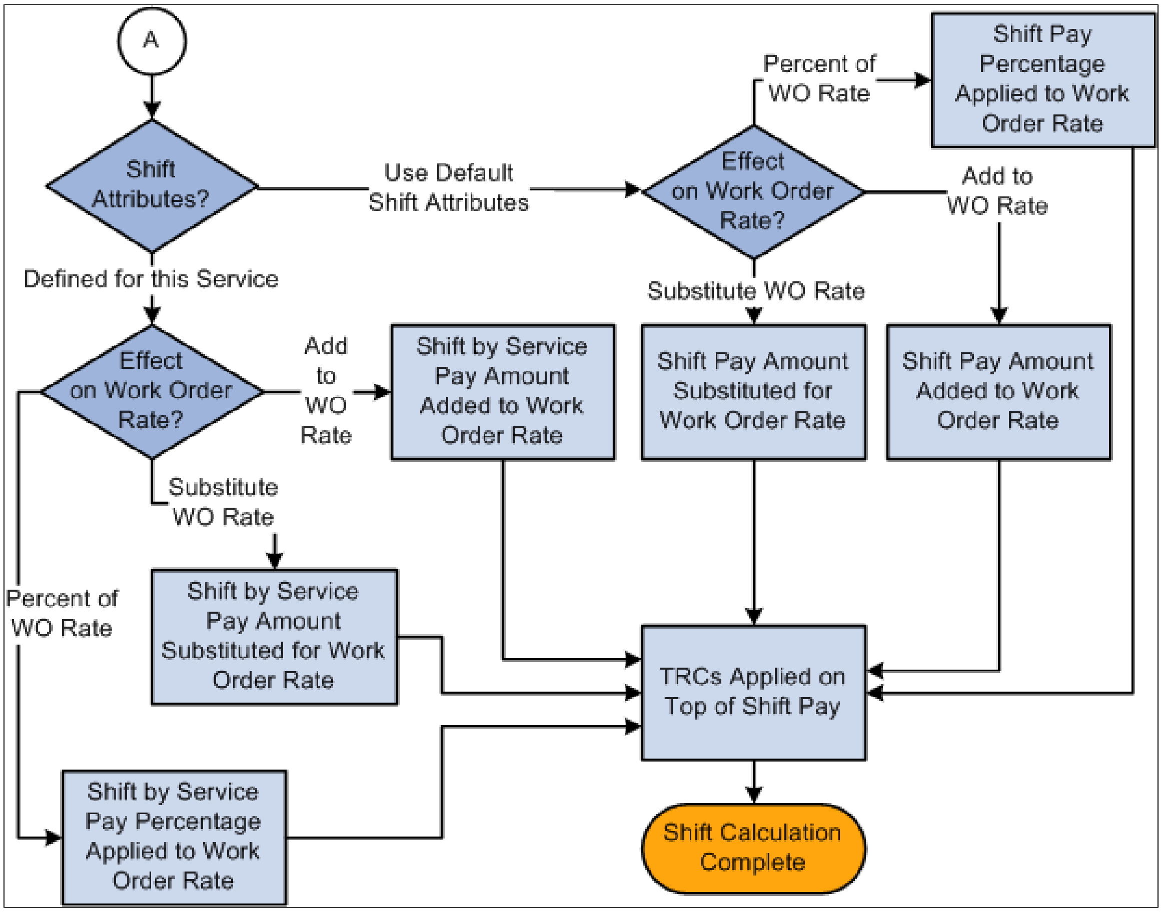
Additional Implementation Process Flow Information

Shifts Process Flow

The following diagrams illustrate the process flow for shifts in PeopleSoft Services Procurement:

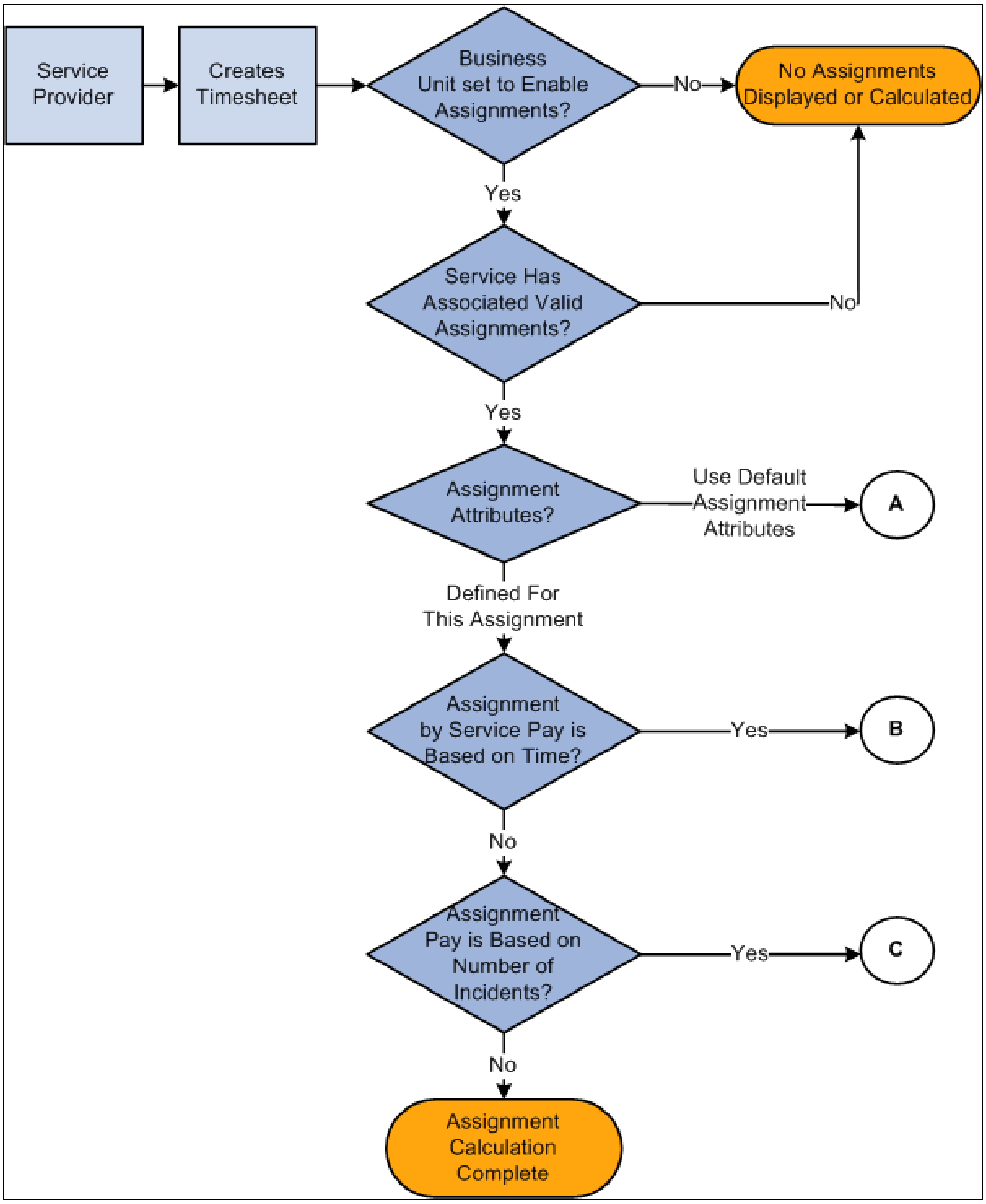


The following diagrams illustrate the process flow for shifts in PeopleSoft Services Procurement: part 2

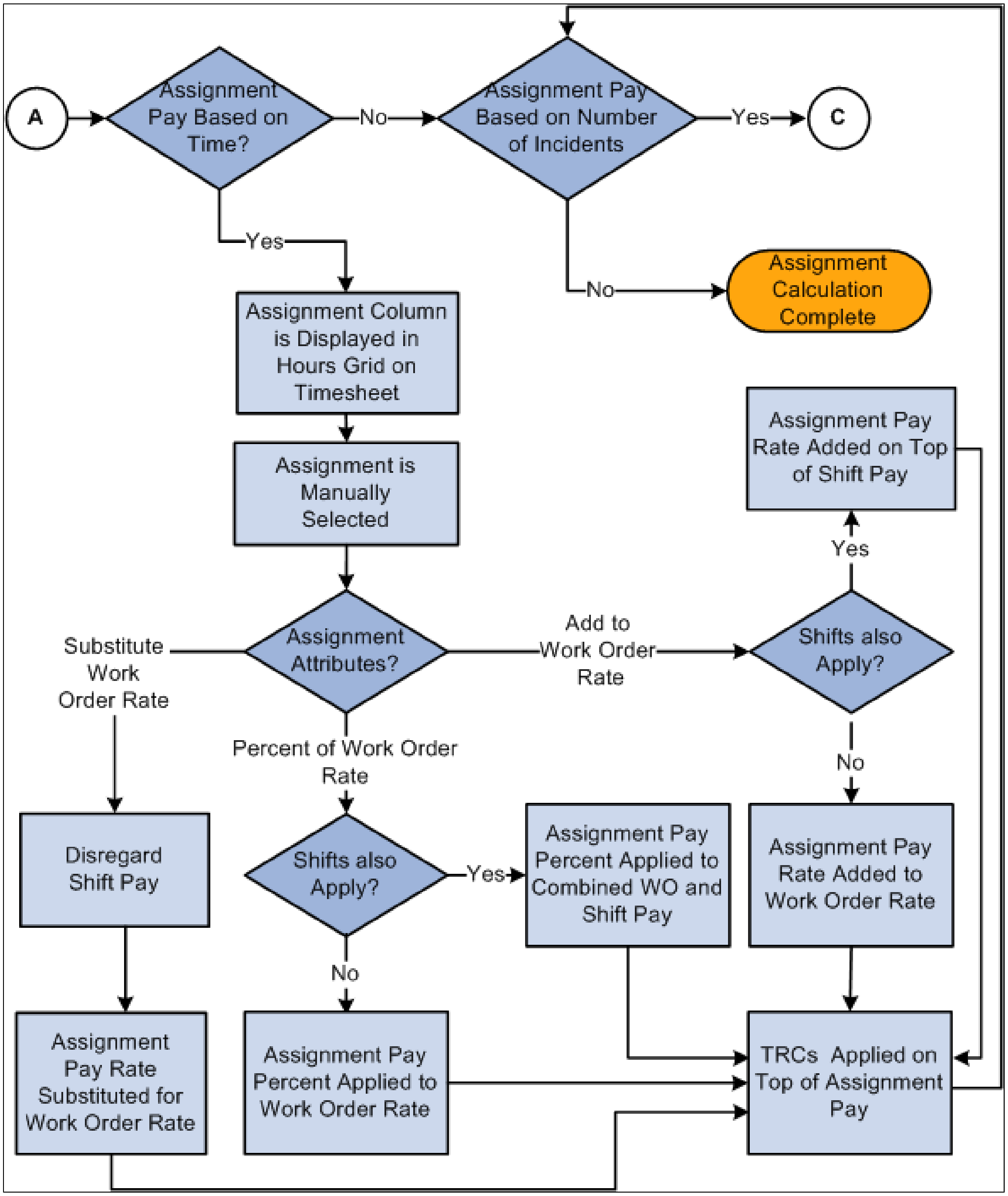


Assignments Process Flow

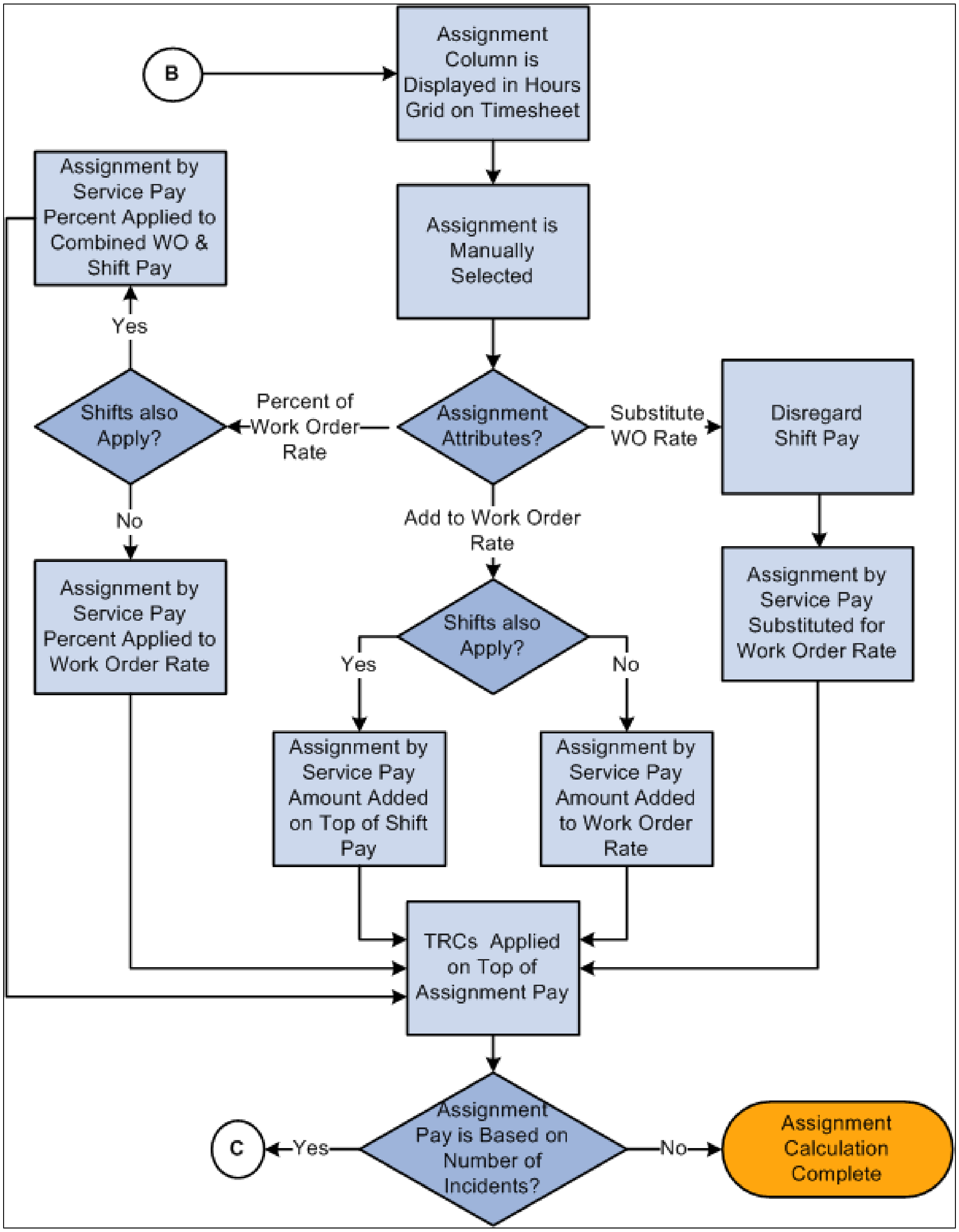
The following diagrams illustrate the process flow for assignments in PeopleSoft Services Procurement: part 1 of 4



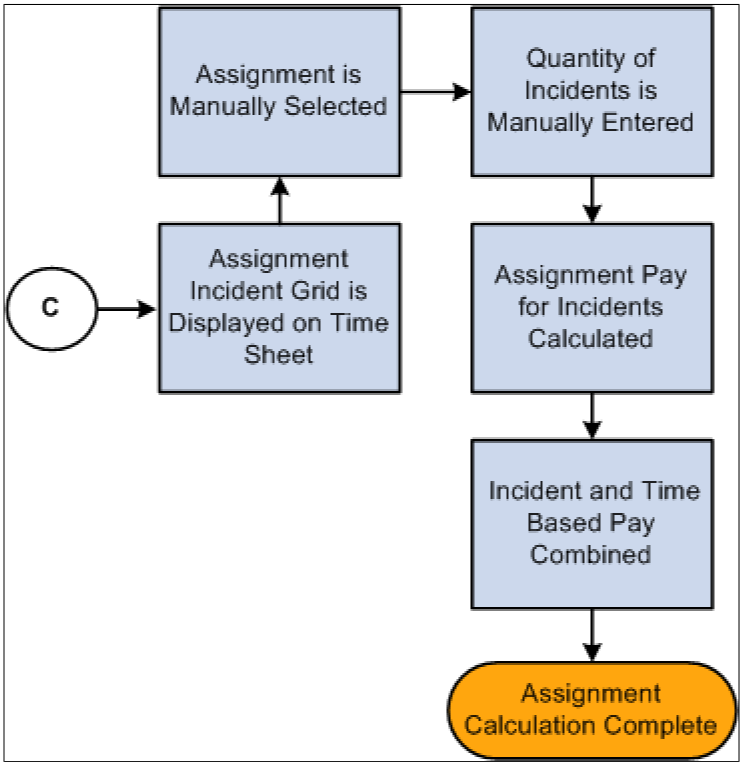
The following diagrams illustrate the process flow for assignments in PeopleSoft Services Procurement: 2 of 4



The following diagrams illustrate the process flow for assignments in PeopleSoft Services Procurement 3 of 4

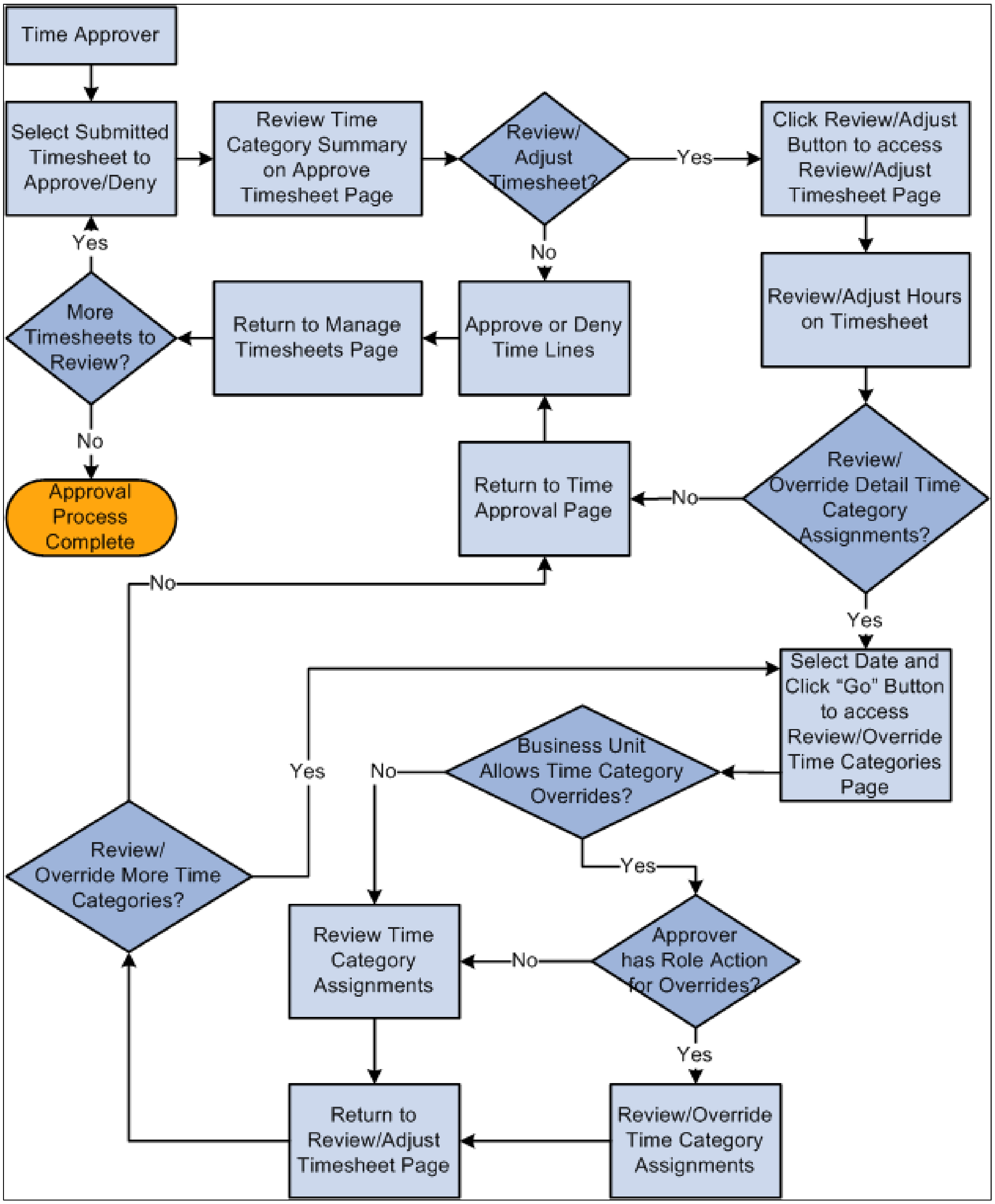


The following diagrams illustrate the process flow for assignments in PeopleSoft Services Procurement 4 of 4



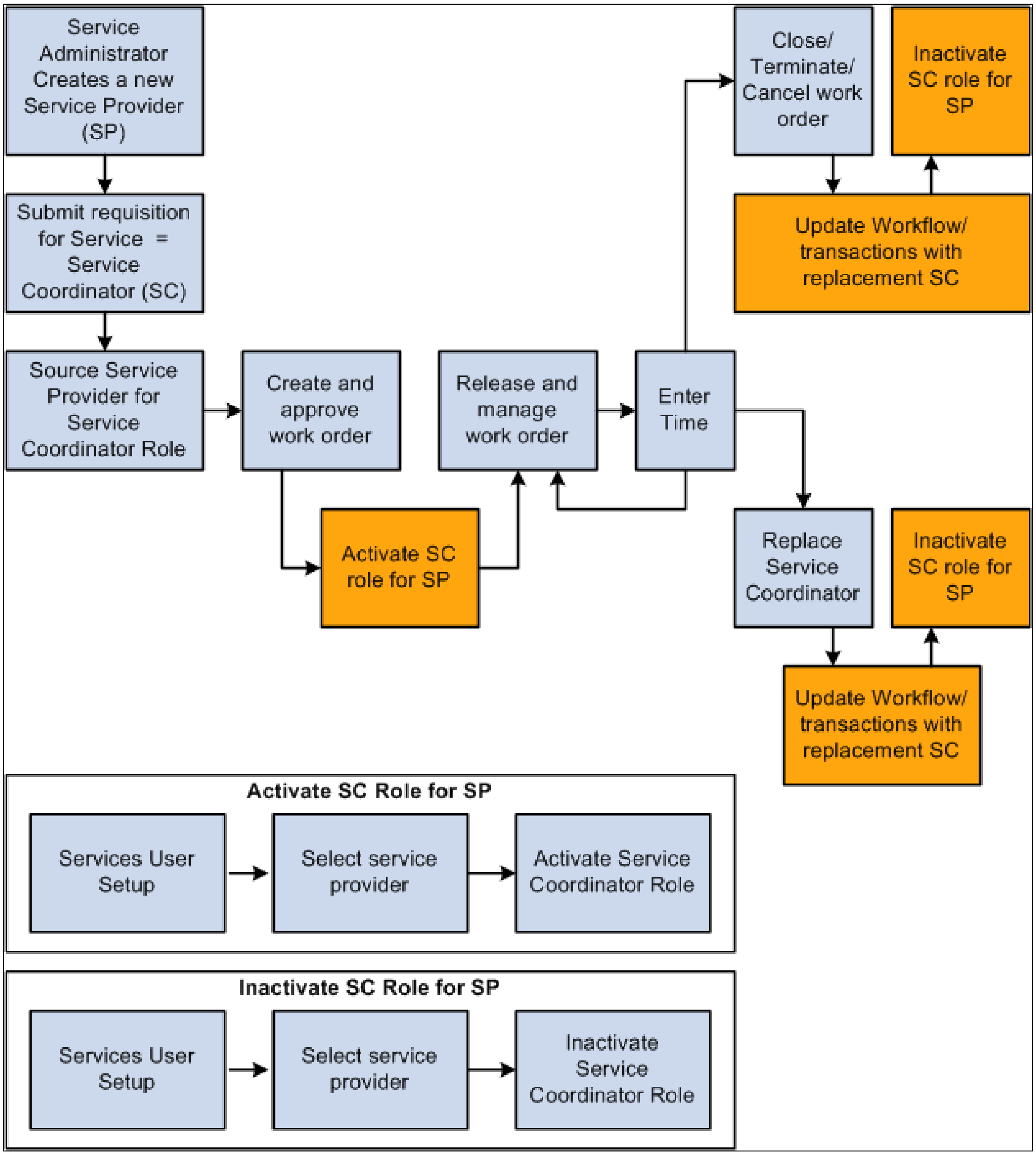
Time Category Override Process Flow

The following diagram illustrates the process flow for time category overrides in PeopleSoft Services Procurement:



Service Provider/Coordinator Role Process Flow

The following diagram illustrates the process flow for service provider/coordinator role used in PeopleSoft Services Procurement:



Service Provider/Coordinator Role — Worklist Information

This section lists the worklist information that is moved or created when you replace a service coordinator on requisitions and work orders.

Requisitions

Step	***Requisition Status***	***Worklist Description***	***Reassign Worklists - Assign To the Team Members****
1	Open	Define Rate worklist entries (depending on the business unit setup information)	All team members
2	Pending/Denied	Preapproval Sourcing Worklist (based on the allow Sourcing Prior to approval option on the business unit setup)	All team members
3	Approved	Sourcing Worklist	All team members
4	Sourced	Approved Worklist Sourcing Worklist Last Bid Worklist (one for each supplier; worklists needs to be triggered in case of a team)	Default team member
5	Filled	Approved Worklist Sourcing Worklist Work Order Creation Worklist	Default team member
6	Canceled	None	None
7	Closed	None	None

*When no team is involved, the Worklist items will be assigned to the specific replacement service coordinator.

Work Orders

Step	***Requisition Status***	***Worklist Description***	***Reassign Worklists - Assign To the Team Members****
1	Open/Denied	Define Rate worklist entries (depending on the business unit setup information) Alert Worklist Entries	All team members
2	Submitted	Alert Worklist Entries	Default team member
3	Approved	Approved Worklist, Alert Worklist Entries	Default team member
4	Released	Alert Worklist Entries Survey Worklist Entries	Default team member
5	Canceled/Closed/Terminate	Alert Worklist Entries Survey Worklist Entries	Default team member
6	Extended/Reassign	None	None

*When no team is involved, the Worklist items will be assigned to the specific replacement service coordinator.

Chapter 27

PeopleSoft Services Procurement Use Scenarios

Understanding Troubleshooting

Oracle recommends with these scenarios how to use some of the features within PeopleSoft Services Procurement. These real-life examples describe some of the intended uses of these features, enabling you to understand how these features might be applied to your own organization.

Note: These real-life examples describe some of the intended uses of these features, enabling you to understand how these features might be applied to your own organization. The real-life scenarios described within this documentation may not conform to the business rules and procedures within your organization. Do not construe these examples as consulting or implementation advice for your specific industry or your individual organization. You should adapt or disregard the information here based on the needs of your organization. PeopleSoft does not guarantee that the information included here will work as intended within your customized environment.

Using Shifts in PeopleSoft Services Procurement

This section discusses how you can use shifts in PeopleSoft Services Procurement.

Shift Example

You create and release work order 1000 for an IT worker service with a rate of $35 per hour and a duration from 07/01/2004 to 06/30/20. The service provider will be spending some time on the swing shift, which may qualify for special pay. The following shift definitions are applicable over the course of the work order:

Swing Shift Definition

Effective Date	*Start/Stop Time*	*Shift Percent*	*Shift Rate (MHR)*	*Rate Type*
01/01/1900	3:00PM/11:00PM	10	NA	NA
01/01/2005	3:00PM/11:00PM	NA	$5.00	Add to WO Rate
01/01/2010	2:00PM/10:00PM	NA	$5.00	Add to WO Rate

Swing Shift by Service Definition for IT Worker

Effective Date	**Shift Attribute Value**	**Start/Stop Time**	**Shift Percent**	**Shift Rate (MHR)**	**Rate Type**
01/01/2004	Use Default Shift Attributes	NA	NA	NA	NA
01/01/2007	Define for this Service	3:00PM/11:00PM	NA	$45.00	Substitute WO Rate
01/01/2009	Use Default Shift Attributes	NA	NA	NA	NA
01/01/2011	Disable Shift for This Service	NA	NA	NA	NA

Swing Shift by Service Definition for IT Worker based on Time Template

Effective Date	**Automatically Derive Shifts**	**Associated Shifts**	**Start/Stop Time**	**Hours Worked**
01/01/1990	No	NA	NA	NA
01/01/2011	Yes	Swing	1:00PM to 9:00 PM	Hours worked are compared to the shift start and stop times defined on time template.
01/01/2011	Yes	Grave	9:00PM to 5:00AM	Hours worked are compared to the shift start and stop times defined on time template.

Selected Timesheet Information for Work Order 1000

This table outlines specific timesheet information that was entered for work order 1000:

Date Worked	**Hours Worked**	**Shift Attributes**	**Rate**
06/30/2004	10:00 AM to 3:00PM	No related shift	First 5 hours at $35.00 — Work Order Rate

Date Worked	*Hours Worked*	*Shift Attributes*	*Rate*
06/30/2004	3:00PM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 3 hours at $38.50 — Shift rate (5.00 + 10%)
06/30/2007	10:00 AM to 3:00PM	No related shift	First 5 hours at 5.00 — Work Order Rate
06/30/2007	3:00PM to 6:00PM	Swing shift — Defined for this Service	Last 3 hours at 5.00 — Shift by Service rate)(5.00 substitute)
06/30/2009	10:00 AM to 3:00PM	No related shift	First 5 hours at 5.00 — Work Order Rate
06/30/2009	3:00 AM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 3 hours at 0.00 — Shift rate (5.00 + (.00)
06/30/201	10:00 AM to 2:00PM	No related shift	First 4 hours at 5.00 — Work Order Rate)
06/30/2010	2:00PM to 6:00PM	Swing shift — Use Default Shift Attributes	Last 4 hours at 0.00 — Shift rate (5.00 + (.00)
01/01/2011	10:00AM to 1:00PM	No related shift	First 3 hrs at $35.00 — Work Order Rate
01/01/2011	1:00PM to 6:00PM	Swing	Last 5 hours at $40.00 (based on time template)
06/30/2011	10:00 AM to 6:00PM	No related shift	8 hours at $35.00 — Work Order Rate

Criteria for Shift Display and Selection on Timesheet

This section discusses how the shift value affects the information that is displayed on the timesheet.

1. **Is the time template defined to automatically derive shift?**

    - If the answer is Yes the system derives the appropriate shift based on the start and end times from the template.

      Is there an effective-dated record defined for the shifts by service for the date worked? If Yes, what is the shift attributes setting for the shift on this date?

  - Use Default Shift Definition: Skip steps 2 and 3; Shift column is not displayed on timesheet, but shift pay is applied based on rate from the shift definition for the date worked.

  - Define for this Service: Skip steps 2 and 3; Shift column is not displayed on timesheet, but shift pay is applied based on Shift by Service definition for the date worked.

  - Disable Shift for This Service: Skip steps 2 and 3. Shift column is not displayed on timesheet and no shift pay is applied.

  If answer is *No*: Skip steps 2 and 3; Shift Column is not displayed on timesheet and no shift pay is applied.

- If answer is *No,* go to step 2.

2. **Is there an effective-dated record defined for shifts by service for any dates within the timesheet date range?**

   If answer is:

   - *Yes*: What is the Shift Attributes settings for the shifts during the timesheet date range?

     - All are set to Use Default Shift Definition or Define For this Service: Shift column is displayed on timesheet, and all shifts are available for selection. Go to step 3

     - Some are set to No Longer Valid: Shift column is displayed on timesheet, and all shifts with a Shift Attributes setting except Disable Shift for This Service effective somewhere within the date range are available for selection. Go to step 3.

     - All are set to Disable Shift for This Service: Shift column is not displayed on timesheet. Skip step 3.

   - *No*: Shift column is not displayed on timesheet. Skip step 3.

3. **Has a shift been selected for the time line?**

   If the answer is:

   - *Yes:* Is there an effective-dated record defined for shifts by service for the specific date associated to the hours column?

     If Yes, then what is the Shift Attributes setting for that effective date?

     - Use Default Shift Definition: Hours field is accessible for that date. System uses rate information from Swing Shift Definition for the date that hours were worked, and replaces or augments work order rate accordingly.

     - Define for this Service: Hours field is accessible for that date. System uses rate information from Swing Shift and IT Worker Service Definition for the date that hours were worked, and replaces or augments work order rate accordingly

     - Disable Shift for This Service: Hours field is not accessible for that date. No hours can be associated to the shift for that date.

     If No, Hours field is not accessible, no hours can be associated to the shift for that date.

- *No:* Hours field is not accessible for that date, and no hours can be associated to the shifts for that specific date.

Using Shifts and Assignments

The following are use cases using shifts and assignments.

1. **Shift Pay**: Certain time of day is paid at a fixed amount over the standard rate.

    - Base Pay: $10.00 per hour
    - Pay for time of day: $.25 per hour
    - Markup: 3%

    Bill Rate for Base Pay hours: $10.30 per hour ($10.00 + 3%)

    Bill Rate for Shift Pay hours: $10.56 per hour ($10.25 + 3%)

2. **Shift Pay**: Certain time of day is paid a percentage over the standard rate.

    Note: Service Provider's work hours for a single day may cross multiple shifts, and a shift may cross multiple days.

    - Base Pay: $10.00 per hour
    - Shift 2: Base rate plus 10%
    - Shift 3: Base rate plus 15%
    - Markup: 3%

    Bill Rate for base pay hours: $10.30 per hour ($10.00 + 3%)

    Bill Rate for shift 2 hours: $11.33 (($10.00 + 10% = $11.00) + 3%)

    Bill Rate for shift 3 hours: $11.85 (($10.00 + 15% = $11.50) + 3%)

3. **Shift Pay Plus Overtime**: Certain time of day is paid an additional shift rate on top of the standard rate, and overtime is paid a percentage over the shift pay rate.

    Note: Overtime may be defined as more than a specified number of hours in a day or more than a specified number of hours in a week.

    - Base Pay: $10.00 per hour
    - Shift 2: Base rate plus 10%
    - Shift 3: Base rate plus 15%
    - Overtime: Rate in effect plus 50%

- Markup: 3%

Bill Rate for base pay hours: $10.30 per hour ($10.00 + 3%)

Bill Rate for overtime using Base Pay hours: $15.45 per hour (10.30 + 50%)

Bill Rate for shift 2 hours: $11.33 per hour(($10.00 + 10% = $11) + 3%)

Bill Rate for overtime using shift 2 hours: $17.00 per hour ($11.33 + 50%)

Bill Rate for shift 3 hours: $11.85 per hour (($10.00 + 15% = $11.50) + 3%)

Bill Rate for overtime using shift 3 hours: $17.78 per hour (11.85 + 50%)

4. **Assignment Pay**: Special rate paid when on call or called out.

- On call amount paid per hour:

  - On call rate: $5.00 per on call hour

  - Call out fee: $100 per call out incident

  - Call out rate: $20 per call out hour

  - Markup: 5%

  Bill Rate for hours on call: $5.25 ($5.00 + 5%)

  Bill Rate for hours called out: $21.00 ($20.00 + 5%)

  Additional Billed Amount - Fixed fee per call out incidence: $105.00 ($100.00 + 5%)

- On call amount paid at a fixed fee, hours are not recorded:

  - On call rate: $50.00 per on call period

  - Call out fee: $100.00 per call out incidence

  - Call out rate: $20.00 per call out hour

  - Markup: 5%

  Billed amount per on call shift: $52.50 ($50.00 + 5%)

  Bill Rate for hours called out: $21.00 ($20.00 + 5%)

  Additional Billed Amount - Fixed fee per call out incidence = $105.00 ($100,00 + 5%)

- On call amount paid at a fixed fee, but hours are still recorded:

  - On call rate: $50.00 per on call period plus $5.00 per on call hour

  - Call out fee: $100.00 per call out incidence

  - Call out rate: $20.00 per call out hour

  - Markup: 5%

Bill Rate for hours on call: $5.25 ($5.00 + 5%)

Additional Billed Amount - Fixed fee per on call shift: $52.50 ($50.00 + 5%)

Bill Rate for hours called out: $21.00 ($20.00 + 5%)

Additional Billed Amount - Fixed fee per call out incidence: $105.00 ($100.00 + 5%)

The following additional use case covers the scenario where both shifts and assignments are applicable to the same work order:

Combined Shift and Assignment Pay: Certain time of day is paid at a fixed amount over the standard rate, certain type of work is paid at a percentage over the standard or shift rate.

- Base Pay: $10.00 per hour
- Pay for time of day: $.25 per hour
- Pay for type of work: 20%
- Markup: 3%

Bill Rate for Base Pay hours: $10.30 per hour ($10.00 + 3%)

Bill Rate for Shift Pay hours: $10.56 per hour ($10.25 + 3%)

Bill Rate for Assignment Pay hours: $12.36 per hour (($10.00 + 20% = $12.00) + 3%)

Bill Rate for Combined Shift and Assignment Pay hours: $12.67 per hour (($10.25 + 20% = $12.30) + 3%)

Using a Skills Matrix on Requisitions

Considerations for using a skill matrix on requisitions include:

1. The requestor is going to need to input the skills on the requisition with each of the skills prioritized. This will force the Requestor to think hard about what they are looking for in a candidate. This should improve the success of the overall process as down-stream activities will have access to more and better information about the required skills.
2. A Service Provider Contact when entering a SP bid, will get a notification when a candidate is missing the required skill. The SP Contact will then have the option of self-rejecting the candidate and not submitting them or they may even try to better-represent the skills of the SP in the event that the SP skills profile is missing information that actually existed for the candidate.
3. A service coordinator will want to compare the skills of candidates as part of their decision process. Once completed, they may eliminate candidates prior to entering them into the bid factor analysis due to a lack of skill fit. Service coordinators will need to visually compare the skills of the candidate against the skills of the requisition.

Chapter 28

PeopleSoft Human Capital Management Integration

Understanding PeopleSoft Services Procurement and Human Capital Management Integration

Many PeopleSoft applications offer seamless integration with other selected PeopleSoft applications. PeopleSoft Services Procurement integrates with PeopleSoft Human Capital Management. When you install both Supply Chain Management (SCM) and HCM database structures, you can configure the system to use the HCM database as the system of record and initiate consistent terminology between the PeopleSoft Services Procurement and PeopleSoft HCM applications. Services Procurement can be registered as a supplier in Talent Acquisition Manager and job postings can be sourced to Services Procurement.

Note: You must register services procurement administrators, approvers, requesters, and service coordinators in the HCM database first. After you register these users in the HCM database, you can then register them as Service Procurement users and assign specific roles in the SCM database.

Note: You cannot enable the HCM integration if you've already selected the MSP Installation option on the Services Procurement Installation Options page.

When you implement PeopleSoft Services Procurement for use with HCM applications, you can configure HCM as the system of record to maintain user details. When the **HCM Person Integration Enabled** check box is selected on the Services Procurement Installation Options page, enterprise administrators can register a Services Procurement user as an HCM person with a unique employee ID and create unique operator login profiles within the HCM database which is then synchronized to the SCM database.

The following users have a specific role that enables them to perform specific tasks within the application. Some are registered in the HCM database with a unique person ID, while others are created only in the SCM database without a person ID:

- *Approver:* This enterprise user can be designated as requisition, work order, time, progress log, expense, or invoice approver.

  This user is created in the HCM database as an HCM person with a unique employee ID.

- *Hiring Manager/Requester:* This enterprise user creates requisitions and determines specific requirements for a resource and creates a requisition listing those requirements. The requester might designate a service coordinator to source the requisition and handle the fulfillment process. This user is created in the HCM database as an HCM person with a unique employee ID. When you activate HCM Talent Acquisition Manager integration, the hiring manager, who sends a Talent Acquisition Manager job posting to Services Procurement for sourcing must also be added as a Services Procurement requester in the SCM database to complete the transfer and submit the requisition for sourcing.

- *Services Coordinator:* This user may work for the enterprise or the supplier.

  He or she handles the sourcing of requisitions to different suppliers and also handles supplier bids to ensure that the request is filled with the most qualified resource. The enterprise service coordinator user is created in the HCM database as an HCM person with a unique employee ID.

- *Service Procurement Administrator:* This user can register all other users in the Services Procurement system, as well as perform basic application setup.

  This user is created in the HCM database as an HCM person with a unique employee ID.

- *Service Provider Contact:* This is a non-enterprise user who manages a team of service providers and handles bidding with the service coordinator.

  This user is registered in SCM database and does not have a corresponding HCM person ID and a unique employee ID.

- *Service Provider:* This supplier resource is submitted as a potential candidate for a sourced requisition.

  The service provider is registered in the SCM database and has a unique Services Procurement person ID. When you approve a Services Procurement work order, the system sends the associated service provider's personal information to the HCM database for creation of a new HCM person, operator login profile, and job assignment information. For integration with Talent Acquisition Manager, after a Services Procurement candidate is filled for a job posting and hired in HCM, the system creates a unique operator login profile in HCM and synchronizes the data to the SCM database.

See *PeopleSoft HCM Application Fundamentals 9.2 documentation*

Prerequisites

To use PeopleSoft Human Capital Management and PeopleSoft Services Procurement integration, you must first install both the HCM and SCM databases.

Common Elements Used to Understand PeopleSoft Services Procurement and Human Capital Management Integration

Field or Control	***Description***
Login Profile	Operator profile or user profile.
HCM Person	A person within the HCM system that has a unique employee ID. This person could be an employee or a contingent worker.

Field or Control	***Description***
Services Procurement Person	A user who is registered in Services Procurement. A Services Procurement person entry is created for service coordinators, service provider contacts and service provider type of users.
HCM User	An administrator that has access to the HCM database.
SCM User	An administrator or other user who has access to the SCM database.
Job Family	The grouping of jobs to make it easier to assign a competency or competency cluster to similar jobs.
Job Function	Creates function categories that can then be assigned to job codes.
Job Code	In HCM, jobs are identified by job codes. You use job codes to maintain information about jobs independent of the person of group performing that job. For example, salary grades and standard hours are assigned to a job regardless of who holds that job.
Job Profile	Identifies a set of competencies, subcompetencies, and responsibilities that apply to employees in the same job or job family.
Establishment	A country specific option for USA or France. **Note:** This option is only visible when the regulatory region is USA or France.
Labor Agreement	This is a country-specific required field for Spain. **Note:** This option is only visible when the regulatory region is Spain.
Job Posting	A job requirement defined within the HCM Talent Acquisition Manager application and sent to Services Procurement for fulfillment.

Setting Up and Using Human Capital Management Terminology Within Service Procurement

This topic provides an overview of PeopleSoft Human Capital Management terminology integration and discusses how to set up installation options.

Pages Used to Set Up Human Capital Management Terminology Integration

Page Name	***Definition Name***	***Usage***
Services Procurement Installation Options Page	INSTALLATION_SP	Define PeopleSoft Services Procurement installation options.
Existing Service Type/Service	SP_SERVICETYPE_WK	Fix the job code and job family relationship before you select the **Use HCM Terminology** check box on the Services Procurement Installation Options page. You can only have a job family associated to a job code.

Understanding PeopleSoft Human Capital Management Terminology Integration

When the **Use HCM Terminology** check box is selected on the Services Procurement Installation Options page, the current service and service type labels are replaced with job code and job family labels throughout the PeopleSoft Services Procurement system. Because the job family and job function terms are widely used throughout HCM applications, you can configure the system to use HCM terminology consistently across both the SCM and HCM databases.

This table lists the terminology for PeopleSoft Services Procurement when HCM integration is selected.

Note: When you enable HCM terminology integration, all service and service type labels change to job family and job code labels respectively.

Page Name in Services Procurement	***Page Name When Use HCM Terminology is Selected***	***Search Pages***
Service Type	Job Family	Service Type changes to Job Family
Service	Job Code	Services changes to Job Code
Project Role	Job Code	Services changes to Job Code

Services Procurement Installation Options Page

Use the Services Procurement Installation Options page (INSTALLATION_SP) to define PeopleSoft Services Procurement installation options.

Navigation:

Set Up Financials/Supply Chain > **Install** > **Installation Options** > **Services Procurement**

Field or Control	Description
Use HCM Terminology	Select to modify HCM terminology throughout PeopleSoft Services Procurement. When you select this option, all current service and service type labels change to job code and job family labels. If you select the **Use HCM Terminology** check box, the **MSP Installation** check box is not available.

Note: When you select the **Use HCM Terminology** check box, the system validates the relationship between the existing job family and job codes. PeopleSoft Human Capital Management allows only one job family per job code, while Services Procurement allows multiple service types per service. Because of this restriction from HCM, you cannot enable the HCM terminology if there are services present with more than one related service type. If this situation occurs, the system provides a secondary page that informs you that service and service type relationships do not meet the criteria. To continue with the conversion to HCM terminology, you must remove the additional relationships.

Setting Up Human Capital Management and Services Procurement Person Integration

This topic discusses how to set up Human Capital Management and Services Procurement Person Integration.

Pages Used to Set Up PeopleSoft HCM and Services Procurement Person Integration

Page Name	Definition Name	Usage
Services Procurement Installation Options Page	INSTALLATION_SP	Define PeopleSoft Services Procurement installation options.
Services Procurement Business Unit Definition Page	BUS_UNIT_TBL_SP	Define PeopleSoft Services Procurement business units. Define your consolidation structures for accounting and reporting purposes.
Services User Setup	SPB_USER_SETUP_PG1	Maintain user setup for requesters, service coordinators, service providers, and service provider contacts.
Services User Setup	SPB_USER_SETUP_PG2	Determine whether the new user has an existing user profile or needs a new profile, add new users as requesters, and establish security and user preferences for the new user.

Page Name	***Definition Name***	***Usage***
User Profile Information Page	SPB_USR_PROFILE_PG	Enter user ID and password information for the new requester.
"Requester Setup Page" (PeopleSoft Source to Settle Common Information)	REQUESTOR_TBL	Define requisition and catalog defaults for the requester.
Business Unit Security by User ID	SEC_BU_OPR	Set up business unit access by user ID.
TableSet Security by User ID	SEC_SETID_OPR	Set up TableSet access by user ID.
User Preferences Page	PV_OPR_LINKS	Define overall and procurement preferences for the requester.
Maintain Service Coordinator Page	SPB_PERSON_PAGE	Define personal information for the service coordinator.
Service Coordinator Information Page	SPB_COORDINATOR_PG	Define employee and user ID information. Services User Setup Page
Maintain Service Coordinator - Phone and Email Details Page	SPB_USR_PH_EM_PAGE	Enter telephone and email details for the service coordinator.
User Login Information - User Profile Information	SPB_PERSLGN_SEC_PG	Define login information for the service coordinator.
Maintain Provider Contact	SPB_SP_PERS_PAGE	Define personal information for the provider contact.
Provider Contact Information	SPB_PROV_CNTCT_PG	Define supplier, location code, and create user profile.
Maintain Provider Contact - Phone and Email Details	SPB_USR_PH_EM_PG2	Enter telephone and email details for the provider contact.
Maintain Service Provider Page	SPB_PERS_PROV_PAGE	Define personal information for the service provider.
Service Provider Information Page	PB_INDP_PROV_PG	Define work status, project role, supplier, years of experience, and other parameters to define the service provider.

Page Name	***Definition Name***	***Usage***
Maintain Service Provider - Phone and Email Details	SPB_USR_PH_EM_PG3	Enter telephone and email details for the service provider. Service Provider Information Page
Service Provider Skills Page	SPB_PROV_SKILL_PG	Select appropriate competencies for the service provider. Service Provider Information Page
Services	IB_SERVICEDEFN	Define services. Setting Up Integration Broker for the SOA for Inbound Timesheets Feature
Service Operations Page	IB_SERVICE	Define service operations and associate them to services. See *PeopleTools: Integration Broker*
Routing Definitions page	IB_ROUTINGDEFN	Define routings associated with service operations. See *PeopleTools: Integration Broker* “Creating Routing Definitions”
Queue Definitions Page	IB_QUEUEDEFN	Define queues to be used with the HCM integration. “Queue Definitions Page” (PeopleSoft Supply Chain Management Integration)
Monitor Overview	IB_MONITOR_OVRVIEW	Use this page to ensure that all service operations are set up and active.

Services Procurement Installation Options Page

Use the Services Procurement Installation Options page (INSTALLATION_SP) to define PeopleSoft Services Procurement installation options.

Navigation:

Set Up Financials/Supply Chain > Install > Installation Options > Services Procurement

Field or Control	*Description*
HCM Person Integration Enabled	Select to enable the integration with HCM for person information. Selecting this option enables basic service provider and work order information to be sent to HCM and HCM Person and then have job-related information sent back to Services Procurement.

Services Procurement Business Unit Definition Page

Use the Services Procurement Business Unit Definition page (BUS_UNIT_TBL_SP) to define PeopleSoft Services Procurement business units.

Define your consolidation structures for accounting and reporting purposes.

Navigation:

Services Procurement > **Define Services Procurement** > **General Setup** > **Business Unit Definitions** > **Services Procurement Definitions**

This example illustrates the fields and controls on the HCM Integration group box on the Services Procurement Business Unit Definition page. You can find definitions for the fields and controls later on this page.

Regulatory Region

Company MDB Multi Dimensional Business

Business Unit HR US001 GBI BU for US001

HCM Administrator DAVIDMORGAN Morgan, David

If you select the **HCM Person Integration Enabled** check box on the Services Procurement Installation Options page, the HCM Integration group box and relative HCM field values are available on this page.

Field or Control	*Description*
Regulatory Region	Select a regulatory region.
Company	Select the company.
Business Unit HR (business unit human resources)	Enter the human resource business unit.
HCM Administrator	Select the name of the human resource administrator responsible for entering user information in the HCM system. This user might also be responsible for re-submittal of the person or job data to HCM if the initial person or job creation did not go through successfully.

Note: Many of the HCM default values from the Services Procurement Business Unit Definition come from the requisition and work order components.

Related Links

Setting Up Business Unit Definitions

Setting Up Service Operations - Incremental Synchronization

PeopleSoft Services Procurement uses PeopleSoft Integration Broker to integrate PeopleSoft Services Procurement tables with PeopleSoft HCM. The service operations are delivered with a default status of *Inactive.* You must activate each service operation before attempting to publish service operation or subscribe to service operations between databases. You must activate these service operations in the HCM and SCM databases.

To begin using PeopleSoft Integration Broker, you must enable the publishing of service operations in PeopleSoft HCM and SCM and the subscribing to those service operations in PeopleSoft HCM and SCM. The publish and subscribe rules may also be incremental or full table synchronization for each service operation.

The following table contains the incremental synchronization service operations that update the PeopleSoft Services Procurement applications when you change data in HCM that is relevant to the integration. These service operations are published from HCM.

Note: You must activate these service operations and queues in the PeopleSoft Services Procurement and HCM databases.

Service Operation	***Queue***
DEPT_SYNC	ENTERPRISE_SETUP
DEPT_SYNC_EFF	ENTERPRISE_SETUP
COMPANY_SYNC	PERSON_ISE_SETUP
LOCATION_SYNC_EFF	ENTERPRISESETUP
LOCATION_SYNC	ENTERPR _SETUP
BUS_UNIT_HR_SYNC	HR_SETUP
HCR_ADD_USER_PROFILE	PERSON_SETUP
HCR_ADD_USER_PROFILE_ACK	PERSON_SETUP
JOBCODE_SYNC	PERSON_SETUP

Service Operation	***Queue***
REGULATORY_REGION_SYNC	PERSON_SETUP
ESTAB_TBL_SYNC	PERSON_SETUP
ESTAB_ LOC_US_SYNC	PERSON_SETUP
HR_LABOR_AGRMNT_S	PERSON_SETUP
PERSON_BASIC_SYNC	PERSON_DATA
WORKFORCE_SYNC	PERSON_DATA
USER_PROFILE	USER_PROFILE

After you activate these service operations, subsequent changes to data in any of the records associated with these service operations triggers the publication and subscription of the new or deleted data. As a result, PeopleSoft Services Procurement reflects the change within a few seconds.

These SYNC service operations are published from HCM. You must activate the subscriptions to these service operations in the SCM system in order to update the data in SCM.

See the product documentation for *PeopleTools: Integration Broker*

Setting Up Service Operations - Full-Table Synchronization

Full-table synchronization is more data-destructive than incremental synchronization. Incremental synchronization service operations modify, delete, or add the data that a user has affected in performing an individual transaction. Full-table synchronization service operations delete all data in the target record first and then loads a copy of the source record.

Full-table synchronization is generally used at the beginning of an implementation to get the data synchronized between databases. After that point, it should be used sparingly.

The following table lists full-table synchronization service operations. You should carefully consider the effect of activating any of these service operations.

Warning! Do not activate any service operations that are identified as FULL_SYNC or FULLSYNC unless you are absolutely certain that you want to overwrite all of the data in the records that are associated with the service operation in the database. Understanding how Full Synchronization Service Operations work is especially important if you have a different list of departments or locations in the Services Procurement database than you have in the HCM database. For example, synchronizing the departments using a FULLSYNC service operation would overwrite all of the Services Procurement departments with the HCM departments.

Note: When using Full Synchronization service operations, the primary concern is that you do not inadvertently overwrite valid data. To prevent this problem, you should generally avoid activating Full Synchronization service operations for any record that receives input from more than one database.

Service Operation	***Queue***
DEPT_FULLSYNC	ENTERPRISE_SETUP
COMPANY_FULLSYNC	PERSON_ISE_SETUP
LOCATION_FULLSYNC_EFF	ENTERPRISESETUP
LOCATION_FULLSYNC	ENTERPR _SETUP
BUS_UNIT_HR_FULLSYNC	HR_SETUP
JOBCODE_FULLSYNC	PERSON_SETUP
REGULATORY_REGION_FULLSYNC	PERSON_SETUP
ESTAB_TBL_FULLSYNC	PERSON_SETUP
ESTAB_ LOC_US_FULLSYNC	PERSON_SETUP
HR_LABOR_AGRMNT_FULLSYNC	PERSON_SETUP

Service Operation	***Queue***
SETID_INITIALIZE	TBLSET_CONTROL
TBLSET_CONTROL_INITIALIZE	TBLSET_CONTROL

Note: To enable the TBLSET_CONTROL_INITIALIZE service operation to publish between two databases, you must set up message chunking for the operation by record group. This process is described in the next set of steps.
To enable the TBLSET_CONTROL_INITIALIZE service operation to publish between two databases:

---

1. Identify the record groups that exist in both databases.
2. Create a chunking rule for each record group and then add the chunking definition to the subscribing nodes of the group.
3. Enter the chunking rule you created to the full table publish rules definition for the TBLSET_CONTROL_INITIALIZE service operation.

If you are publishing to one node, this setup is sufficient; however, if you are publishing to multiple nodes, you need to add routing PeopleCode to the channel.

See "Using the Publish Utility", Message Chunking, documentation *PeopleSoft Integration Interfaces.*

See the product documentation for *PeopleTools: Integration Broker Service Operations Monitor*

Activating Full-Table Publish Rules

Full-table service operations in PeopleSoft Integration Broker are delivered with a status of *Inactive.* The publishing rules must be activated. When the appropriate service operations are activated, information that is shared by the SCM, and PeopleSoft HCM databases is updated properly.

For example, PeopleSoft publishes (Full Table Publish) data from HCM. Table BUS_UNIT_TBL_HR is populated with new data from PeopleSoft HCM, and all old data is deleted. The data from this table is published in the service operation BUS_UNIT_HR_FULLSYNC.

You should activate the service operation and routings in both the HCM and SCM databases to enable the integration. Use these service operations to send the service provider information from the SCM database to the HCM database:

Service Operation	***Queue***
HCR_ADD_PERSON This service operation is published from SCM to HCM when a work order is released. The service operation contains the service providers personal information that is required by HCM for creating an HCM person. The service operation also contains job information for creating a job assignment in HCM.	PERSON_DATA
HCR_ADD_PERSON_ACK This service operation is published from HCM after processing the HCR_ADD_PERSON service operation. This acknowledgement service operation contains information of whether the HCM person, job and user profile have been created in HCM.	PERSON_DATA
HCR_ADD_JOB This service operation is published from SCM when a service provider who is currently associated to a work order is also associated to another work order. This service operation contains job information for creating a job assignment in HCM.	PERSON_DATA
HCR_ADD_JOB_ACK This service operation is sent from HCM after processing the HCR_ADD_JOB message. This service operation contains info of whether the job assignment was created in HCM.	PERSON_DATA

Service Operation	***Queue***
HCR_ADD_USER_PROFILE This service operation from Services Procurement to HR requests the creation of a user profile. The message structure includes the existing records HCR_JOB_WK and HCR_HANDLE_WK. It can be copied from the existing message HCR_ADD_JOB, with only one field active on the HCR_JOB_WK record: Employee ID.	PERSON_DATA
HCR_ADD_USER_PROFILE_ACK This service operation is identical to the existing HCR_ADD_JOB_ACK and HCR_ADD_PERSON_ACK acknowledgement messages.	PERSON_DATA
HCR_CAN_JOB This service operation is published from SCM when a work order is canceled, closed or terminated. This service operation contains the job information for terminating the job assignment in HCM.	PERSON_DATA

See the product documentation for *PeopleTools: Integration Broker*

Registering Enterprise Administrators, Approvers, Requesters, and Service Coordinators

The following list details the required steps for registering administrators, approvers, requesters, and service coordinators.

1. The enterprise administrator registers the user in the HCM database.

   The HCM system creates a new HCM person of type *Employee.*

2. The enterprise administrator creates an operator login profile for the user.

   Note: The new user employee ID is associated with the operator login profile.

3. The PERSON_BASIC_SYNC service operation publishes the person and job assignment information from the HCM database to the SCM database.

   The USER_PROFILE service operation publishes the user profile information from the HCM database to the SCM database.

4. The enterprise administrator registers the new user in the PeopleSoft Services Procurement application.

5. For service coordinators, the service procurement person ID is associated to the user profile. In SCM, the required roles are associated to the users when they are added as administrators, approvers, requestors or service coordinators

Registering Service Provider Contacts

The service provider contact is a supplier person of interest user that does not require registration in the HCM database.

Registering Service Providers

The following list details the required steps for registering a service provider.

Note: The HCM Integration option must be enabled to complete this process effectively.

---

1. The enterprise or supplier administrator registers the service provider in the PeopleSoft Services Procurement application.

   After the service provider is successfully registered, the system creates a unique Services Procurement Person ID.

2. After a service provider is registered with his own unique Person ID, the service provider contact sources the candidate, the candidate qualifies and accepts the position, and then the work order is created and approved.

3. After a work order is released, the SCM system sends the service provider information to HCM to create an HCM person of type *Contingent Worker.*

   This information is sent to HCM in the form of an asynchronous service operation.

4. In HCM, a new HCM person entry and login profile is created for the service provider.

5. The Services Procurement application receives a response back from HCM.

   This information includes, but is not limited to the HCM employee ID, Work Order Business Unit, Work Order ID, and the Services Procurement person ID.

6. Services Procurement stores the HCM employee ID as a cross-reference in the SCM database.

7. The PERSON_BASIC_SYNC and WORKFORCE_SYNC service operations synchronize the person and job assignment information from the HCM database to the SCM database.

   The USER_PROFILE service operation synchronizes the user profile information from the HCM database to the SCM database. When creating the user profile, the HCM system uses the employee ID as the user ID and password. The user has the option of changing the password when they log in into Services Procurement.

The following service provider data is sent to the HCM database from the SCM database using asynchronous service operations:

- Services Procurement Person ID
- First Name
- Middle Name
- Last Name
- Person Organization

- Email ID
- Primary Phone Number

The following job data information is also sent to the HCM database from the SCM database:

- Work Order Business Unit
- Work Order ID
- Sequence Number
- Effective Date
- Employee ID
- Regulatory Region
- Company
- Business Unit
- Department
- Location
- Job Code
- Establishment
- Labor Agreement

After data is received and processed in the HCM database, the following information is sent back to SCM from the HCM database using the PERSON_BASIC_SYNC and USER_PROFILE service operations:

- Services Procurement Person ID
- Work Order Business Unit
- Work Order ID
- HCM Employee ID
- Employee Record Number
- Sequence Number

Note: After an administrator registers a service provider in PeopleSoft Services Procurement, all updates to personal data must be performed in the HCM database.

Related Links

Maintaining Users and Team Setup

Using the Service Operations Monitor

Use the Services Operations Monitor menu to ensure that all service operations are set up and active. You can also use this menu to monitor asynchronous and synchronous service operations.

See the product documentation for *PeopleTools: Integration Broker*

Setting Up PeopleSoft Talent Acquisition Manager and Services Procurement Integration

This topic provides an overview of PeopleSoft Talent Acquisition Manager and Services Procurement integration.

Pages Used to Set Up PeopleSoft Talent Acquisition Manager and Services Procurement Integration

Page Name	***Definition Name***	***Usage***
Services Procurement Installation Options Page	INSTALLATION_SP	Define PeopleSoft Services Procurement installation options.
Create Requisition Page	SPF_REQ_INFO_PG	Enter basic service requisition information.
Services	IB_SERVICEDEFN	Define services. Setting Up Integration Broker for the SOA for Inbound Timesheets Feature
Service Operations Page	IB_SERVICE	Define service operations and associate them to services. “Service Operations - General Page” (PeopleSoft eProcurement)
“Routing Definitions Page” (PeopleSoft eProcurement)	IB_ROUTINGDEFN	Define routings associated with service operations.
Queue Definitions	IB_QUEUEDEFN	Define queues to be used with the PeopleSoft Talent Acquisition Manager integration.
Monitor Overview	IB_MONITOR_OVRVIEW	Use this page to ensure that all service operations are set up and active.

Understanding the PeopleSoft Talent Acquisition Manager and Services Procurement Integration

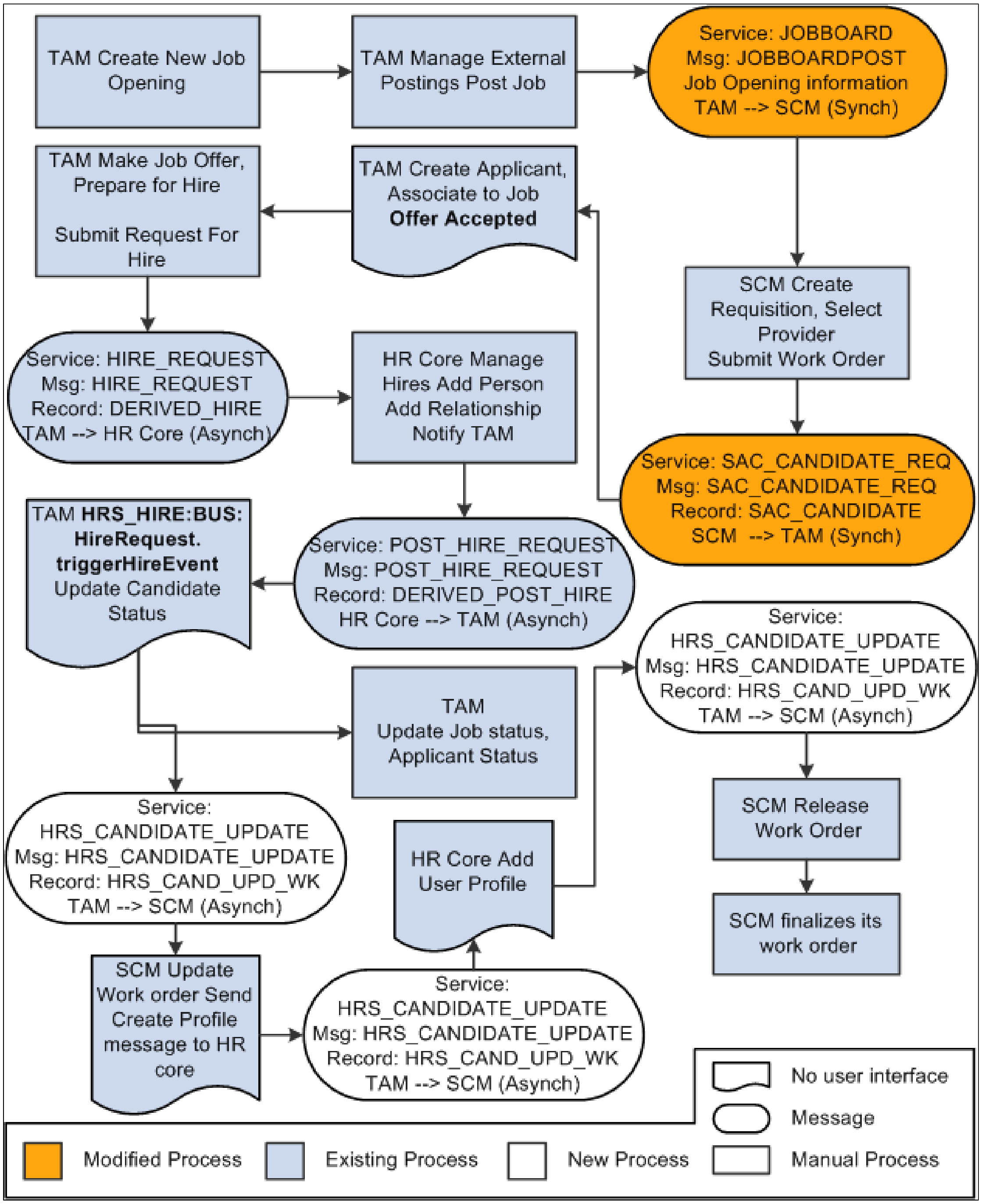
When you implement both the PeopleSoft Services Procurement and Talent Acquisition Manager applications, you can create a job opening in the Talent Acquisition Manager and post the job to Services Procurement for fulfillment. When you select the **eRecruit Integration Enabled** check box on the Services Procurement Installation Options page, users can create a job posting in Talent Acquisition Manager and post the job to Services Procurement with pre-populated data that you can use to create, approve, source, and fulfill the requisition, create a work order, and send the candidate information back to Talent Acquisition Manager for further processing.

With this integration, you can send messages back and forth between the two applications by using PeopleTools Integration Broker to support the following activities:

- Create a PeopleSoft Talent Acquisition Manager job requirement and post it to Services Procurement to find a suitable candidate.
- Unpost a posted job from Talent Acquisition Manager enabling the cancellation of the Services Procurement requisition.
- Send candidate information from Services Procurement to Talent Acquisition Manager after work order approval.
- Send candidate confirmation from Talent Acquisition Manager to Services Procurement after on boarding process is complete.

User profile integration enables you to trigger the user profile creation request from Services Procurement to Human Resources. The request is sent from Services Procurement to Human Resources when the Services Procurement candidate is hired for a Talent Acquisition Manager job opening. When a Services Procurement candidate is hired, Talent Acquisition Manager will send a message to Services Procurement indicating that the candidate has been hired. On successful validation that the candidate has been hired, Services Procurement will send a message to Human Resources to request the creation of a user profile for the newly hired person. Human Resources will create the user profile and send an acknowledgement message back to Services Procurement.

The next example illustrates how the three applications exchange messages when you create a new job opening in the PeopleSoft Talent Acquisition Manager application for use with a Services Procurement requisition:



The exchange of messages is described in these steps:

1. Talent Acquisition Manager initiates the integration by posting a job using the JOBBOARDPOST message to Services Procurement.

2. Services Procurement directs the Talent Acquisition Manager user to the Services Procurement requisition page for creating the requisition.

The requisition is pre-populated with data from the Talent Acquisition Manager job opening.

3. Services Procurement sources and fills the requisition with the most suitable candidate and creates a work order.
4. When the work order is approved, Services Procurement sends the SAC_CANDIDATE_REQ message to Talent Acquisition Manager.

   This message contains the job posting ID for which the candidate information is being sent.
5. Talent Acquisition Manager processes the incoming candidate information, creates an applicant and fills the job opening.

   Talent Acquisition Manager then initiate the Prepare for Hire process to hire the candidate in the Human Resources application. Human Resources hires the candidate as a contingent worker, creates a person and job assignment and sends the POST_HIRE_REQUEST message to Talent Acquisition Manager. This message contains the candidate's employee ID and job assignment number.
6. Talent Acquisition Manager sends the HRS_CANDIDATE_UPDATE message to Services Procurement indicating that the candidate has been hired.

   The message contains the employee ID and the job assignment number along with the Services Procurement business unit, work order ID, and the person ID of the service provider.
7. Services Procurement stores the employee ID and job assignment number as a reference and sends the HCR_ADD_USER_PROFILE message to request Human Resources to create a user profile for the newly hired service provider.
8. Human Resources creates the user profile and sends the HCR_ADD_USER_PROFILE_ACK message to Services Procurement indicating the creation of the user profile.

When PeopleSoft Services Procurement fills a Talent Acquisition Manager job opening with a service provider, Services Procurement sends the candidate message to Talent Acquisition Manager. The candidate message is sent regardless of whether the service provider is a new service provider or the service provider already has an existing Talent Acquisition Manager applicant ID.

Data Included in Services Procurement Message to Talent Acquisition Manager	***Talent Acquisition Manager Action***	***Human Resources Action***	***Comments***
Human Resources employee ID is blank. Talent Acquisition Manager applicant ID is blank.	Talent Acquisition Manager creates a new external applicant record. The Talent Acquisition Manager recruiter initiates the hire, *Type = Add Contingent Worker*.	Adds a new person record with the *Organization Relationship =Contingent Worker* and creates a job. Sends message to Talent Acquisition Manager and Services Procurement to confirm the hire and provides Talent Acquisition Manager the employee ID, employment record number.	This is the basic use case.

Data Included in Services Procurement Message to Talent Acquisition Manager	***Talent Acquisition Manager Action***	***Human Resources Action***	***Comments***
Talent Acquisition Manager applicant ID is not blank and employee ID is not blank.	Not applicable Talent Acquisition Manager associates the applicant ID to the job opening by filling the open position and initiating the hire request.	Human Resources adds a new job as the applicant has an existing employee ID and sends a message to Talent Acquisition Manager to confirm the hire and provides Talent Acquisition Manager with the employment record number.	The Services Procurement service provider is an existing Talent Acquisition Manager applicant and has a person record with a valid employee ID in Human Resources.

PeopleSoft Services Procurement sends an add assignment message when a service provider with a current assignment accepts an additional assignment and when a terminated service provider accepts a new assignment with the organization. In these scenarios, PeopleSoft Talent Acquisition Manager always receives the Human Resource employee ID assigned to the service provider.

Data Included in Services Procurement Message to Talent Acquisition Manager	***Talent Acquisition Manager Action***	***Human Resources Action***	***Comments***
Human Resources employee ID is blank Talent Acquisition Manager applicant ID is blank	Talent Acquisition Manager creates a new external applicant record. The Talent Acquisition Manager recruiter initiates the hire, *Type = Add Contingent Worker.*	Adds a new person record with the *Organization Relationship =Contingent Worker* Sends message to Talent Acquisition Manager and Services Procurement to confirm the hire and provides Human Resources the employee ID, employment record number.	This can happen if the contingent worker (CWR) record was set up through direct integration with the Human Resources application. In this case, Services Procurement does not have a Talent Acquisition Manager applicant ID.
Talent Acquisition Manager applicant ID is not blank.	Talent Acquisition Manager uses the applicant ID provided by Services Procurement.	Adds an additional assignment (new employment record number) for the employee ID. Sends message to Talent Acquisition Manager and Services Procurement to confirm the hire and provide the new employment record number.	None
Talent Acquisition Manager applicant ID is not in an Active status.	Create a new external applicant ID.		The applicant ID may have been inactivated during an applicant merge process.

See documentation *PeopleSoft HCM Application Fundamentals*

Services Procurement Installation Options Page

Use the Services Procurement Installation Options page (INSTALLATION_SP) to define PeopleSoft Services Procurement installation options.

Navigation:

Set Up Financials/Supply Chain > **Install** > **Installation Options** > **Services Procurement**

See "Services Procurement Installation Options Page" (Application Fundamentals).

Field or Control	***Description***
eRecruit Integration Enabled	Select to enable the integration with Talent Acquisition Manager. When you select this check box all requisitions created in the Talent Acquisition Manager application are passed to Services Procurement for fulfillment.
HCM Node Name	Enter the HCM node location where the work order service operation is sent.
HCM Person Integration	Select to enable the integration with HCM for person information. When you select this option, basic person and job data is synchronized between the HCM and Services Procurement systems.

Viewing the PeopleSoft Talent Acquisition Manager and Services Procurement Integration Process Flow

The following sections describe the process flow for PeopleSoft Talent Acquisition Manager and Services Procurement integration.

Job Posting Process

The following steps outline the job posting process:

1. User creates a job posting in Talent Acquisition Manager and sends that data to the Services Procurement application.

   The JOBBOARDPOST service operation is used to send the job opening information to Services Procurement.

2. . The SCM Integration Broker receives the JOBBOARDPOST message, and transforms it into data that Services Procurement can process.

3. Services Procurement examined the service operation for the authentication data originally sent in the HR-XML envelope.

   If authenticated, the system generates a unique identifier *HOLDING_ID* and inserts data from the JOB_POSTING service operation into the Job Posting table.

4. A URL that points to the Services Procurement requisition is generated, which includes the HOLDING_ID identifier.

   The URL is added to the response.

5. HCM receives the response XML, extracts the Services Procurement URL, and creates a new browser page that points to the URL.
6. Services Procurement requisition process examines the unique identifier and then loads matching data from the holding table into the appropriate fields on the requisition.
7. The user completes the requisition, submits it for approval, and continues with the fulfillment process from within Service Procurement.

Note: You can also sent updates from Talent Acquisition Manager to Services Procurement to modify or cancel job posting that were sent previously.

Work Order Process

After a requisition is filled and a related work order is generated, the following steps outline the work order process:

1. The work order is approved, and the Work Order process begins.

   This process is manually started by the service coordinator.

2. The SAC_CANDIDATE_REQ service operation is triggered and contains the information from the current work order.

   This service operation is sent asynchronously to Talent Acquisition Manager.

3. The SCM Integration Broker receives the SAC_CANDIDATE_REQ service operation and converts it into the HR-XML *Candidate* format.
4. Talent Acquisition Manager receives the Candidate XML service operation and creates the applicant or associates the applicant to the job opening.

   Talent Acquisition Manager sends the HRS_CANDIDATE_UPDATE message back to Services Procurement indicating whether the service provider was filled for the job opening in TAM.

5. Talent Acquisition Manager initiates the prepare for hire process and Human Resources processes the hire request.

   After the on boarding process is complete in Human Resources, Talent Acquisition Manager sends the HRS_CANDIDATE_UPDATE service operation to Services Procurement indicating the hiring status.

6. Services Procurement updates the work order with the employee ID and the employee record number and releases the work order.

Viewing Service Operations

When the system transfers you to the Services Procurement requisition, you can view the requisition fields populated with the data from Talent Acquisition Manager.

Talent Acquisition Manager **Position Opening Element Name**	**Services Procurement** **Field Label**
PositionProfile.ProfileId.IdValue	Job Code
PositionProfile.PositionDetail.Competency.NumericValue	Experience
PositionProfile.PositionDetail.Competency. CompetencyEvidence. EvidenceId.id	Educational Level
PositionProfile.PositionDetail.Competency.name	Competencies
PositionProfile.PositionDetail.RemunerationPackage.BasePay. currencyCode	Currency
PositionProfile.PositionDateInfo.ExpectedEndDate	End Date
PositionProfile.PositionDetail.PositionTitle	Job Title
PositionProfile.PositionDetail.PhysicalLocation.Name	Location
PositionProfile.PositionDetail.RemunerationPackage.BasePay. BasePayAmountMax	Rate
PositionProfile.PositionDetail.FormattedPositionDescription. Value	Scope of Work
PositionProfile.PositionDetail.PositionTitle	Service
PositionProfile.PositionDetail.JobCategory.CategoryCode	Service Type
PositionProfile.PositionDateInfo.StartDate	Start Date
PositionProfile.PositionDetail.RemunerationPackage.BasePay. baseInterval	Unit of Measure

Services Procurement **Record**	**Services Procurement** **Field Label**	**Talent Acquisition Manager** **Candidate Element Name**
NA	JobOpeningID	RelatedPositionPostings.PositionPosting. Id.IdValue.name

Services Procurement Record	***Services Procurement Field Label***	***Talent Acquisition Manager Candidate Element Name***
PV_EXT_XREF_HDR	KEY1FLDVAL	RelatedPositionPostings.PositionPosting.Id.IdValue
SPF_WORDERREC	JOB_TITLE	RelatedPositionPostings.PositionPosting.Id.Title
SPB_PERSON_TBL	FIRST_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName.GivenName
SPB_PERSON_TBL	MIDDLE_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName.MiddleName
SPB_PERSON_TBL	LAST_NAME	Resume.StructuredXMLResume.ContactInfo.PersonName. FamilyName
SPB_PERSON_TBL	TITLE	Resume.StructuredXMLResume.ContactInfo.PersonName.Affix
NA	familyNamePrefix	Resume.StructuredXMLResume.ContactInfo.PersonName.Affix.type
SPB_PERS_PHONE	COUNTRY_CODE (where PHONE_TYPE=Home)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.Telephone.InternationalCountryCode
SPB_PERS_PHONE	PHONE (where PHONE_TYPE=Home)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.Telephone.SubscriberNumber
SPB_PERS_PHONE	COUNTRY_CODE (where PHONE_TYPE=Cellular)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.Mobile.InternationalCountryCode
SPB_PERS_PHONE	PHONE(where PHONE_TYPE=Cellular)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.Mobile.SubscriberNumber
SPB_PERS_PHONE	COUNTRY_CODE(where PHONE_TYPE=FAX)	Resume.StructuredXML.Resume.ContactInfo.PersonName.ContactMethod.FAX.InternationalCountryCode

Services Procurement Record	***Services Procurement Field Label***	***Talent Acquisition Manager Candidate Element Name***
SPB_PERS_PHONE	PHONE(where PHONE_TYPE=FAX)	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.FAX.SubscriberNumber
SPB_PERS_EMAIL	EMAIL_ADDR	Resume.StructuredXMLResume.ContactInfo.PersonName.ContactMethod.InternetEmailAddress

Chapter 29

Delivered Workflows for PeopleSoft Services Procurement

Delivered Workflows for PeopleSoft Services Procurement

This section discusses PeopleSoft Services Procurement workflows. The workflows are listed alphabetically by workflow name.

Bid Forwarded to Requester

The section discusses the Bid Forwarded to Requester workflow.

Description

Information Type	***Description***
Event Description	The service coordinator sends a bid response to the requester.
Action Description	The service coordinator sends the requester a candidate to consider.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SPF_CBID_RSP_COMP
Role	Requester
Email Template	SCTOREQBID

Bid Response from Requester

The section discusses the Bid Response from Requester workflow.

Description

Information Type	***Description***
Event Description	The requester sends a bid response to a service coordinator.
Action Description	Notifies internal service coordinator that the requester has reviewed the bid. Notifies external service coordinator that the requester has reviewed the bid.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SPF_RBID_RSP_COMP
Role	Service coordinator (internal) Service coordinator (external)
Email Template	FREQTSC FREQTSC_E

Related Links

Understanding Supplier Communications

Bid Retracted After Submission

The section discusses the Bid Retracted After Submission workflow.

Description

Information Type	***Description***
Event Description	The service provider contact selects to withdraw a bid submission before the service coordinator or requester responds to the bid.

Information Type	***Description***
Action Description	Notifies the service coordinator and requester, when needed, that the bid has been withdrawn.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SPF.BID_WRK.SPF_RETRACT_SUBMTL
Role	Service coordinator
Email Template	SPF_RETRACT_SUBMITTAL

Bid Submitted

The section discusses the Bid Submitted workflow.

Description

Information Type	***Description***
Event Description	The service provider or service provider contact submits a bid on a requisition or work order.
Action Description	Notifies the service coordinator that a bid has been submitted for a requisition line or work order. Notifies a service coordinator that a service provider has entered a response for a bid on a requisition or work order.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SPF_BID SPF_BIDRESPONSE SPF_SUBMITTAL
Role	Service coordinator (internal employee) Service coordinator (external)
Email Template	S_RESPN_E S_RESPONSE CONBID CONBID_E

Communication Ended

The section discusses the Communication Ended workflow.

Description

Information Type	***Description***
Event Description	The requester sends a bid response to the service coordinator with the bid action of *End Communication.* The service coordinator sends a bid response to the requester with the bid action of *End Communication.* The service coordinator sends a bid response to the service provider contact with the bid action of *End Communication.* The service provider contact sends a bid response to the service coordinator with the bid action of *End Communication.*

Information Type	***Description***
Action Description	Notifies the service coordinator that communication has ended for this bid. Notifies the requester that communication has ended for this bid. Notifies the service provider contact that communication has ended for this bid. Notifies the service coordinator that communication has ended for this bid.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_CBID_RSP_COMP
Role	Service coordinator Requester Service provider contact Service coordinator
Email Template	ECREQTOSC ECSCTOREQ ECSCTOSPC ECSPCTOSC

Final Approval

The section discusses the Final Approval workflow.

Description

Information Type	***Description***
Event Description	The task is approved or denied.
Action Description	The requester is informed of the action taken.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SAC_AW_ROUTE
Role	Requester
Email Template	WO_On_Final_Approval

Interview Canceled

The section discusses the Interview Canceled workflow.

Description

Information Type	***Description***
Event Description	A scheduled interview is canceled.
Action Description	Notifies interviewer that the interview has been canceled.
Notification Method	Email. **Note:** The Send Email check box must be selected for the interviewer to be notified.

Workflow Objects

Information Type	***Description***
Component	SPF_INTERVIEW_SCHD
Role	Interviewer
Email Template	INTRVREMVD

Interview Rescheduled

The section discusses the Interview Rescheduled workflow.

Description

Information Type	***Description***
Event Description	A scheduled interview is rescheduled and the send email check box is selected.
Action Description	Notifies interviewer that the interview has been rescheduled.
Notification Method	Email (only when the send email check box is selected).

Workflow Objects

Information Type	***Description***
Component	SPF_INTERVIEW_SCHD
Role	Interviewer
Email Template	INTRVRESCH

Interview Scheduled

The section discusses the Interview Scheduled workflow.

Description

Information Type	***Description***
Event Description	An interview is scheduled for a bid.
Action Description	Notifies interviewer that he or she is scheduled to interview a candidate.
Notification Method	Worklist, email (only when the send email check box is selected).

Workflow Objects

Information Type	***Description***
Component	SPF_INTERVIEW_SCHD
Role	Service provider (email only), interviewer (worklist and email).
Email Template	INTERVIEW

Invoice Approved by Internal Approver

The section discusses the Invoice Approved by Internal Approver workflow.

Description

Information Type	***Description***
Event Description	Invoice is approved by the internal invoice approver.
Action Description	Notifies the invoice manager that the invoice has been approved by the internal invoice approver.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVAPR

Related Links

Understanding Settlements in PeopleSoft Services Procurement

Invoice Approved by Supplier

The section discusses the Invoice Approved by Supplier workflow.

Description

Information Type	***Description***
Event Description	Invoice is approved by the supplier invoice approver.
Action Description	Notifies the internal invoice approver that the supplier has approved the invoice.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_INV_APPROVE
Role	Internal invoice approver
Email Template	SP_IVABS

Invoice Rejected by Internal Approver

The section discusses the Invoice Rejected by Internal Approver workflow.

Description

Information Type	***Description***
Event Description	Invoice is rejected by the internal invoice approver.
Action Description	Notifies the invoice manager that the invoice has been rejected by the internal invoice approver.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVREJ

Invoice Rejected by Supplier

The section discusses the Invoice Rejected by Supplier workflow.

Description

Information Type	***Description***
Event Description	Invoice is rejected by the supplier invoice approver.
Action Description	Notifies the invoice manager that the supplier has rejected the invoice.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_INV_APPROVE
Role	Invoice manager
Email Template	SP_IVRBS

Invoice Submitted for Approval

The section discusses the Invoice Submitted for Approval workflow.

Description

Information Type	***Description***
Event Description	Invoice is submitted for approval.
Action Description	Notifies invoice manager that an invoice has been submitted for approval. Notifies internal invoice approver that an invoice has been submitted for approval.
Notification Method	Email (invoice manager). Worklist, email (internal invoice approver).

Workflow Objects

Information Type	***Description***
Component	SPF_INV_APPROVE
Role	Invoice manager Internal invoice approver
Email Template	SP_IVS2E (invoice manager) SP_IVSUB (internal invoice approver)

Requisition Approved

The section discusses the Requisition Approved workflow.

Description

Information Type	***Description***
Event Description	A requisition is approved.
Action Description	Notifies a service coordinator that a requisition has been approved and is ready to be sourced. Notifies a service coordinator that a requisition is approved and ready for bid submittal.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SPF_REQ_LN_STTS (service coordinator—external, service coordinator—internal employee) SPF_SOURCE_CMP (service coordinator)
Role	Service coordinator (external) Service coordinator (internal employee)
Email Template	REQAPPROVE REQAPR_E SOURCING

Related Links

Understanding Requisitions

Requisition Canceled

The section discusses the Requisition Canceled workflow.

Description

Information Type	***Description***
Event Description	A requisition is canceled.
Action Description	Notifies service provider contacts that the requisition has been canceled.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SPF_REQ_LN_STTS
Role	Service provider contact
Email Template	CANCEL

Requisition Filled

The section discusses the Requisition Filled workflow.

Description

Information Type	***Description***
Event Description	The service coordinator fills the requisition.
Action Description	Notifies the requester and the service coordinator (if the service coordinator can create work orders) that the position on the requisition was filled. Click to generate a work order so that the service provider can record time and expenses.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Component	SPF_CBID_RSP_COMP
Role	Requester, service coordinator Service provider contact
Email Template	REQFILLED (requester, service coordinator) FILLED (service provider contact)

Requisition Reassigned

The section discusses the Requisition Reassigned workflow.

Description

Information Type	***Description***
Event Description	A requisition is reassigned.
Action Description	Notifies an external service coordinator that a requisition has been reassigned to him or her and is ready for sourcing. Notifies an internal service coordinator that a requisition has been reassigned to him or her and is ready for sourcing.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_SOURCE_CMP
Role	Service coordinator (external) Service coordinator (internal employee)

Information Type	***Description***
Email Template	REASSIGN (service coordinator—external) REASSIGN_E (service coordinator—internal employee)

Respond to Supplier Bid

The section discusses the Respond to Supplier Bid workflow.

Description

Information Type	***Description***
Event Description	The service coordinator sends a bid response to the service provider contact.
Action Description	Notifies the service provider contact that the service coordinator has responded to a bid.
Notification Method	Worklist, email.

See Configuring the Workflow System.

See Sourcing Requisitions.

Workflow Objects

Information Type	***Description***
Component	SPF_CLIBID_COMP
Role	Service provider contact
Email Template	C_RESPONSE

Service Provider Registered

The section discusses the Service Provider Registered workflow.

Description

Information Type	***Description***
Event Description	The service provider is registered.
Action Description	Notifies the administrator that a service provider needs a user profile.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_MANAG_REQ_LINE
Role	Administrator
Email Template	REGSRVCPRO

Suggest Supplier Notification

The section discusses the Suggest Supplier Notification workflow.

Description

Information Type	***Description***
Event Description	The requester creates a requisition with suggested suppliers.
Action Description	Notifies the administrator of suggested suppliers that need to be added to the system.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_REQ_LINE
Role	Administrator
Email Template	SUG_VENDOR

Work Order Auto Task Notify

The section discusses the Work Order Auto Task Notify workflow.

Description

Information Type	***Description***
Event Description	A work order is created.
Action Description	Notifies users that work order tasks have been assigned to them.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WORK_ORDER_CMP
Role	Configurable
Email Template	WO_A_TASK

Related Links

Understanding Services Work Orders

Work Order Canceled

The section discusses the Work Order Canceled workflow.

Description

Information Type	***Description***
Event Description	A work order is canceled.
Action Description	Notifies the service provider contact that a work order has been canceled.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WORK_ORDER_CMP
Role	Service provider contact
Email Template	WO_CAN_3 (work orders with requisitions) WO_CAN_2 (work orders without requisitions)

Work Order Created

The section discusses the Work Order Created workflow.

Description

Information Type	***Description***
Event Description	A work order is created.
Action Description	Notifies the service coordinator that a work order has been created.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WORK_ORDER_CMP
Role	Service coordinator
Email Template	WO_CREATE

Work Order Extension

The section discusses the Work Order Extension workflow.

Description

Information Type	***Description***
Event Description	The service coordinator or requestor extends a work order.
Action Description	Notifies the service provider that the work order has been extended.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WORK_ORDER_CMP
Role	Service provider
Email Template	WO_EXTEND

Work Order Reassign

The section discusses the Work Order Reassign workflow.

Description

Information Type	***Description***
Event Description	The service coordinator reassigns a work order.
Action Description	Notifies the originally assigned user that the work order has been reassigned. Notifies the newly assigned user that the work order has been reassigned.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WORK_ORDER_CMP
Role	Assigned users
Email Template	WO_REASSIG (previously assigned user) WO_REASSIGN (newly assigned user)

Work Order Release

The section discusses the Work Order Release workflow.

Description

Information Type	***Description***
Event Description	The service coordinator or requester releases a work order.
Action Description	Notifies the service provider or service provider contact that the work order has been released and time or progress can be recorded against the work order.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WORK_ORDER_CMP
Role	Service provider, service provider contact
Email Template	WO_RELEASE

Work Order Task Assigned

The section discusses the Work Order Task Assigned workflow.

Description

Information Type	***Description***
Event Description	A work order is closed.
Action Description	Notifies users that off boarding tasks have been assigned to them.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WO_APPR_CMP SPF_WO_TASK_CHKLST
Role	Assigned user
Email Template	TASK_EM WO_TASK

Work Order Approved

The section discusses the Work Order Approved workflow.

Description

Information Type	***Description***
Event Description	A work order is approved.
Action Description	Notifies the work order requester that the work order was approved.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Component	SPF_WORK_ORDER_CMP
Role	Requester
Email Template	WO_APPROVE

Work Order Survey

The section discusses the Work Order Survey workflow.

Description

Information Type	***Description***
Event Description	A survey is sent to recipient.
Action Description	Notifies survey recipient that a work order survey is submitted and requires completion.
Notification Method	Worklist, Email.

Workflow Objects

Information Type	***Description***
Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_SEND_SURVEY
Component	SP_SUR_FILL
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	WO_SNDSURR WO_SNDSURD

Work Order Survey Canceled

The section discusses the Work Order Survey Canceled workflow.

Description

Information Type	***Description***
Event Description	A survey is canceled.
Action Description	Notifies survey recipient that a work order survey is canceled.
Notification Method	Email

Workflow Objects

Information Type	***Description***
Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_CANC_SUR_EM
Component	SPF_WORK_ORDER_CMP

Information Type	***Description***
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.
Email Template	WO_CNLSUR

Work Order Threshold Alerts

The section discusses the Work Order Threshold Alerts workflow.

Description

Information Type	***Description***
Event Description	A work order reaches a specific pre-defined consumption or target date threshold.
Action Description	Notifies all work order threshold distribution list users that the work order consumption percentage has reached the target percentage. Also sends a notification to users a number of days before and after a specific event occurs.
Notification Method	Worklist, email.

Workflow Objects

Information Type	***Description***
Business Process	SPF_WORKORDER_BP
Activity	SPF_WO_ALERT_BY_DT, SPF_WO_ALERT_BY PER
Component	SPF_WORK_ORDER_CMP
Role	Work order creator, requester, service coordinator, service team members, requisition approver, work order approver, progress log approver, time approver, expense approver and invoice approver.

Information Type	***Description***
Email Template	Uses message catalog text, no template used.

Chapter 30

PeopleSoft Services Procurement Reports

PeopleSoft Services Procurement Reports: General Description

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
POPO008 Close Purchase Order Report	Close all qualified purchase orders and generate the Purchase Order Reconciliation report.	**Services Procurement** > **Reconciliations** > **Close Purchase Orders**	RUN_PORECON
PORQ009 Close Requisition	Close all qualified requisitions using the Run Close Requisitions process, and generate the Requisition Reconciliation report.	**Services Procurement** > **Reconciliations** > **Close Requisitions**	RUN_REQRECON
SPINV001 Proforma Invoice	Lists detailed Proforma invoice information.	**Services Procurement** > **Services Settlement** > **Print Invoices**	SPF_GEN_CINP
SPINV002 sPro Invoice Report	View the generated invoice information in a report form.	**SSP** > **Services Settlement** > **Generate Batch Invoices**	SPF_GEN_CLINV
Shift by Service Shift by Service	Generate a PSQUERY report that lists shifts by service at a SetID level.	**Reporting Tools** > **Query** > **Query Manager** Select the *SPB_SHIFT_BY_SERVICE* Query Name to run the Shift by Service report.	QRY_QUERY
Assignment by Service Assignment by Service	Generate a PSQUERY report that lists assignments by service at a SetID level.	**Reporting Tools** > **Query** > **Query Manager** Select the *SPB_ASSGNMT_BY_SERVICE* Query Name to run the Assignment by Service report.	QRY_QUERY

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
Service by Assignment Service by Assignment	Generate a PSQUERY report that lists services by assignment at a SetID level.	**Reporting Tools** > **Query** > **Query Manager** Select the *SPB_SRVC_BY_ASSIGNMENT* Query Name to run the Service by Assignment report.	QRY_QUERY
Service by Shift Service by Shift	Generate a PSQUERY report that lists services by shifts at a SetID level.	**Reporting Tools** > **Query** > **Query Manager** Select the *SPB_SRVC_BY_SHFT* Query Name to run the Service by Shift report.	QRY_QUERY