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PeopleSoft

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

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Documentation Accessibility

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Contents

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

Contact Us

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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Chapter 1

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

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

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

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

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

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

  You can associate these roles with employees in your organization.

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

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

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

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

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

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

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

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

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

Chapter 2

Setting Up PeopleSoft Financials Portal Pack

Prerequisites for the PeopleSoft Financials Portal Pack

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

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

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

   See Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack.
3. Specify pagelet security for each user ID on the ChartField Pagelet Security page to access information on the PeopleSoft General Ledger Actual vs Budgeted pagelet.

   See Viewing Actual Versus Budgeted (Standard Budget) Information.

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

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

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

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

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

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

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

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

   See also *PeopleTools: PeopleTools Portal Technology.*

   See also *PeopleTools: Using PeopleSoft Applications.*

Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack

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

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

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

Enabling Financials Application	*Pagelet*	*Permission List*
PeopleSoft Payables	Average Days in Payables Payables Discounts Top suppliers by Expenditure	EPAP1400

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

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

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

Chapter 3

Setting Up PeopleSoft Enterprise Service Automation (ESA) Portal Pack

Prerequisites for the PeopleSoft ESA Portal Pack

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

1. Install the Financials database.

2. Install the enabling ESA applications.

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

   See Using Roles and Permission Lists for the PeopleSoft ESA Portal Pack.

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

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

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

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

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

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

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

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

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

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

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

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

   See “Updating Resource Utilization Data” (PeopleSoft Program Management).

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

   See “Specifying Staffing Workbench and Resource Utilization Options” (PeopleSoft Resource Management).

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

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

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

    This process stores information for the Payables In Progress, Purchasing In Progress, Inventory In Progress, Expenses Time In Progress, and Expenses In Progress pagelets to staging tables so that the data renders more rapidly. To schedule this process, navigate to **Project Costing** > **Utilities** > **Transaction In Progress Summary** and select a frequency that is appropriate for your users to have refreshed information.

Using Roles and Permission Lists for the PeopleSoft ESA Portal Pack

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

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

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

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

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

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

Chapter 4

Setting Up PeopleSoft Asset Lifecycle Management (ALM) Portal Pack

Prerequisites for the PeopleSoft ALM Portal Pack

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

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

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

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

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

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

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

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

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

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

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

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

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

Chapter 5

Setting Up PeopleSoft Supply Chain Management (SCM) Portal Pack

Understanding PeopleSoft SCM Portal Pack

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

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

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

Prerequisites for PeopleSoft SCM Portal Pack

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

- Install the PeopleSoft FSCM product database.
- Select Supply Chain Portal Pack on the Products page of the Installation Options. (Set Up Financials/ Supply Chain, Installation Options).
- Install the products on the Installation Options – Products page that supply data to the SCM Portal Pack, which include:
    - PeopleSoft Billing.
    - PeopleSoft Order Management.
    - PeopleSoft Promotions Management.
    - PeopleSoft eBill Management.
- Set up PeopleSoft PeopleTools Security roles and permission lists to access pagelets.

Using Roles and Permission Lists for the PeopleSoft SCM Portal Pack

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

- Employee.
- Customer.

Pagelet Security

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

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

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

- Employee (internal)
- Customer (external)

PeopleTools: Using PeopleSoft Applications

Employee (Internal)

Buyer.

Customer service manager.

Customer service representative.

Employee.

Purchasing manager.

Salesperson.

Warehouse manager.

Warehouse personnel.

Customer (External)

Broker.

Customer.

Related Links

PeopleSoft Supply Chain Management Portal Pack Pagelets Overview

Chapter 6

Using Pagelets Enabled by PeopleSoft General Ledger

Viewing Expense Variances

This topic discusses how to view expense variances, personalize the Expense Variance pagelet, compare standard ledgers, and view Commitment Control budget overviews.

Pages Used to View Expense Variances

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

Expense Variance Pagelet

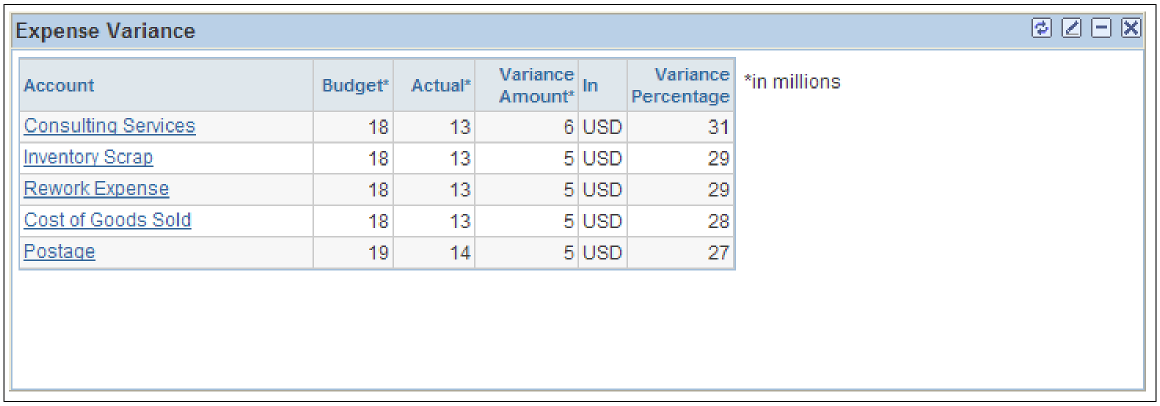
Use the Expense Variance pagelet (GL_PE_02) to view the top five expense variances between amounts budgeted and actual expenses.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Expense Variance.**

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



Field or Control	***Description***
Account	Displays up to the top five ChartField values (for example, *Account, Department, Fund Code,* and so on) with the most expense variances based on the ChartField or ChartField Value Set that you select on the Expense Variance Personalization page.
Variance Amount **Variance Percentage** and	Displays the difference between actual and budgeted amounts as a positive or negative percentage.

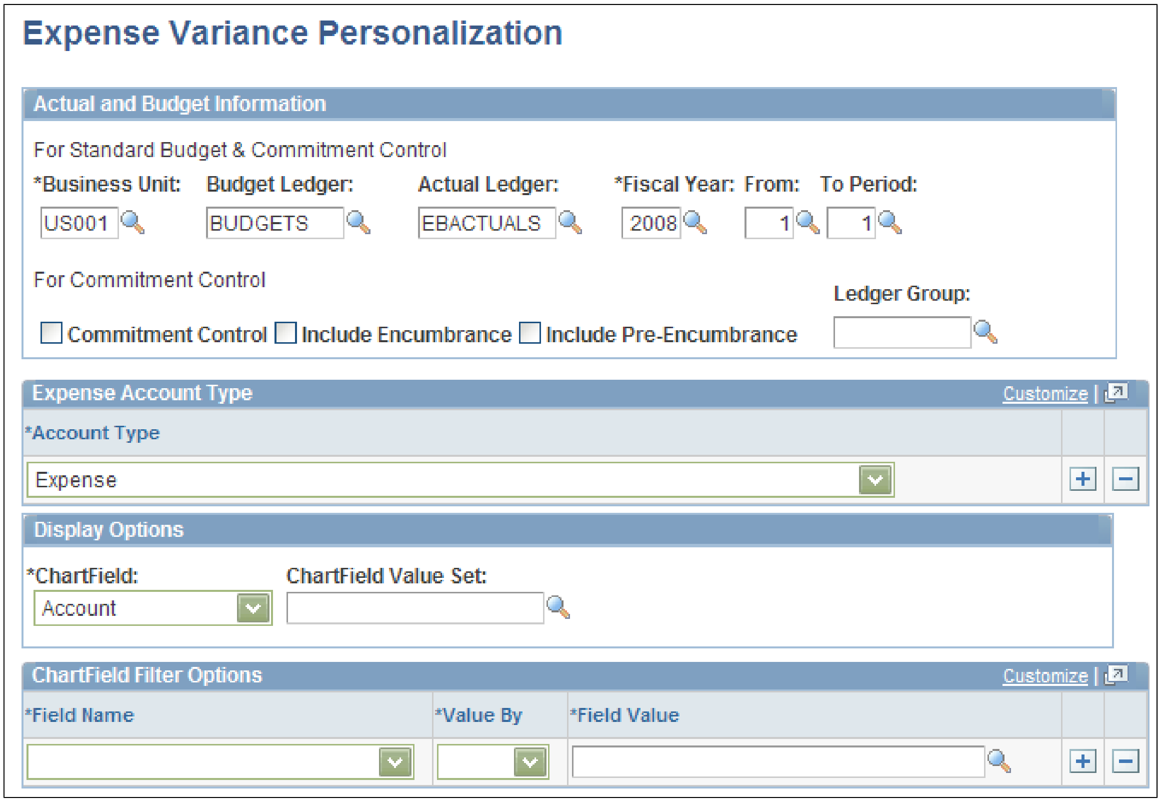
Expense Variance Personalization Page

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

Navigation:

Click the **Customize** icon on the Expense Variance pagelet.

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



Field or Control	*Description*
Budget Ledger	Specify a standard budget ledger of the business unit. The ledger group to which this ledger belongs must have a Ledger Group Type of *Budget.*
Actual Ledger	Specify an actual ledger of the business unit.
From and **To Period**	Select a range of ledger accounting periods for the specified year.
Ledger Group	Select a specific Commitment Control ledger group.
Account Type	Select the account type that identifies expense accounts.
ChartField	Select the ChartField that you want to display on the pagelet.
ChartField Value Set	Select the ChartField Value Set that defines the scope of the ChartField values that you want to include. The ChartField Value Set must define values for only one ChartField.
Field Name	Select the field on which you want to add an additional filter.

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

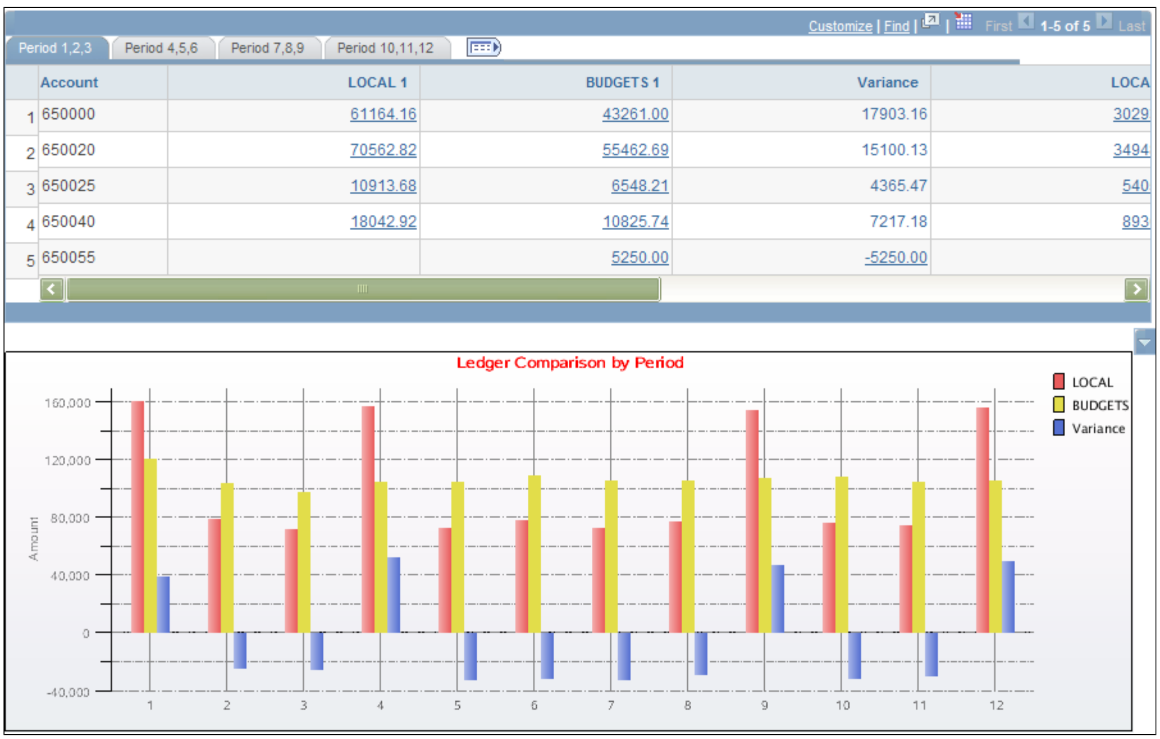
Compare Across Ledgers Page

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

Navigation:

- Click a ChartField value that is displayed on the Expense Variance pagelet.
- **General Ledger** > **Review Financial Information** > **Compare Across Ledger**

This example illustrates the fields and controls on the Compare Across Ledgers page.



Related Links

“Comparing Across Ledgers” (PeopleSoft General Ledger)

Budget Overview Page

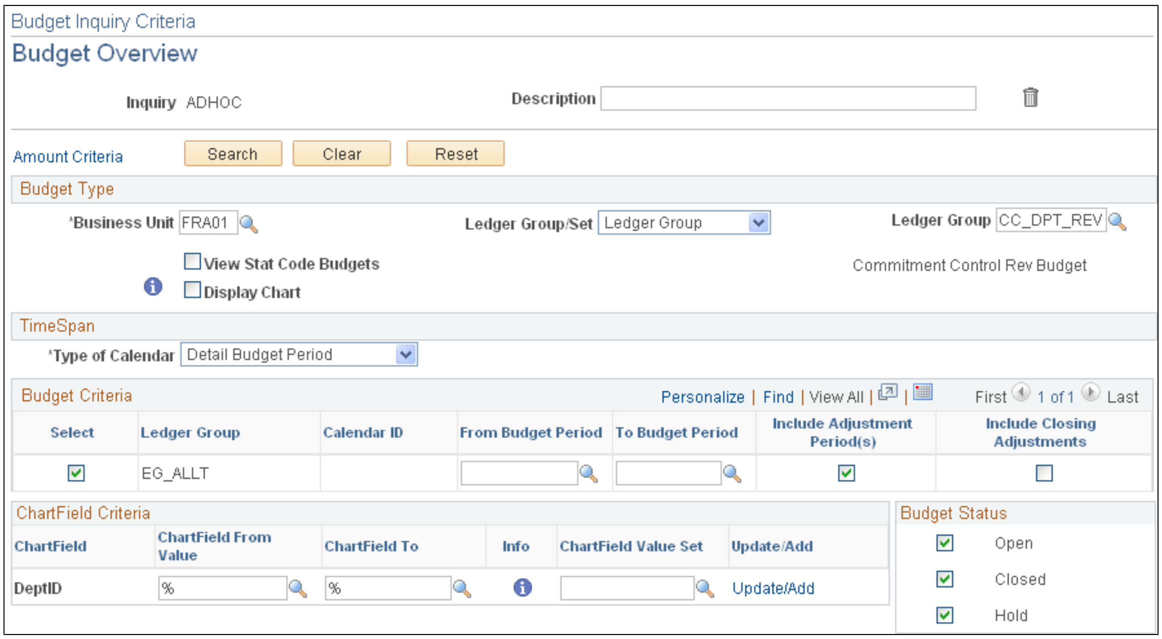
Use the Budget Overview (for Commitment Control ledgers) page (KK_INQ_BD_OVW) to the search page is populated with values from the selected ChartField.

Click the Search icon to view the Budget Overview page.

Navigation:

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

This example illustrates the fields and controls on the Budget Overview page.



Related Links

"Creating and Reviewing Budget Overview Inquiries" (PeopleSoft Commitment Control)

Viewing Gross Margins

This topic discusses how to view gross margins, personalize the Gross Margin pagelet, and view ledger details.

Pages Used to View Gross Margins

Page Name	***Definition Name***	***Usage***
Gross Margin Pagelet	GL_PE_04	View a bar graph that shows the five most profitable or five least profitable gross margins.

Page Name	***Definition Name***	***Usage***
Gross Margin Personalization Page	GL_PE_04_PRS	Define default display information for the Gross Margin pagelet.
Ledger Inquiry Page	INQ_DETAIL_LEDGER	View ledger details for the department represented in the bar graph.

Gross Margin Pagelet

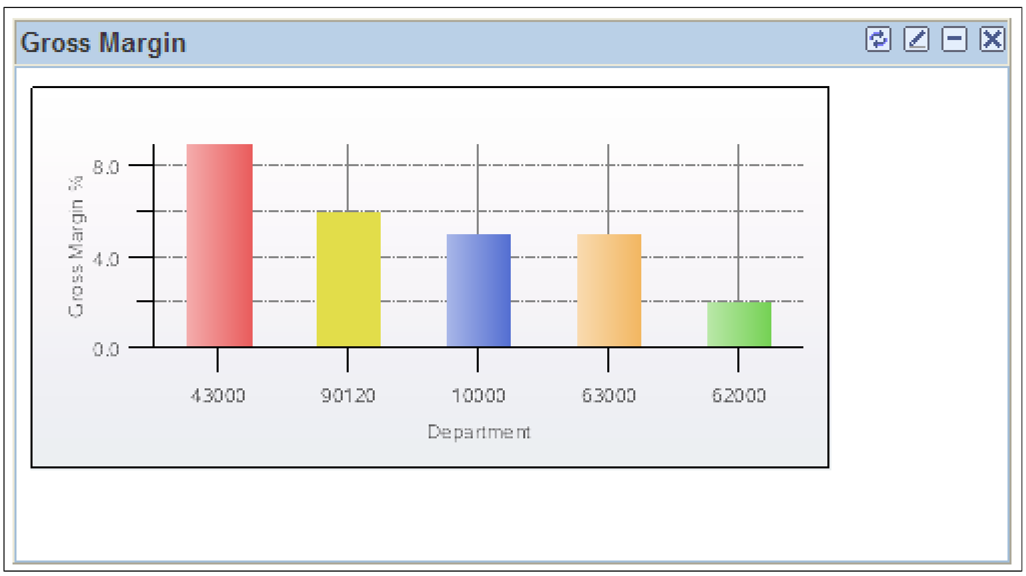
Use the Gross Margin pagelet (GL_PE_04) to view a bar graph that shows the five most profitable or five least profitable gross margins.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Gross Margin.**

This example illustrates the fields and controls on the Gross Margin pagelet.



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

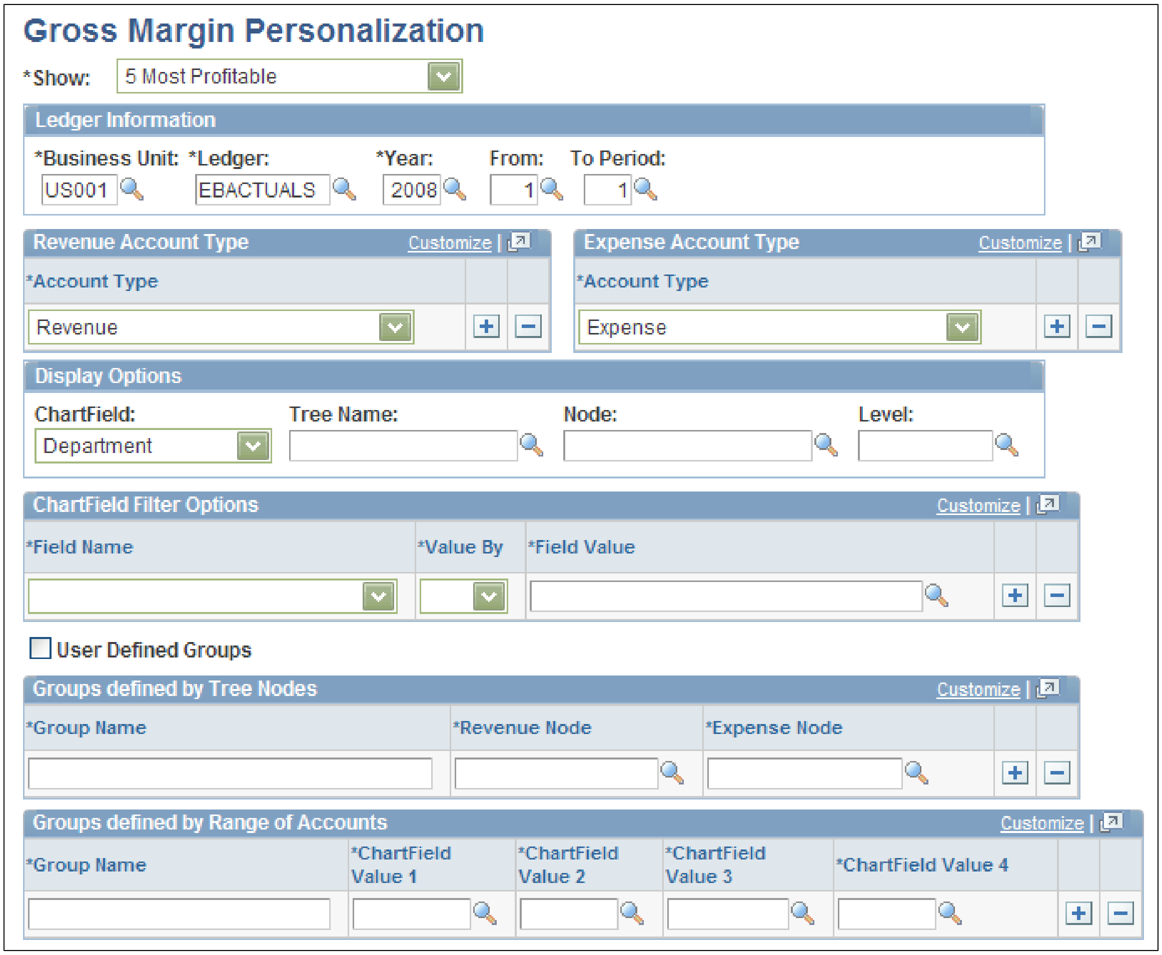
Gross Margin Personalization Page

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

Navigation:

Click the **Customize** icon on the Gross Margin pagelet.

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



Field or Control	***Description***
Show	Select whether the pagelet displays the *5 Least Profitable* or *5 Most Profitable* gross margins.
From and **To Period**	Select a range of ledger accounting periods for the specified year. If you enter a range with more than five accounting periods, the Gross Margin pagelet displays only the five most profitable or least profitable departments.
Revenue Account Type and **Expense Account Type**	Select the account types that correspond to revenue and expense.
ChartField, Tree Name, Node, or **Level**	Use these fields as needed to narrow the display to a PeopleSoft internal ChartField, or to a ChartField and its associated **Tree Name, Node,** or **Level** or a combination of these. You can leave a field blank or enter a valid value. If you leave the **Tree Name, Node,** or **Level** field blank, the system uses all of the values for that ChartField.

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

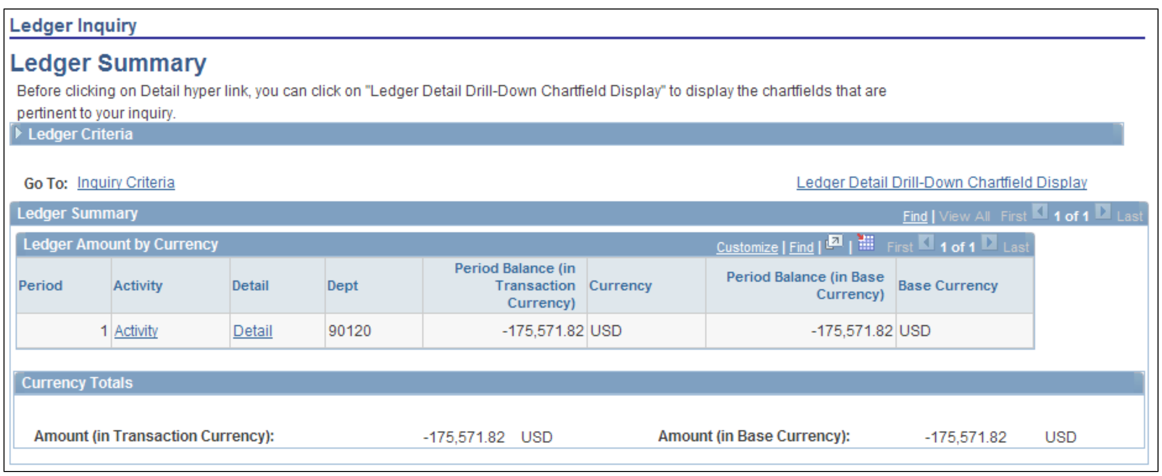
Ledger Inquiry Page

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

Navigation:

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

This example illustrates the fields and controls on the Ledger Inquiry - Ledger Summary page.



Related Links

"Ledger Inquiry - Ledger Details Page" (PeopleSoft General Ledger)

Viewing Lapsing of Appropriation

This topic discusses how to view the lapsing of appropriation and personalize the Lapsing of Appropriation pagelet.

Pages Used to View the Lapsing of Appropriation

Page Name	***Definition Name***	***Usage***
Lapsing of Appropriation Pagelet	GL_PE_08	View a list of projects according to their expiration dates and the total amount unbilled.
Lapsing of Appropriation Personalization page	GL_PE_08_PRS	Define default display information for the Lapsing of Appropriation pagelet.

Lapsing of Appropriation Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Lapsing of Appropriation.**

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

Field or Control	***Description***
Unbilled Amount	The total amount of the balance that has not been billed.

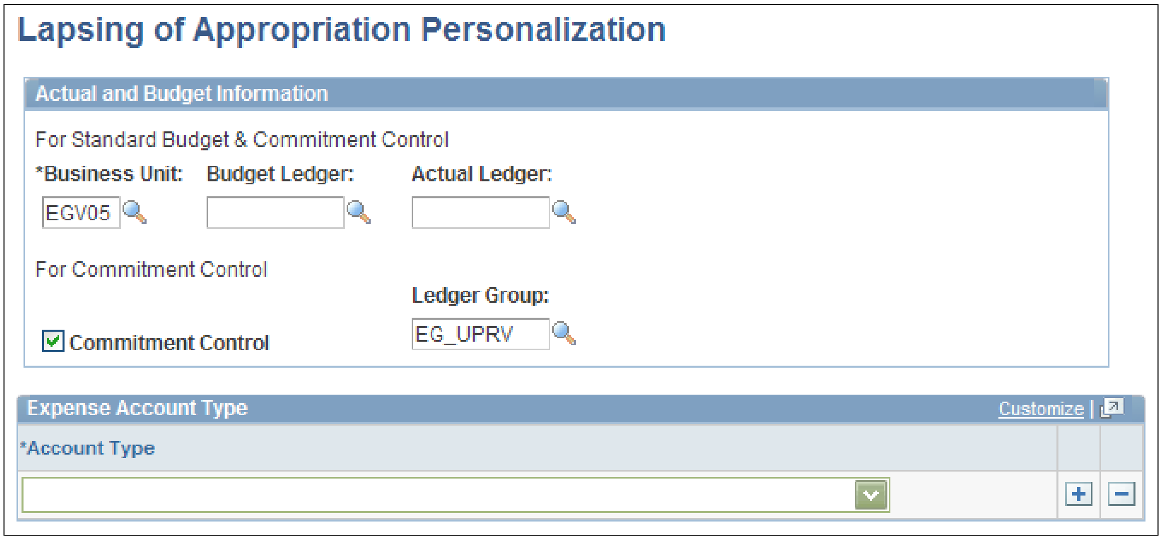
Lapsing of Appropriation Personalization page

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

Navigation:

Click the **Customize** icon on the Lapsing of Appropriation pagelet.

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



Field or Control	*Description*
Commitment Control and **Ledger Group**	Select the **Commitment Control** option to calculate the unbilled appropriation in a Commitment Control ledger group. Use **Ledger Group** to select a specific Commitment Control ledger group.
Expense Account Type	Select the account type used for appropriations that you want to view.

Viewing Budget Alerts

This topic discusses how to view budget alerts, personalize the My Budget Alert pagelet, and view budget details.

Pages Used to View Budget Alerts

Page Name	*Definition Name*	*Usage*
My Budget Alert Pagelet	GL_PE_03	View the top five alerts by the actual amount or by the percentage remaining in the budget.
My Budget Alert Personalization Page	GL_PE_03_PRS	Define default display information for the My Budget Alert pagelet.

Page Name	***Definition Name***	***Usage***
Commitment Control Budget Details Page	KK_INQ_BDT_STATUS	The search page is populated with values from the selected ChartField. Click the **Search** button to display the Commitment Control Budget Details page.

My Budget Alert Pagelet

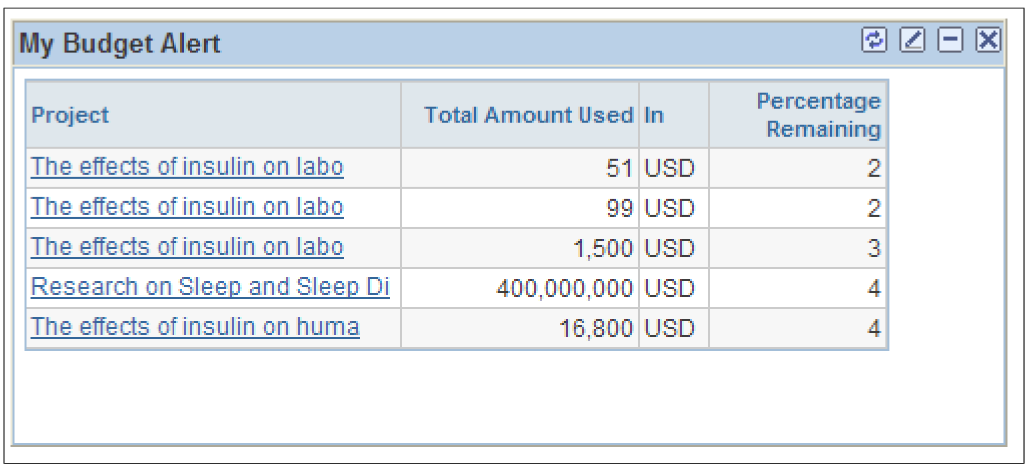
Use the My Budget Alert pagelet (GL_PE_03) to view the top five alerts by the actual amount or by the percentage remaining in the budget.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **My Budget Alert.**

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



Field or Control	***Description***
Refresh icon	Click to update the data that appears on the page.

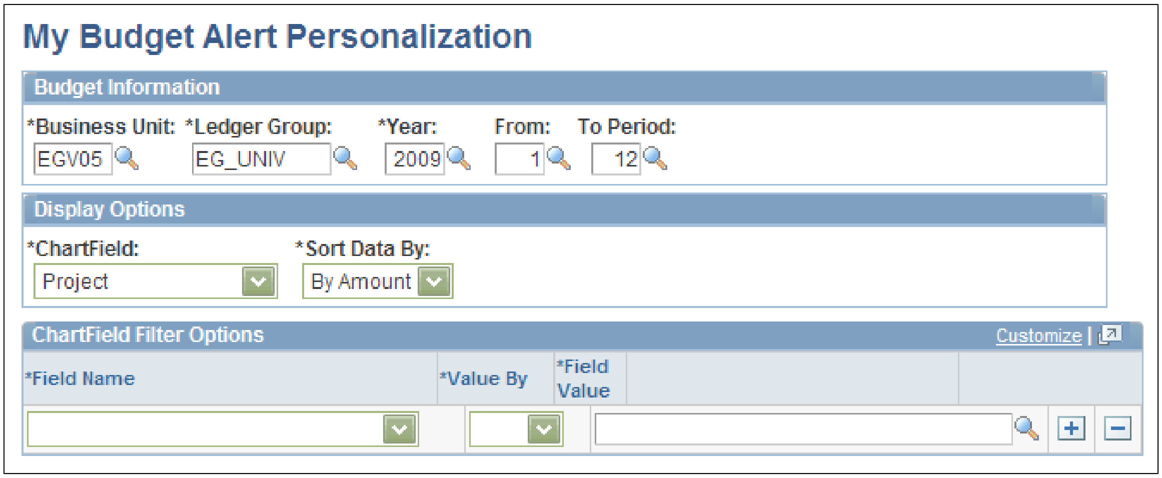
My Budget Alert Personalization Page

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

Navigation:

Click the **Customize** icon on the My Budget Alert pagelet.

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



Field or Control	*Description*
Ledger Group	Select a specific Commitment Control ledger group.
Sort Data By	Select whether pagelet data is sorted *By Amount* or *By Percent.*

Commitment Control Budget Details Page

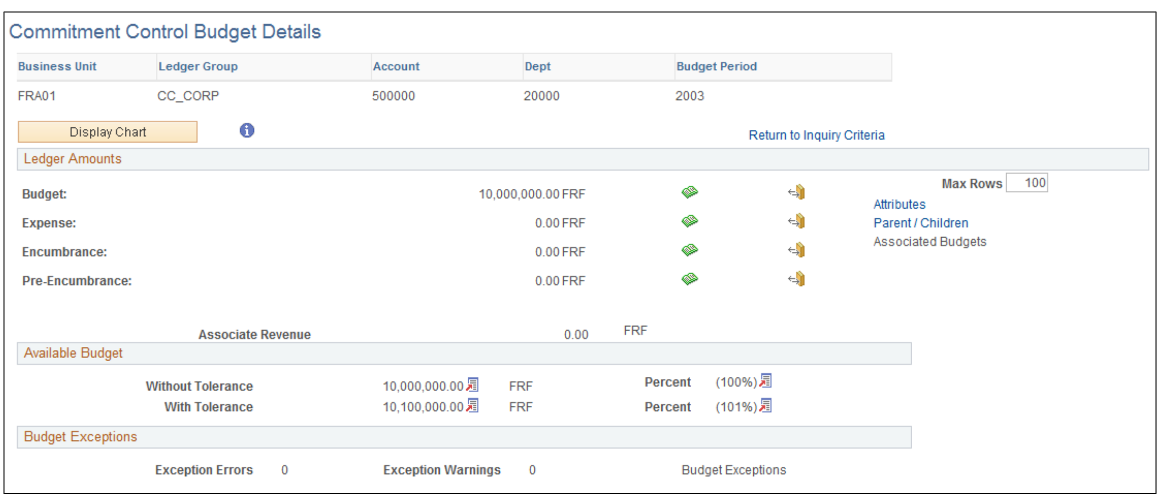
Use the Commitment Control Budget Details page (KK_INQ_BDT_STATUS) to the search page is populated with values from the selected ChartField.

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

Navigation:

Click a ChartField value on the My Budget Alert pagelet.

This example illustrates the fields and controls on the Commitment Control Budget Details page.



Related Links

"Viewing Budget Details and Transaction Activity" (PeopleSoft Commitment Control)

Viewing Operating Budget Variances

This topic discusses how to view the operating budget variance, personalize the Operating Budget Variance pagelet, compare standard ledgers, and view Commitment Control budget overviews.

Pages Used to View Operating Budget Variances

Page Name	***Definition Name***	***Usage***
Operating Budget Variances Pagelet	GL_PE_06	View the top five variances between budgeted amounts and actual expenses. This pagelet can display the amount budgeted, actual amount spent, variance amount, and variance percentage.
Operating Budget Variance Personalization Page	GL_PE_06_PRS	Define default display information for the Operating Budget Variance pagelet.
Compare Across Ledgers Page	INQ_COMPARE_PNL	(For standard ledgers) Specify the ledger data you want to compare by period and view comparison results.
Budget Overview Page	KK_INQ_BD_OVW	(For Commitment Control ledgers) The search page is populated with values from the selected ChartField. Click the **Search** button to view the Budget Overview page.

Operating Budget Variances Pagelet

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

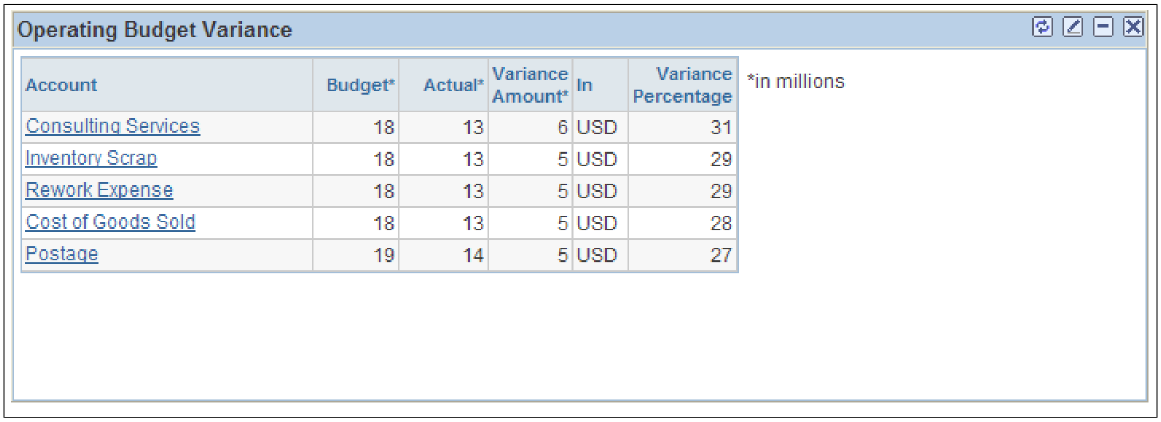
This pagelet can display the amount budgeted, actual amount spent, variance amount, and variance percentage.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Operating Budget Variance.**

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



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

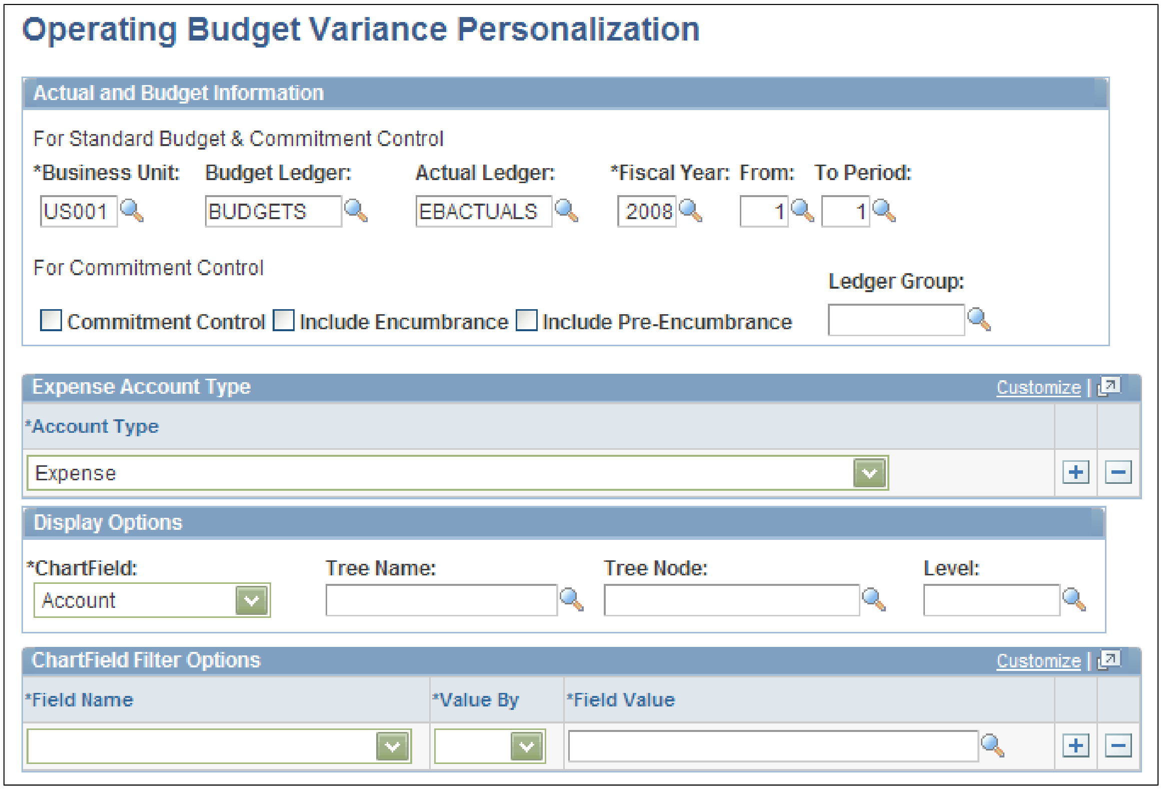
Operating Budget Variance Personalization Page

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

Navigation:

Click the **Customize** icon on the Operating Budget Variance pagelet.

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



Field or Control	*Description*
From and To Period	Select a range of ledger accounting periods for the specified year.
Ledger Group	Select a commitment control ledger group.
Expense Account Type	Select the account type that is associated with expenses.

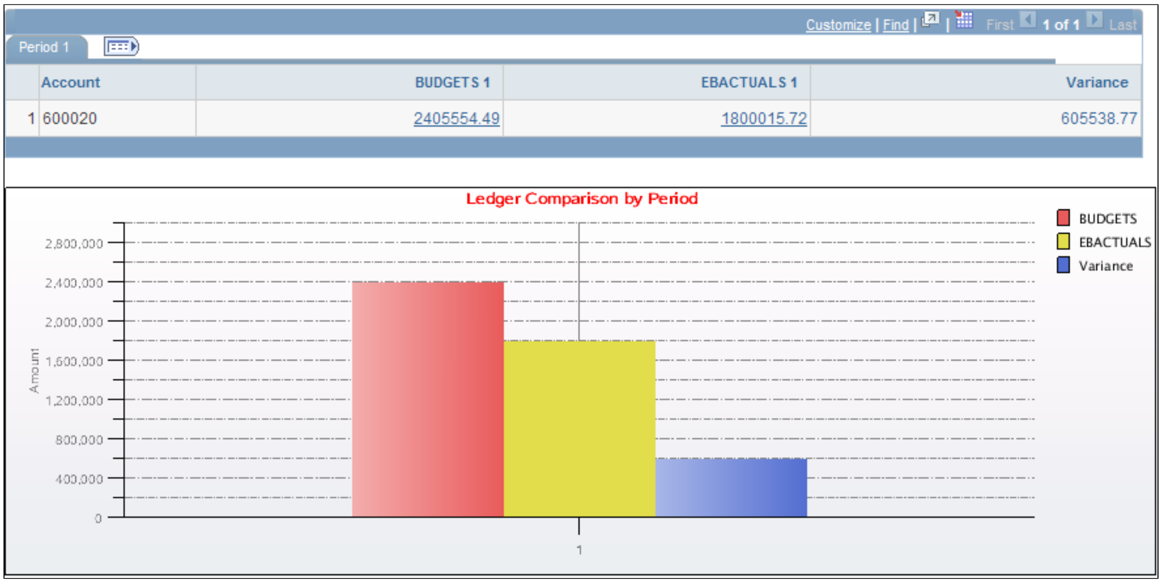
Compare Across Ledgers Page

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

Navigation:

Click a ChartField value on the Operating Budget Variance pagelet.

This example illustrates the fields and controls on the Compare Across Ledgers page.



Related Links

"Comparing Across Ledgers" (PeopleSoft General Ledger)

Budget Overview Page

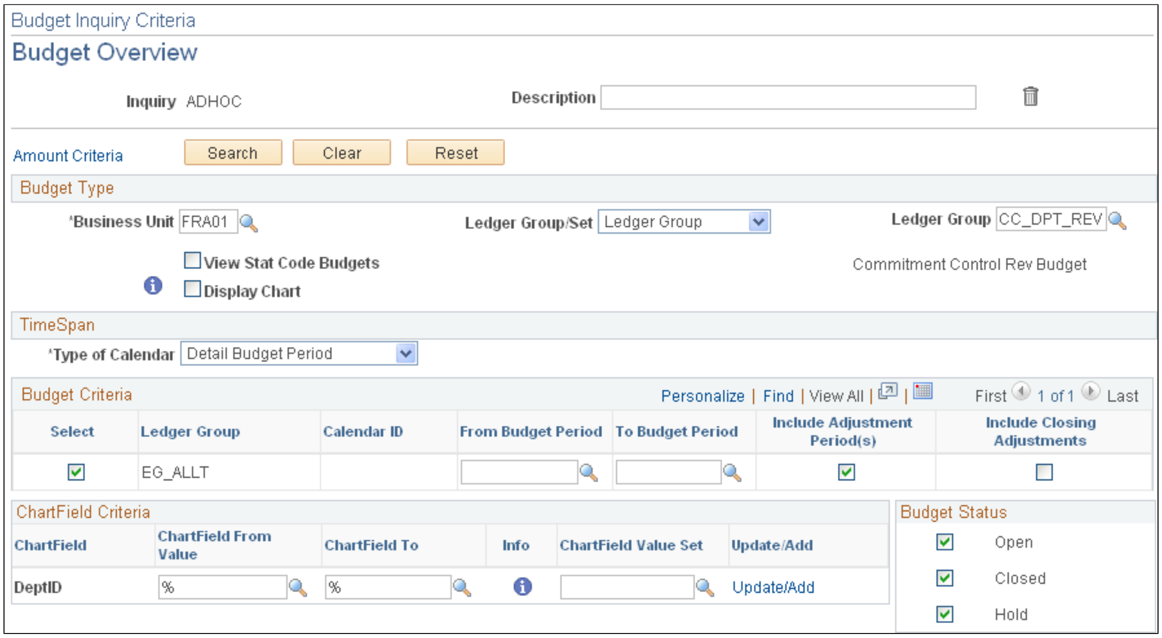
Use the Budget Overview (for Commitment Control ledgers) page (KK_INQ_BD_OVW) to the search page is populated with values from the selected ChartField.

Click the Search button to view the Budget Overview page.

Navigation:

Click a ChartField value on the Operating Budget Variance pagelet.

This example illustrates the fields and controls on the Budget Overview page.



Related Links

"Creating and Reviewing Budget Overview Inquiries" (PeopleSoft Commitment Control)

Viewing Project Revenue Variances

This topic discusses how to view project revenue variances, personalize the Project Revenue Variance pagelet, compare standard ledgers, and view Commitment Control budget overviews.

Pages Used to View Project Revenue Variances

Page Name	***Definition Name***	***Usage***
Project Revenue Variance Pagelet	GL_PE_05	View the top five variances between budgeted amounts for a project and actual expenses.
Project Revenue Variance Personalization Page	GL_PE_05_PRS	Define default display information for the Project Revenue Variance pagelet.
Compare Across Ledgers Page	INQ_COMPRE_PNL	(For standard ledgers) Specify the ledger data that you want to compare by period and view comparison results. See Comparing Standard Ledgers.

Page Name	*Definition Name*	*Usage*
Budget Overview Page	KK_INQ_BD_OVW	Ffor Commitment Control ledgers) The search page is populated with values from the selected ChartField. Click the **Search** button to view the Budget Overview page. See Viewing Commitment Control Budget Overviews.

Project Revenue Variance Pagelet

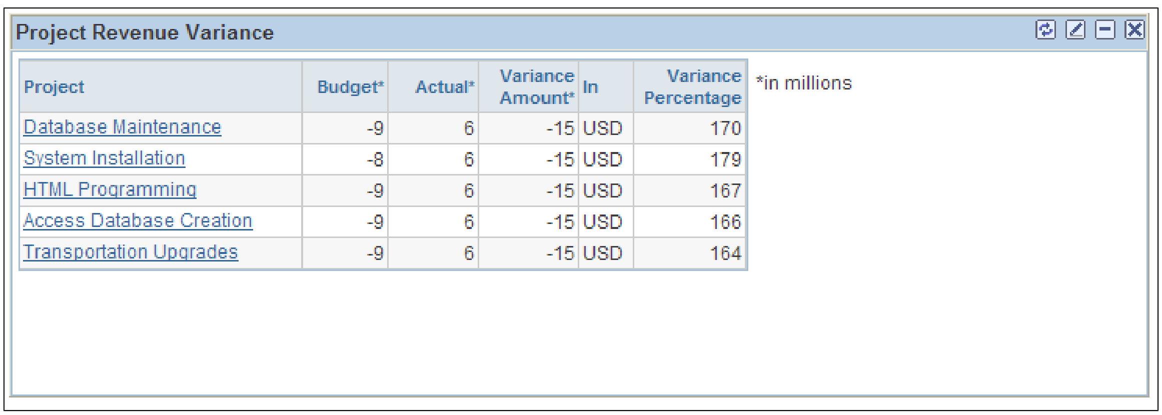
Use the Project Revenue Variance pagelet (GL_PE_05) to view the top five variances between budgeted amounts for a project and actual expenses.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Project Revenue Variance.**

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



Project Revenue Variance

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

*in millions

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

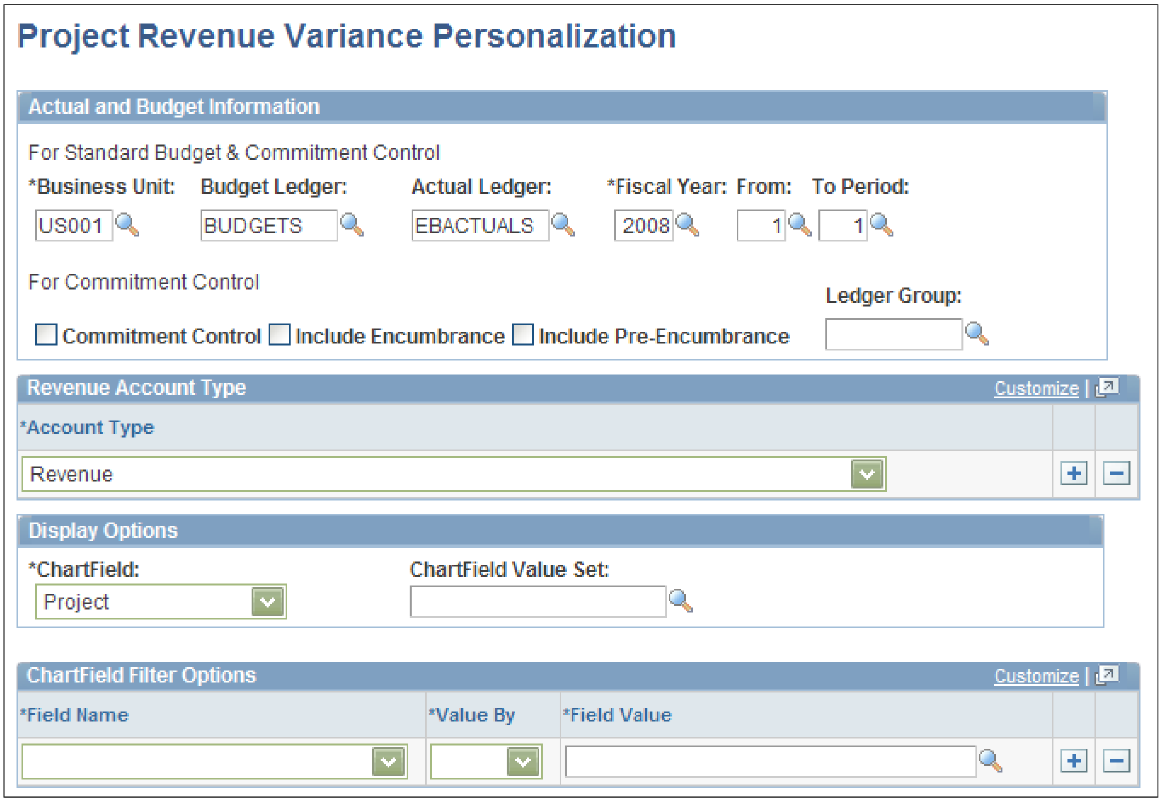
Project Revenue Variance Personalization Page

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

Navigation:

Click the **Customize** icon on the Project Revenue Variance pagelet.

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



Field or Control	***Description***
Ledger Group	Select a specific Commitment Control ledger group.
From and To Period	Select a range of ledger accounting periods for the specified year.
Revenue Account Type	Select the account type that is associated with revenue.
ChartField	Although you can select any ChartField, it is recommended that you select *Project* because this personalization page specifically sets up a pagelet to display project revenue variance data.

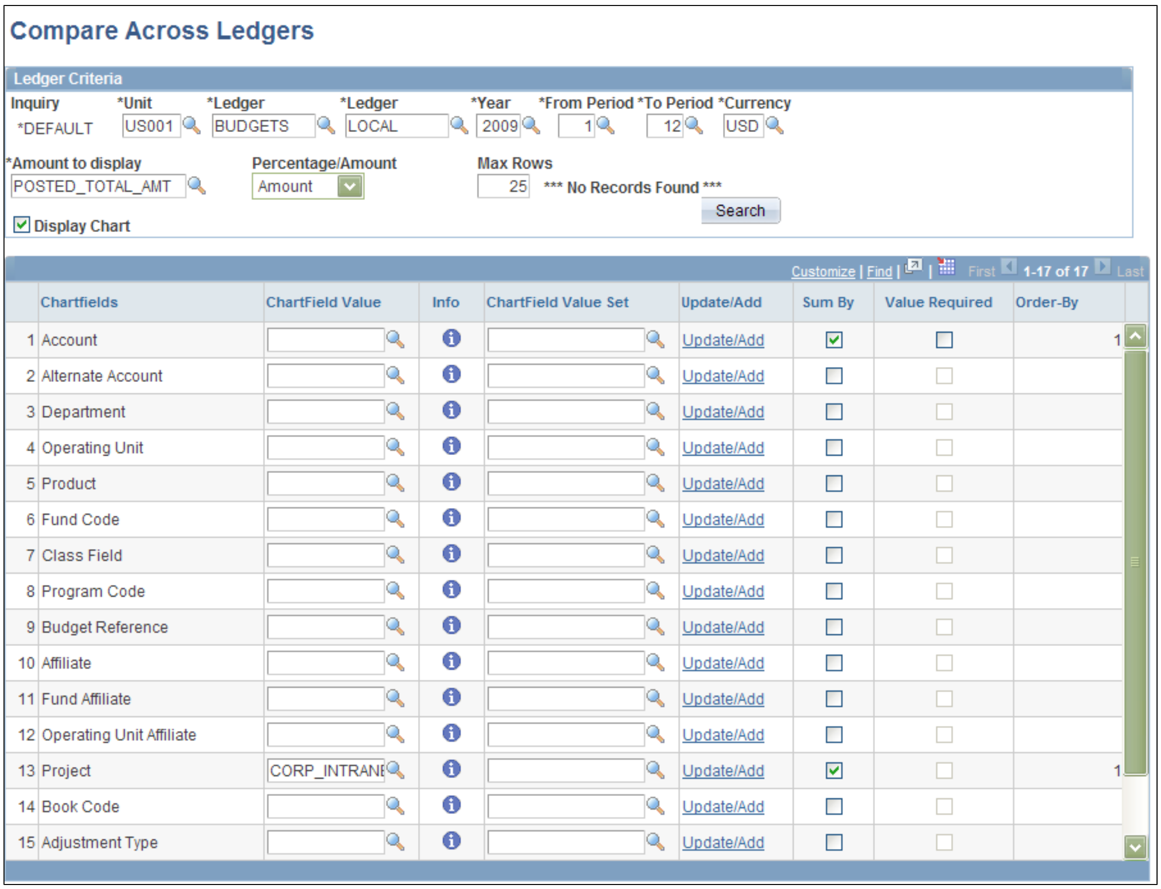
Comparing Standard Ledgers

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

Navigation:

Click a ChartField value on the Project Revenue Variance pagelet.

This example illustrates the fields and controls on the Compare Across Ledgers page.



Related Links

"Comparing Across Ledgers" (PeopleSoft General Ledger)

Viewing Commitment Control Budget Overviews

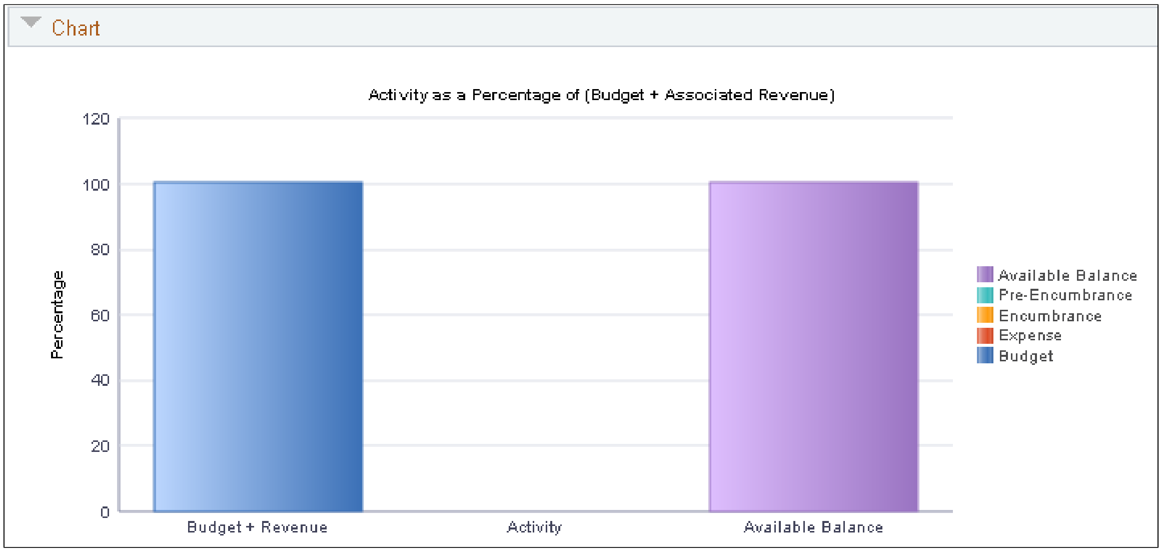
Use the Budget Overview (for Commitment Control ledgers) page (KK_INQ_BD_OVW) to the search page is populated with values from the selected ChartField.

Click the Search button to view the Budget Overview page.

Navigation:

Click a ChartField value on the Project Revenue Variance pagelet.

This example illustrates the fields and controls on the Budget Overview (Results) page.



Related Links

“Creating and Reviewing Budget Overview Inquiries” (PeopleSoft Commitment Control)

Viewing Unbilled Balances to Projects Expiring

This topic discusses how to view unbilled balances to projects expiring and personalize the Expiring Projects pagelet.

Pages Used to View Unbilled Balances

Page Name	***Definition Name***	***Usage***
Expiring Projects Pagelet	GL_PE_07	View a list of the top five projects with unbilled amounts, and project expiration dates. Sort by most unbilled amounts or by earliest expiration date.
Unbilled Balances to Projects Expiring Personalization Page	GL_PE_07_PRS	Define default display information for the Expiring Projects pagelet.

Expiring Projects Pagelet

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

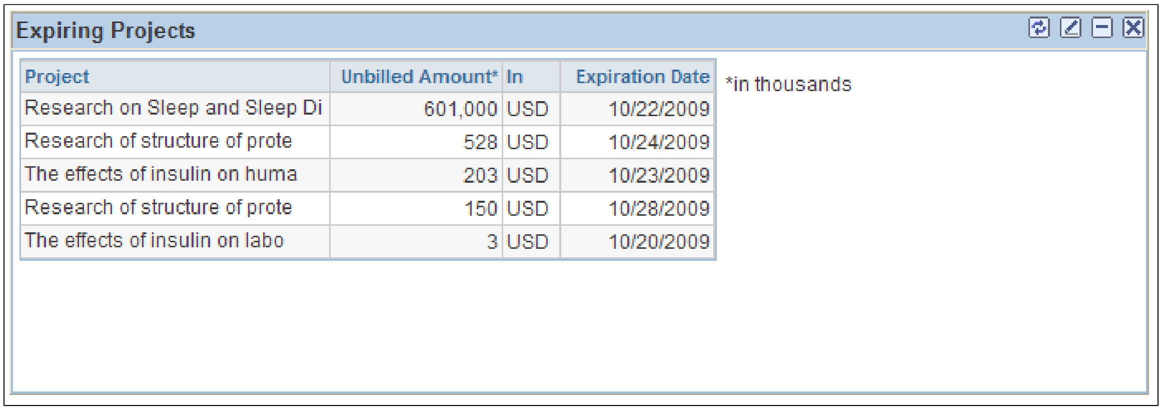
Sort by most unbilled amounts or by earliest expiration date.

Navigation:

Click the **Personalize Content** link on the PeopleSoft homepage.

Select **Expiring Projects.**

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



Field or Control	***Description***
Unbilled Amount	The amount of the balance that has not been billed.
Expiration Date	The date a project ends. This date was entered when the project was added to the system.

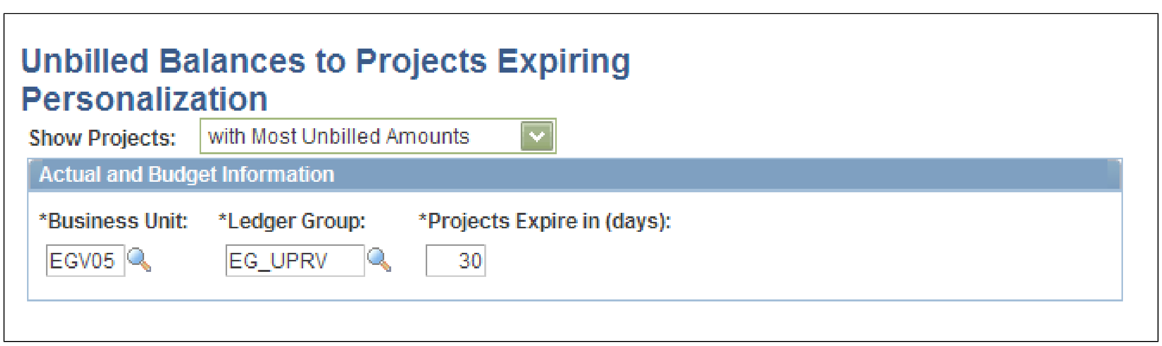
Unbilled Balances to Projects Expiring Personalization Page

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

Navigation:

Click the **Customize** icon on the Expiring Projects pagelet.

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



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

Field or Control	Description
Ledger Group	The Expiring Projects pagelet retrieves data only from Commitment Control ledgers. Select a specific Commitment Control ledger group.
Projects Expire in (days)	Enter the number of days before the project expires. The system uses this information to select only projects that expire within the number of specified days.

Viewing Actual Versus Budgeted (Standard Budget) Information

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

Pages Used to Access and View Actual Versus Budgeted Information

Page Name	Definition Name	Usage
ChartField Pagelet Security Page	GL_PE_CF_SEC_PAGE	Enable additional security for the Actual vs Budgeted pagelet by restricting data access to specified department IDs and operating units.
Actual vs Budgeted Pagelet	GL_PE_ACTVBUD	View actual amount compared to budgeted amount for a specified time period, and view the positive or negative variance.
Actual Versus Budgeted Personalization Page	GL_PE_ACTVBUD_PRS	Define default display information for the Actual vs Budgeted pagelet.
Compare Across Ledgers Page	INQ_COMPARE_PNL	Specify the ledger data you want to compare by period and view comparison results.

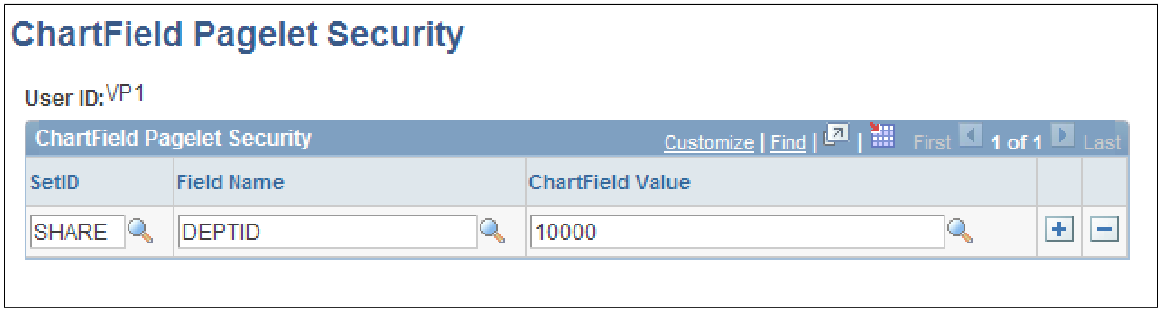
ChartField Pagelet Security Page

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

Navigation:

Set Up Financials/Supply Chain > **Security** > **Setup CF Pagelet Security**

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



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

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

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

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

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

See Using Roles and Permission Lists for the PeopleSoft Financials Portal Pack.

See “Understanding ChartField Security” (Application Fundamentals).

Actual vs Budgeted Pagelet

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

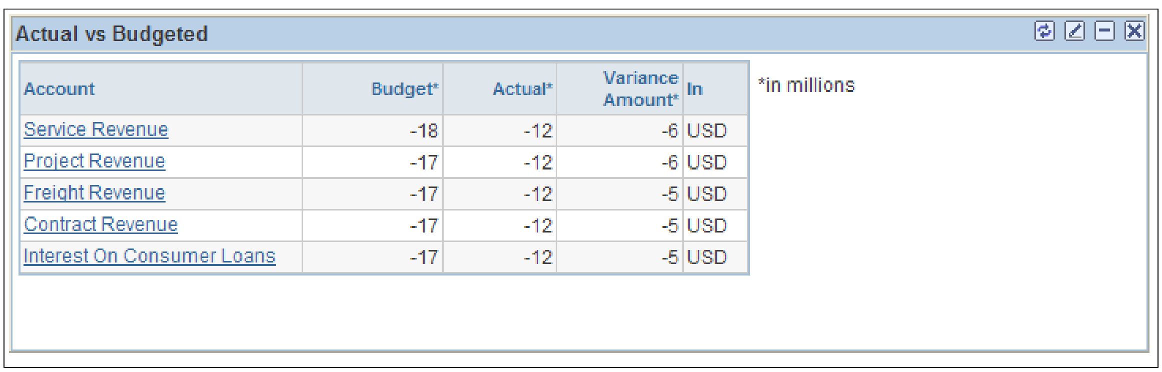
Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Actual vs Budgeted.**

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

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



Actual vs Budgeted

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

*in millions

Field or Control	***Description***
Account	Displays the top five accounts based on selections from the personalization page.

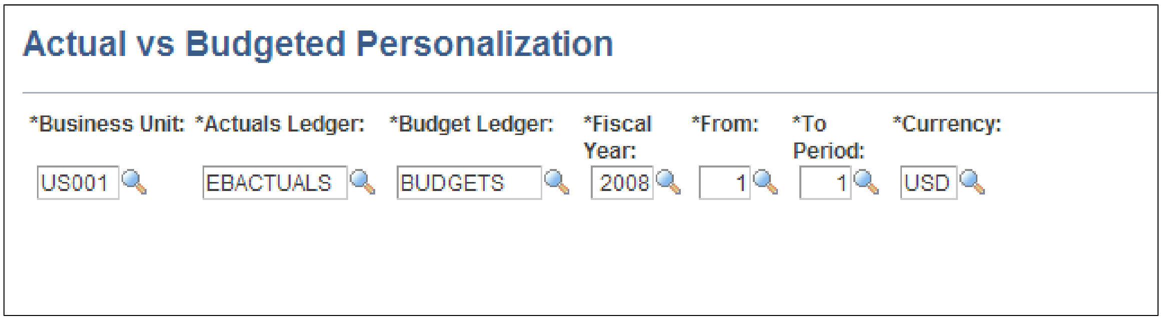
Actual Versus Budgeted Personalization Page

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

Navigation:

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

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



Field or Control	***Description***
Actuals Ledger and **Budget Ledger**	Specify the actual and budgeted (standard budget) ledgers of the business unit that you want to compare. Unlike other pagelets, which qualify budget ledger by the ledger group type, this pagelet qualifies the budget ledger by ledger template. The ledger template associated with the budget ledger must be *BUDGET.*
From and **To Period**	Select a range of ledger accounting periods for the specified year.

Compare Across Ledgers Page

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

Navigation:

Click an account on the Actual vs Budgeted pagelet.

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

Related Links

“Comparing Across Ledgers” (PeopleSoft General Ledger)

Chapter 7

Using Pagelets Enabled by PeopleSoft Payables

Setting Up PeopleSoft Payables for the PeopleSoft Financials Portal Pack

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

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

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

Understanding Setup

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

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

Viewing Average Days in Payables

This topic discusses how to view average days in Payables, personalize the average days pagelet, and view average days information by business unit.

Pages Used to View Average Days in Payables

Page Name	***Definition Name***	***Usage***
Average Days in Payables Pagelet	AP_CFOP_AVG_MAIN	View a bar graph that displays average days for the periods specified on the Average Days Personalization page.
Average Days in AP Personalization Page	AP_CFOP_AVG_PERS	Define default display information for the Average Days in Payables pagelet.
Average Days by Business Unit Page	AP_CFOP_AVG_DTLS	View details of each period shown on the bar graph, such as the name of the business unit and the average days per business unit.

Average Days in Payables Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Average Days** in Accounts Payable.

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

Click a bar on the graph to view details.

Average Days in AP Personalization Page

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

Navigation:

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

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

Field or Control	***Description***
Business Unit	Enter a business unit or leave the field blank to view average days for all business units. Leave the field blank to view all business units on the Average Days by Business Unit page.
Calendar ID	Select *Annually, Monthly,* or *Quarterly.* This will affect the type of period that appears in each **Period** field.
Year and **Period**	Define up to three accounting periods to display on the Average Days in Payables pagelet.

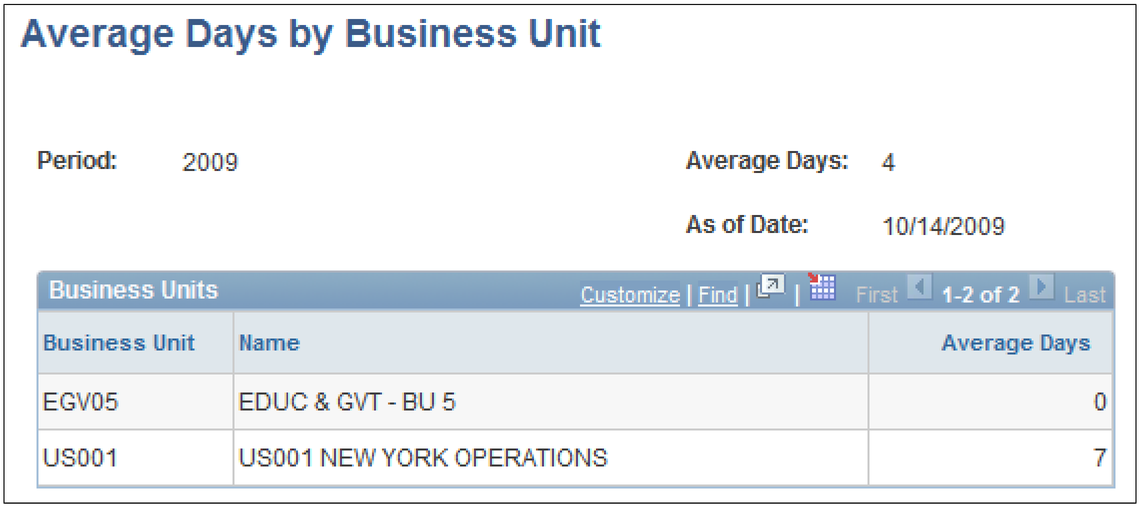
Average Days by Business Unit Page

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

Navigation:

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

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



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

Field or Control	***Description***
Average Days	Number of average days represented by a bar on the bar graph.

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

Viewing Payables Discounts

This topic discusses how to view payables discounts, personalize the Payables Discounts pagelet, and view discounts by business unit.

Pages Used to View Payables Discounts

Page Name	***Definition Name***	***Usage***
Payables Discounts Pagelet	AP_CFOP_DSCNT_MAIN	View a bar graph that displays the discount taken or lost amounts per business unit for the periods specified on the Discounts Personalization page.
Discounts Personalization Page	AP_CFOP_DSCNT_PERS	Define default display information for the Payables Discounts pagelet.
Discounts by Business Unit Page	AP_CFOP_DSCNT_DTLS	View details on discounts and vouchers.

Payables Discounts Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Payables Discounts** in Accounts Payable.

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

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

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

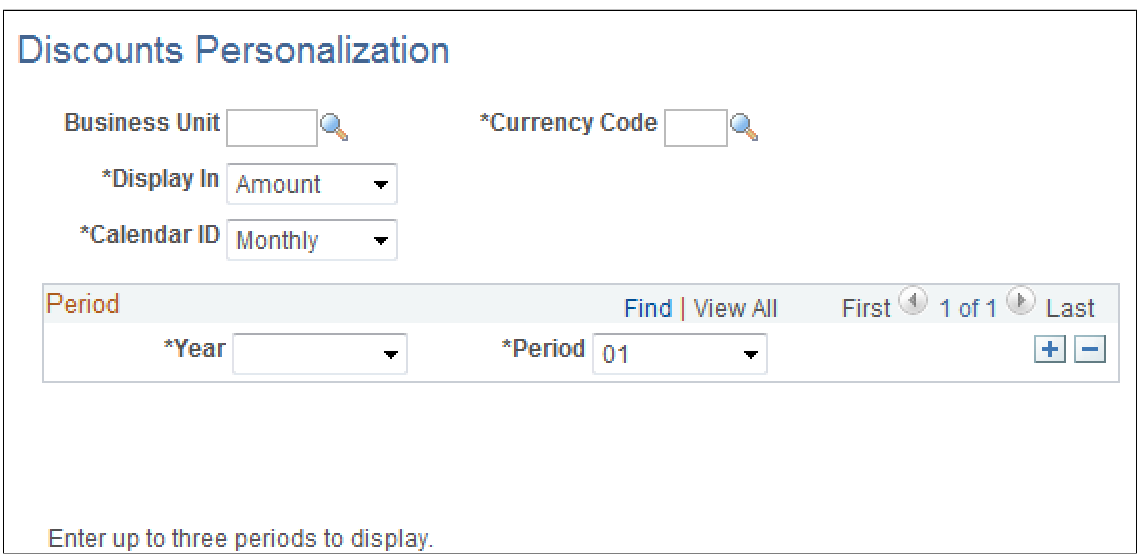
Discounts Personalization Page

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

Navigation:

Click the **Customize** icon on the Payables Discounts pagelet.

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



Field or Control	***Description***
Business Unit	Enter a business unit or leave the field blank to view discounts lost and taken for all business units. Leave the field blank to view all business units on the Discounts by Business Unit page.
Display In	Select *Amount* or *Percentage.*
Calendar ID	Select *Annually, Monthly,* or *Quarterly.* This will affect the type of period that appears in the **Period** field.
Year and **Period**	Define up to three accounting periods to display on the Payables Discounts pagelet.

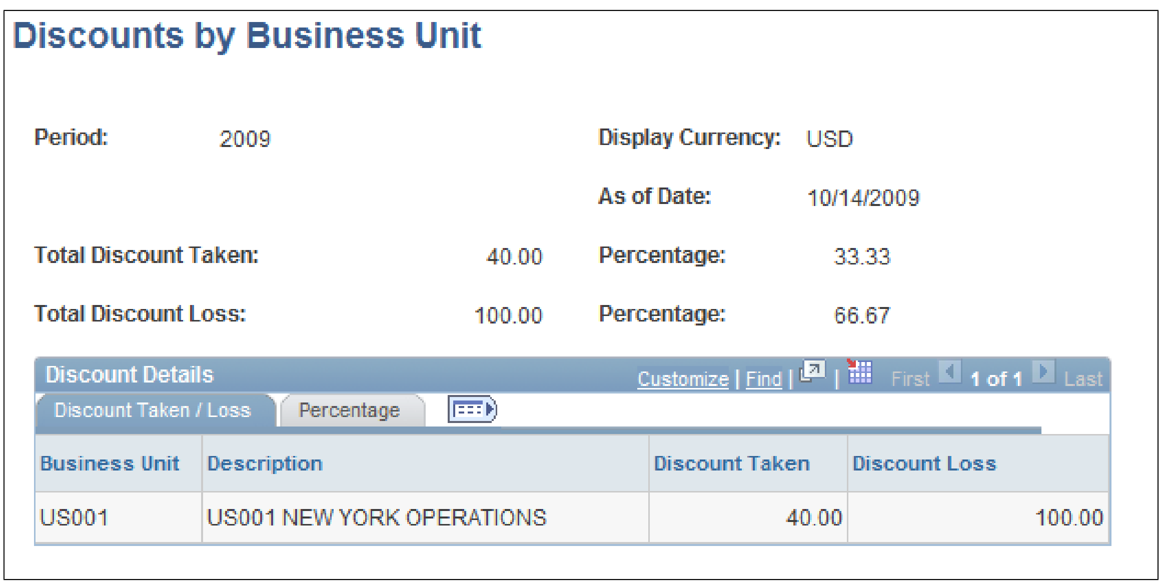
Discounts by Business Unit Page

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

Navigation:

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

This example illustrates the fields and controls on the Discounts by Business Unit page.



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

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

Viewing Top Payables Suppliers by Expenditure

This topic discusses how to view top Payables suppliers by expenditure, personalize the Top Suppliers by Expenditure pagelet, and view top supplier details.

Pages Used to View Top Payables Suppliers by Expenditure

Page Name	***Definition Name***	***Usage***
Top Suppliers by Expenditure Pagelet	AP_CFOP_VNDR_MAIN	View expenditure amounts for the top five PeopleSoft Payables suppliers over the periods specified on the Top Suppliers Personalization page.
Top Suppliers Personalization Page	AP_CFOP_VNDR_PERS	Define default display information for the Top Suppliers by Expenditure pagelet.
Top Supplier Details Page	AP_CFOP_VNDR_DTLS	View vouchers for any supplier.

Top Suppliers by Expenditure Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Top Suppliers by Expenditure** in Accounts Payable.

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

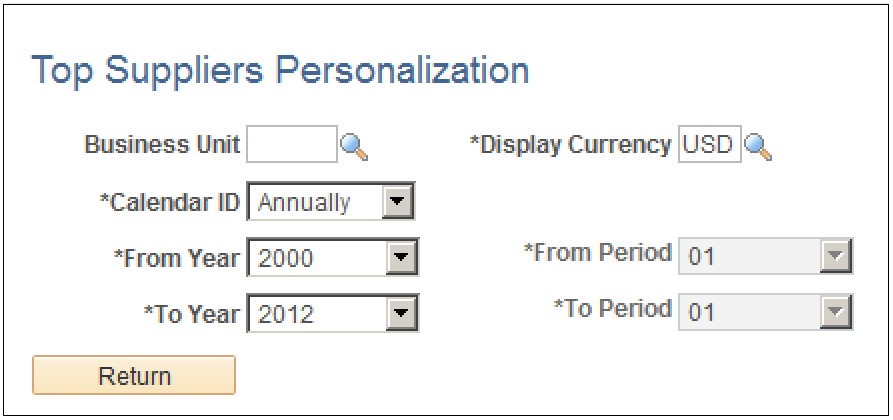
Top Suppliers Personalization Page

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

Navigation:

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

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



Field or Control	***Description***
Business Unit	Enter a business unit or leave the field blank to view top suppliers for all business units.
Calendar ID	Select a calendar option: *Annually, Monthly,* or *Quarterly.*
From Year and **To Year**	Select the range for which you want to display the data.

Top Supplier Details Page

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

Navigation:

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

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

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

Field or Control	***Description***
Supplier ID	Enter a different supplier ID to see details on a different supplier. To see details on all suppliers, leave this field blank.

Chapter 8

Using Pagelets Enabled by PeopleSoft Receivables

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

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

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

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

Understanding Setup

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

Viewing Aging Summary Information

This topic discusses how to view aging summary information and personalize the aging summary pagelet.

Pages Used to View Aging Summary Information

Page Name	Definition Name	Usage
Aging Summary Pagelet	AR_PE_AGING_PAGE	View a bar graph that shows the total aging amount in up to five aging categories.
Aging Summary Personalization Page	AR_PE_AGSUM_PRS	Define default display information for the Aging Summary pagelet.

Aging Summary Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Aging Summary.**

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

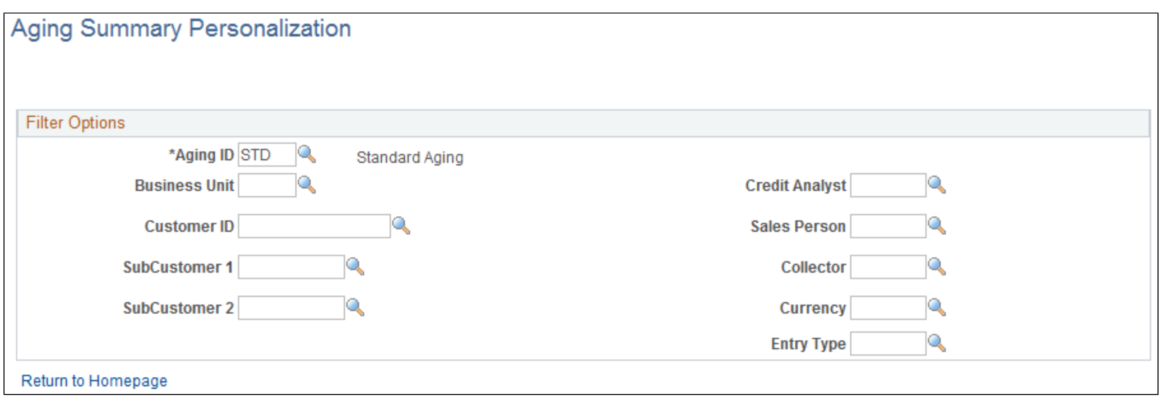
Aging Summary Personalization Page

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

Navigation:

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

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



Field or Control	***Description***
Aging ID	Select an aging category to display items that are part of the age range specified by the aging ID.
Entry Type	Select an entry type to display the items for an entry type in a category.

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Average Time to Resolve Deductions

This topic discusses how to view average time to resolve deductions and personalize the Average Time to Resolve pagelet.

Pages Used to View Average Time to Resolve Deductions

Page Name	***Definition Name***	***Usage***
Average Time to Resolve Pagelet	AR_PE_DEDAVG_PAGE	Display the average time to resolve a deduction over a user-defined period using a bar graph.
Average Time to Resolve Personalization Page	AR_PE_DEDAVG_PRS	Define default display information for the Average Time to Resolve Deduction pagelet.

Average Time to Resolve Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Average Time to Resolve.**

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

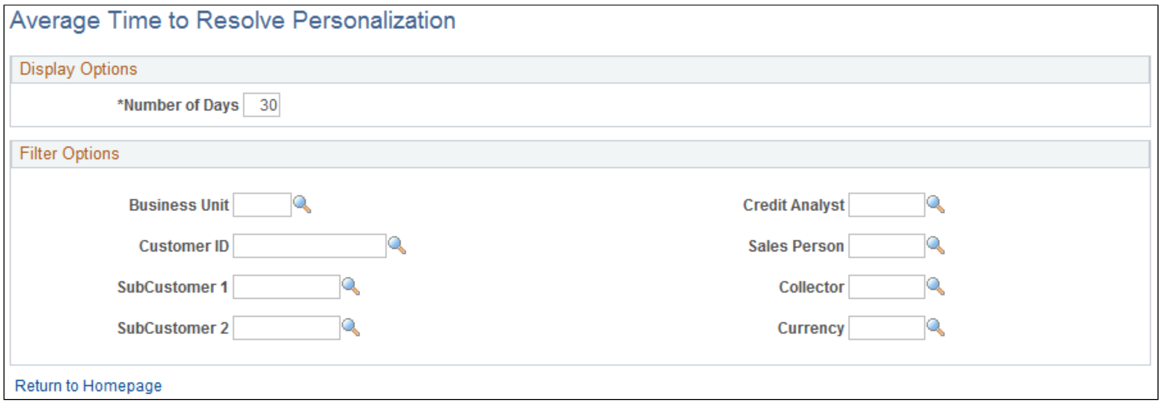
Average Time to Resolve Personalization Page

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

Navigation:

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

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



Field or Control	***Description***
Number of Days	Enter the number of days for each period in the Time Frame axis.

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Days Sales Outstanding

This topic discusses how to view days sales outstanding and personalize the Days Sales Outstanding pagelet.

Pages Used to View Days Sales Outstanding

Page Name	***Definition Name***	***Usage***
Days Sales Outstanding Pagelet	AR_PE_DSO_PAGE	View a bar graph that shows the days sales outstanding for up to five time periods.
DSO Personalization Page	AR_PE_DSO_PRS	Define default display information for the Days Sales Outstanding pagelet.

Days Sales Outstanding Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Days Sales Outstanding.**

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

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

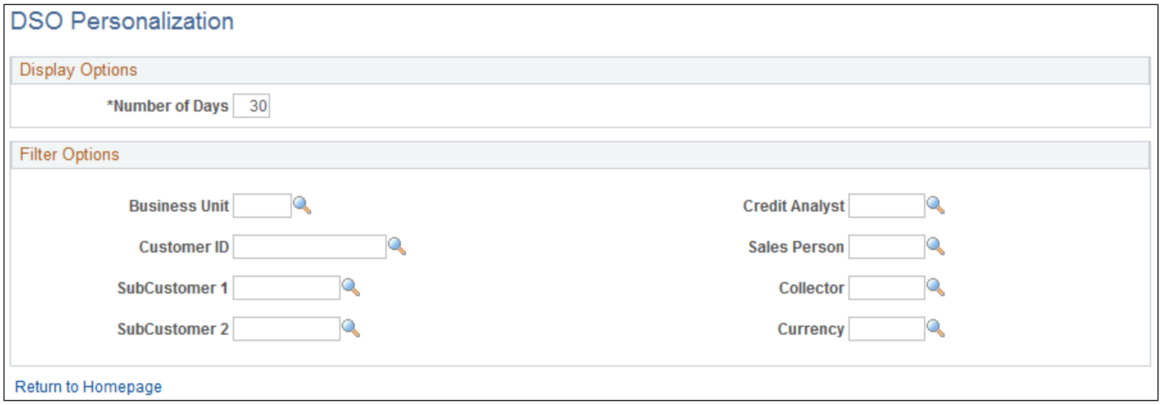
DSO Personalization Page

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

Navigation:

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

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



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

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Deductions by Amount

This topic discusses how to view deductions by amount and personalize the Deduction by Amount pagelet.

Pages Used to View Deduction by Amount

Page Name	***Definition Name***	***Usage***
Deduction by Amount Pagelet	AR_PE_DEDAMT_PAGE	Display the current deduction amount and the previous year deduction amount over a user defined period on a stacked bar graph.
Deduction by Amount Personalization Page	AR_PE_DEDAMT_PRS	Define default display information for the Deduction by Amount pagelet.

Deduction by Amount Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Deduction by Amount.**

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

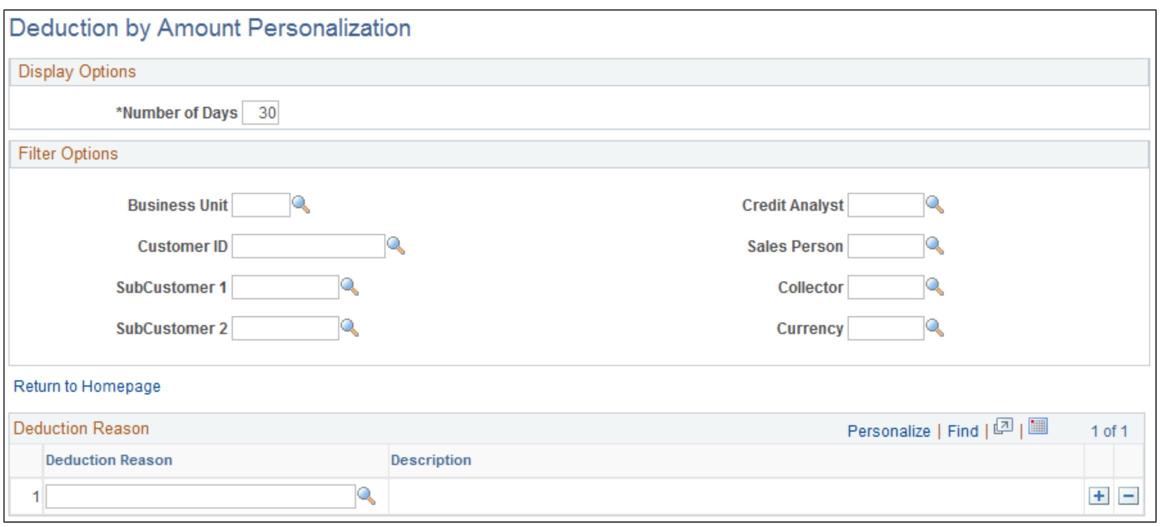
Deduction by Amount Personalization Page

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

Navigation:

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

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



Field or Control	*Description*
Number of Days	Enter the number of days for each period. The system subtracts the numbers of days that you enter from the current date to determine the current period and includes deductions created during that period in the amount on the pagelet.
Deduction Reason	Enter each deduction reason for the deductions that you want to include in the amount.

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Deductions by Reason

This topic discusses how to view deductions by reason and personalize the Deduction by Reason pagelet.

Pages Used to View Deductions by Reason

Page Name	***Definition Name***	***Usage***
Deduction by Reason Pagelet	AR_PE_DEDRSN_PAGE	Display deductions by reason in a table format, listing the reason, current amount and currency, count of deductions making up the current amount, and the comparison amount and currency.
Deduction by Reason Personalization Page	AR_PE_DEDRSN_PRS	Define default display information for the Deduction by Reason pagelet.
Item List - Advanced Search	ITEM_LIST	Click the **Deduction Reason** link on the Deduction by Reason pagelet to update search parameters and create a list of items with a specific deduction reason. See the Deduction by Reason Pagelet.

Deduction by Reason Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Deduction by Reason.**

Field or Control	Description
Deduction Reason	Displays the description for the reason. Click a link to access the Item List - Advanced Search page, where you enter search criteria to display a list of items with a specific deduction reason. The system automatically populates the search criteria on the Advanced Search page using the data that you entered on the Deduction by Reason Personalization page. Modify the criteria if necessary.
Current Amount and **Count**	Displays the total amount and count of deductions in the current period.
Prior Amount and **Count**	Displays the total amount and count of deductions for the previous year or period.

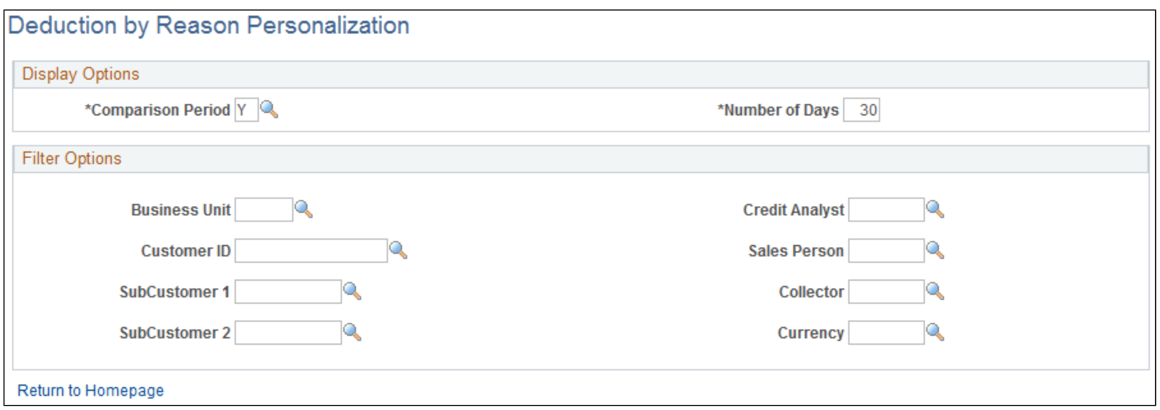
Deduction by Reason Personalization Page

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

Navigation:

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

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



Field or Control	Description
Comparison Period	Select a value that determines the length of the comparison period. Options are: *P* (Prior Period): Compares the period of time to prior period of time. For example, if the period of time is 10 days, it compares the past 10 days to the past 11 to 20 days. *Y* (Prior Year): Compares the period of time to the same period in the prior year.

Field or Control	***Description***
Number of Days	Enter the number of days for the comparison period.

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Outstanding and Past Due Balances

This topic discusses how to view outstanding balances and view past due balances.

Pages Used to View Outstanding and Past Due Balance Information

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

Outstanding Balances Pagelet

Use the Outstanding Balances pagelet (AR_PE_OUTBAL_PAGE) to view customer accounts with large open balances.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Outstanding Balances.**

Field or Control	*Description*
Customer	Displays up to five customers that have a large outstanding balance. The pagelet displays only corporate customer balances. Click a customer to access the Account Overview - Balances page, where you view detailed information regarding the outstanding balance.
Amount	Displays the total amount owed to your organization regardless of the payment due date.

Related Links

"Reviewing Customer Account Information" (PeopleSoft Receivables)

Past Due Balances Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Past Due Balances.**

Field or Control	*Description*
Customer	Displays up to five customers that have a large unpaid balance past a specified due date. The pagelet displays only corporate customer balances. Click a customer to access the Account Overview - Balances page, where you view detailed information regarding the outstanding balance.
Amount	Displays the total amount of the unpaid balances past the specified due date.

Related Links

"Reviewing Customer Account Information" (PeopleSoft Receivables)

Viewing Sales for New and Existing Customers

This topic discusses how to view sales for new and existing customers and personalize the Sales New/ Existing Customers pagelet.

Pages Used for View Sales to New and Existing Customers

Page Name	Definition Name	Usage
Sales New/Existing Customers Pagelet	AR_PE_SALES_PAGE	View a bar graph that compares the sales for new and existing customers over a period of time.
New and Existing Customers Personalization Page	AR_PE_SALES_PRS	Define default display information for the Sales New/Existing Customers pagelet.

Sales New/Existing Customers Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Sales New/Existing Customers.**

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

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

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

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

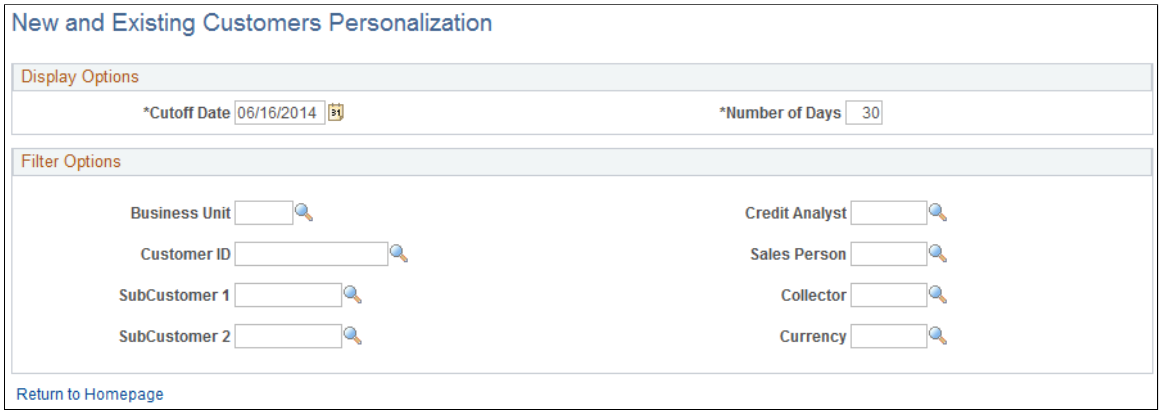
New and Existing Customers Personalization Page

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

Navigation:

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

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



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

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

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Top Customer Sales Balances

This topic discusses how to view top customer sales balances and personalize the Top Customers Personalization page.

Pages Used to View Top Customer Sales Balances

Page Name	***Definition Name***	***Usage***
Top Customer Sales Balances Pagelet	AR_PE_TOPCST_PAGE	View the sales balances and the percentage of total sales for up to five corporate customers.
Top Customers Personalization Page	AR_PE_TPCST_PRS	Define default display information for the Top Customer Sales Balances pagelet.
Account Overview - Balances Page	CUST_BALANCES_HDR	Click a customer on the Top Customer Sales Balances pagelet to view a wide range of information about a customer's outstanding balance or past due balance, and use links to view items that comprise each balance. See the Top Customer Sales Balances Pagelet.

Top Customer Sales Balances Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Top Customer Sales Balances.**

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

Field or Control	***Description***
% (percent)	Displays the percentage of total sales for the sales period contributed by this customer.

Related Links

“Reviewing Customer Account Information” (PeopleSoft Receivables)

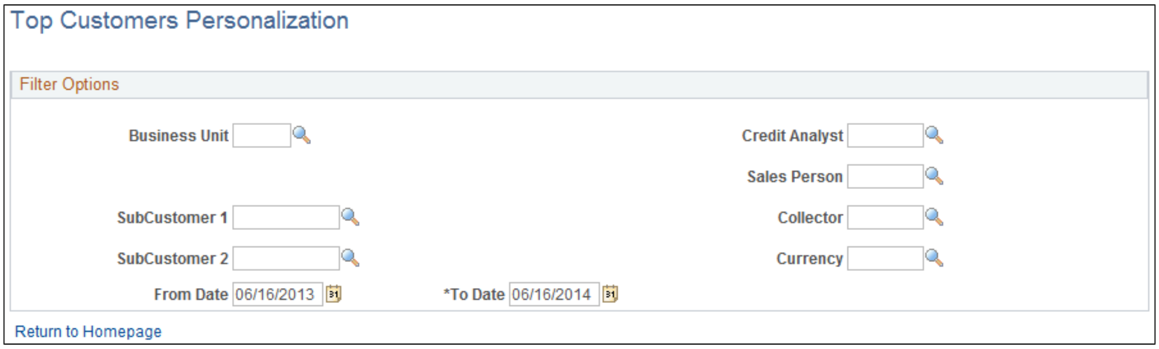
Top Customers Personalization Page

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

Navigation:

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

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



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

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Top Customer Write-offs

This topic discusses how to view top customer write-offs and personalize the Bad Debt Write-off by Customer pagelet.

Pages Used to View Top Customer Write-offs

Page Name	*Definition Name*	*Usage*
Bad Debt Write-off by Customer Pagelet	AR_PE_DETWO_PAGE	View the balances that have been written off for up to five top corporate customers.
Customer Write-off Personalization Page	AR_PE_DETWO_PRS	Define default display information for the Bad Debt Write-off by Customer pagelet.

Page Name	***Definition Name***	***Usage***
Account Overview - Balances Page	CUST_BALANCES_HDR	Click a customer on the Bad Debt Write-off by Customer pagelet to view a wide range of information about a customer's outstanding balance or past due balance and use links to view items that comprise each balance. See the Bad Debt Write-off by Customer Pagelet.

Bad Debt Write-off by Customer Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Bad Debt Write-off by Customer.**

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

Related Links

"Reviewing Customer Account Information" (PeopleSoft Receivables)

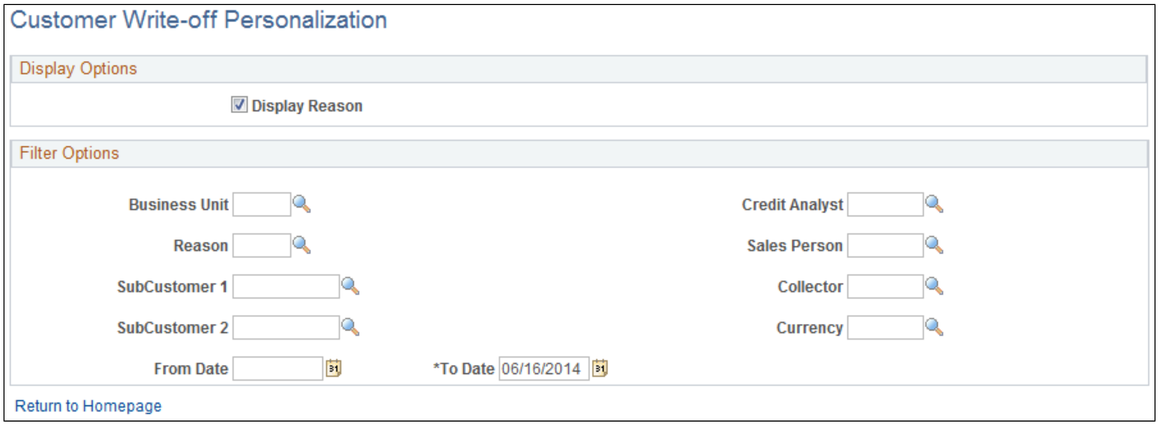
Customer Write-off Personalization Page

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

Navigation:

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

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



Field or Control	*Description*
Display Reason	Select this option to display the write-off reason on the pagelet broken down by customer and reason code. Deselect this option if you do not want to display the write-off reason. In this case, the amount is broken down by customer only.
From Date and **To Date**	Enter the date range of the write-off items to include in the pagelet. This field is required.

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Viewing Write-off Trends

This topic discusses how to view write-off trends and personalize the Write-off Trends pagelet.

Pages Used to View Write-off Trends

Page Name	*Definition Name*	*Usage*
Write-off Trends Pagelet	AR_PE_WO_PAGE	Display the amount written off over a user-defined period using a bar graph.
Write-off Trends Personalization Page	AR_PE_WO_PRS	Define default display information for the Write-off Trends pagelet.

Write-off Trends Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Write-off Trends.**

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

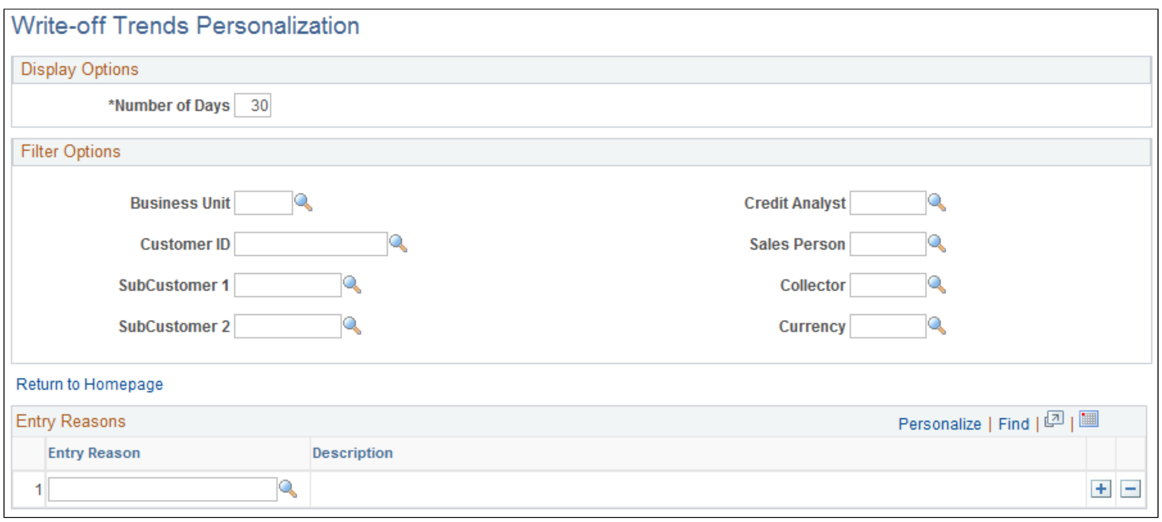
Write-off Trends Personalization Page

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

Navigation:

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

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



Field or Control	*Description*
Number of Days	Enter the number of days for each period of time.
Entry Reason	Enter each entry reason for the write-off items that you want to include in the amount.

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

Related Links

Setting Up PeopleSoft Receivables for the PeopleSoft Financials Portal Pack

Chapter 9

Using Pagelets Enabled by PeopleSoft Treasury Management

Viewing Bank Contacts

This topic discusses how to view and personalize bank contacts, and review financial contact information.

Pages Used to View Bank Contacts

Page Name	***Definition Name***	***Usage***
Bank Contacts Pagelet	TR_PE_BANK_CONTACT	View information for an individual bank contact as defined on the Bank Contacts Personalization page.
Bank Contacts Personalization Page	TR_PE_BNKCPRS	Define default display information for the Bank Contacts pagelet.
Financial Contacts Page	TR_CONTACT_PNL	View and edit information about bank contacts.

Related Links

"Contact Information Page" (PeopleSoft Banks Setup and Processing)

Bank Contacts Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft homepage.

Select **Bank Contacts.**

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

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

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

Bank Contacts Personalization Page

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

Navigation:

Click the **Customize** icon on the Bank Contacts pagelet.

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

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

Financial Contacts Page

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

Navigation:

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

Viewing Bank Statement Reconciliation Aging Information

This topic discusses how to view and personalize bank statement reconciliation aging information, and review bank statement information.

Pages Used to View Bank Statement Reconciliation Aging Information

Page Name	*Definition Name*	*Usage*
Reconciliation Aging Pagelet	TR_PE_RCNAGE	View unreconciled items grouped by number of days the item has been unreconciled and the total unreconciled amount of each group.
Bank Reconciliation Aging Personalization Page	TR_PE_RCNPERS	Define default display information for the Reconciliation Aging pagelet.
Bank Statement Inquiry Page	BNK_RCN_STMT_GEN	View detailed information for unreconciled transactions and generate an Account Register report. To view the resulting report, navigate to the Process Monitor.

Related Links

"Review Bank Statements Page" (PeopleSoft Banks Setup and Processing)

Reconciliation Aging Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Reconciliation Aging.**

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

Field or Control	*Description*
Group	A transaction is grouped by the number of days it has had an unreconciled status. Group categories are *0-30*, *30-60*, *60-90*, and *90+*.
Count	Total number of unreconciled transactions.
Amount	Total dollar amount of unreconciled transactions.

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

Bank Reconciliation Aging Personalization Page

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

Navigation:

Click the **Customize** icon on the Reconciliation Aging pagelet.

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

Bank Statement Inquiry Page

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

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

Navigation:

Click a **Group** link on the Bank Reconciliation Aging pagelet.

Chapter 10

Understanding Enterprise Service Automation Pagelets

Understanding Enterprise Service Automation Pagelet Types

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

This section lists common elements and discusses:

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

Common Elements Used in This Topic

Field or Control	***Description***
Calendar ID	Select a calendar identifier to indicate the types of periods to use for the analysis. For example, a pagelet may give a user the option to view data according to a quarterly calendar or monthly calendar.
My Projects	Select this option to view and analyze only projects listed on the PeopleSoft Project Costing My Projects page for the user.
Number of Prior Periods	Enter the number of prior calendar periods over which an analysis occurs.
Restore Defaults	Click this button to reinstate the administrator default settings for a pagelet or OTA personalization page.
Show Only if Alert	Select this option to indicate that an OTA will appear only if the measurement reaches the threshold at which an alert is triggered.
Specify	Select this option to use a particular business unit, and enter the business unit in the provided field. This option is available if you do not want to use the default business unit value that is established as the user preference for your user ID.

Field or Control	*Description*
Alert Threshold	Enter the tolerance value that triggers an alert, using the unit of measure that appears in parentheses. When a measurement reaches the alert threshold, a red visual indicators appears on the OTA pagelet for the OTA. Based on the OTA, the alert can indicate that the measurement is above or below the alert threshold.
User Preferences	When this option appears in the **Business Unit** group box, select it to indicate that the business unit will be based on the default business unit value that is established as the user preference for your user ID.
Visual Indicators	Green and red visual indicators provide status information for pagelet data. An indicator that is used for an OTA displays the status of the OTA in relation to the alert threshold defined on the OTA's personalization page. The system also uses green and red visual indicators to provide priority information:
	The green visual indicator appears when the measurement is within a favorable range when compared to the alert threshold defined on the OTA's personalization page. The system also uses this icon to indicate a low priority.
	The red visual indicator appears when the measurement is within an unfavorable range (alert status) when compared to the alert threshold defined on the OTA's personalization page. The system also uses this icon to indicate a high priority.

Operational Summary Pagelets

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

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

- Most Recent Contracts (PeopleSoft Contracts)
- Top Five Contracts (PeopleSoft Contracts)
- Contract Milestone Metric (PeopleSoft Contracts)
- Contract Product Grouping Metric (PeopleSoft Contracts)
- Contract Status Metric (PeopleSoft Contracts)
- Total Predicted Expenses (PeopleSoft Expenses)

- Top Projects (PeopleSoft Project Costing)
- Top 5 Issues (PeopleSoft Program Management)
- Top 5 Risks (PeopleSoft Program Management)
- Change Control Analysis (PeopleSoft Program Management)
- Forecast to Complete (PeopleSoft Program Management)
- Critical Issues by Project (PeopleSoft Program Management)
- My Program (PeopleSoft Program Management)
- Issues by Priority (PeopleSoft Program Management)
- Issues by Priority by Project (PeopleSoft Program Management)
- Proposal Operational Summary (PeopleSoft Proposal Management)
- Proposal Resource Demand (PeopleSoft Proposal Management)
- Proposal Revenue Pipeline (PeopleSoft Proposal Management)
- Resources Needing Assignments (PeopleSoft Resource Management)

Operational Threshold Alerts

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

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

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

- Projects Over Budget (PeopleSoft Project Costing)

Transactions in Progress

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

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

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

Administering System Defaults for PeopleSoft Enterprise Service Automation Portal Pack Pagelets

This topic discusses how to define default values for Enterprise Service Automation (ESA) pagelets.

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

Page Name	***Definition Name***	***Usage***
ESA Portal Pack Pagelet Default Administration Page	PC_ESA_PPACK_ADMIN	Access pages to define default personalization settings for PeopleSoft Enterprise Service Automation Portal Pack pagelets.

Understanding System Defaults for PeopleSoft Enterprise Service Automation Portal Pack Pagelets

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

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

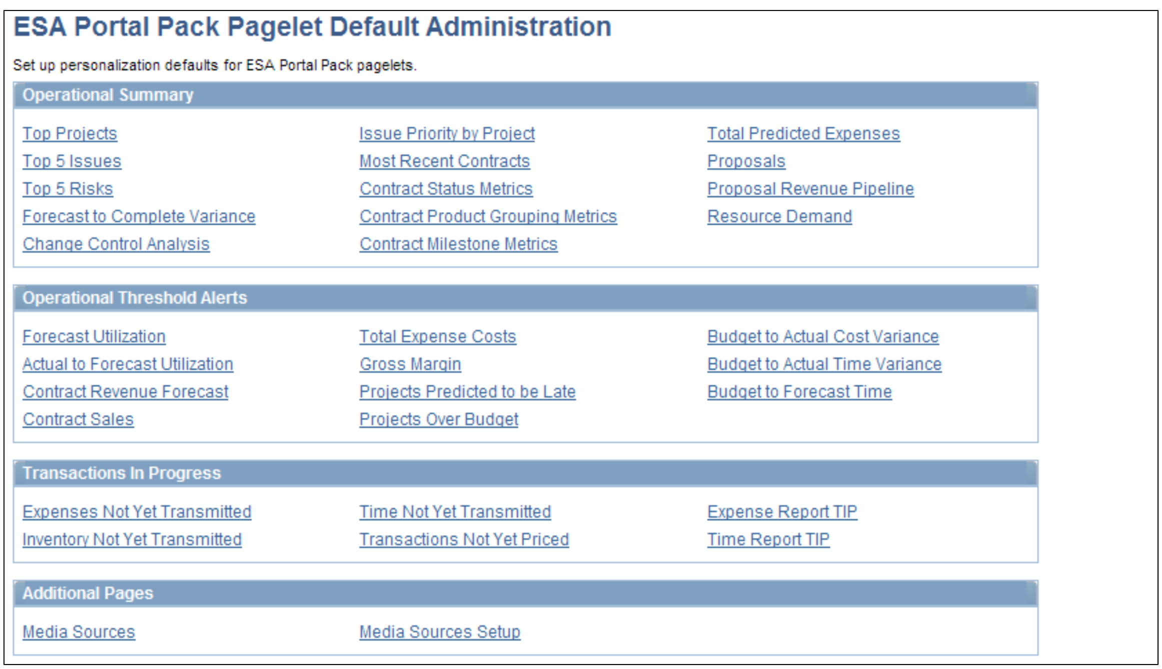
ESA Portal Pack Pagelet Default Administration Page

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

Navigation:

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

This example illustrates the fields and controls on the ESA Portal Pack Pagelet Default Administration page.



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

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

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

Operational Summary

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

Operational Threshold Alerts

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

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

Transactions in Progress

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

Additional Pages

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

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

Viewing OTAs

This topic discusses how to set up and personalize OTAs, and use the Operational Threshold Alert and Chart pagelets.

Pages Used to View OTAs

Page Name	***Definition Name***	***Usage***
Operational Threshold Alert Pagelet	PC_PE_OTA_LIST	View up to five OTAs that display real-time monitoring data based on tolerance levels that you define.
Operational Threshold Chart Pagelet	PC_PE_OTA_CHART	View an OTA in a chart format that monitors data based on tolerance levels that you define.
Personalize Operational Threshold Alerts Page	PC_PE_OTA_PRS	Select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.

Setting Up OTAs

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

The overall tasks to set up OTAs are:

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

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

Related Links

ESA Portal Pack Pagelet Default Administration Page

Operational Threshold Alert Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft homepage.

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

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

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

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

Operational Threshold Chart Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft homepage.

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

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

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

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

Personalize Operational Threshold Alerts Page

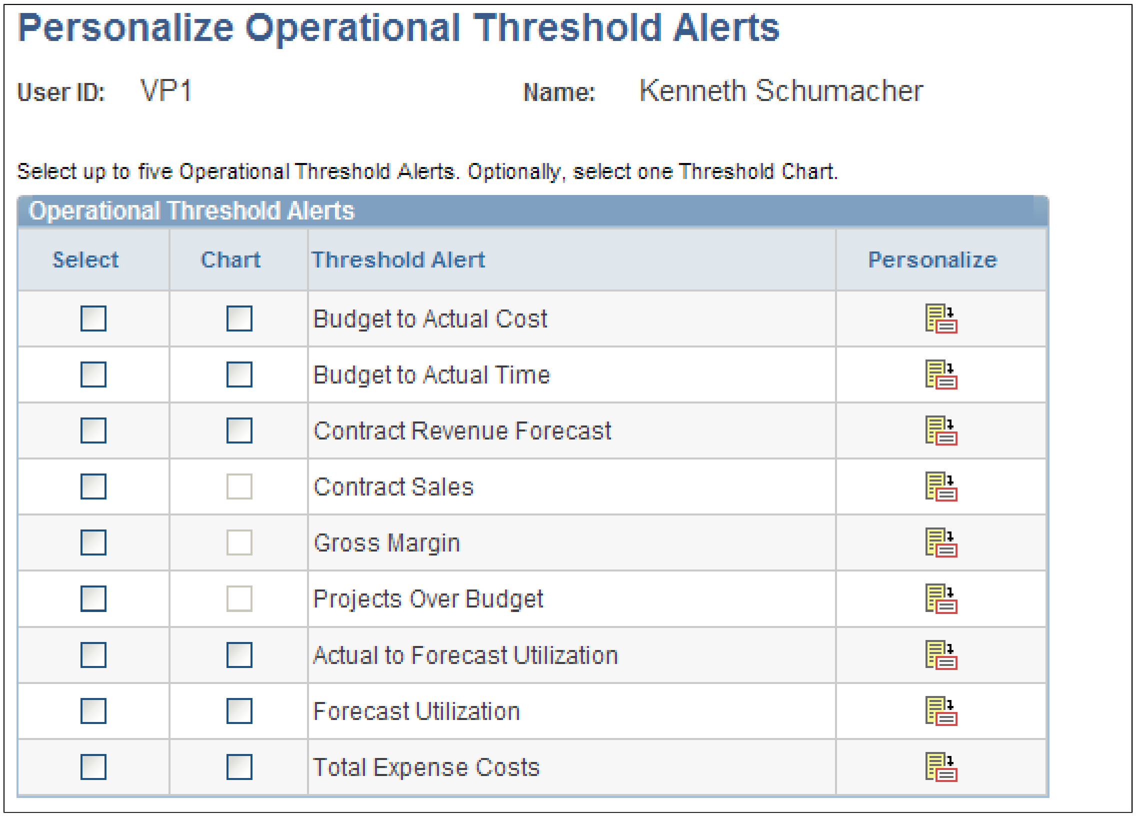
Use the Personalize Operational Threshold Alerts page (PC_PE_OTA_PRS) to select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets.

Access the page to personalize individual OTA tolerance levels.

Navigation:

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

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



Field or Control	***Description***
Select	Select up to five OTAs that you want to appear on the Operational Threshold Alert pagelet.
Chart	Select one OTA to appear on the Operational Threshold Chart pagelet.
	Click the **Personalize** icon to access the corresponding OTA's personalization page, where you can specify the tolerance level parameters for the OTA.

Viewing the Media Sources Pagelet

This topic discusses how to set up and personalize media sources, and view the Media Sources pagelet.

Pages Used to View the Media Sources Pagelet

Page Name	***Definition Name***	***Usage***
Media Sources Setup Page	GM_PE_3RD_ADMIN	Set up a content link so that it can be available to appear on the Media Sources pagelet.
Personalize Media Sources Page	GM_PE_3RD_MEDIAPRS	Select up to five online publications to appear by default on the Media Sources pagelet.
Media Sources Page	GM_PE_3RD_MEDIA	View the Media Sources pagelet that contains up to five links to publications or other content.

Media Sources Setup Page

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

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

Navigation:

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

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

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

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

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

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

See *PeopleTools: System and Server Administration.*

Personalize Media Sources Page

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

Navigation:

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

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

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

Media Sources Page

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

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

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

Viewing Enterprise Service Automation Navigation Collection Pagelets

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

Pages Used to View Enterprise Service Automation Navigation Collection Pagelets

Page Name	***Definition Name***	***Usage***
Navigation Collections - Find an Existing Collection Page	PTPP_SCSRCH	Search for an existing Navigation Collection that you want to edit or delete. Access pages that you can use to create new Navigation Collections.
Maintain Collection - Navigation Collection Page	PTPP_SCMAINTCOLL	Maintain Navigation Collection pagelets.

Understanding Navigation Collection Pagelets

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

Navigation Collection pagelets support these business processes:

- Managing proposals.
- Managing contracts.

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

Viewing Navigation Collections

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

To view a Navigation Collection pagelet:

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

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

Navigation Collections - Find an Existing Collection Page

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

You can use these to create new Navigation Collections.

Navigation:

PeopleTools > **Portal** > **Portal Utilities** > **Navigation Collections**

Maintain Collection - Navigation Collection Page

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

Navigation:

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

Administrators can modify Navigation Collection pagelets as follows:

1. Search for the navigation collection that identifies the business process that you want to modify.
2. Click the **Edit** link corresponding to the Navigation Collection.

3. Add or edit links or folders on the Maintain Collection - Navigation Collection page.

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

Chapter 11

Using Pagelets Enabled by PeopleSoft Contracts

Viewing the Top Five Contracts

This topic discusses how to view the five largest contracts and personalize the Top Five Contracts pagelet.

Pages Used to View the Top Five Contracts

Page Name	***Definition Name***	***Usage***
Top Five Contracts Pagelet	CA_PE_TOPCON_PAGE	View the five largest contracts that meet the filtering criteria specified on the Personalization Top Five Contracts page.
Personalization Top Five Contracts Page	CA_PE_TOPCON_PRS	Define default display information for the Top Five Contracts pagelet.
Contract General Page	CA_HDR_PNL	View details for a specific contract shown on the Top Five Contracts pagelet. See the Top Five Contracts Pagelet.

Top Five Contracts Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft homepage.

Select **Top Five Contracts.**

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

Field or Control	*Description*
Contract Number	Click this link to access the Contract General page (CA_HDR_PNL) for a specific contract. This link is not available if you do not have authorization to access the page.
Amount	Displays the contract amount which equals the current total amount minus discounts plus non-inclusive prepaids.

Personalization Top Five Contracts Page

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

Navigation:

Click the **Customize** icon on the Top Five Contracts pagelet.

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

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

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

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

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

Related Links

“Creating and Administering PeopleSoft Contracts” (PeopleSoft Contracts)

Viewing Most Recent Contracts

This topic discusses how to view the most recent contracts and personalize the Most Recent Contracts pagelet.

Pages Used to View Most Recent Contracts

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

Page Name	***Definition Name***	***Usage***
Most Recent Contracts	CA_PE_RCNT_MORE	View additional recently signed contracts that meet your filter criteria. Click the **More** link on the Most Recent Contracts pagelet.
Contract Summary	CA_CONTR_SUM_PNL	View details for a specific contract shown on the Most Recent Contracts pagelet. Click a contract number displayed on the Most Recent Contracts pagelet.
Personalize Most Recent Contracts	CA_PE_RCNT_PRS	Define default display information for the Most Recent Contracts pagelet. • Click the **Customize** icon on the Most Recent Contracts pagelet. • Click the **Most Recent Contracts** link on the ESA Portal Pack Pagelet Default Administration page.

Most Recent Contracts Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft homepage.

Select **Most Recent Contracts.**

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

Field or Control	***Description***
Contract Number	Click this link to access the Contract Summary page for a specific contract. This link is not available if you do not have authorization to access this page.
More	Click to access the Most Recent Contracts page where you can view all contracts meeting the filtering criteria. This link appears on the page if more than five contracts meet the filtering criteria specified on the personalization page.

Viewing Additional Details

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

Navigation:

Click the **More** link on the Most Recent Contracts pagelet.

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

Field or Control	*Description*
Amount	Displays the contract amount which equals the revised gross amount minus revised discounts plus non-inclusive prepaids.

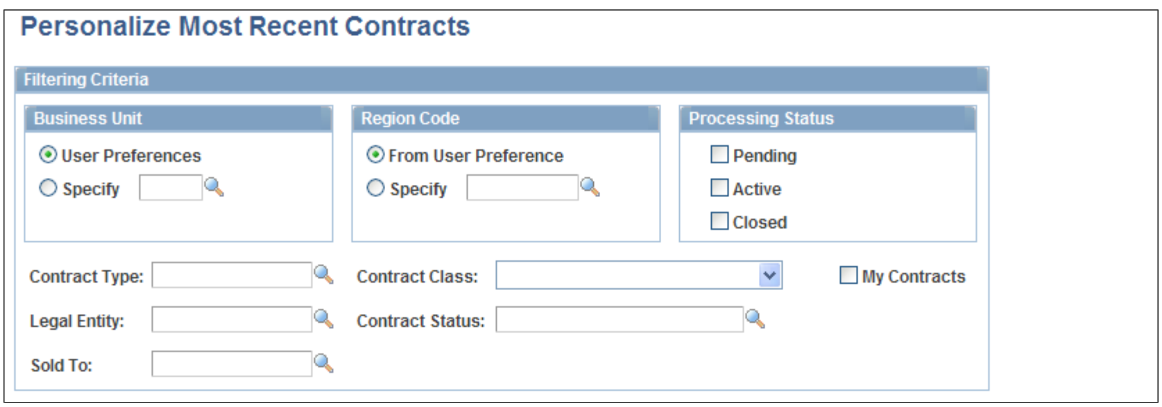
Personalizing Most Recent Contracts

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

Navigation:

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

This example illustrates the fields and controls on the Personalize Most Recent Contracts page.



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

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

Business Unit

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

Field or Control	*Description*
From User Preference	Select to view only those contracts with the contracts business unit specified in your user preferences.
Specify	Select to view contracts from a business unit other than the contracts business unit specified in your user preferences. If you select **Specify,** you must specify a business unit value.

Region Code

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

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

Processing Status

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

Field or Control	*Description*
Pending	Select to view contracts with a processing status of *Pending.*
Active	Select to view contracts with a processing status of *Active.*
Closed	Select to view contracts with a processing status of *Closed.*

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

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

Field or Control	*Description*
My Contracts	Click to indicate that the Most Recent Contracts pagelet should display only those contracts that you have designated as part of your My Contracts list. If you do not have any contracts in your My Contracts list, the system does not display any data on the Most Recent Contracts pagelet.
Restore Defaults	Click to restore the default selection criteria set by the pagelet administrator. This button does not display if you accessed this page through the ESA Portal Pack Pagelet Default Administration page.

Viewing Contract Status Metrics

This topic discusses how to view the contract status metric information and personalize the Contract Status Metrics pagelet.

Pages Used to View Contract Status Metrics

Page Name	*Definition Name*	*Usage*
Contract Status Metrics Pagelet	CA_TICS_METR_STAT	View and analyze the status of your contracts.
Personalize Contract Status Metrics Page	CA_TICS_OPR_STAT	Define default display information for the Contract Status Metric pagelet.

Contract Status Metrics Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Contract Status Metric.**

Here you can view the current contract count by status.

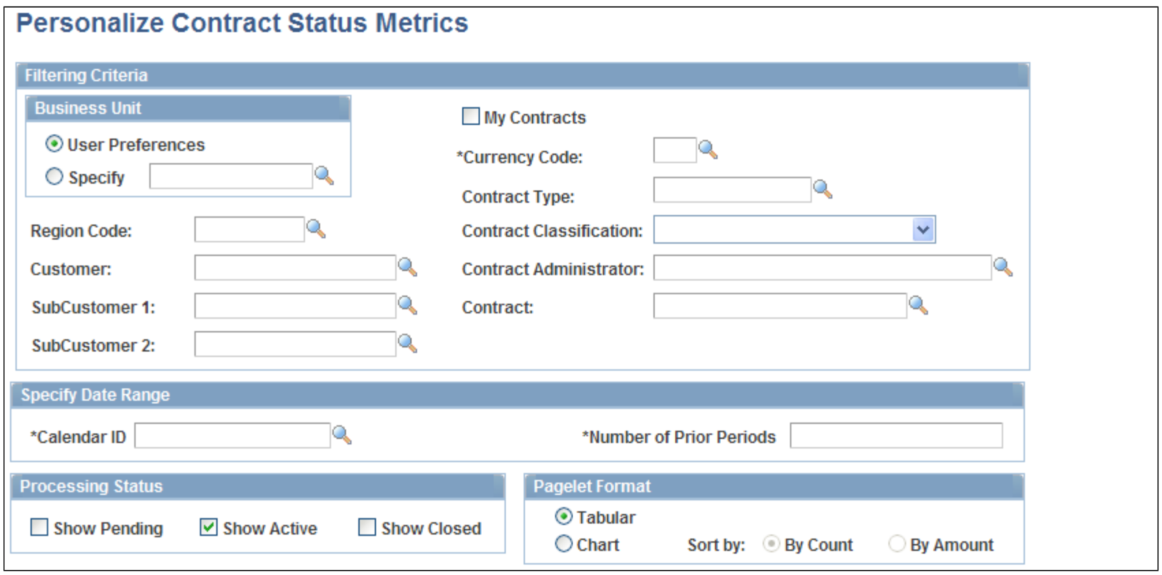
Personalize Contract Status Metrics Page

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

Navigation:

Click the pagelet's **Customize** icon.

This example illustrates the fields and controls on the Personalize Contract Status Metrics page.



Filtering Criteria

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

Specify Date Range

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

Field or Control	***Description***
Calendar ID	Select a calendar for the system to use when displaying contracts on the pagelet.

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

Processing Status

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

Pagelet Format

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

Viewing Contract Milestone Metrics

This topic discusses how to view the contract milestone metric information and personalize the Contract Milestone Metric pagelet.

Pages Used to View Contract Milestone Metrics

Page Name	*Definition Name*	*Usage*
Contract Milestone Metric Pagelet	CA_TICS_METR_MS	View and analyze the status for each milestone for all of your contracts that are in *active* status.
Personalize Contract Milestone Metrics Page	CA_TICS_OPR_MS	Define default display information for the Contract Milestone Metric pagelet.

Contract Milestone Metric Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Contract Milestone Metric.**

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

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

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

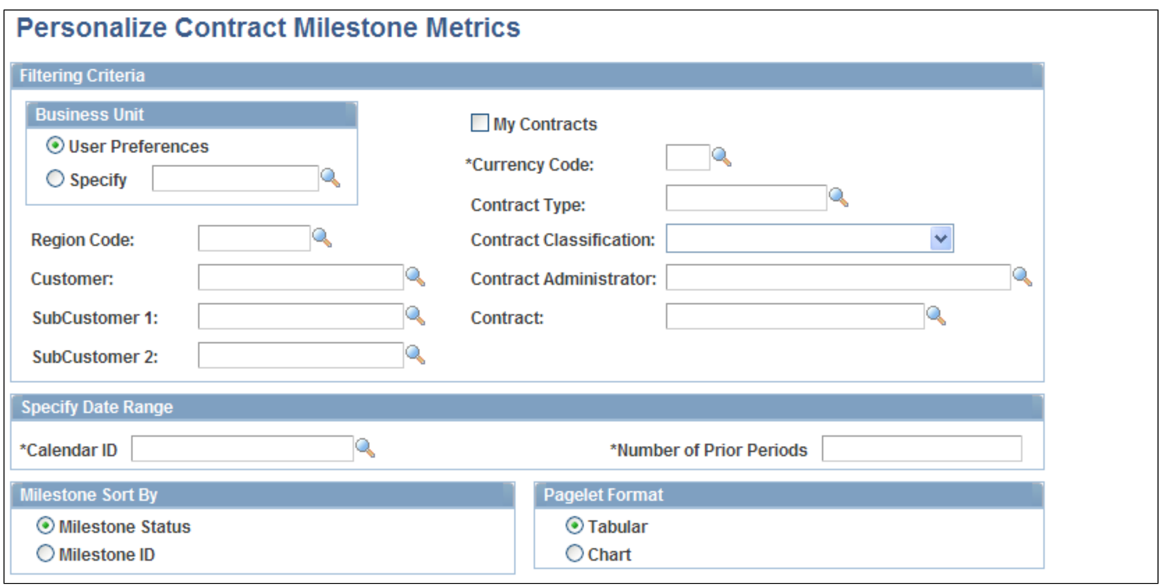
Personalize Contract Milestone Metrics Page

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

Navigation:

Click the pagelet's **Customize** icon.

This example illustrates the fields and controls on the Personalize Contract Milestone Metrics page.



Filtering Criteria

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

Specify Date Range

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

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

Milestone Sort By

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

Pagelet Format

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

Viewing Contract Product Group Metrics

This topic discusses how to view the contract product group metric information and personalize the Contract Product Group Metric pagelet.

Pages Used to View Contract Product Group Metrics

Page Name	***Definition Name***	***Usage***
Contract Product Group Metric Pagelet	CA_TICS_METR_PROD	View and analyze product group information for all of your contracts that are in *active* status.
Personalize Contract Product Grouping Metrics Page	CA_TICS_OPR_PROD	Define default display information for the Contract Product Group Metric pagelet.

Contract Product Group Metric Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Contract Product Group Metric.**

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

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

Field or Control	***Description***
Product Group	Provides the product grouping name per contract.
Number of Records	Provides the number of products and services sold by product grouping.
Amount	Total value of sales by product grouping.

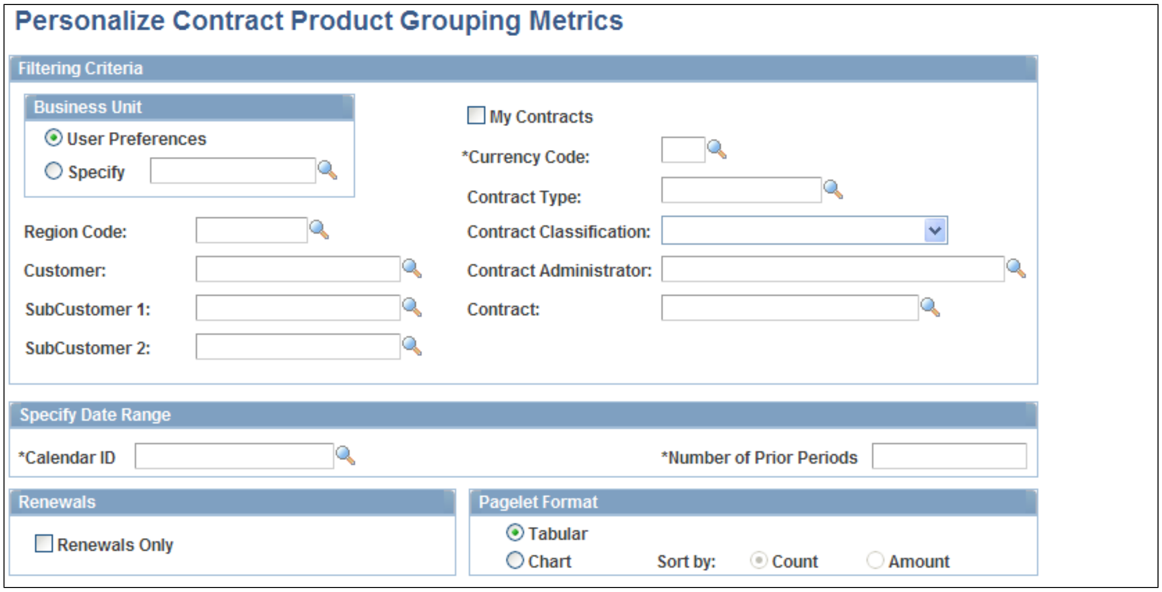
Personalize Contract Product Grouping Metrics Page

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

Navigation:

Click the pagelet's **Customize** icon.

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



Filtering Criteria

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

Specify Date Range

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

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

Renewals

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

Pagelet Format

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

Using OTAs for PeopleSoft Contracts

This topic discusses OTA calculations and how to personalize Contract Revenue Forecast and Contract Sales.

Pages Used to Personalize OTAs for PeopleSoft Contracts

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

Understanding OTA Calculations in PeopleSoft Contracts

This section discusses calculations for these operational threshold alerts:

- Contract Revenue Forecast.
- Contract Sales.

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

Calculating Contract Revenue Forecast

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

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

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

Calculating Contract Sales

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

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

Operational Threshold Alert Pagelet

Use the Operational Threshold Alert pagelet (PC_PE_OTA_LIST [wide] and PC_PE_OTA_LIST_N [narrow]) to view up to five Operational Threshold Alerts that display real-time monitoring data according to tolerance levels that you define.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Operational Threshold Alert.**

Operational Threshold Chart Pagelet

Use the Operational Threshold Chart pagelet (PC_PE_OTA_CHART) to view an Operational Threshold Alert that displays a real-time monitoring chart according to tolerance levels that you define.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Operational Threshold Chart.**

Personalize Operational Threshold Alerts Page

Use the Personalize Operational Threshold Alerts page (PC_PE_OTA_PRS) to select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page used to personalize individual OTA tolerance levels.

Navigation:

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

Personalize Contract Revenue Forecast Page

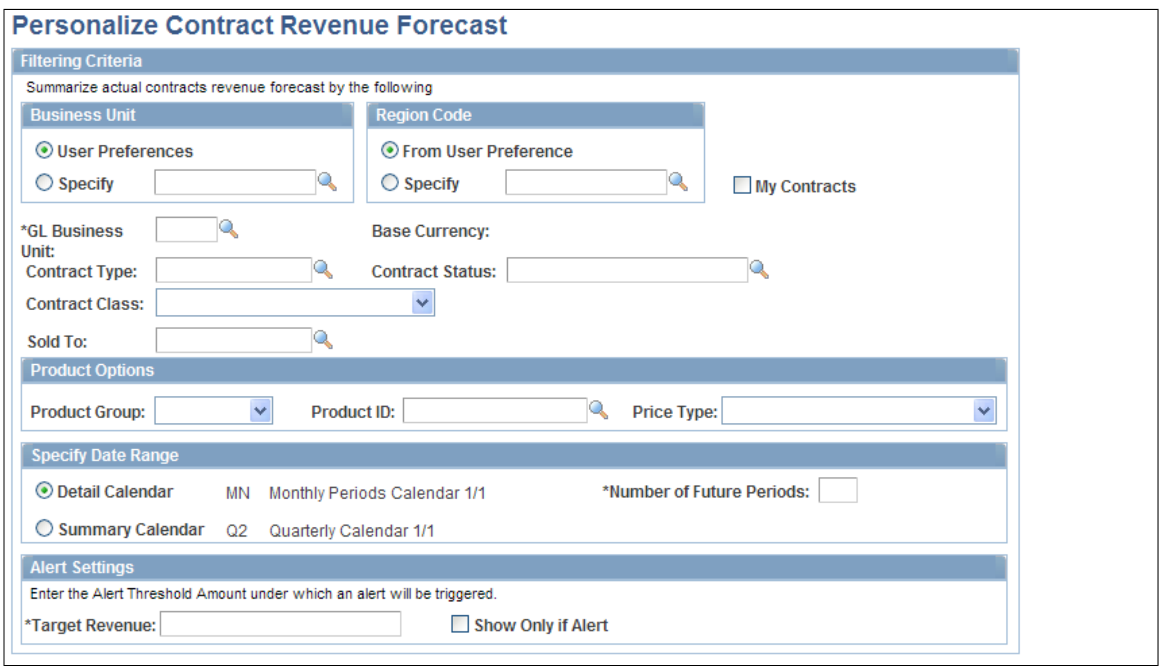
Use the Personalize Contract Revenue Forecast page (CA_PE_CFR_PRS) to specify the business unit, region code, product options, date range, and alert settings for the Contract Revenue Forecast OTA.

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

Navigation:

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

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



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

Business Unit

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

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

Region Code

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

Field or Control	*Description*
From User Preference	Select to view forecasted revenue for only those contracts with the region code specified in your user preferences.
Specify	Select to view forecasted revenue for contracts from a region code other than the region code specified in your user preferences. You can specify a new region code or leave this field blank. If you leave this field blank, the system searches all regions when selecting the contracts to display on the OTA pagelet.

Field or Control	*Description*
My Contracts	Click to indicate that the Contract Revenue Forecast pagelet should display only those contracts that you have designated as part of your My Contracts list.
GL Business Unit (General Ledger business unit)	Select a General Ledger business unit to filter contracts based on a specific GL business unit.

Field or Control	*Description*
Base Currency	Displays the base currency for the selected **GL Business Unit.**
Contract Type	Select to view forecasted revenue for contracts of a specific contract type. Selecting a contract type is optional.
Contract Status	Select to view forecasted revenue for contracts with a specific contract status. Selecting a contract status is optional. Contract status values include: *Active* and *Pending.*
Contract Class (contract classification)	Select to view forecasted revenue for contracts with a specific contract classification. Values include: *Standard, Internal, Government,* and *Federal Reimbursable Agreement.*
Sold To	Select to view forecasted revenue for contracts with a specific sold to customer. Selecting a sold to customer is optional.

Product Options

Field or Control	*Description*
Product Group	Select to view forecasted revenue for contract lines containing a specific product group.
Product ID	Select to view forecasted revenue for contract lines containing a specific product ID.
Price Type	Select to view forecasted revenue for contract lines containing specific price types. Price type values include: *Rate, Percent, Amount,* and *Recurring.*

Specify Date Range

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

Field or Control	Description
Detail Calendar	Select to use the periods defined in the detail calendar to sum and display forecasted revenue on OTA pagelet or chart. If you select **Detail Calendar,** the system uses CALENDAR_ID_2 from the Installation table.
Summary Calendar	Select to use the periods defined in the summary calendar to sum and display forecasted revenue on the OTA pagelet or chart. If you select **Summary Calendar,** the system uses CALENDAR_ID from the Installation table.
Number of Future Periods	Select the number of future periods, as defined in the detail or summary calendar, over which the system should forecast contract revenue. This field is required. The system uses the contract's accounting date to compare with the date ranges specified by the number of periods.

Alert Settings

Field or Control	Description
Target Revenue	Enter the target alert threshold that will trigger a red alert visual indicator to appear on the OTA pagelet if the contract revenue forecast falls under the target revenue value. A green indicator appears in the OTA pagelet if the revenue forecast equals or exceeds the target revenue indicating that the revenue forecast is acceptable.
Show Only if Alert	Select this option for the OTA to appear on the OTA pagelet only if the revenue forecast falls under the alert threshold. Deselect this option for the OTA to appear on the pagelet if the revenue forecast falls above, equals, or falls below the target revenue value.

Related Links

“Understanding Revenue Management” (PeopleSoft Contracts)

Personalize Contract Sales Page

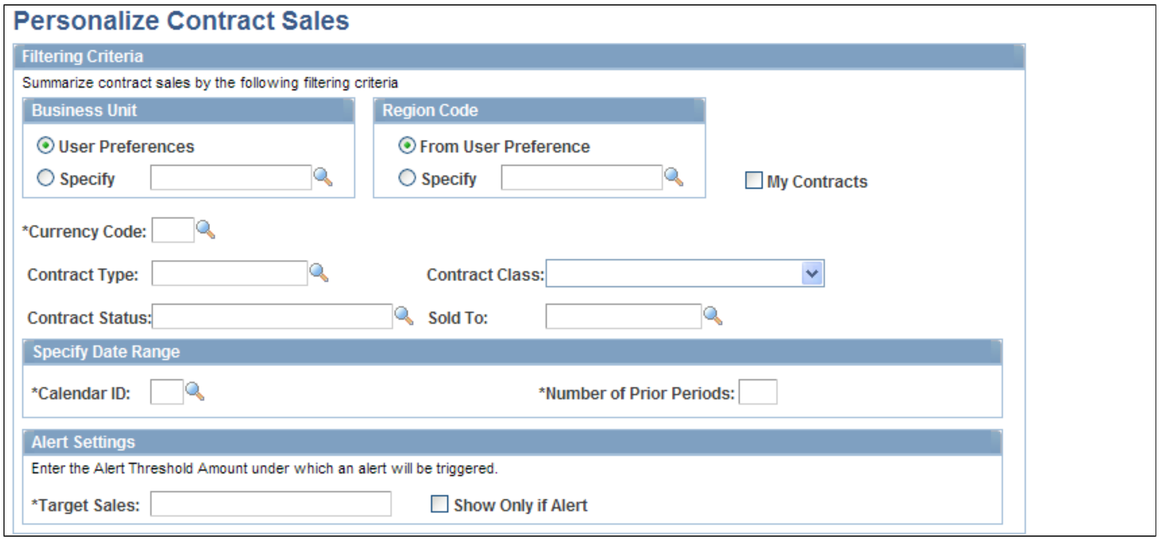
Use the Personalize Contract Sales page (CA_PE_SALES_PRS) to specify the business unit, region code, date range, and alert settings for the Contract Sales OTA.

Navigation:

- Click the **Contract Sales** link on the ESA Portal Pack Pagelet Default Administration page.

- Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

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



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

Business Unit

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

Field or Control	*Description*
User Preferences	Select to have the system display contract sales for only those contracts with the contracts business unit specified in your user preferences.
Specify	Select to have the system display contract sales for contracts from a business unit other than the contracts business unit specified in your user preferences. If you select **Specify,** you must specify a business unit value.

Region Code

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

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

Field or Control	***Description***
My Contracts	Click to indicate that the OTA pagelet should display contract sales for only those contracts that you have designated as part of your My Contracts list.
Currency Code	Select a currency for the system to use when displaying contract sales amounts on the OTA pagelet. The system uses the value that you select to filter the contracts that display. For example, if you select *USD,* contracts with a contract currency other than *USD* will not appear on the page.
Contract Type	Select to view contract sales for contracts of a specific contract type. Selecting a contract type is optional.
Contract Class	Select to view contract sales for contracts with a specific contract classification. Values include: *Standard, Internal, Government,* and *Federal Reimbursable Agreement.*
Contract Status	Select to view contract sales for contracts with a specific contract status. Selecting a contract status is optional.
Sold To	Select to view contract sales for contracts with a specific sold to customer. Selecting a sold to customer is optional.

Specify Date Range

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

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

Alert Settings

Field or Control	***Description***
Target Sales	Enter the target alert threshold that will trigger a red alert visual indicator to appear on the OTA pagelet if the contract sales fall under the target sales value. A green indicator appears in the OTA pagelet if the contract sales forecast equals or exceeds the target sales indicating that the contract sales forecast is acceptable.
Show Only if Alert	Select this option for the OTA to appear on the OTA pagelet only if the contract sales fall under the alert threshold. Deselect this option for the OTA to appear on the pagelet if the contract sales fall above, equal, or fall below the target sales value.

Related Links

“Understanding Revenue Management” (PeopleSoft Contracts)

Chapter 12

Using Pagelets Enabled by PeopleSoft Expenses

Understanding the Pagelets Designed for PeopleSoft Expenses

There are three types of pagelets designed for PeopleSoft Expenses:

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

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

Note: Before PeopleSoft Expenses can display data in the Total Predicted Expense pagelet or an OTA pagelet, the administrator must define the calendar ID and the number of periods that the Expenses Pagelet Processing process uses to populate the summary tables.
The Expenses Pagelet Processing process converts expense data to various currencies so that the PeopleSoft Expenses pagelets can provide data in a currency that is meaningful to each user. The process also summarizes the information, which renders data in pagelets more rapidly.
Schedule this process by navigating to Travel and Expenses, Real-Time Analysis, Update Expenses Pagelet Info.

See Administer Expense Report and Time Report Pagelets.

Viewing Total Predicted Expenses

This topic discusses how to view the Total Predicted Expenses Summary page and personalize your Total Predicted Expenses pagelet.

Pages Used to View Total Predicted Expenses

Page Name	***Definition Name***	***Usage***
Administer Total Predicted Expenses Page	EX_PE_PRED_PRS	Set up defaults and define the calendar ID and periods to filter on for the Total Predicted Expenses pagelet.
Total Predicted Expenses Pagelet	EX_PE_PRED_TA_WD (wide) EX_PE_PRED_TA_NR (narrow)	Displays travel authorization data based on filter criteria set up by the system administrator and the user. The size of the pagelet depends on if you have personalized the layout for your portal homepage for two columns or three columns. To view billable, non-billable, and internal travel authorization amounts, use a wide layout.
Total Predicted Expenses Summary Page	EX_PE_PRED_SUM	Enter more filter criteria (optional) and click **Go** to view list of travel authorizations.
Personalize Total Predicted Expenses Page	EX_PE_PRED_PRS	Set up user-specific defaults to filter on for the Total Predicted Expenses pagelet.

Understanding Total Predicted Expenses

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

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

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

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

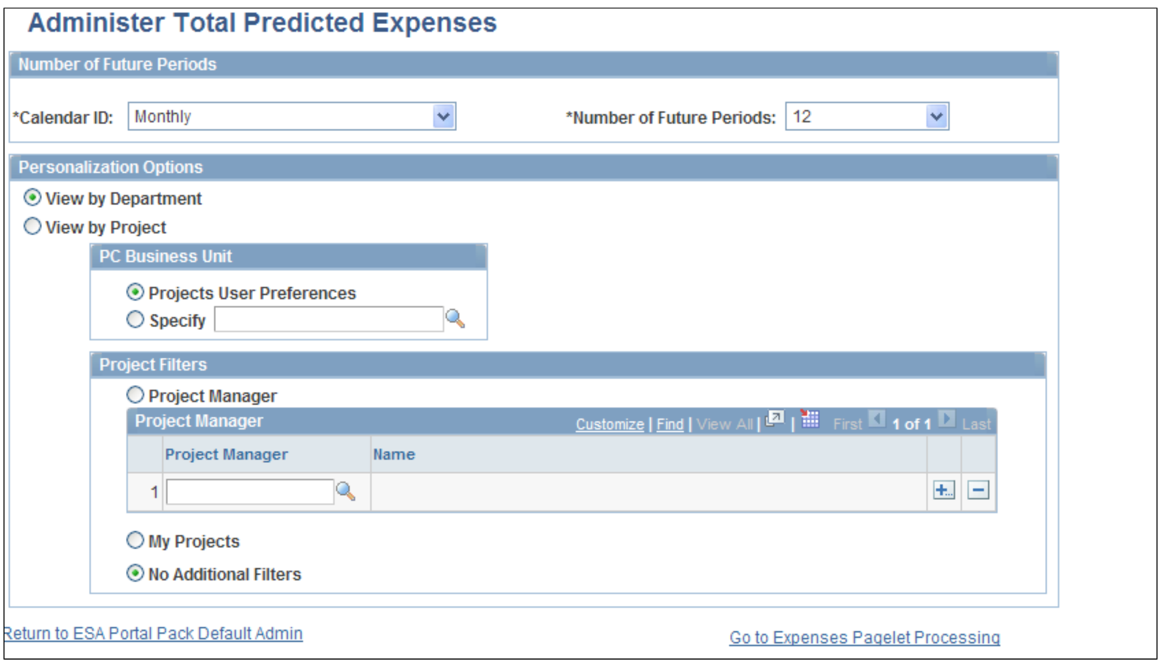
Administer Total Predicted Expenses Page

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

Navigation:

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

This example illustrates the fields and controls on the Administer Total Predicted Expenses page.



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

Total Predicted Expenses Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Total Predicted Expenses.**

Field or Control	***Description***
Department or **Project**	Click the link in the **Department** or **Project** column to access the Total Predicted Expenses Summary page and drill down to a specific travel authorization.
More	Click the **More** link on the Total Predicted Expenses pagelet to display more travel authorization data. PeopleSoft Expenses displays the More link only when there are more than five Department IDs or Project IDs, depending on how you set up your system.

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

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

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

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

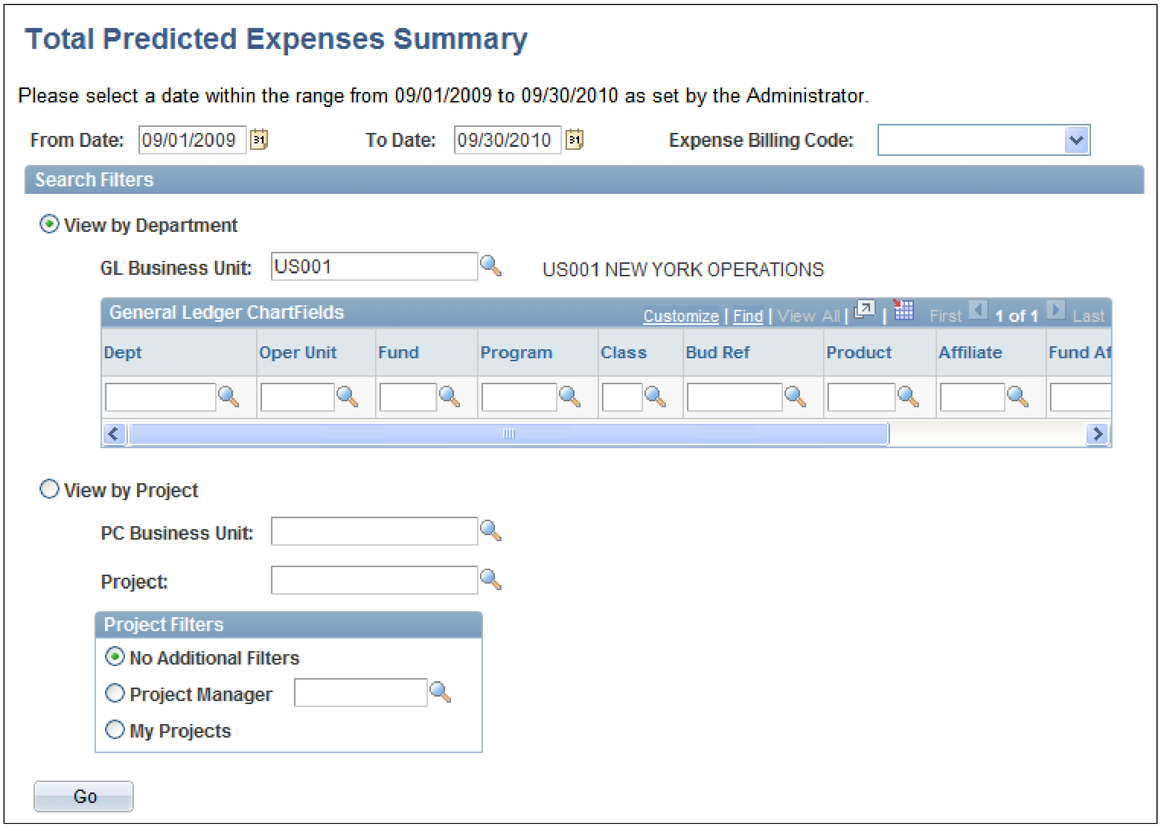
Total Predicted Expenses Summary Page

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

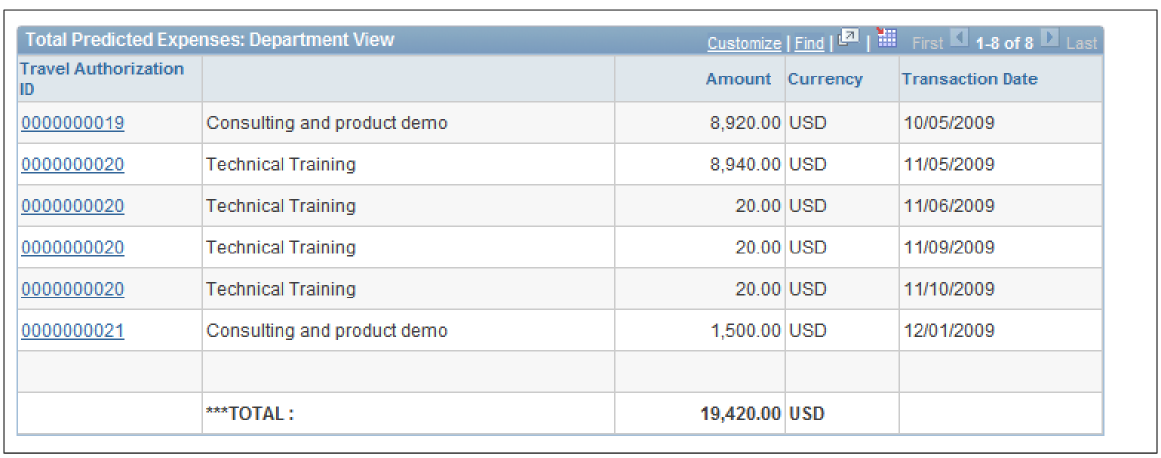
Navigation:

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

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



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



Travel Authorization ID		Amount	Currency	Transaction Date
0000000019	Consulting and product demo	8,920.00	USD	10/05/2009
0000000020	Technical Training	8,940.00	USD	11/05/2009
0000000020	Technical Training	20.00	USD	11/06/2009
0000000020	Technical Training	20.00	USD	11/09/2009
0000000020	Technical Training	20.00	USD	11/10/2009
0000000021	Consulting and product demo	1,500.00	USD	12/01/2009
	***TOTAL :	19,420.00	USD	

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

Field or Control	***Description***
Expense Billing Code	Enter a billing code to filter on. If none is specified, PeopleSoft Expenses retrieves all billing codes.

Search Filters

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

Field or Control	***Description***
Go	Click to display a list of total approved travel authorizations that fall within your selection criteria.

Total Predicted Expenses: Department View or Project View

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

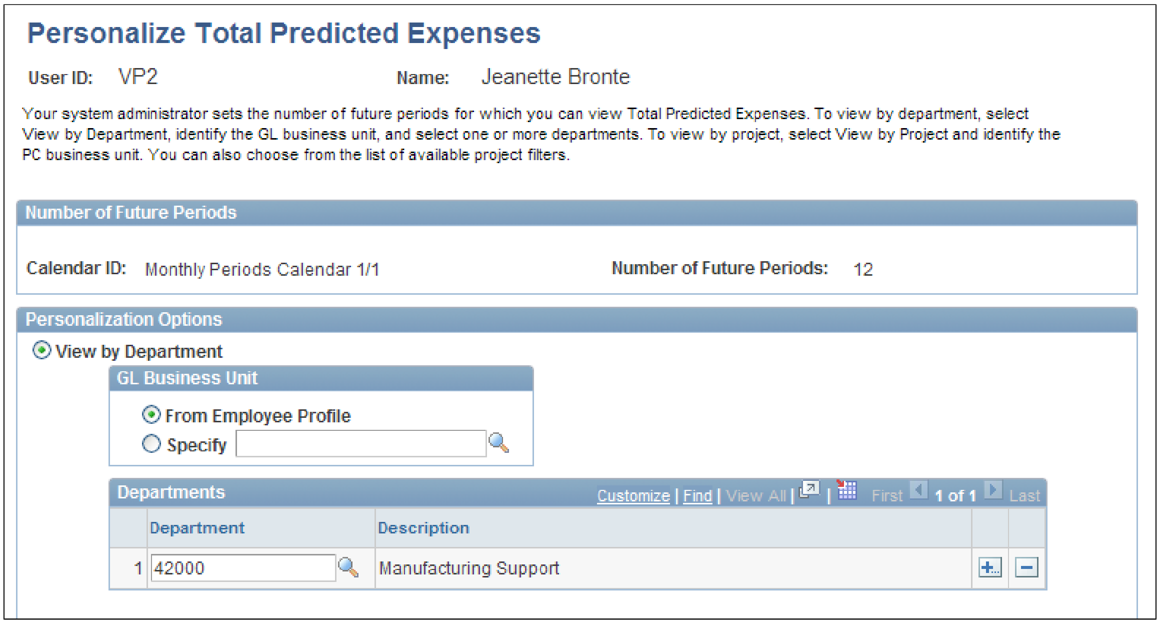
Personalize Total Predicted Expenses Page

Use the Personalize Total Predicted Expenses page (EX_PE_PRED_PRS) to set up user-specific defaults to filter on for the Total Predicted Expenses pagelet.

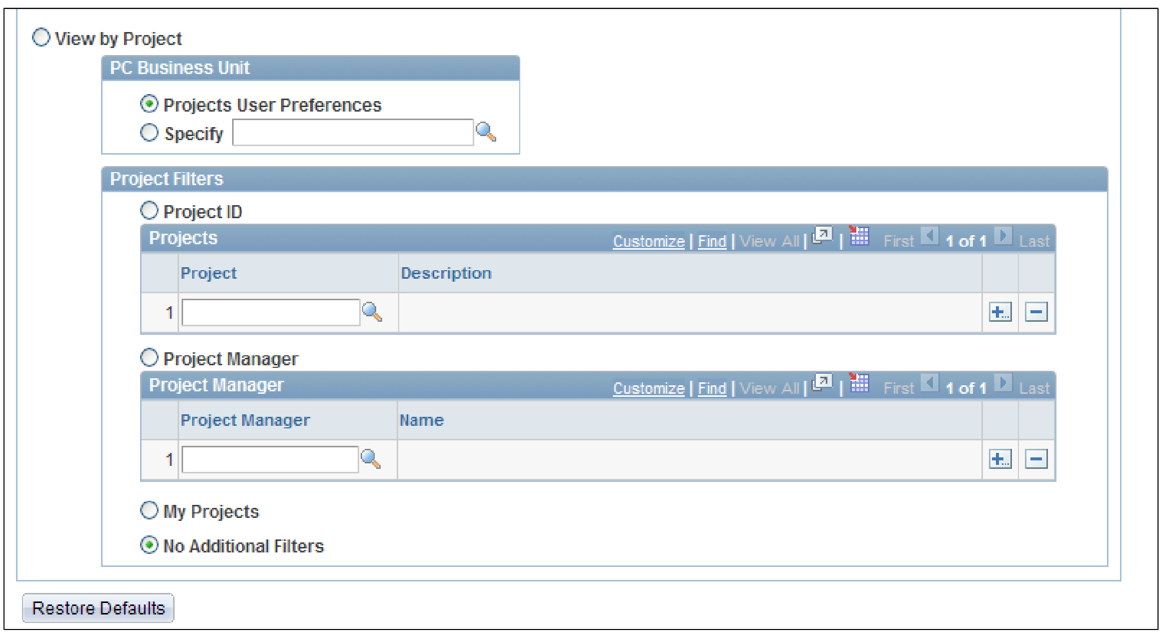
Navigation:

Click the **Customize** icon on the Total Predicted Expenses pagelet.

This example illustrates the fields and controls on the Personalize Total Predicted Expenses page (1 of 2).



This example illustrates the fields and controls on the Personalize Total Predicted Expenses page (2 of 2).



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

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

Using Operational Threshold Alerts (OTA) for PeopleSoft Expenses

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

Pages Used to Personalize OTAs for PeopleSoft Expenses

Page Name	***Definition Name***	***Usage***
Personalize Operational Threshold Alerts Page	PC_PE_OTA_PRS	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels. See Understanding the Total Expense Costs OTA and the Personalize Operational Threshold Alerts Page for more information.
Operational Threshold Alert Pagelet	PC_PE_OTA_LIST	View up to five Operational Threshold Alerts that display real-time monitoring data according to tolerance levels that you define. See the Operational Threshold Alert Pagelet for more information.
Operational Threshold Chart Pagelet	PC_PE_OTA_CHART	View an Operational Threshold Alert that displays a real-time monitoring chart according to tolerance levels that you define. See theOperational Threshold Chart Pagelet for more information.
Personalize Total Expense Costs Page	EX_PE_TEXP_PRS	Define default data for calculating and displaying the Total Expense Costs OTA.

Understanding the Total Expense Costs OTA

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

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

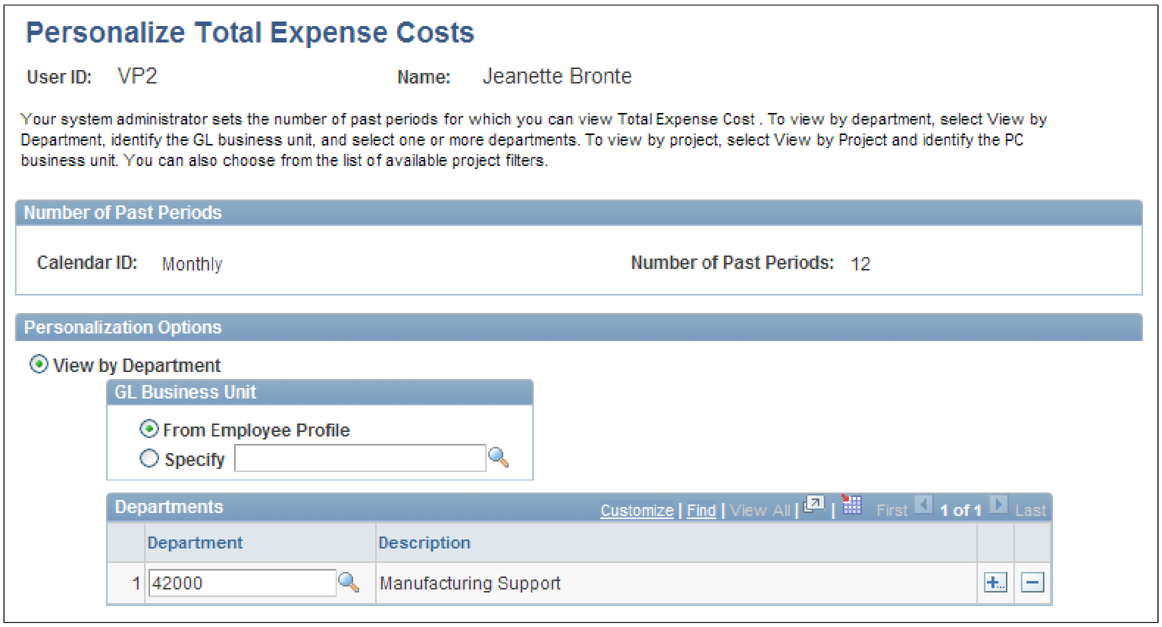
Personalize Total Expense Costs Page

Use the Personalize Total Expense Costs page (EX_PE_TEXP_PRS) to define default data for calculating and displaying the Total Expense Costs OTA.

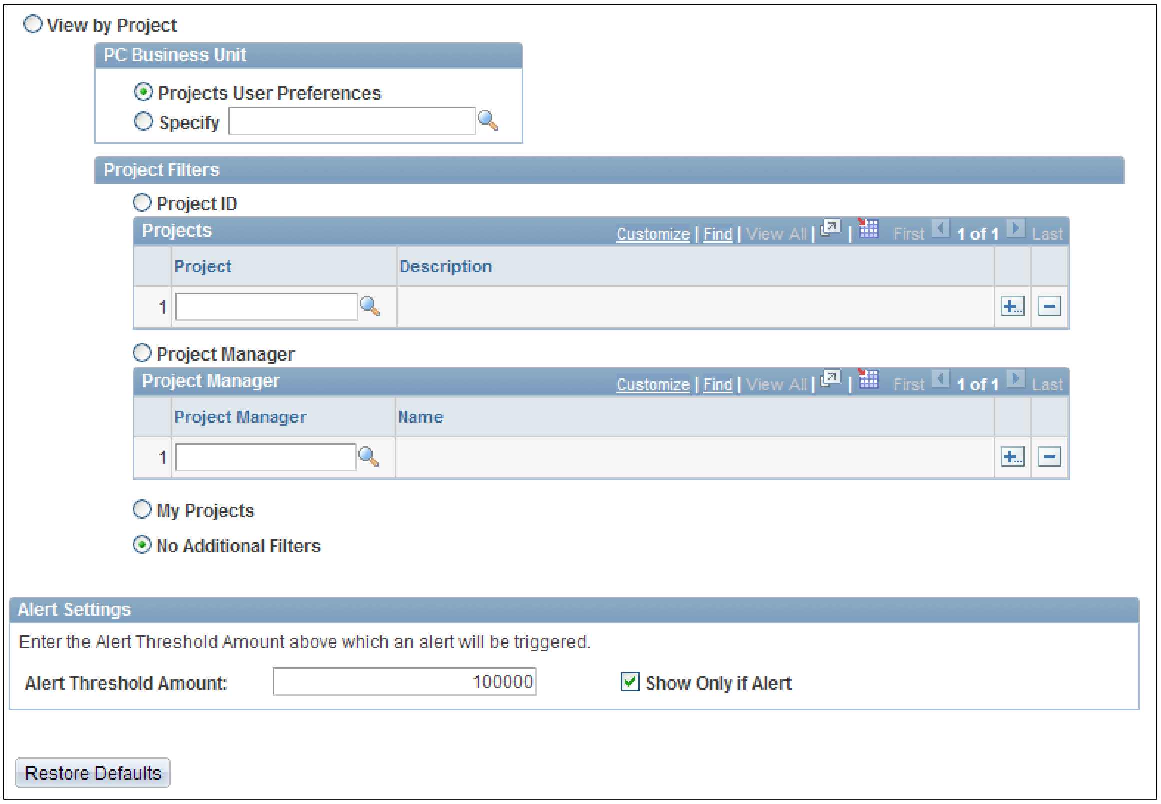
Navigation:

Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Total Expense Costs page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Personalize Total Expense Costs page (2 of 2). You can find definitions for the fields and controls later on this page.



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

Field or Control	***Description***
Alert Threshold Amount	Enter an Alert Threshold dollar amount that triggers an alert. When the PeopleSoft Expenses dollar amount exceeds the target threshold, the OTA page displays a red indicator.
Show Only if Alert	Select to indicate that an OTA displays only if the measurement threshold reaches the level at which an alert or warning is triggered.
Return to Personalize Alerts	Click to return to the Personalize Operational Threshold Alerts page.

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

Understanding Transactions in Progress

This topic discusses how to search for transactions in progress (TIP) and view them in detail and charts.

Pages Used to View and Personalize Transactions in Progress

Page Name	***Definition Name***	***Usage***
Transactions in Progress - Expenses (Details) Page	EX_TIP	Add a transactions in progress, specify criteria, and click Search to display a list of expense and time report transactions in progress.
Transactions in Progress - Expenses (Graphical) Page	EX_TIP2	Uses the search criteria to display a graphical view of expense and time report transactions in progress.
Personalize TIP for Expense Reports Page	EX_PE_TIP_PRS	Define default display information for TIP pagelets for expense reports.
Personalize TIP for Time Reports Page	EX_PE_TIPTE_PRS	Define default display information for TIP pagelets for time reports. See Personalize TIP for Expense Reports Page.
Expenses Pagelet Processing Page	RUN_EX_PORTAL_AE	Run the Expenses Pagelet Processing process to convert expense data to various currencies and summarize the information.

Understanding TIP Stages

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

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

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

The TIP Stages

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

There are five TIP stages for PeopleSoft Expenses:

1. PeopleSoft Expenses estimated but actual expenses not submitted. This stage identifies expense reports with a status of *pending.* (EXESTNE)

2. PeopleSoft Expenses recorded but not approved. This stage identifies expense reports with a status of *submitted, partially approved,* and *approved.* (Still pending a final approval for payment.) (EXRECNA)

3. PeopleSoft Expenses approved but not paid or reimbursed. This stage identifies expense reports in *approved for payment* status. (EXAPRNP)

4. Time estimated but actual time not entered. This stage identifies time reports with a status of *pending.* (TEESTNE)

5. Time recorded but not approved. This stage identifies time reports with a status of *submitted* and *partially approved.* (TERECNA)

6. Travel authorizations with Project ChartFields for which the actual expenses are pending and have not been recorded. (TAUTNE)

For TIP stages 1 through 4 and stage 6, which are targeted at pending transactions, PeopleSoft Expenses uses the creation date to calculate the days inactive amount. There is no need to evaluate the approval level in this instance because the TIP stage refers to pending transactions.

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

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

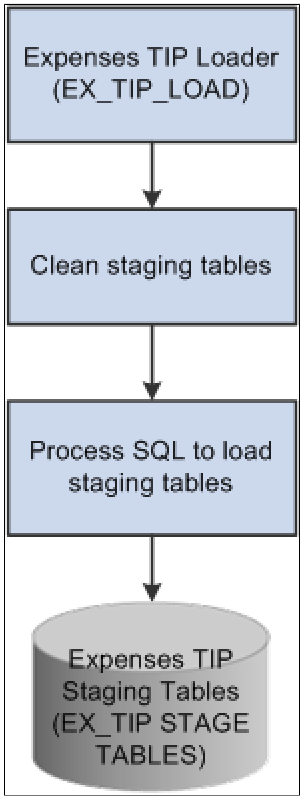
Using the Expenses Transaction in Progress (EX_TIP_LOAD) Application Engine Batch Process

The Expenses Transaction in Progress Loader application engine (EX_TIP_LOAD) enables users to run a batch process to load a large amount of transaction in progress data from PeopleSoft Expenses. Using this process decreases the amount of time it takes to load the transactions in progress from the feeder systems to the TIP staging tables and display them in the Project Costing Transaction in Progress page.

When the EX_TIP_LOAD application is run, it deletes the staging tables, inserts any new TIP exceptions, and populates the EX_TIP staging tables so that you can search for and display these PeopleSoft Expenses transactions in progress on the Transactions in Progress page in PeopleSoft Project Costing.

This diagram describes the Expenses TIP Loader process flow to the staging tables.

Expenses TIP Loader process flow to the staging tables



Understanding How to Search for Transactions in Progress

To view PeopleSoft Expenses TIP pagelets, you must add a TIP stage type for each of the 6 expense reports and time reports. Select Travel and Expenses, Real-Time Analysis, Review Transaction in Progress and click the Add a New Value link. Click the **Look up** icon to obtain the search results. After selecting a TIP stage type, you can specify your search criteria defaults in the Transactions in Progress - Expenses (Details) page.

TIP stage types for PeopleSoft Expenses are:

- EXESTNE
- EXRECNA
- EXAPRNP
- TEESTNE
- TERECNA
- TAUTNE

This example illustrates the fields and controls on the Look Up Transactions in Progress search page.

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

Note: Although there are 23 TIP stages listed; only 6 belong to PeopleSoft Expenses. If you select a PeopleSoft Project Costing TIP stage, the Project Costing TIP inquiry page appears.

Related Links

"Transactions in Progress" (PeopleSoft Project Costing)

Transactions in Progress - Expenses (Details) Page

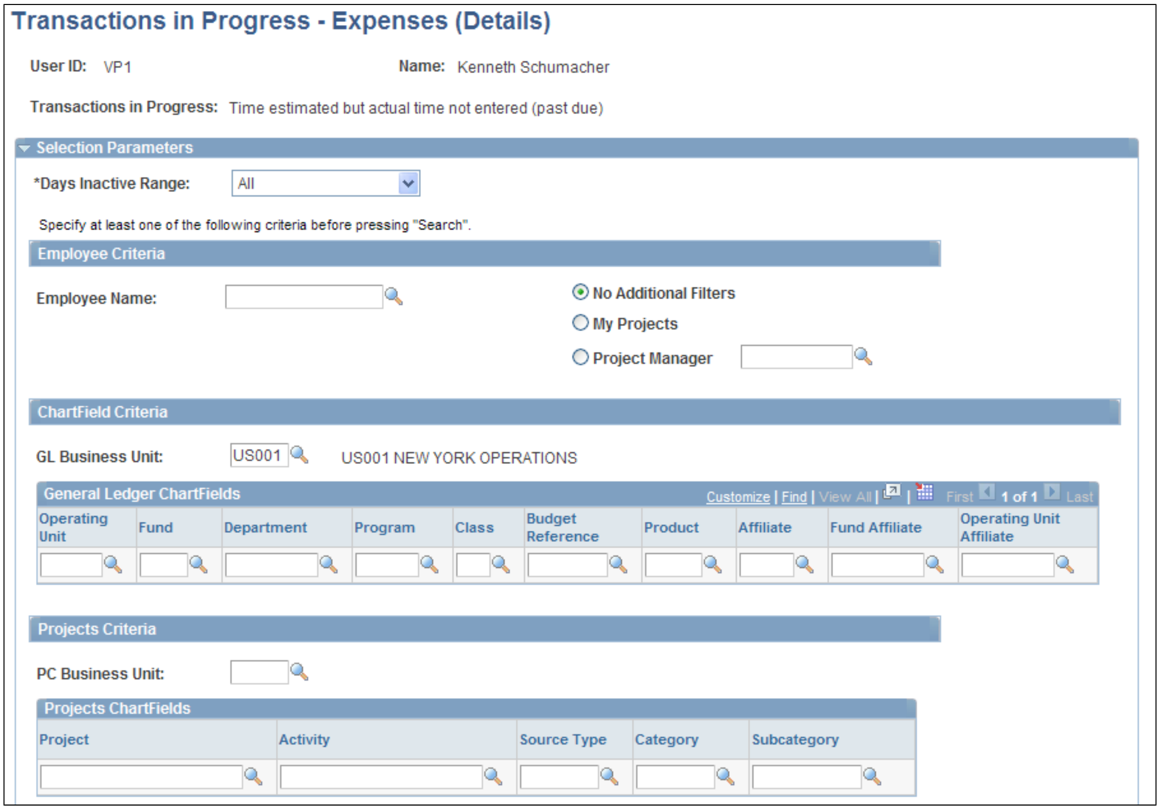
Use the Transactions in Progress - Expenses (Details) page (EX_TIP) to add transactions in progress, specify criteria, and click Search to display a list of expense and time report transactions in progress.

Navigation:

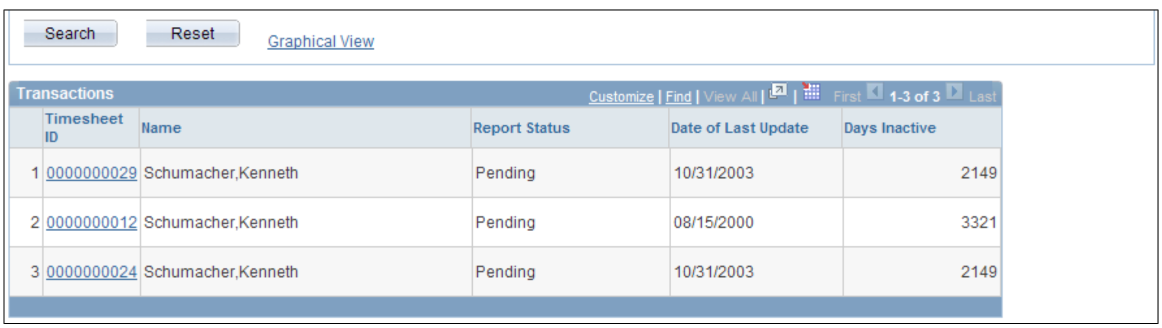
Travel and Expenses > **Real-Time Analysis** > **Review Transaction in Progress**

Manager Self-Service > **Travel and Expenses Center** > **Analysis** > **View Transactions in Progress**

This example illustrates the fields and controls on the Transactions in Progress - Expenses (Details) page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Transactions in Progress - Expenses (Details) page (2 of 2). You can find definitions for the fields and controls later on this page.



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

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

Field or Control	***Description***
Days Inactive Range	Displays the number of days since the last activity. Select *31 to 60, 61 to 90, <31, >90,* or *All.* PeopleSoft Expenses calculates days inactive using the: • Creation date for Expenses not Submitted and for Time Reported but not Submitted. • Submission date for Expenses Recorded but not Approved and for Time Recorded but not Approved. • Last approval date or submission date for Expenses Approved but not Paid, depending on the approval rules. If the transaction is not approved, PeopleSoft Expenses uses the submission date; if it is approved or partially approved, PeopleSoft Expenses uses the last approval date. Enter the remaining search criteria to filter transactions in progress. Click the **Search** button for PeopleSoft Expenses to retrieve and display a list of transactions in progress. **Note:** PeopleSoft Expenses saves your selection criteria (by User ID and TIP stage) so you do not need to re-enter the criteria each time you access this page.
Graphical View	Click to see the Transactions in Progress - Expenses (Graphical) page. This link only appears if there is data in the Transactions grid.
Report ID	Click to drill down to the Expense Reports or Time Reports Detail page. Click the Return to TIP Inquiry Page link to return to the TIP Inquiry page.

Transactions in Progress - Expenses (Graphical) Page

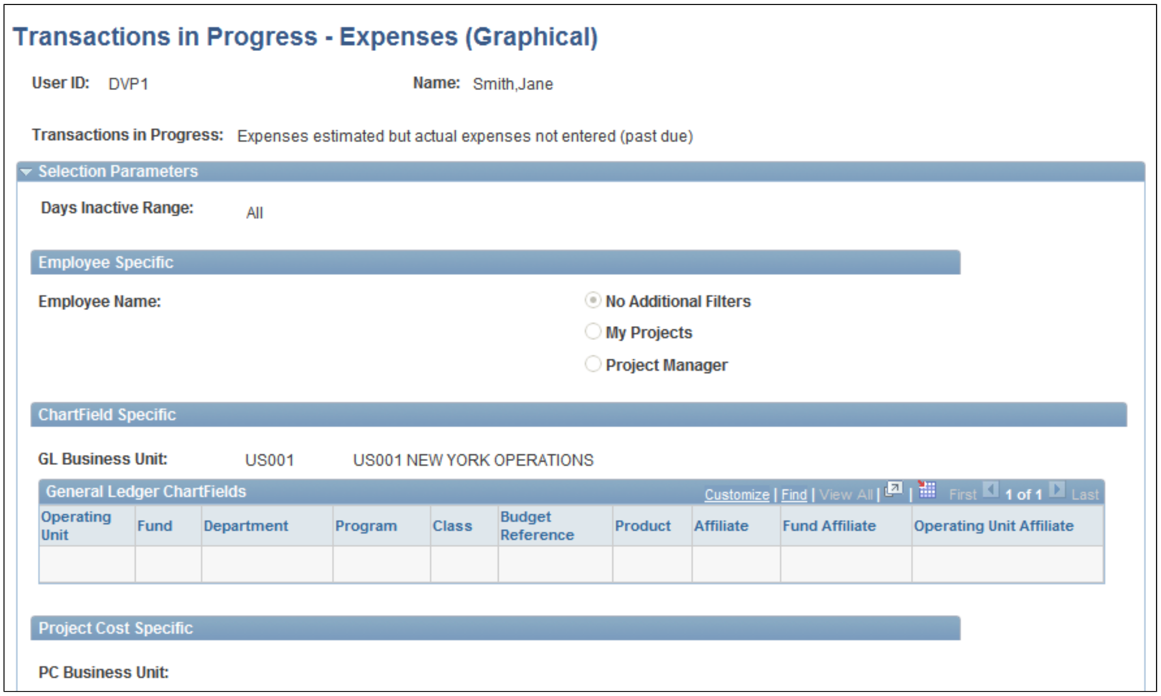
Use the Transactions in Progress - Expenses (Graphical) page (EX_TIP2) to display a graphical view of expense and time report transactions in progress.

Navigation:

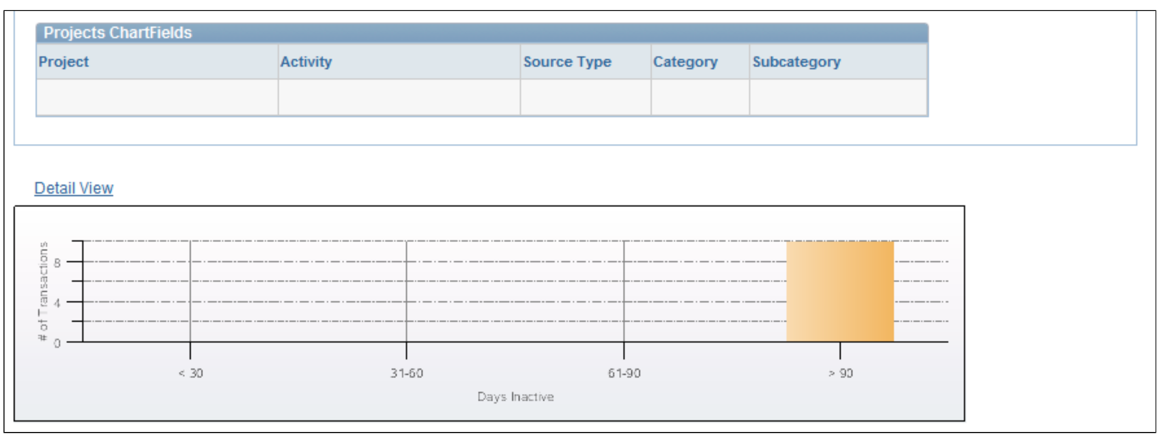
Travel and Expenses > **Real-Time Analysis** > **Review Transaction in Progress** > **click the Graphical View link**

Manager Self-Service > **Travel and Expenses Center** > **Analysis** > **View Transactions in Progress** > **click Search** > **then the Graphical View link.**

This example illustrates the fields and controls on the Transactions in Progress - Expenses (Graphical) page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Transactions in Progress - Expenses (Graphical) page (2 of 2). You can find definitions for the fields and controls later on this page.



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

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

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

Personalize TIP for Expense Reports Page

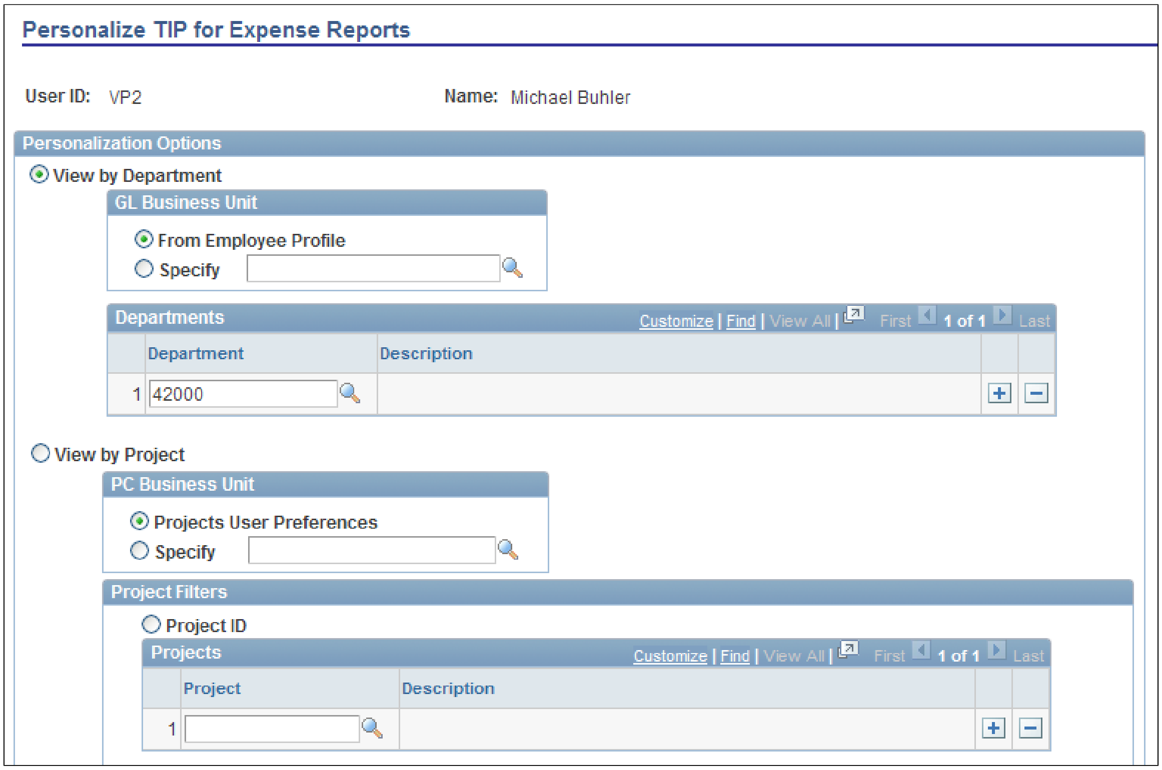
Use the Personalize TIP for Expense Reports page (EX_PE_TIP_PRS) to define default display information for TIP pagelets for expense reports.

Navigation:

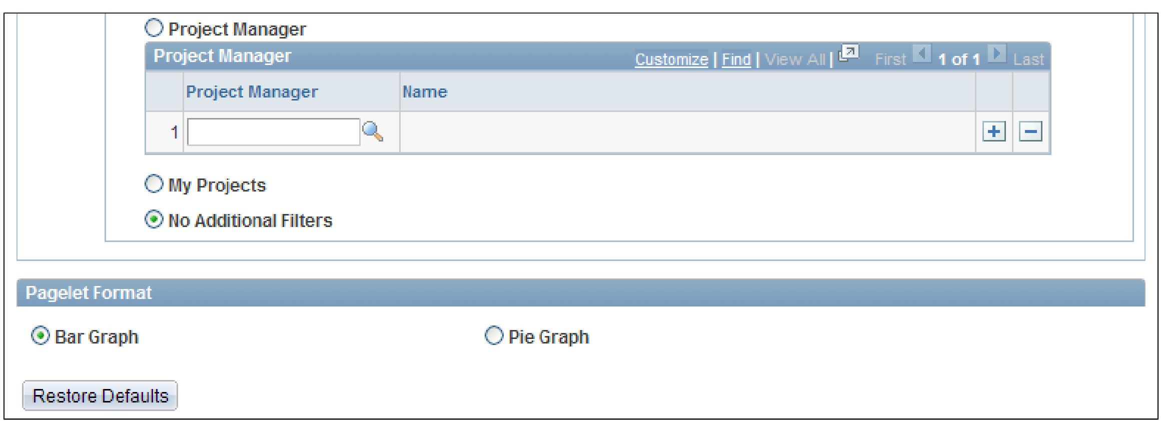
Click the **Customize** icon on a TIP pagelet for expense reports.

To access the administrator pages, go to **Set Up Financials/Supply Chain** > **Pagelets** > **Enterprise Service Automation** > **Portal Pack Defaults** > **Expense Report TIP**

This example illustrates the fields and controls on the Personalize TIP for Expense Reports page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Personalize TIP for Expense Reports page (2 of 2). You can find definitions for the fields and controls later on this page.



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

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

Field or Control	***Description***
Bar Graph	Select to view search results as a bar graph.

Field or Control	***Description***
Pie Graph	Select to view search results as a pie graph.

Note: The administrator sets the defaults for displaying TIP pagelets as a **Bar Graph** or a **Pie Graph.**
If a user personalizes a time report pagelet and changes the default selection for **Bar Graph** or **Pie Graph,** the two time report pagelets will be displayed the same way. That is, both time report pagelets can be displayed either as a bar graph or as a pie graph, not one of each.
Similarly, if a user personalizes an expense report pagelet and changes the default selection for **Bar Graph** or **Pie Graph,** the three expense report pagelets will be displayed the same way. That is, the three expense report pagelets can only be displayed either as a bar graph or as a pie graph, not one of each.

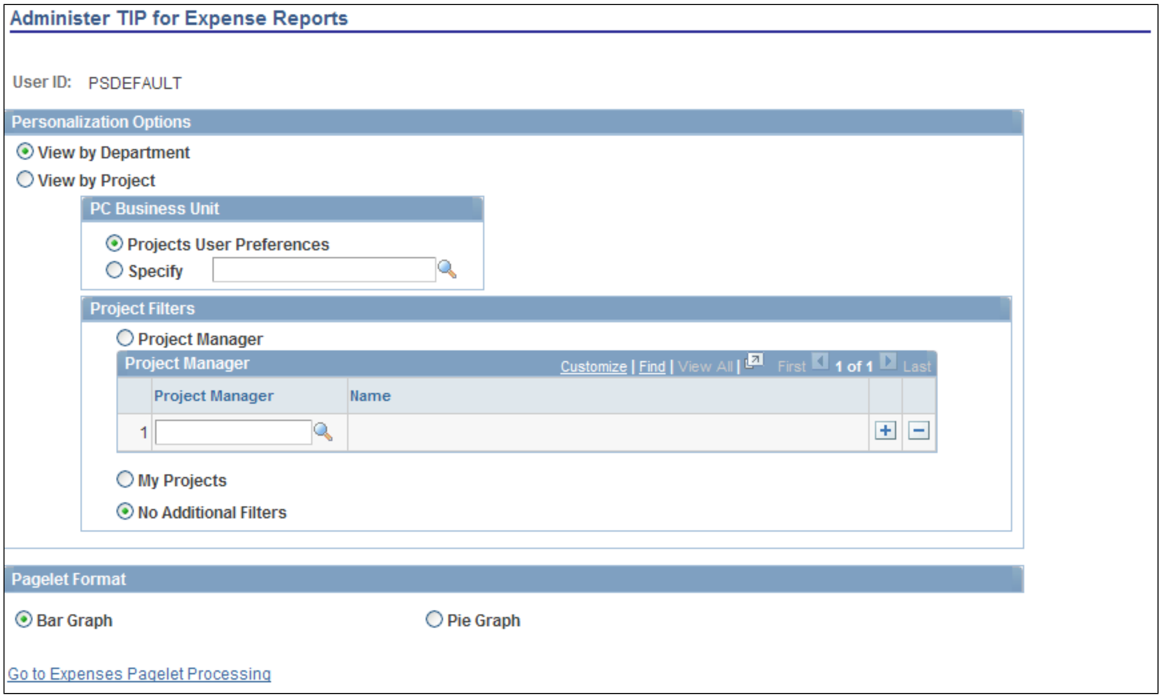
Administer Expense Report and Time Report Pagelets

Use the Administer TIP for Expense Reports or the Administer TIP for Time Reports page to obtain data for PeopleSoft Expenses and Time pagelets .

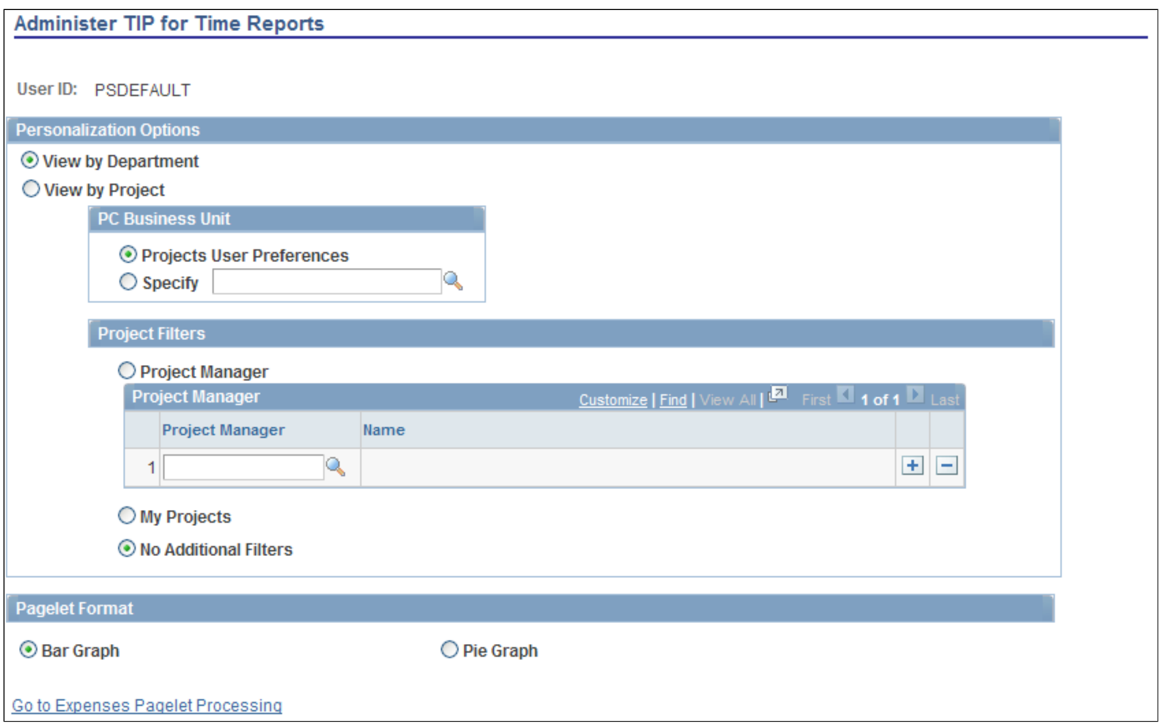
To obtain data for PeopleSoft Expenses pagelets, an administrator must define filter criteria and then run the Expenses Pagelet Processing process. This process converts expense data to various currencies so that the Total Expense Costs Operational Threshold Alert (OTA) and Transactions in Progress pagelets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

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

This example illustrates the fields and controls on the Administer TIP for Expense Reports page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Administer TIP for Time Reports page. You can find definitions for the fields and controls later on this page.



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

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

Field or Control	*Description*
Go to Expenses Pagelet Processing (Travel and Expenses, Real-Time Analysis, Update Expenses Pagelet Info, Expenses Pagelet Processing)	Click to run the process that populates the tables that enable you to view transactions in progress data and pagelets. When you run Expenses Transaction in Progress Loader application engine (EX_TIP_LOAD), you can run a batch process to load a large amount of transactions in progress data from PeopleSoft Expenses. This decreases the amount of time it takes to load the transactions in progress from the feeder systems to the TIP staging tables and display them in the Project Costing Transaction in Progress page.

Expenses Pagelet Processing Page

Use the Expenses Pagelet Processing page (RUN_EX_PORTAL_AE) to run the Expenses Pagelet Processing process to convert expense data to various currencies and summarize the information.

Navigation:

- **Travel and Expenses** > **Real-Time Analysis** > **Update Expenses Pagelet Info** > **Expenses Pagelet Processing**
- Click the **Go to Expenses Pagelet Processing** link on the Administer TIP for Time Reports page.
- Click the **Go to Expenses Pagelet Processing** link on the Administer TIP for Expense Reports page.

The Expenses Transaction in Progress Loader application engine (EX_TIP_LOAD) enables you to run a batch process to load a large amount of transactions in progress data from PeopleSoft Expenses in order to decrease the amount of time it takes to load the transactions in progress from the feeder systems to the TIP staging tables and display them in the Project Costing Transaction in Progress page.

Chapter 13

Using Pagelets Enabled by PeopleSoft Program Management

Viewing Change Control Analysis

This topic discusses how to view change control analysis information and personalize the Change Control Analysis pagelet.

Pages Used to View Change Control Analysis

Page Name	***Definition Name***	***Usage***
Change Control Analysis Pagelet	PC_PE_CHG_ANALYSIS	View the top five projects with the highest number of changes.
Personalize Change Control Analysis Page	PC_PE_CHC_PRS	Define default display information for the Change Control Analysis pagelet.

Change Control Analysis Pagelet

Use the Change Control Analysis pagelet (PC_PE_CHG_ANALYSIS) to view the top five projects with the highest number of changes.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Change Control Analysis.**

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

Field or Control	***Description***
<Project ID>	Click the project ID link to access the Change Control Monitor page in PeopleSoft Program Management to view a list of changes to projects and activities for which change control is enabled.
Show All / Enhanced	Click to access the Change Control Analysis page in PeopleSoft Program Management, which contains more details about project changes.

Personalize Change Control Analysis Page

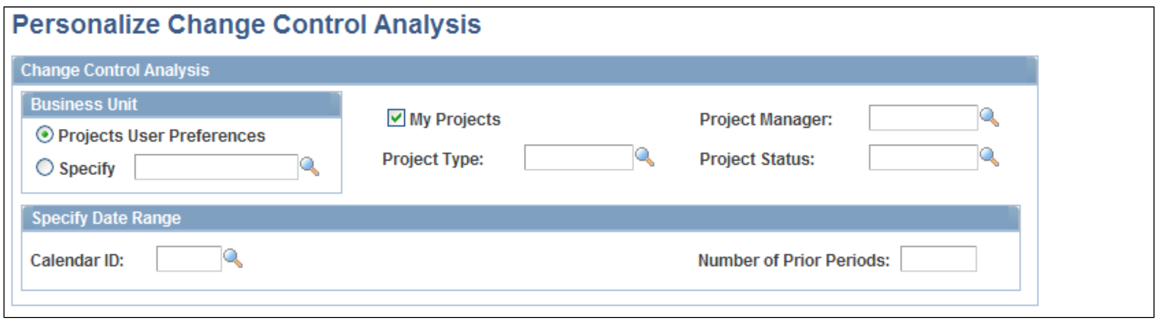
Use the Personalize Change Control Analysis page (PC_PE_CHC_PRS) to define default display information for the Change Control Analysis pagelet.

Navigation:

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

  Click the **Change Control Analysis** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Customize Change Control Analysis** icon on the Change Control Analysis pagelet.

This example illustrates the fields and controls on the Personalize Change Control Analysis page. You can find definitions for the fields and controls later on this page.



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

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

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

  The administrator uses the ESA Portal Pack Pagelet Default Administration page to set up default filter criteria for all Enterprise Service Automation portal pagelets.
- Other users access this page by clicking the **Customize Change Control Analysis** icon on the Change Control Analysis pagelet.

Field or Control	***Description***
User Preferences	Select to analyze change control for only those projects with the project business unit that is specified in your user preferences.
Specify	Select to analyze change control for projects in a project business unit other than the business unit that is specified in your user preferences. If you select **Specify,** you must enter a business unit value.

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

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

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

Field or Control	*Description*
Restore Defaults	Click to restore the default selection criteria that the administrator establishes on the ESA Portal Pack Pagelet Default Administration page. The **Restore Defaults** button appears if you access this page by clicking the **Customize Change Control Analysis** link on the Change Control Analysis pagelet.

Viewing Critical Issues by Project

This topic discusses how to view critical issues by project and personalize the Critical Issues by Project pagelet.

Pages Used to View Critical Issues by Project

Page Name	*Definition Name*	*Usage*
Critical Issues by Project Pagelet	PC_PE_CRIT_BY_PROJ	View a maximum of the top five projects that have the most open critical issues.
Personalize Critical Issues by Project Page	PC_PE_CRIT_PRS	Define default display information for the Critical Issues by Project pagelet.

Critical Issues by Project Pagelet

Use the Critical Issues by Project pagelet (PC_PE_CRIT_BY_PROJ) to view a maximum of the top five projects that have the most open critical issues.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Critical Issues by Project.**

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

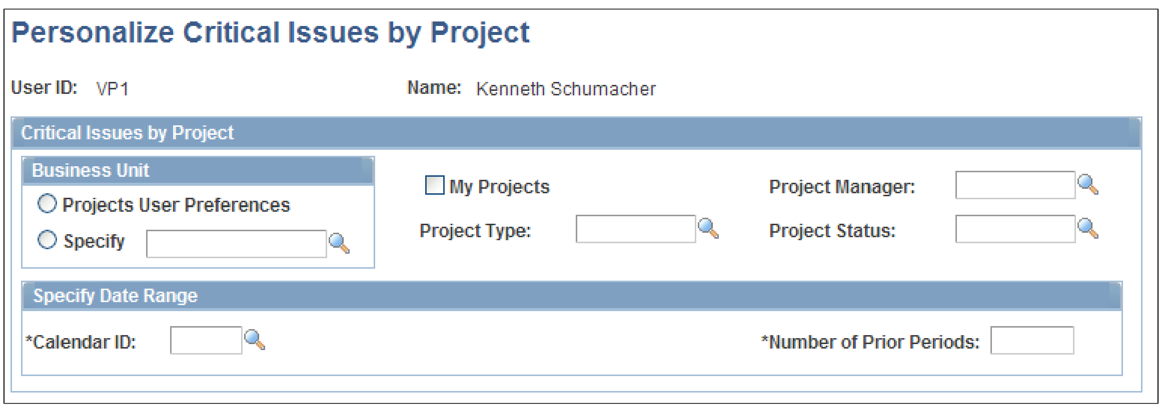
Personalize Critical Issues by Project Page

Use the Personalize Critical Issues by Project page (PC_PE_CRIT_PRS) to define default display information for the Critical Issues by Project pagelet.

Navigation:

Click the **Customize Critical Issues by Project** icon on the Critical Issues by Project pagelet.

This example illustrates the fields and controls on the Personalize Critical Issues by Project page.



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

Viewing Issues by Priority

This topic discusses how to view issues by priority.

Page Used to View Issues by Priority

Page Name	*Definition Name*	*Usage*
Issues by Priority Pagelet	PC_PE_ISU_CNT_PRIO	View a chart that displays all the high, medium, and low issues that are assigned to the user.

Issues by Priority Pagelet

Use the Issues by Priority pagelet (PC_PE_ISU_CNT_PRIO) to view a chart that displays all the high, medium, and low issues that are assigned to the user.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Issues by Priority.**

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

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

Viewing Issue Priority by Project

This topic discusses how to view issues by priority by project and personalize the Issue Priority by Project pagelet.

Pages Used to View Issue Priority by Project

Page Name	*Definition Name*	*Usage*
Issue Priority by Project Pagelet	PC_PE_PRIO_BY_PROJ	View a maximum of the top five projects that have the greatest number of open issues.
Personalize Issue Priority by Project Page	PC_PE_PRIO_PRS	Define default display information for the Issue Priority by Project pagelet.

Issue Priority by Project Pagelet

Use the Issue Priority by Project pagelet (PC_PE_PRIO_BY_PROJ) to view a maximum of the top five projects that have the greatest number of open issues.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Issue Priority by Project.**

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

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

Personalize Issue Priority by Project Page

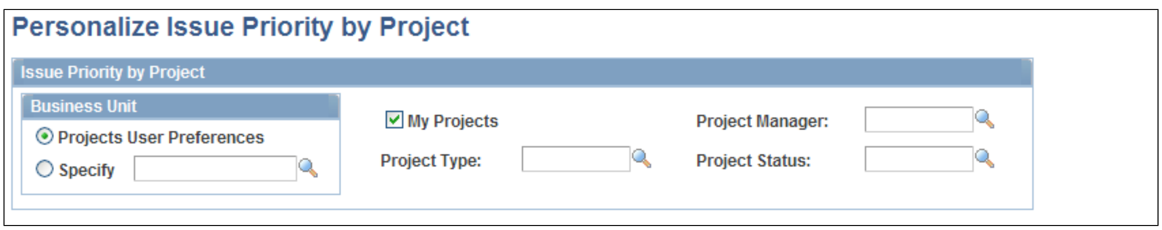
Use the Personalize Issue Priority by Project page (PC_PE_PRIO_PRS) to define default display information for the Issue Priority by Project pagelet.

Navigation:

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

  Click the **Issue Priority by Project** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Customize Issue Priority by Project** icon on the Issue Priority by Project pagelet.

This example illustrates the fields and controls on the Personalize Issue Priority by Project page. You can find definitions for the fields and controls later on this page.



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

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

Viewing Top Five Issues

This topic discusses how to view the top five issues and personalize the Top 5 Issues pagelet.

Pages Used to View Top Five Issues

Page Name	***Definition Name***	***Usage***
Top 5 Issues Pagelet	PGM_PE_TISU (wide) PGM_PE_TISU_N (narrow)	View up to five projects or programs that have the highest number of open high priority issues.
Personalize Top 5 Issues Page	PGM_PE_TISU_PRS	Define default display information for the Top 5 Issues pagelet.

Top 5 Issues Pagelet

Use the Top 5 Issues pagelet (PGM_PE_TISU [wide] and PGM_PE_TISU_N [narrow]) to view up to five projects or programs that have the highest number of open high priority issues.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Top 5 Issues.**

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

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

Personalize Top 5 Issues Page

Use the Personalize Top 5 Issues page (PGM_PE_TISU_PRS) to define default display information for the Top 5 Issues pagelet.

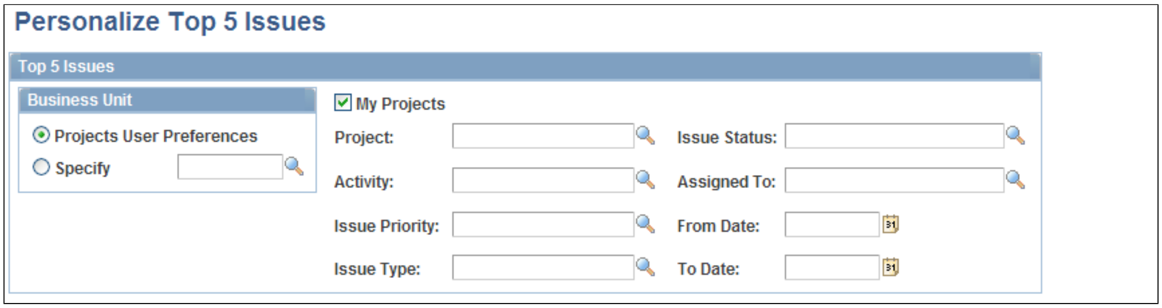
Navigation:

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

  Click the **Top 5 Issues** link on the ESA Portal Pack Pagelet Default Administration page.

- Click the **Customize Top 5 Issues** icon on the Top 5 Issues pagelet.

This example illustrates the fields and controls on the Personalize Top 5 Issues page.



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

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

Viewing Top Five Risks

This topic discusses how to view the top five risks and personalize the Top 5 Risks pagelet.

Pages Used to View Top Five Risks

Page Name	***Definition Name***	***Usage***
Top 5 Risks Pagelet	PGM_PE_TOP_RISK (wide) PGM_PE_TOP_RISK_N (narrow)	View up to five active or potential risks in order of the risk status and priority.
Personalize Top 5 Risks Page	PGM_PE_TOP_RSK_PRS	Define default display information for the Top 5 Risks pagelet.

Top 5 Risks Pagelet

Use the Top 5 Risks pagelet (PGM_PE_TOP_RISK [wide] and PGM_PE_TOP_RISK_N [narrow]) to view up to five active or potential risks in order of the risk status and priority.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Top 5 Risks.**

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

Personalize Top 5 Risks Page

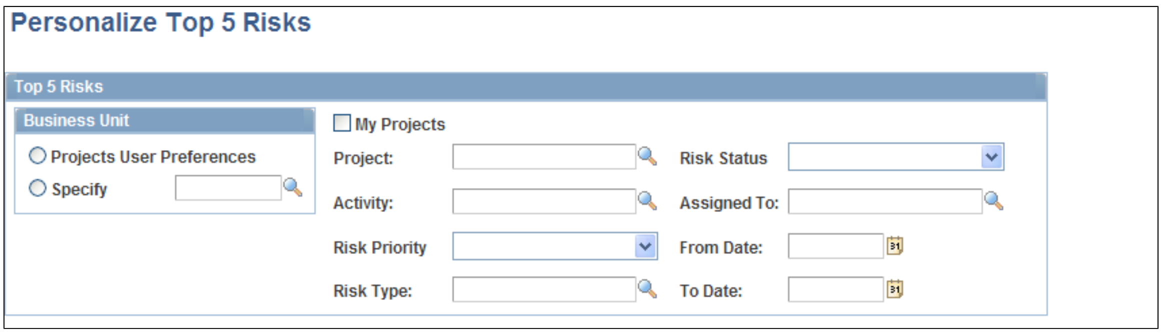
Use the Personalize Top 5 Risks page (PGM_PE_TOP_RSK_PRS) to define default display information for the Top 5 Risks pagelet.

Navigation:

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

  Click the **Top 5 Risks** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Customize Top 5 Risks** icon on the Top 5 Risks pagelet.

This example illustrates the fields and controls on the Personalize Top 5 Risks page.



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

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

Viewing Forecast to Complete Information

This topic discusses how to view forecast to complete information and personalize the Forecast to Complete pagelet.

Pages Used to View Forecast to Complete Information

Page Name	***Definition Name***	***Usage***
Forecast to Complete Pagelet	PC_PE_ETC_VARIANCE	View the forecast to complete date variance for a maximum of five projects with the greatest variance.

Page Name	***Definition Name***	***Usage***
Personalize Forecast to Complete Page	PC_PE_ETC_PRS	Define default display information for the Forecast to Complete pagelet.

Forecast to Complete Pagelet

Use the Forecast to Complete pagelet (PC_PE_ETC_VARIANCE) to view the forecast to complete date variance for a maximum of five projects with the greatest variance.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Forecast to Complete.**

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

Personalize Forecast to Complete Page

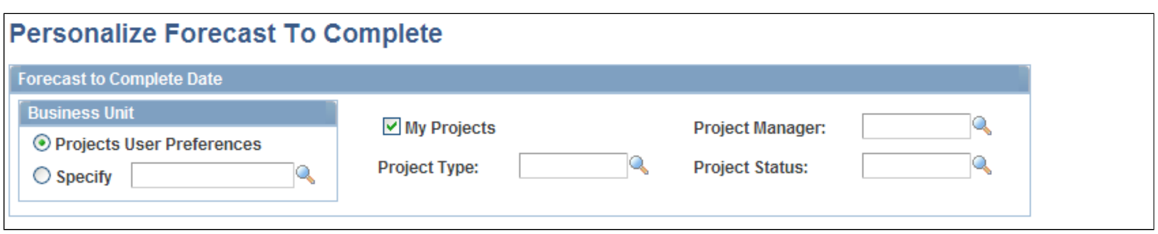
Use the Personalize Forecast to Complete page (PC_PE_ETC_PRS) to define default display information for the Forecast to Complete pagelet.

Navigation:

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

  Click the **Forecast to Complete Variance** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Customize Forecast to Complete** icon on the Forecast to Complete pagelet.

This example illustrates the fields and controls on the Personalize Forecast to Complete page.



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

Viewing Programs

This section discusses how to view My Program and personalize the My Program pagelet.

Pages Used to View Programs

Page Name	***Definition Name***	***Usage***
My Program Pagelet	PGM_PE_MYPGM (wide) PGM_PE_MYPGM_N (narrow)	View the specified program and the top four worst health projects.
Personalize My Program Page	PGM_PE_MYPGM_PRS	Define default display information for the My Program pagelet.

My Program Pagelet

Use the My Program pagelet (PGM_PE_MYPGM [wide] and PGM_PE_MYPGM_N [narrow]) to view the specified program and the top four worst health projects.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **My Program.**

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

Field or Control	***Description***
Project (ID)	Click this link for the selected program to access the Review Program page, which provides more detailed information about the program and projects under the program. When you click a link for one of the projects under the program, the pagelet transfers you to the Flexible Analysis page for the selected Project ID. This provides cost drill down functionality and the ability to reconfigure flexible analysis cost columns.
Program	Indicates if it is a program or a project.
Process Status	Displays the processing status of the project. Available values are: *Pending, Active,* or *Inactive.*
Project Manager	Displays the current project manager.
Project Type	Indicates the project type.
Project Status	Displays the state of the project in its progress toward completion.

Field or Control	***Description***
% Complete (percent complete)	Displays the percentage of the project work that is complete. This value can be entered by a project team member or automatically calculated by the system.
Health	Displays a visual indicator based on the health of the project. Available indicators are: Good (green diamond) Fair (yellow triangle) Poor (red square)

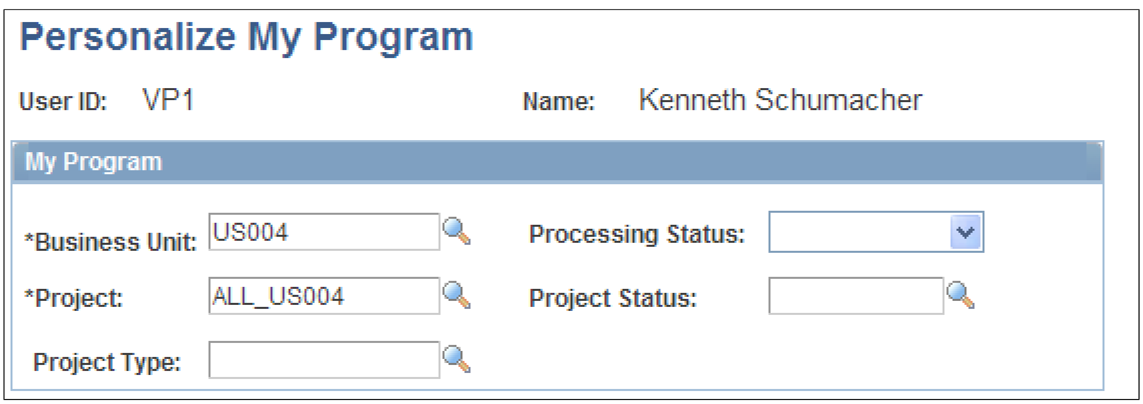
Personalize My Program Page

Use the Personalize My Program page (PGM_PE_MYPGM_PRS) to define default display information for the My Program pagelet.

Navigation:

Click the **Customize My Program** icon on the My Program pagelet.

This example illustrates the fields and controls on the Personalize My Program page.



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

Using OTAs for PeopleSoft Program Management

This topic discusses OTAs in PeopleSoft Program Management.

Pages Used to Personalize OTAs for PeopleSoft Program Management

Page Name	***Definition Name***	***Usage***
Personalize Operational Threshold Alerts Page	PC_PE_OTA_PRS	Select the OTAs to display on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page used to personalize individual OTA tolerance levels. See the Personalize Operational Threshold Alerts Page for more information.
Operational Threshold Alert Pagelet	PC_PE_OTA_LIST (wide) PC_PE_OTA_LIST_N (narrow)	View up to five OTAs that display real-time monitoring data according to tolerance levels that you define. See the Operational Threshold Alert Pagelet for more information.
Operational Threshold Chart Pagelet	PC_PE_OTA_CHART	View an OTA that displays a real-time monitoring chart according to tolerance levels that you define. See the Operational Threshold Chart Pagelet for more information.
Personalize Budget to Forecast Time Variance Page	PC_PE_BETV_PRS	Define default data for calculating and displaying the Budget to Forecast Time Variance OTA.
Personalize Projects Predicted to be Late Page	PC_PE_PJLT_PRS	Define default data for calculating and displaying the Projects Predicted to be Late OTA.
Personalize Actual to Forecast Utilization Page	RS_PE_RSAU_PRS	Specify the business unit, date range, filter, and alert variance threshold percentage for the Actual to Forecast Utilization analysis.
Personalize Forecast Utilization Page	RS_PE_RSFU_PRS	Specify the business unit, date range, filter, and alert threshold percentage for the Forecast Utilization OTA.

Understanding Using OTAs for PeopleSoft Program Management

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

Related Links

Viewing Enterprise Service Automation Navigation Collection Pagelets

Understanding OTA Calculations in PeopleSoft Program Management

This section discusses calculations for these OTAs:

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

Calculating Budget to Forecast Time Variance

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

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

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

Calculating Projects Predicted to be Late

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

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

Calculating Actual to Forecast Utilization

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

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

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

Calculating Forecast Utilization

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

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

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

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

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

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

Personalize Budget to Forecast Time Variance Page

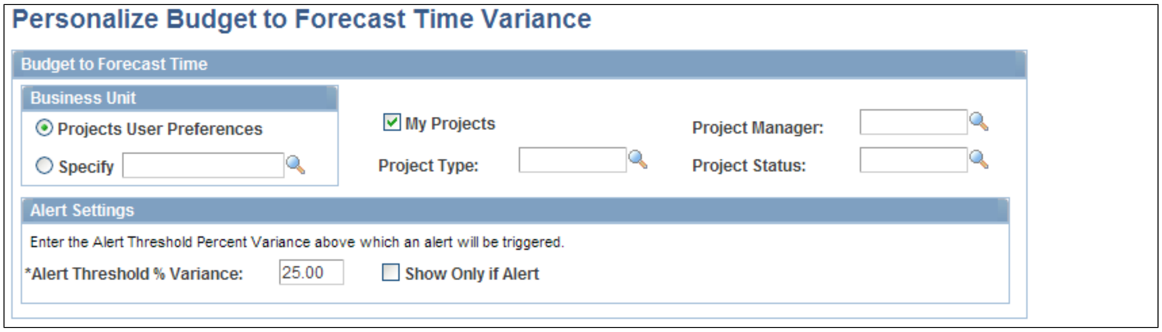
Use the Personalize Budget to Forecast Time Variance page (PC_PE_BETV_PRS) to define default data for calculating and displaying the Budget to Forecast Time Variance OTA.

Navigation:

- Click the **Budget to Forecast Time Variance** link on the ESA Portal Pack Pagelet Default Administration page.

- Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Budget to Forecast Time Variance page.



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

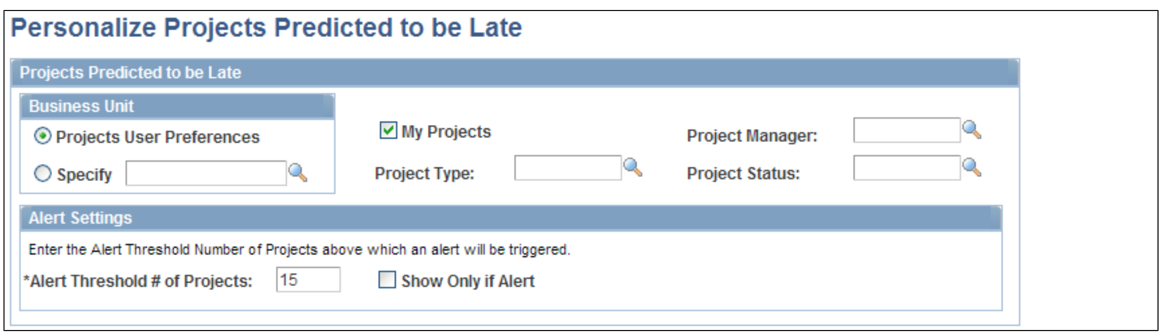
Personalize Projects Predicted to be Late Page

Use the Personalize Projects Predicted to be Late page (PC_PE_PJLT_PRS) to define default data for calculating and displaying the Projects Predicted to be Late OTA.

Navigation:

- Click the **Projects Predicted to be Late** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Projects Predicted to be Late page.



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

Personalize Actual to Forecast Utilization Page

Use the Personalize Actual to Forecast Utilization page (RS_PE_RSAU_PRS) to specify the business unit, date range, filter, and alert variance threshold percentage for the Actual to Forecast Utilization analysis.

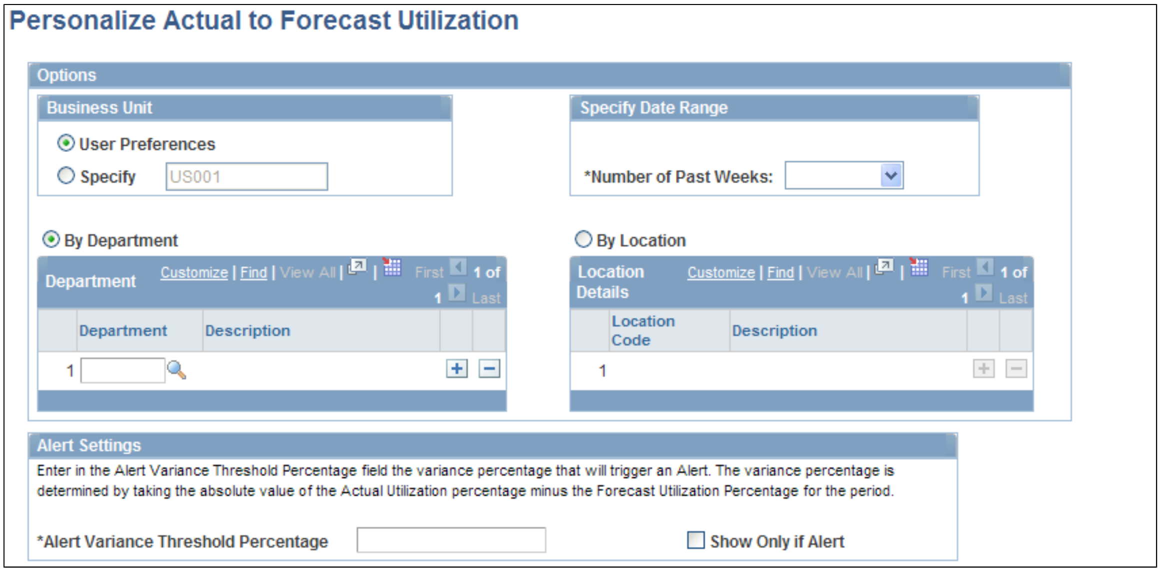
Navigation:

- Click **Actual to Forecast Utilization** on the ESA Portal Pack Pagelet Default Administration page.

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

  Click the **Personalize** icon on the Actual to Forecast Utilization line on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Actual to Forecast Utilization page. You can find definitions for the fields and controls later on this page.



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

Field or Control	***Description***
Number of Past Weeks	Specify the number of past weeks to analyze. The system starts from the previous week and counts back for the specified number of weeks. Utilization is calculated for the entire number of weeks as if it were one rolling period. **Note:** The Actual to Forecast Utilization OTA pagelet and chart does not include the current calendar week in the analysis. The most recent calendar week (prior to the current week) counts as *01*. The maximum number of weeks that can appear on the OTA chart is five weeks.

Field or Control	***Description***
Alert Variance Threshold Percentage	Enter the actual to forecast utilization variance percentage that triggers an alert on the OTA pagelet. The variance is the absolute value of the actual utilization percentage minus the forecast utilization percentage. If the variance is less than or equal to the value that you enter, a green visual indicator appears on the OTA pagelet. If the variance exceeds the value that you enter, a red alert visual indicator appears on the OTA pagelet. Enter the percentage as a whole or mixed number, such as *10* for 10 percent, or *15.5* for 15.5 percent. Enter a positive number.

Personalize Forecast Utilization Page

Use the Personalize Forecast Utilization page (RS_PE_RSFU_PRS) to specify the business unit, date range, filter, and alert threshold percentage for the Forecast Utilization OTA.

Navigation:

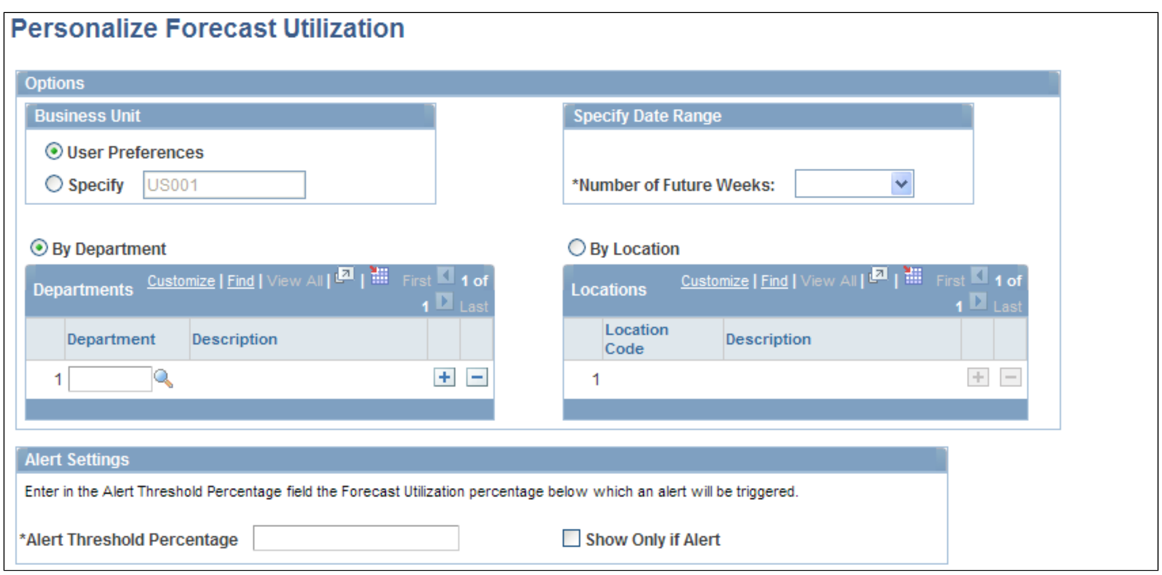
- **Set Up Financials/Supply Chain** > **Pagelets** > **Enterprise Service Automation** > **Portal Pack Defaults** > **ESA Portal Pack Pagelet Default Administration**

  Click **Forecast Utilization** on the ESA Portal Pack Pagelet Default Administration page.

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

  Click the **Personalize** icon on the Forecast Utilization row on the Personalize Operational Threshold Alerts page.

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



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

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

Field or Control	***Description***
User Preferences	Select to analyze resources from your HR business unit based on the utilization definition. **Note:** You define the billing actions, time reporting codes, and job codes that constitute utilized time for each HR business unit in the Utilization Definition component in PeopleSoft Program Management.
Specify	Select **Specify** and enter an HR business unit to analyze resources from a business unit other than the HR business unit that is defined in the utilization definition.
Number of Future Weeks	Select the period over which utilization is analyzed. The system starts with the current week and counts forward for the specified number of weeks. Utilization is calculated for the entire number of weeks as if it were one rolling period. **Note:** For the Forecast Utilization OTA, the current calendar week counts as week *01*. The maximum number of weeks that can appear on the OTA chart is five weeks.
By Department	Select **By Department** to analyze utilization for one department or multiple departments in aggregate. Click **Look up Department** to choose from a list of departments. Add as many departments as required. The default value for administrators is the administrator's department and business unit from the Job record (JOB). The default value for individual users is specified by the administrator.
By Location	Select **By Location** to analyze utilization for one location or multiple locations in aggregate. Click **Look up Location Code** to choose from a list of locations. Add as many locations as required. The default value for administrators is the administrator's location and business unit from the Job record. The default value for individual users is specified by the administrator.

Field or Control	***Description***
Alert Threshold Percentage	Enter the minimum acceptable forecast utilization percentage. If forecast utilization falls below the alert threshold percentage, a red alert visual indicator appears in the OTA pagelet. If forecast utilization equals or exceeds the alert threshold percentage, a green visual indicator appears in the OTA pagelet indicating that the forecast utilization is acceptable. Enter the percentage as a whole or mixed number, such as *85* for 85 percent, or *75.5* for 75.5 percent. Enter a positive number.
Show Only if Alert	Select for the OTA to appear on the pagelet or chart only if forecast utilization falls below the alert threshold percentage. Deselect this option for the OTA to appear on the pagelet or chart if forecast utilization falls above, equals, or falls below the alert threshold percentage.
Restore Defaults	Select to restore the values on this page to the global default values that are established by the administrator. This button does not appear for administrators who access the page through the Set Up Financials/Supply Chain folder in the menu navigation.

Chapter 14

Using Pagelets Enabled by PeopleSoft Project Costing

Viewing Top Projects

This topic discusses how to view the top projects by budget amount and personalize the Top Projects pagelet.

Pages Used to View Top Projects

Page Name	***Definition Name***	***Usage***
Top Projects Pagelet	PC_PE_TOP_PROJS (wide) PC_PE_TOP_PROJS_N (narrow)	View budget amounts for the top five projects using filter criteria that you specify on the Personalize Top Projects page.
Personalize Top Projects Page	PC_PE_TOP_PRS	Define default information to appear on the Top Projects pagelet.

Top Projects Pagelet

Use the Top Projects pagelet (PC_PE_TOP_PROJS [wide] and PC_PE_TOP_PROJS_N [narrow]) to view budget amounts for the top five projects using filter criteria that you specify on the Personalize Top Projects page.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Top Projects.**

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

Field or Control	***Description***
Project ID	Displays the unique project identifier. Click the link to access the Project Valuation component (PC_VALN_ANALYTICS) search page for the corresponding project. See “Setting Up and Using Project Valuation” (PeopleSoft Project Costing).

Field or Control	***Description***
% Complete (percent complete)	Displays the progress of the project and is calculated or entered manually based on project setup parameters. This field appears only on the wide version of this pagelet.
Cost Amount	Displays the sum of the values in the Project Business Unit Amount field (RESOURCE_AMOUNT) in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Actual Cost field (AN_GRP_TOT_COSTS) on the Project Costing Definition page for the project.
Budget Total	Displays the sum of the values in the Project Business Unit Amount field in the summary table for all rows with an analysis type in the analysis group that is specified for the project in the Cost Budget field (AN_GRP_ACTV_BUD) on the Project Costing Definition page for the project.
Cost Variance	Displays a value calculated as: (Cost amount – Budget total). This field appears only on the wide version of this pagelet.
Curr (currency) or **Currency Code**	Displays the base currency for the business unit.
Project Status, Health, and **Health As Of**	These fields provide information about the project. They appear only on the wide version of this pagelet.

Personalize Top Projects Page

Use the Personalize Top Projects page (PC_PE_TOP_PRS) to define default information to appear on the Top Projects pagelet.

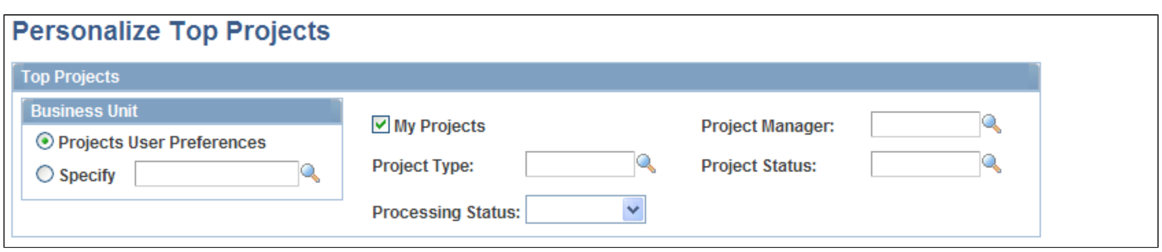
Navigation:

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

  Click the **Top Projects** link on the ESA Portal Pack Pagelet Default Administration page.

- Click the **Customize Top Projects** icon on the Top Projects pagelet.

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



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

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

Field or Control	***Description***
User Preferences	Select to view only those projects with the project business unit that is specified in your user preferences.
Specify	Select to view projects from a business unit other than the project business unit that is specified in your user preferences. If you select **Specify,** you must enter a business unit value.
My Projects	Select to indicate that only those projects that you designate as part of your My Projects list appear on the Top Projects pagelet. If you do not have any projects in your My Projects list, no data appears on the Top Projects pagelet.

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

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

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

Using OTAs for PeopleSoft Project Costing

This topic discusses OTA calculations and personalizing OTAs for PeopleSoft Project Costing.

Pages Used to Personalize OTAs for PeopleSoft Project Costing

Page Name	***Definition Name***	***Usage***
Operational Threshold Alert Pagelet	PC_PE_OTA_LIST (wide) PC_PE_OTA_LIST_N (narrow)	View up to five OTAs that display real-time monitoring data based on tolerance levels that you define.
Operational Threshold Chart Pagelet	PC_PE_OTA_CHART	View an OTA that displays a real-time monitoring chart based on tolerance levels that you define.
Personalize Operational Threshold Alerts Page	PC_PE_OTA_PRS	Select the OTAs to appear on the Operational Threshold Alert or Operational Threshold Chart pagelets. Access the page to personalize individual OTA tolerance levels.
Personalize Budget to Actual Cost Variance Page	PC_PE_BACV_PRS	Define default data for calculating and displaying the Budget to Actual Cost OTA.
Personalize Budget to Actual Time Variance Page	PC_PE_BATV_PRS	Define default data for calculating and displaying the Budget to Actual Time OTA.
Personalize Gross Margin Page	PC_PE_GRMG_PRS	Define default data for calculating and displaying the Gross Margin OTA.
Personalize Projects Over Budget Page	PC_PE_OVER_PRS	Define default data for calculating and displaying the Projects Over Budget OTA.

Related Links

Understanding Enterprise Service Automation Pagelet Types

Understanding OTA Calculations for PeopleSoft Project Costing

This section discusses the calculations for PeopleSoft Project Costing's operational threshold alerts, including the following:

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

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

Calculating Budget to Actual Cost Variance

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

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

Calculating Budget to Actual Time Variance

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

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

Calculating Gross Margin

This table lists the calculations for the Gross Margin OTA:

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

Calculating Projects Over Budget

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

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

Operational Threshold Alert Pagelet

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

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

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

Operational Threshold Chart Pagelet

Use the Operational Threshold Chart pagelet (PC_PE_OTA_CHART) to view an OTA that displays a real-time monitoring chart based on tolerance levels that you define.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

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

Personalize Operational Threshold Alerts Page

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

Access the page to personalize individual OTA tolerance levels.

Navigation:

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

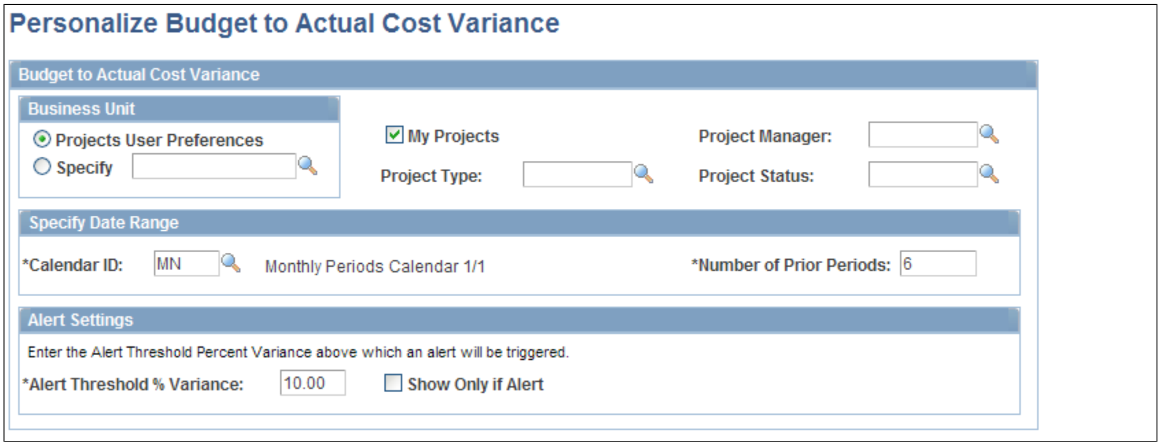
Personalize Budget to Actual Cost Variance Page

Use the Personalize Budget to Actual Cost Variance page (PC_PE_BACV_PRS) to define default data for calculating and displaying the Budget to Actual Cost OTA.

Navigation:

- Click the **Budget to Actual Cost Variance** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Budget to Actual Cost Variance page. You can find definitions for the fields and controls later on this page.



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

Specify Date Range

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

Field or Control	*Description*
Calendar ID	Select a calendar for the system to use when displaying the budget to actual variance on the pagelet.
Number of Prior Periods	Enter the number of periods for the system to use to obtain the budget to actual variance to appear on the pagelet. The system starts from the prior period and counts backward for the specified number of periods. The system uses the accounting date to compare with the date ranges specified by the number of periods.

Alert Settings

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

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

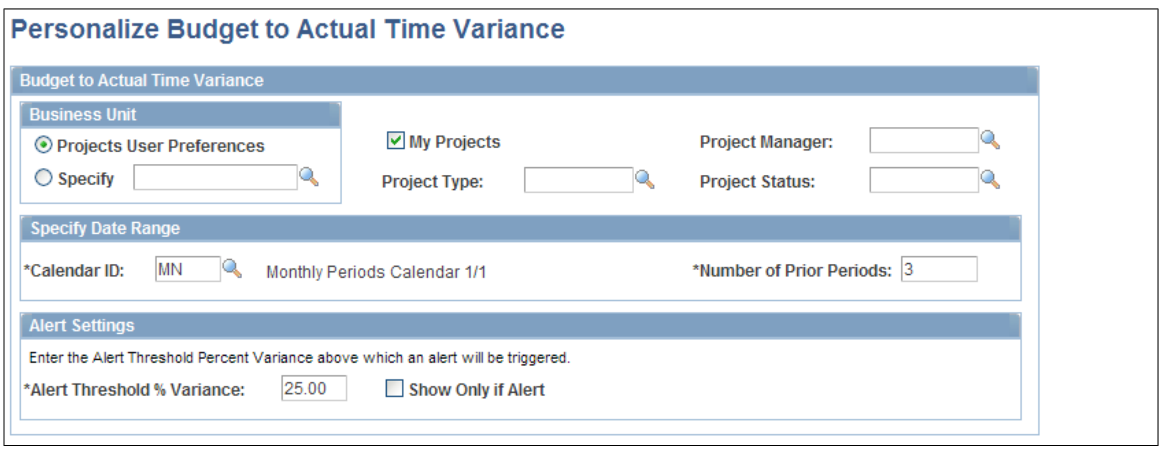
Personalize Budget to Actual Time Variance Page

Use the Personalize Budget to Actual Time Variance page (PC_PE_BATV_PRS) to define default data for calculating and displaying the Budget to Actual Time OTA.

Navigation:

- Click the **Budget to Actual Time Variance** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Budget to Actual Time Variance page.



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

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

Personalize Gross Margin Page

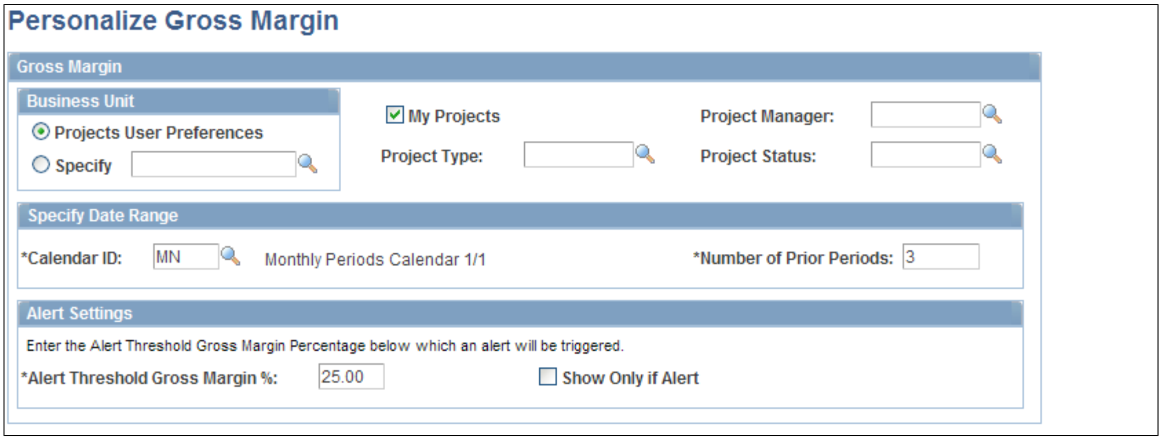
Use the Personalize Gross Margin page (PC_PE_GRMG_PRS) to define default data for calculating and displaying the Gross Margin OTA.

Navigation:

- Click the **Gross Margin** link on the ESA Portal Pack Pagelet Default Administration page.

- Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Gross Margin page.



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

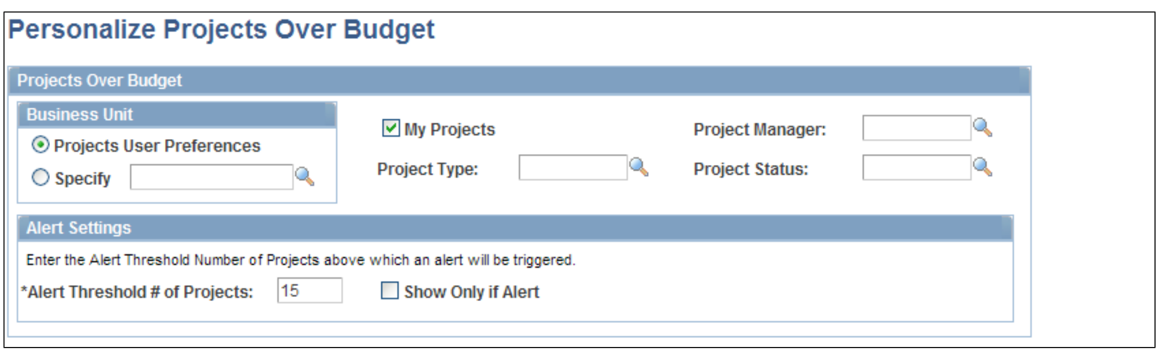
Personalize Projects Over Budget Page

Use the Personalize Projects Over Budget page (PC_PE_OVER_PRS) to define default data for calculating and displaying the Projects Over Budget OTA.

Navigation:

- Click the **Projects Over Budget** link on the ESA Portal Pack Pagelet Default Administration page.
- Click the **Personalize** icon for this OTA on the Personalize Operational Threshold Alerts page.

This example illustrates the fields and controls on the Personalize Projects Over Budget page.



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

Viewing TIPs for PeopleSoft Project Costing

This topic discusses how to view unpriced, Payables, Expenses, Inventory, Purchasing, and Expenses time TIPs:

Pages Used to View Transactions in Progress for PeopleSoft Project Costing

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

Related Links

“Understanding the Pricing Process” (PeopleSoft Project Costing)

“Viewing Transactions in Progress” (PeopleSoft Project Costing)

Prerequisites for the PeopleSoft ESA Portal Pack

Unpriced in Progress Pagelet

Use the Unpriced in Progress pagelet (PC_PE_TIP_ALLTOPC) to view a graph showing all expense transactions that are transmitted to PeopleSoft Project Costing that are not yet costed or priced.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Unpriced in Progress.**

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

Payables in Progress Pagelet

Use the Payables in Progress pagelet (PC_PE_TIP_APTOPC) to view a graph showing the number of payable expense transactions that are recorded but not yet transmitted to PeopleSoft Project Costing.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Payables in Progress.**

Field or Control	***Description***
Payables to Projects	Click to access the PeopleSoft Payables page to run the Payables to Project Costing Application Engine process (PC _AP_TO_PC) to transmit payable expense transactions to PeopleSoft Project Costing.

Expenses in Progress Pagelet

Use the Expenses in Progress pagelet (PC_PE_TIP_EXTOPC) to view a graph showing the number of expense transactions that are approved but not yet transmitted to PeopleSoft Project Costing.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Expenses in Progress.**

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

Inventory in Progress Pagelet

Use the Inventory in Progress pagelet (PC_PE_TIP_INTOPC) to view a graph showing the number of inventory cost transactions that are not yet transmitted to PeopleSoft Project Costing.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Inventory in Progress.**

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

Purchasing in Progress Pagelet

Use the Purchasing in Progress pagelet (PC_PE_TIP_POTOPC) to view a graph showing purchase order cost transactions that are not yet transmitted to PeopleSoft Project Costing.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Purchasing in Progress.**

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

Expenses Time in Progress Pagelet

Use the Expenses Time in Progress pagelet (PC_PE_TIP_TMTOPC) to view a graph showing the number of time entry transactions that are approved but not yet transmitted to PeopleSoft Project Costing.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Expenses Time in Progress.**

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

Personalize Transaction in Progress Page

Use the Personalize Transaction in Progress page (PC_PE_TIP_PRS) to define default information to appear on transaction in progress pagelets for PeopleSoft Project Costing reports.

Navigation:

Click the **Customize** icon on any Project Costing TIP pagelet.

Chapter 15

Using Pagelets Enabled by PeopleSoft Proposal Management

Viewing Proposal Operational Summary Information

This topic discusses how to view proposal operational summary information and personalize the Proposal Operational Summary pagelet.

Pages Used to View Proposal Information

Page Name	***Definition Name***	***Usage***
Proposal Operational Summary Pagelet	GM_PE_PROPOSAL (narrow) GM_PE_PROPOSAL_2 (wide)	View a list of proposals based on criteria specified on the Personalize Proposals Operational Summary page.
Personalize Proposals Operational Summary Page	GM_PE_PROPOSAL_PRS	Define default display information for the Proposal Operational Summary pagelet. The default personalization is initially set by the system administrator.
Maintain Proposal Page	GM_OPPTY_HDR	Click the link under the Proposal field on the Proposal Operational Summary pagelet to view proposal information.

Proposal Operational Summary Pagelet

Use the Proposal Operational Summary pagelet (GM_PE_PROPOSAL [narrow] and GM_PE_PROPOSAL_2 [wide]) to view a list of proposals based on criteria specified on the Personalize Proposals Operational Summary page.

Navigation:

Click the **Personalize Content** link on the PeopleSoft homepage.

Select **Proposal Operational Summary.**

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

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

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

Personalize Proposals Operational Summary Page

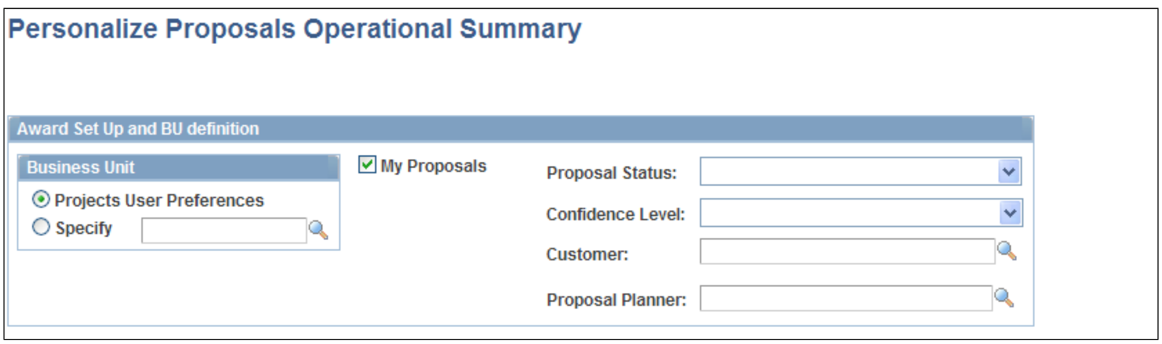
Use the Personalize Proposals Operational Summary page (GM_PE_PROPOSAL_PRS) to define default display information for the Proposal Operational Summary pagelet.

The default personalization is initially set by the system administrator.

Navigation:

- **Set Up Financials/Supply Chain** > **Pagelets** > **Enterprise Service Automation** > **Portal Pack Defaults** > **Proposals**
- Click the **Customize** icon on the Proposal Operational Summary pagelet.

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



Field or Control	***Description***
User Preferences	Select to display proposals based on the business unit that was set up in your user preferences profile.
Specify	Select to use a specific business unit to display proposals.
My Proposals	Select to display proposals that you have designated as your own by clicking the **My Proposals** button on the Proposal page or by adding proposals to the My Proposal Page in PeopleSoft Proposal Management.
Proposal Status	Select a status if you want to view proposals with a specific status only. If you do not specify a proposal status, the system displays proposals with all proposal statuses.

Field or Control	***Description***
Confidence Level	Select a confidence level if you want to view proposals with a specific confidence level only. If you do not specify a confidence level, the system displays proposals with all confidence levels.
Customer	Select a customer if you want to view proposals for a specific customer only. If you do not specify a customer, the system displays proposals associated with all customers.
Proposal Planner	Select a proposal planner if you want to view proposals for a specific proposal planner only. If you do not specify a proposal planner, the system displays proposals associated with all proposal planners.

Viewing Proposal Revenue Pipeline Information

This topic discusses how to view proposal revenue pipeline information and personalize the Proposal Revenue Pipeline pagelet.

Pages Used to View Proposal Revenue Pipeline Information

Page Name	***Definition Name***	***Usage***
Proposal Revenue Pipeline Pagelet	GM_PE_REVEN_PIPE (narrow) GM_PE_REVEN_PIPE_2 (wide)	View revenue information for future periods by confidence threshold as delineated by the user.
Personalize Proposal Revenue Pipeline Page	GM_PE_REV_PIPE_PRS	Define default display information for the Proposal Revenue Pipeline pagelet. The default personalization is initially set by the system administrator.

Proposal Revenue Pipeline Pagelet

Use the Proposal Revenue Pipeline pagelet (GM_PE_REVEN_PIPE [narrow] and GM_PE_REVEN_PIPE_2 [wide]) to view revenue information for future periods by confidence threshold as delineated by the user.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Proposal Revenue Pipeline.**

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

Personalize Proposal Revenue Pipeline Page

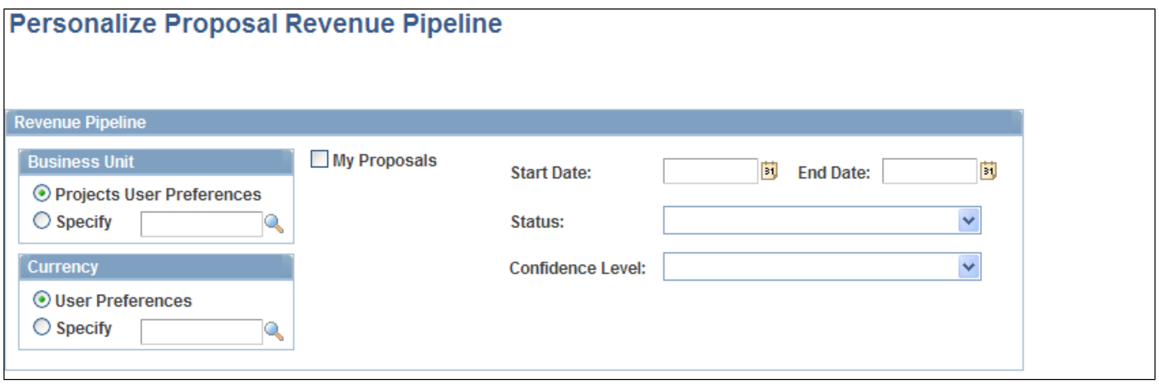
Use the Personalize Proposal Revenue Pipeline page (GM_PE_REV_PIPE_PRS) to define default display information for the Proposal Revenue Pipeline pagelet.

The default personalization is initially set by the system administrator.

Navigation:

- **Set Up Financials/Supply Chain** > **Pagelets** > **Enterprise Service Automation** > **Portal Pack Defaults** > **Proposal Revenue Pipeline**
- Click the **Customize** icon on the Proposal Revenue Pipeline pagelet.

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



Business Unit

Field or Control	***Description***
User Preferences	Select to display proposal revenue based on the business unit that you set up in the user preferences profile.
Specify	Select to use a specific business unit to display proposal revenue.

Currency

Field or Control	***Description***
User Preferences	Select to use the currency that you set up in the user preferences profile to display proposal revenue.
Specify	Select to use a specific currency to display proposal revenue.

Revenue Pipeline

Field or Control	***Description***
My Proposals	Select to display revenue from proposals that you have designated as your own by clicking the **My Proposals** button on the Maintain Proposal page or by adding proposals to the My Proposal Page in PeopleSoft Proposal Management.
Start Date and **End Date**	Select the beginning and ending dates that you want the system to use to graph proposal revenue. If the target due date on the proposal falls within the date range, then its revenue is included in the graph. If you do not enter any dates, the system uses the current date and then adds six months. The date range cannot exceed six months.
Status	Select a status if you want to view proposal revenue with a specific status only. If you do not specify a proposal status, the system displays proposal revenue with all proposal statuses.
Confidence Level	Select a confidence level if you want to view proposal revenue with a specific confidence level only. If you do not specify a confidence level, the system displays proposal revenue with all confidence levels.

Viewing Proposal Resource Demand Information

This topic discusses how to view proposal resource demand information and personalize the Proposal Resource Demand pagelet.

Pages Used to View Proposal Resource Demand Information

Page Name	***Definition Name***	***Usage***
Proposal Resource Demand Pagelet	GM_PE_RES_DEMAND (narrow) GM_PE_RES_DEMAND_2 (wide)	Learn what the demand for resources will be in a future time period. The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed.
Personalize Proposal Resource Demand Page	GM_PE_REDMD_PRS	Define default display information for the Proposal Resource Demand pagelet. The default personalization is initially set by the system administrator.

Proposal Resource Demand Pagelet

Use the Proposal Resource Demand pagelet (GM_PE_RES_DEMAND (narrow)) to learn what the demand for resources will be in a future time period.

The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Proposal Resource Demand.**

Use the information generated by this analytic to learn what the demand for resources will be in a future time period. The Proposal Resource Demand analytic shows the number of days demanded for each role if all the proposals in the system meeting the confidence level criteria set by the user are sold and executed. The system displays a maximum of 10 project roles, generates a unique color for each job role, and displays a legend at the top of the page. Information contained in this pagelet can help you make more informed hiring and training decisions.

Personalize Proposal Resource Demand Page

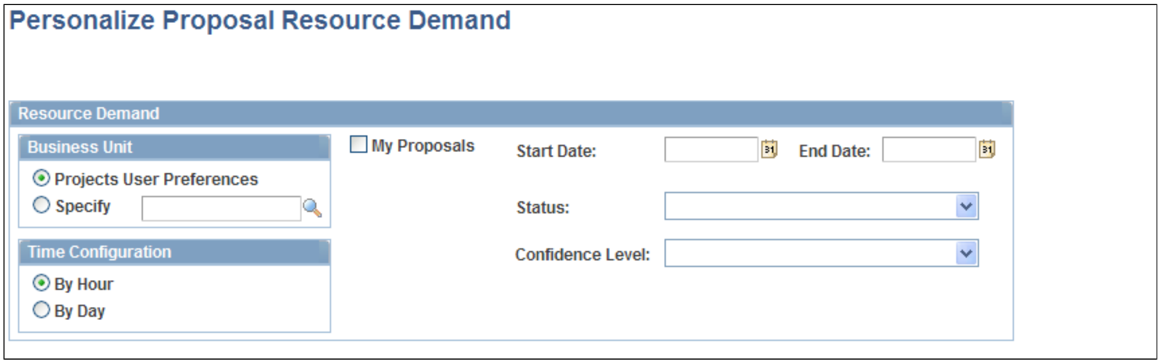
Use the Personalize Proposal Resource Demand page (GM_PE_REDMD_PRS) to define default display information for the Proposal Resource Demand pagelet.

The default personalization is initially set by the system administrator.

Navigation:

- **Set Up Financials/Supply Chain** > **Pagelets** > **Enterprise Service Automation** > **Portal Pack Defaults** > **Resource Demand**
- Click the **Customize** icon on the Proposal Resource Demand pagelet.

This example illustrates the fields and controls on the Personalize Proposal Resource Demand page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	***Description***
User Preferences	Select to display resource demand information based on the business unit that you set up in the user preferences profile.
Specify	Select to use a specific business unit to display resource demand information.

Time Configuration

Field or Control	***Description***
By Hour	Select to display resource demand information in hours.
By Day	Select to display resource demand information in days.

Resource Demand

Field or Control	***Description***
My Proposals	Select to display resource demand information from proposals that you have designated as your own by clicking the **My Proposals** button on the Maintain Proposal page or by adding proposals to the My Proposal Page in PeopleSoft Proposal Management.

Field or Control	***Description***
Start Date and **End Date**	Select the beginning and ending dates that you want the system to use to graph resource demand information. If the target due date on the proposal falls within the date range, then its resource demand information is included in the graph. If you do not enter any dates, the system uses the current date and then adds three months.
Status	Select a status if you want to view resource demand information from proposals with a specific status only. If you do not specify a proposal status, the system displays resource demand information from proposals with all proposal statuses.
Confidence Level	Select a confidence level if you want to view resource demand information from proposals with a specific confidence level only. If you do not specify a confidence level, the system displays resource demand information from proposals with all confidence levels.

Chapter 16

Using the Pagelet Enabled by PeopleSoft Resource Management

Prerequisite

Before you can view resources needing assignments you must establish a resource group for your user ID. If you select the Resources Needing Assignments pagelet to appear on your PeopleSoft Home page without establishing a resource group, a message appears stating that no data is available for the pagelet.

See “Specifying Staffing Workbench and Resource Utilization Options” (PeopleSoft Resource Management).

Viewing Resources Needing Assignments

This topic discusses how to personalize and view resources needing assignments.

Pages Used to View Resources Needing Assignments

Page Name	***Definition Name***	***Usage***
Resources Needing Assignments Pagelet	RS_PE_TOP_MYRES	View up to five resources who have been unassigned for the longest period of time or are about to end their assignments. If all resources are assigned, view up to five resources whose assignment end dates are closest to the current date.
My Workbench Options - Workbench Page	RS_MYWKBNCH_OPT	Select the group of resources to appear on the Resources Needing Assignments pagelet. See Personalizing the Resources Needing Assignments Pagelet.
My Workbench Options - Orders Page	RS_MYWKBNCHREQ_OPT	Select the default method by which you search for resources, using either a resource group or the owning organization on the service order. See Personalizing the Resources Needing Assignments Pagelet.

Page Name	Definition Name	Usage
My Workbench Options - Utilization Page	RS_MYWKBNCHRSC_OPT	Specify the number of calendar days prior to the end date of an assignment that a warning appears on the Resources Needing Assignments pagelet for the resource. See Personalizing the Resources Needing Assignments Pagelet.

Personalizing the Resources Needing Assignments Pagelet

The Resources Needing Assignment pagelet options are shared with the options that are used for the Staffing Workbench in PeopleSoft Resource Management. In PeopleSoft Resource Management you establish resource groups for whom you are responsible so you can manage information about their current assignment status.

To personalize the pagelet:

Use the My Workbench Options - Workbench page (RS_MYWKBNCH_OPT) to select the group of resources to appear on the Resources Needing Assignments pagelet.

Navigation:

- Click the **Customize Resources Needing Assignments** icon on the Resources Needing Assignments pagelet.
- **Resource Management** > **Define User Options** > **My Workbench Options** > **Workbench**

1. Specify the default resource group, then click the **Return to HomePage** link.

   Note: The system uses the selected resource group to determine which resources can appear on the Resources Needing Assignments pagelet.

   ---

2. Use the My Workbench Options - Utilization page (RS_MYWKBNCHRSC_OPT) to specify the number of calendar days prior to the end date of an assignment that a warning appears on the Resources Needing Assignments pagelet for the resource.

   - Click the **Customize Resources Needing Assignments** icon on the Resources Needing Assignments pagelet.

     Select the **Utilization** tab.

   - **Resource Management** > **Define User Options** > **My Workbench Options** > **Utilization**

   Specify the **Number of Days** prior to the end date of an assignment that a warning appears.

   If there are not five unassigned resources, the pagelet displays resources whose assignment end dates are closest to the current date.

If resources are on assignments that end in fewer or equal to the number of calendar days that you specify on the My Workbench Options - Utilization page, the resources appear on the Resources Needing Assignments pagelet with a yellow triangle warning visual indicator.

If resources are on assignments that end in a number of days *greater* than the number of days that you specify, the resources appear on the pagelet with a green circle visual indicator which represents that the resource is fully staffed.

Note: The values that are used to personalize the Resources Needing Assignments pagelet are the Resource Group ID field (RS_RSRCGRP_NAME) and the Number of Days field (NUM_OF_DAYS) in the My Workbench Options component (RS_MYWKBNCH_OPT). No other field values in the My Workbench Options component affect the display of resources needing assignments on the pagelet.

Resources Needing Assignments Pagelet

Use the Resources Needing Assignments pagelet (RS_PE_TOP_MYRES) to view up to five resources who have been unassigned for the longest period of time or are about to end their assignments.

If all resources are assigned, view up to five resources whose assignment end dates are closest to the current date.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select the **Resources Needing Assignments** check box under the **Resource Management** heading and save the page.

Note: Resources appear on this pagelet only if they have an assignment end date. For example, new resources with no assignment history can appear on the Staffing Workbench - Utilization page, but they do not appear on this pagelet.

The resources appear in ascending order of their last assignment end date.

Field or Control	***Description***
Name	Displays the name of the resource that is currently unassigned, or whose assignment end dates are closest to the current date.
Bill Rate	Displays the resource's bill rate as specified for the resource's employee ID. If no bill rate is specified for the employee ID, the value is the rate associated with the job code in the Rates by Jobcode record (PC_RATE_JOBC) in PeopleSoft Project Costing. If neither value exists, the bill rate appears as *0.00* on this pagelet.
Currency	Displays the bill rate currency as specified for the resource's employee ID. If the bill rate appears as *0.00,* the currency value is blank.

Field or Control	***Description***
End Date	Displays the end date of the resource's current assignment or, if the resource is not currently assigned, the end date of the resource's most recent assignment. If the assignment includes multiple date ranges, the last end date appears.
Requires Immediate Attention	Indicates that the corresponding resource is currently unassigned and requires immediate attention. If the current day is a workday as specified on the resource profile and stored in the Worker table (RS_WORKER_TBL), PeopleSoft Resource Management looks to see if the resource has a task scheduled on that day. If the current day is not a workday, PeopleSoft Resource Management looks at the next workday to see if the resource has a scheduled assignment on that day. If no assignment is scheduled, the resource is treated as unassigned.
Warning	Indicates that the corresponding resource is currently on an assignment that ends in fewer or equal to the number of days specified on the My Workbench Options - Utilization page.
Within Range	Indicates that the corresponding resource is currently on an assignment that ends in a number of days greater than the number of days specified on the My Workbench Options - Utilization page.
More	Click the **More** link to access the Staffing Workbench - Utilization page to view the assignment status for all of the resources in the resource group.

Chapter 17

Using Pagelets Enabled by PeopleSoft Staffing Front Office

Viewing My Agenda

This topic discusses how to view the My Agenda pagelet.

Pages Used to View My Agenda

Page Name	***Definition Name***	***Usage***
My Agenda Pagelet	FO_ADD_AGN_PGLT	Displays a list of user-specific agenda items.
My Agenda - Configure User Options Page	FO_AGN_CFG_PG	Select the time periods you want the system to display in the My Agenda pagelet.

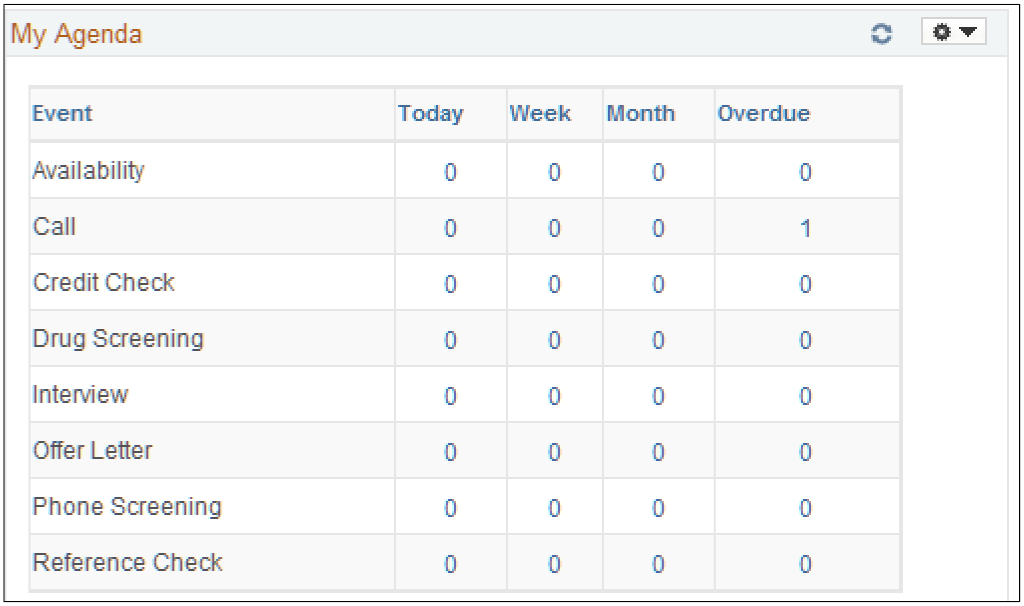
My Agenda Pagelet

Use the My Agenda pagelet (FO_ADD_AGN_PGLT) to view a list of user-specific agenda items.

Navigation:

Click the Personalize Content link on the PeopleSoft Home page and select My Agenda.

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



A large part of a staffing branch's daily activities include communications with customers, applicants, and other contacts. To manage these activities or events Staffing Front Office provides the My Agenda pagelet. In the course of a day, they are likely to access many different applicant, employee, and customer, order, and assignment records. In doing so, users might have to contact several individuals. The agenda helps track what they need to do in the immediate and near future to help them manage time, contacts, and future work.

When selecting a number in the grid, the system opens a new window, displaying the Review Agenda/ History page.

Field or Control	***Description***
Event	Displays all event types selected on the Event Types set up page.
Today	Displays a count of the agenda items due today for each event type displayed. Click the link to access the Agenda Detail page.
Week	Displays a count of the agenda items due in the current week for each event type displayed. For example, starting at the beginning of the current week (the first day of the week) until the end of the current week. Click the link to access the Agenda Detail page.
Month	Displays a count of the agenda items due in the current month for each event type displayed. For example, starting at the beginning of the current month (the first day of the month) until the end of the current month. Click the link to access the Agenda Detail page.

Field or Control	***Description***
Overdue	Displays a count of overdue agenda items for each event type displayed. Click the link to access the Agenda Detail page.

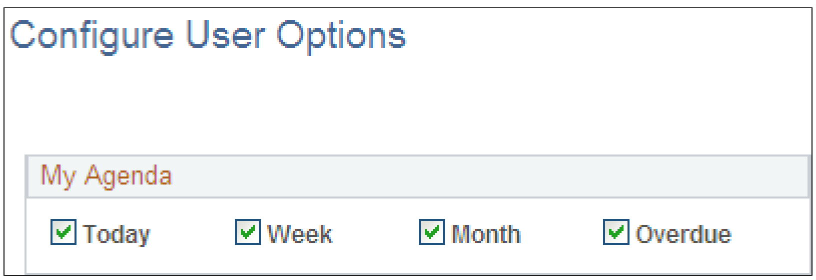
My Agenda - Configure User Options Page

Use the My Agenda - Configure User Options page (FO_AGN_CFG_PG) to select the time periods you want the system to display in the My Agenda pagelet.

Navigation:

From the My Agenda pagelet, select Pagelet Settings and then select Personalize.

This example illustrates the fields and controls on the My Agenda - Configure User Options page.



Viewing the Branch Agenda

This topic describes how to view branch agenda and personalize the Branch Agenda pagelet.

Pages Used to View Branch Agenda

Page Name	***Definition Name***	***Usage***
Branch Agenda Pagelet	FO_BR_AGN_PGLT	Displays the summary of all the agenda items related to a branch.
Branch Agenda - Configure User Options Page	FO_BR_AGN_CFG_PG	Select the time periods you want the system to display in the Branch Agenda pagelet.

Branch Agenda Pagelet

Use the Branch Agenda pagelet (FO_GR_AGN_PGLT) to view the summary of all the agenda items related to a branch.

Navigation:

Click the Personalize Content link on the PeopleSoft Home page and select Branch Agenda.

This example illustrates the fields and controls on the Branch Agenda pagelet.


Branch Agenda

Branch CA001

Event	Today	Week	Month	Overdue
Availability	0	0	0	0
Call	0	0	0	7
Credit Check	0	0	0	0
Drug Screening	0	0	0	0
Interview	0	0	0	0
Offer Letter	0	0	0	0
Phone Screening	0	0	0	0
Reference Check	0	0	0	0

The fields on this pagelet operate the same as those on the My Agenda pagelet. Users can only select branches for which they are authorized.

Branch Agenda - Configure User Options Page

Use the Branch Agenda - Configure User Options page (FO_BR_AGN_CFG_PG) to select the time periods you want the system to display on the pagelet.

Navigation:

From the Branch Agenda pagelet, select Pagelet Settings and then select Personalize.

The options on the Branch Agenda - Configure User Options page are similar to those on the My Agenda - Configure User Options Page. In addition, depending upon your permissions, you can select the branch for which you want to view agenda items.

Viewing the Team Agenda

This topic discusses how to view Team Agenda.

Pages Used to View the Team Agenda

Page Name	***Definition Name***	***Usage***
Team Agenda Pagelet	FO_TEAM_AGN_PGLT	Displays the summary of all the agenda items related to a team.
Team Agenda - Configure User Options Page	FO_TEAM_AGN_CFG_PG	Select the time periods you want the system to display in the Team Agenda pagelet.

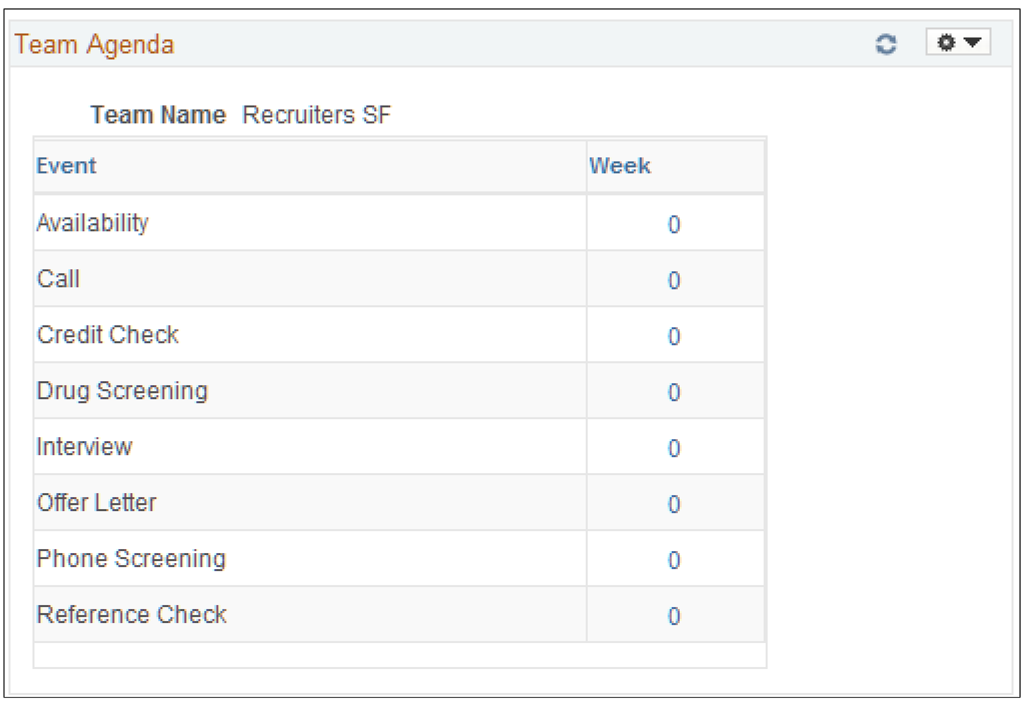
Team Agenda Pagelet

Use the Team Agenda page (FO_TEAM_AGN_PGLT) to display the summary of all the agenda items related to a team.

Navigation:

Click the Personalize Content link on the PeopleSoft Home page and select Team Agenda.

This example illustrates the fields and controls on the Team Agenda pagelet.



The fields on this pagelet operate the same as those on the My Agenda Pagelet. Users can only select teams for which they are authorized to see.

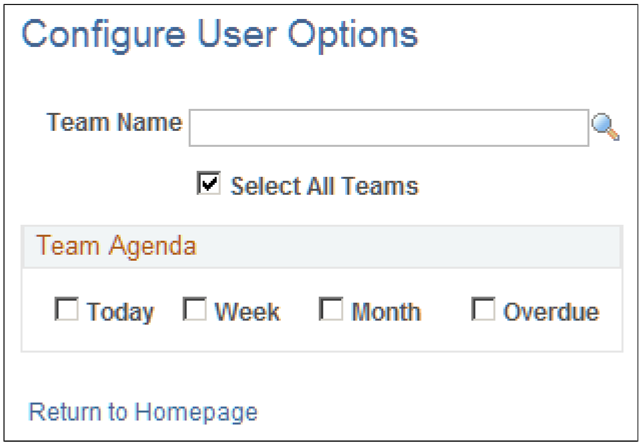
Team Agenda - Configure User Options Page

Use the Team Agenda - Configure User Options page (FO_TEAM_AGN_CFG_PG) to select the display options for the Team Agenda pagelet.

Navigation:

From the Team Agenda pagelet, select Pagelet Settings and then select Personalize.

This example illustrates the fields and controls on the Team Agenda - Configure User Options pagelet.



Field or Control	***Description***
Team Agenda	Select the time periods to display on the pagelet. The system displays the number of items for each event in each time period.

Analyzing Branch Agenda

This topic discusses how to analyze branch agenda.

Pages Used to View Hot Customers, Contacts, and Orders Pagelets

Page Name	***Definition Name***	***Usage***
Near Term Branch Agenda Pagelet	PTPG_PGVIEWER	Use this page to view the open agenda items that are nearing the end date and assigned to a specified branch, categorized by the event type with which it is associated.
Overdue Branch Agenda Pagelet	PTPG_PGVIEWER	Use this page to view the open agenda items that are beyond their end date, assigned to a specified branch, and categorized by the event type with which it is associated.

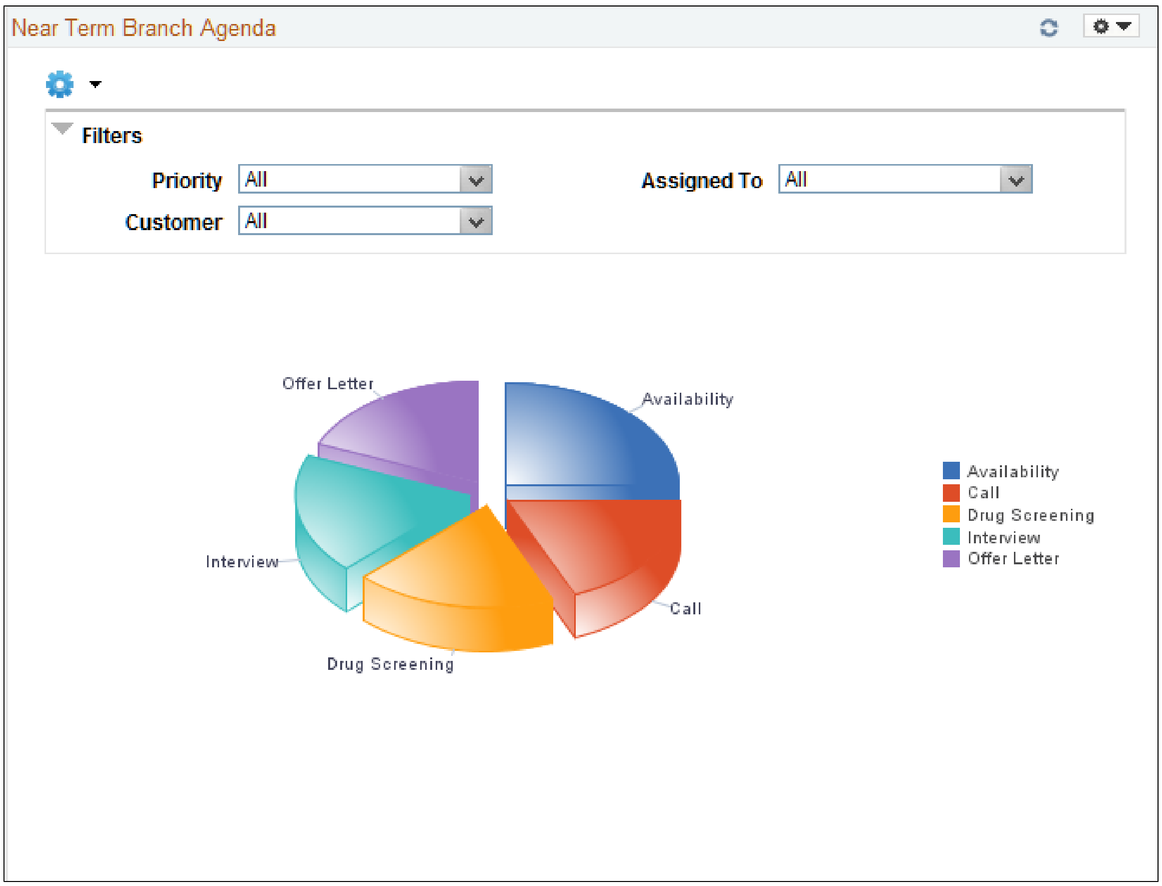
Near Term Branch Agenda Pagelet

Use the Near Term Branch Agenda pagelet (EP_NEAR_TERM_BRANCH_AGENDA) to view the open agenda items that are nearing the end date and assigned to a specified branch, categorized by the event type with which it is associated.

Navigation:

Click the **Personalize Content** link on the Home page, and select Near Term Branch Agenda.

This example illustrates the fields and controls on the Near Term Branch Agenda pagelet. You can find definitions for the fields and controls later on this page.



The Near Term Branch Agenda pagelet displays a Pivot Grid. This pivot grid is based on a query that displays all open agenda items that are assigned to a branch where the agenda end date is equal to the specified number of days from the present date. The specified number of days is defined on the Prompts page.

The agenda items displayed are grouped based on the event type associated with each agenda item. Only agenda items that are associated with events and have the Show on Pagelet check box selected are displayed in the pivot grid. The Show on Pagelet check box is on the on the Event Types page (Set Up Financials/Supply Chain, Product Related, Staffing, General, Event Types). Agenda items that are associated to process events are excluded from the pivot grid.

Users have the option to change the assigned to branch and the number of days in which the agenda is due in the pivot grid prompt options. Users can narrow the pivot grid data based on these filters: Priority, Customer, and Assigned To (the individual or team to which the agenda is assigned).

When you click a piece of the pie, the system provides an option to view the detail of that pie piece. Select Detailed View to access the Pivot Grid Drilldown page.

Field or Control	***Description***
Action	Select to indicate that you want to perform the action selected in the Action drop-down field. Options include: *Review Agenda/History* – The system opens a new window and displays the Review Agenda/History page for the agenda item. *Review Orders* – The system opens a new window and displays the Orders page for the order to which the agenda is associated. If the agenda item is not associated with an order, then the system opens the Search page for Orders.

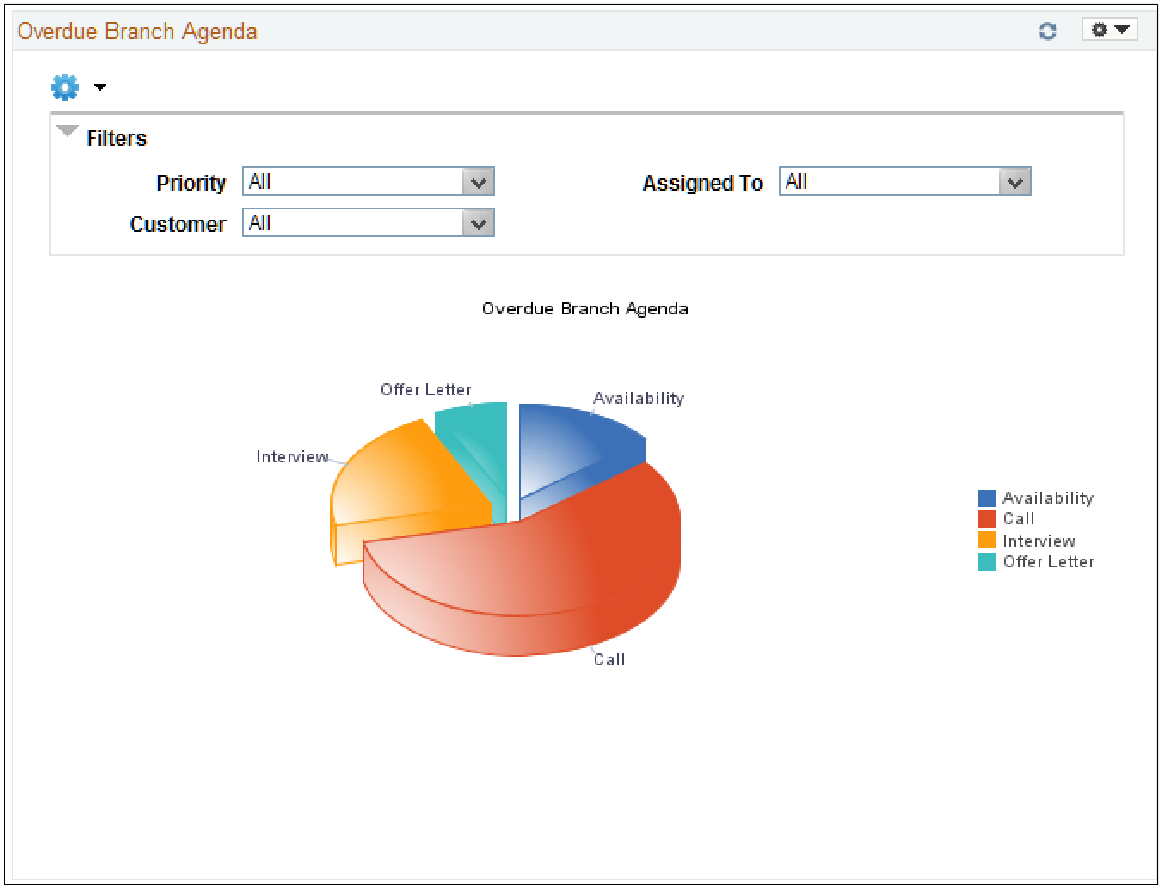
Overdue Branch Agenda Pagelet

Use the Overdue Branch Agenda pagelet (EP_OVERDUE_BRANCH_AGENDA) to view the open agenda items that are beyond their end date, assigned to a specified branch, and categorized by the event type with which it is associated.

Navigation:

Click the **Personalize Content** link on the Home page, and select Overdue Branch Agenda.

This example illustrates the fields and controls on the Overdue Branch Agenda pagelet. You can find definitions for the fields and controls later on this page.



The Overdue Branch Agenda pagelet displays a Pivot Grid. This pivot grid is based on a query that displays all open agenda items that are assigned to a branch and have passed the end date assigned to the agenda item.

The agenda item is displayed in the event type in which it is associated. Only agenda items that are associated with events that have the Show on Pagelet check box selected are displayed in the grid. The Show on Pagelet check box is determined on the Event Types page (Set Up Financials/Supply Chain, Product Related, Staffing, General, Event Types). Agenda items that are associated with process events are not displayed.

Users have the option to change the assigned to branch in the pivot grid prompt options. Users can narrow the pivot grid data based on these filters: Priority, Customer, and Assigned To (the individual or team to which the agenda is assigned).

When you click a piece of the pie, the system provides an option to view the detail of that pie piece. Select Detailed View to access the Pivot Grid Drilldown page.

Field or Control	Description
Action	Select to indicate that you want to perform the action selected in the Action drop-down field. Options include: *Review Agenda/History* – The system opens a new window and displays the Review Agenda/History page for the agenda item. *Review Orders* – The system opens a new window and displays the Orders page for the order to which the agenda is associated. If the agenda item is not associated with an order, then the system opens the Search page for Orders.

In addition, see the product documentation for *PeopleTools: Pivot Grid*.

Performing Staffing Searches

This topic discusses how to perform staff searches.

Page Used to Perform Staffing Searches

Page Name	Definition Name	Usage
Staffing Searches Pagelet	FO_MYSEARCH_PGLT	Use this page to view and access staffing searches.

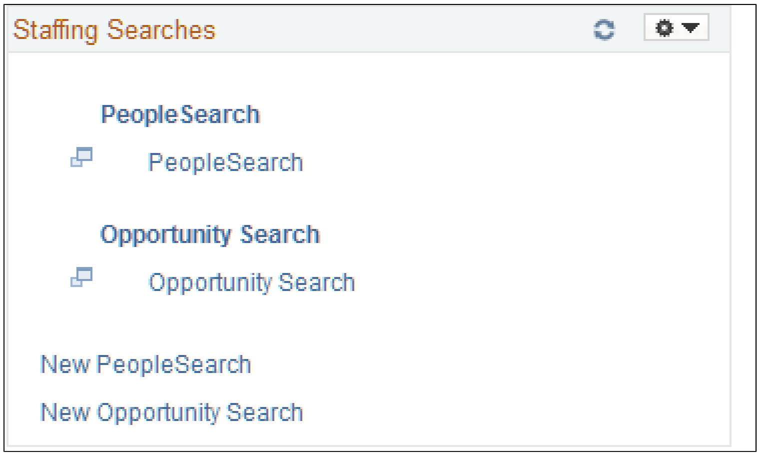
Staffing Searches Pagelet

Use the Staffing Searches pagelet (FO_MYSEARCH_PGLT) to view and access staffing searches.

Navigation:

Click the Personalize Content link on the Home page, and select Staffing Searches.

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



Field or Control	***Description***
PeopleSearch	Select to access the PeopleSearch page. The system pulls the corresponding criterion into the PeopleSearch page. See "Performing Searches" (PeopleSoft Staffing Front Office)
Opportunity Search	Select to access the Opportunity Search page. The system pulls the corresponding criterion into the Opportunity Search page. See "Performing Searches" (PeopleSoft Staffing Front Office)
New PeopleSearch	Select to access the PeopleSearch page. The system opens the page with no search criteria. See "Performing Searches" (PeopleSoft Staffing Front Office)
New Opportunity Search	Select to access the Opportunity Search page. The system opens the page with no search criteria. See "Performing Searches" (PeopleSoft Staffing Front Office)

Applicant Hot List Pagelet

This topic discusses viewing the applicant hot list.

Pages Used to View the Applicant Hot List

Page Name	***Definition Name***	***Usage***
Applicant Hot List Pagelet	FO_APL_HOTLST_PGLT	Lists the applicants that were added to a hot list.

Page Name	***Definition Name***	***Usage***
Personalize Applicant Hot List Page	FO_DASH_CONFIG_PG	Select the number of applicants you want to display in the pagelet.

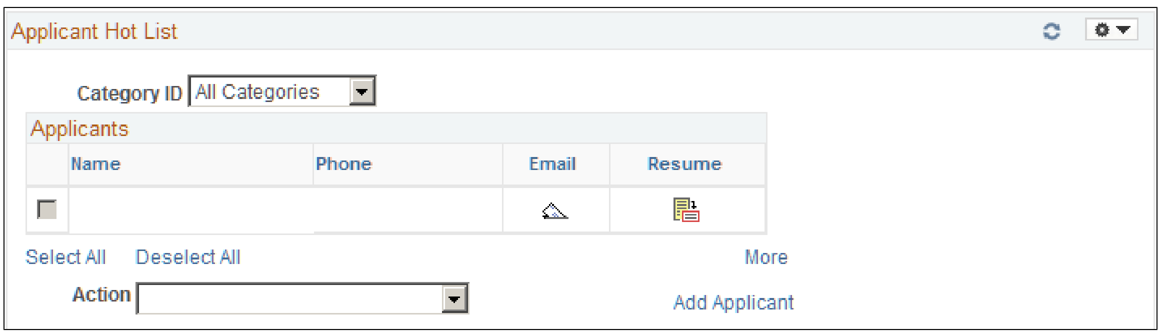
Applicant Hot List Pagelet

Use the Applicant Hot List page (FO_APL_HOTLST_PGLT) to view the applicants that were added to a hot list.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page and select Applicant Hot List.

This example illustrates the fields and controls on the Applicant Hot List pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Category ID	You must enable categories on the User Preferences - Staffing General Preferences page before you can select categories here.
Name	Click the **Name** link to open a new window displaying the applicant record.
Email	Click the **Email** button for applicant to open a new window and send an email to the applicant.
Resume	Click the **Resume** button to view an applicant's resume. The system will display a message if the applicant does not have a resume attached to their record.

Field or Control	***Description***
Action	Select one or more applicants, then perform any of these actions: *Add Agenda*: A new window will open, allowing you to add agenda items for the selected applicants. *Add History*: A new window will open, allowing you to add history items for the selected applicants. *Remove Applicant from List*: Select to delete one or more applicants from the hot list. *Send Email*: Select to send an email to the selected applicants. *View Resume*: Select to review the resumes of the selected applicants.
More	Click to access the Applicant Hot List page.
Add Applicant	Click to add a new applicant to the database.

Personalize Applicant Hot List Page

Use the Personalize Applicant Hot List page (FO_DASH_CONFIG_PG) to select the number of applicants you want to display in the pagelet.

Navigation:

Click the **Customize Applicant Hot List** button on the Applicant Hot List pagelet.

Viewing Hot Customers, Contacts, and Orders Pagelets

This topic discusses viewing and accessing customers, contacts, and orders that are considered to be hot.

Pages Used to View Hot Customers, Contacts, and Orders Pagelets

Page Name	***Definition Name***	***Usage***
Customer Hot List Pagelet	FO_CST_HOTLST_PGLT	View and access customers who are considered to be hot.
Contact Hot List Pagelet	FO_CNT_HOTLST_PGLT	View and access contacts who are considered to be hot.
Order Hot List Pagelet	FO_ORD_HOTLST_PGLT	View and access orders that are considered to be hot.

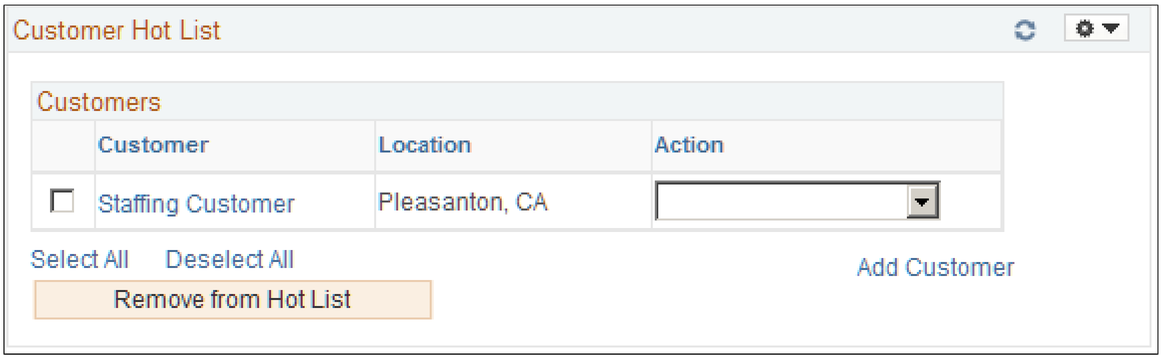
Customer Hot List Pagelet

Use the Customer Hot List pagelet (FO_CST_HOTLST_PGLT) to view and access customers who are considered to be hot.

Navigation:

Click the Personalize Content link on the Home page and select Customer Hot List.

This example illustrates the fields and controls on the Customer Hot List pagelet. You can find definitions for the fields and controls later on this page.



Customers can be added as hot list customers from the Customer Information - General Info page. When a customer is added as a hot list customer, the system adds customer information in the Customer Hotlist table (FO_CUST_HOT_TBL).

Field or Control	*Description*
<select check box>	Select a check box next to the customer and select an action in the drop-down box.
Customer	Click the link to access the Customer Information – General Info page.
Action	Select an action item to perform on one or more customer. Options include: Add Agenda, Add History, Add Order, and Review Agenda/History.
Remove from Hot List	Click to delete a customer from the hot list. You must select the check box to the left of the customer and then click this button. When a customer is removed from this pagelet, then all customer information for the customer is removed from the FO_CUST_HOT_TBL table. **Note:** The customer is not removed from the database.
Add Customer	Click to access the Customer Information, General Information component where you can add a customer to the database.

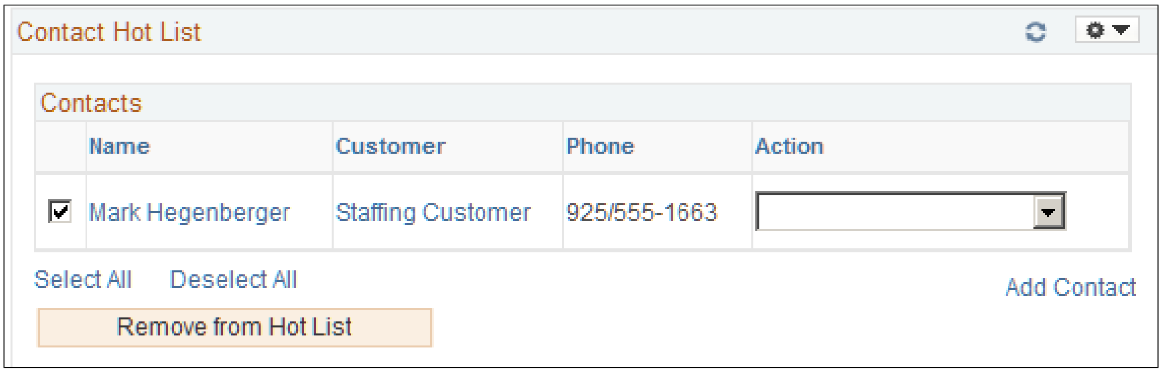
Contact Hot List Pagelet

Use the Contact Hot List Pagelet (FO_CNT_HOTLST_PGLT) to view and access customer contacts who are considered to be hot.

Navigation:

Click the Personalize link on the Home page and select Contact Hot List.

This example illustrates the fields and controls on the Contact Hot List pagelet. You can find definitions for the fields and controls later on this page.



Customer contacts can be added as hotlist contacts from the Contact Information – Contact Customers page. When a contact is added as a hotlist contact, the system adds customer information in the Contact Hotlist table (FO_CNTC_HOT_TBL).

Field or Control	***Description***
<select check box>	Select the check box next to the contact and select an action in the drop-down list box.
Name	Click to access the Contact Information – Maintain Contacts page.
Customer	Click to access the Customer Information – General Info page.
Action	Select an action item to perform on one or more contacts. Options include: Add Agenda, Add History, Add Order, Review Agenda/History, and Send Email.
Remove from Hot List	Click to remove a contact from the hot list. You must select the check box to the left of the contact and then click this button. When a contact is removed from this pagelet, then all contact information is removed from the FO_CNTC_HOT_TBL table. **Note:** The contact is not removed from the database.
Add Contact	Click to access the Contact Information component where you can add a contact to the database.

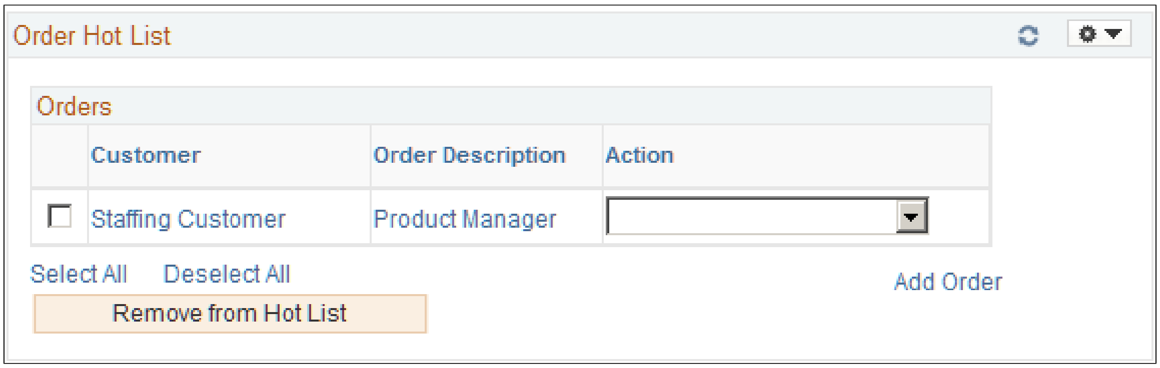
Order Hot List Pagelet

Use the Order Hot List Pagelet (FO_ORD_HOTLST_PGLT) to view and access customer orders that are considered to be hot.

Navigation:

Click the Personalize link on the Home page and select Order Hot List.

This example illustrates the fields and controls on the Order Hot List pagelet. You can find definitions for the fields and controls later on this page.



Customer orders can be added as hotlist orders from the Orders page. When an order is added as a hot list order, the system adds order information in the Order Hotlist table (FO_ORD_HOT_TBL).

Field or Control	***Description***
<select check box>	Select the check box next to the Order and select an action in the drop-down list box.
Customer	Click to access the Customer Information – General Info page.
Order Description	Click to access the Order page.
Action	Select an action item to perform on one or more contacts. Options include: Add Agenda, Add History, Review Agenda/History, and Send Email.
Remove from Hot List	Click to remove an order from the hot list. You must select the check box to the left of the order and then click this button. When an order is removed from this pagelet, then all order information is removed from the FO_ORD_HOT_TBL table. **Note:** The order is not removed from the database.
Add Order	Click to access the Add/Update Orders component where you can add a new order to the database.

Viewing Pending Applicants

This topic discusses how to view pending applicants.

Pages Used to View Pending Applicants

Page Name	***Definition Name***	***Usage***
Pending Applicants Pagelet	FO_PNDG_APPL_PGLT1	View all applicants that have not been associated to any assignment yet.
Personalize Pending Applicants Page	FO_PNDG_APPL_CFG	Set the period for which the applicants should be displayed in the Pending Applicants pagelet.

Pending Applicants Pagelet

Use the Pending Applicants pagelet (FO_PNDG_APPL_PGLT1) to view all applicants that have not been associated to any assignment yet.

Navigation:

Click the Personalize Content link on the PeopleSoft Home page and select View Pending Applicants.

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

Use this page to view a list of pending applicants that require an action from a staffing recruiter. The page displays applicants in this order:

1. All valid applicants and pending applicants that are associated with an order.
2. Valid applicants that are not associated with an order.
3. Pending applicants that are not associated with an order.

Field or Control	***Description***
Name	Position your mouse over the name link to view contact information. Click to access the Applicants – Contact Information page, which opens in a new window.
Order Description	Displays order information when the applicant is assigned to an order.
Resume	Click to access the resume belonging to the applicant, when it is available. When you position the mouse over this icon: • If a resume is available, the system displays a message that reads, “View Resume.” • If a resume is not available, the system displays a message indicating that a resume is not available for the related applicant.

Field or Control	***Description***
Action	Select one of the following actions: *Add Agenda*: Select to open the "Agenda Detail Page" (PeopleSoft Staffing Front Office) where you can add an agenda item for the selected applicant. *Add History*: Select to open the"History Details Page" (PeopleSoft Staffing Front Office) where you can add a history item for the selected applicants. *Add to Considering List*: Select to add the selected applicants to the considering list of the corresponding order. *Add to Hot List*: Select to have the system automatically add the selected applicants to the Hot List. The system displays a message confirming that the applicant is added to the hot list. *Make Invalid*: Select to mark the selected applicants invalid. *Make Valid*: Select to mark the selected applicants valid. *Remove from List*: Select to have the system automatically remove the applicant from the list. The system displays a message that reads, "This will delete the Applicant from the list." You must respond by clicking the OK or Cancel button. If you click OK, the system displays a message confirming that the action was performed successfully. Keep in mind that the system removes the applicant from the list that is displayed. This does not mean that the applicant is no longer pending activities on the Staffing hiring and on-boarding process. *Send Email*: Select to send an email to the selected applicants. You must associate an email template to your role to use this option.
More	Click to access the Pending Applicants page where you can view more applicants at one time.
(legend)	Displays the definition of the green circle and the red square. The legend is configurable by clicking the Pagelet Settings drop down arrow, selecting Personalization, and then selecting the Show Legend check box.
Add Applicant	Click to access the PeopleSoft Applicants – Contact Information page (**Staffing** > **Resources** > **Applicants** > **Manage Applicants**), where you can add an applicant.

Personalize Pending Applicants Page

Use the Personalize Pending Applicants page (FO_PNDG_APPL_CFG) to set the period for which the applicants should be displayed in the Pending Applicants pagelet.

Navigation:

Click the **Customize Pending Applicants** button on the Pending Applicants pagelet.

Viewing Pending Applicants Aging

This topic describes how to view pending applicants aging and personalize the Pending Applicants Aging pagelet

Pages Used to View Pending Applicants Aging

Page Name	***Definition Name***	***Usage***
Pending Applicants Aging Pagelet	FO_PNDG_APPL_PGLT2	Displays the number of pending applicants for each aging period defined.
Pending Applicants Aging - Configure User Options Page	FO_AGE_CFG_PGLT	Define the aging periods to display on the Pending Applicants Aging pagelet.

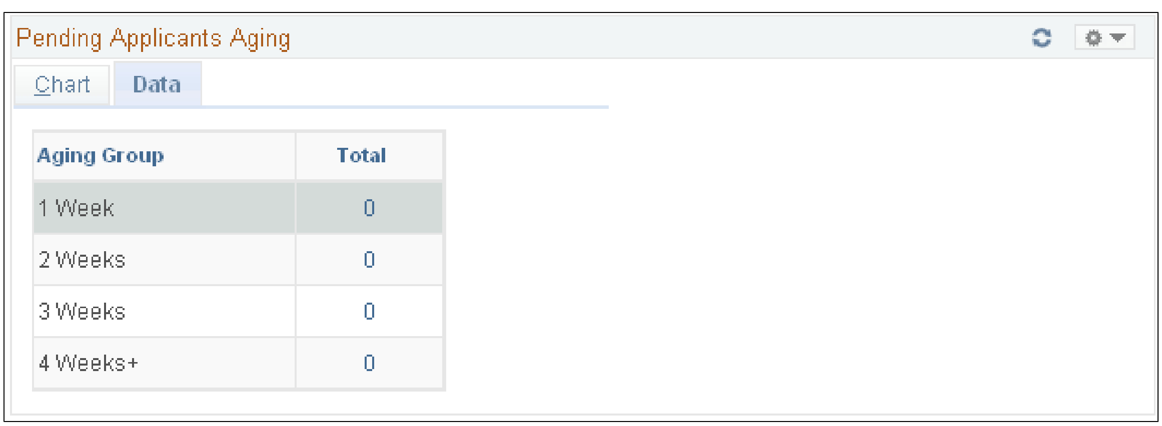
Pending Applicants Aging Pagelet

Use the Pending Applicants Aging pagelet (FO_PNDG_APPL_PGLT2) to display the number of pending applicants for each aging period defined.

Navigation:

Click the Personalize Content link on the PeopleSoft Home page and select Pending Applicants Aging.

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



Use this page to view a list of applicants that require action from the staffing recruiter. This list includes all applicants who have applied for a job that is managed by the recruiter. This list is different for each recruiter.

The number of days that an applicant requires action is calculated by the system based on the effective date on the Applicant page.

Field or Control	Description
Aging Group	Displays the labels that are defined on the Configure User Options page, which can be accessed by clicking on the Customize Pending Applicants Aging button.
Total	Click to access the Pending Applicants Search page.

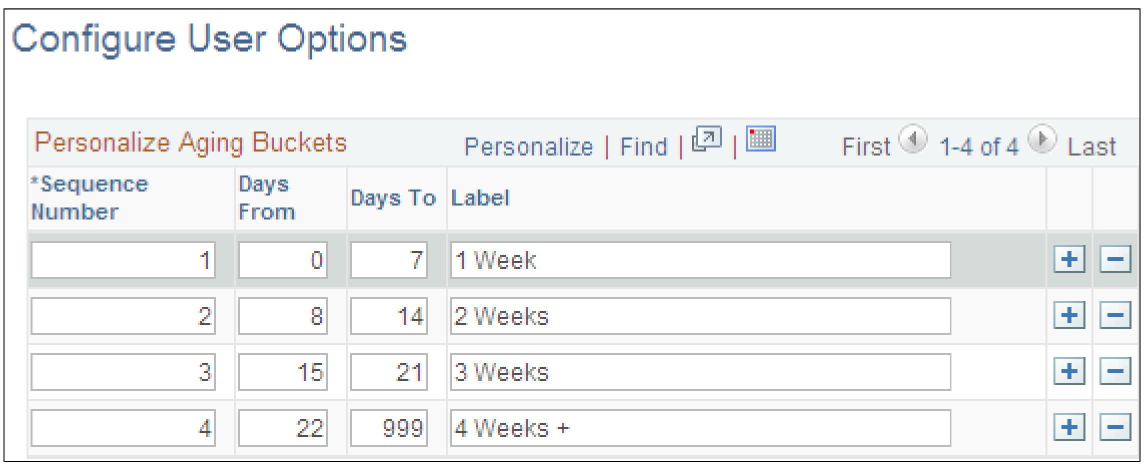
Pending Applicants Aging - Configure User Options Page

Use the Pending Applicants Aging - Configure User Options page (FO_AGE_CFG_PGLT) to define the aging periods to display on the Pending Applicants Aging pagelet.

Navigation:

Click the Customize Pending Applicants Aging button on the Pending Applicants Aging pagelet.

This example illustrates the fields and controls on the Pending Applicants Aging - Configure User Options page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Sequence Number	Enter the order that you want the labels to appear on the Pending Applicants Aging pagelet.
Days From and **Days To**	Enter the days that each label represents.
Label	Enter a label to display on the pagelet.

Chapter 18

Using Pagelets Enabled by PeopleSoft IT Asset Management

Understanding Reporting Metrics

PeopleSoft IT Asset Management (ITAM) organizes enterprise IT assets into a clear presentation of business value, with certifiable accuracy. Valuable business information is expressed in high level, concise metrics that invite users to drill down to any level of detail from the big picture in the portal. The pagelets contain information on total IT asset valuation, hardware and software inventory, missing, misappropriated, and misconfigured inventory, as well as specifying leases and contracts that need attention.

Some of the pagelets include charting functionality, which provides a graphical representation of the information that resides in the corresponding record. These charts are included with the pagelets when you select to display the pagelet on your PeopleSoft Home page. Additionally, when you position your mouse over a portion of the chart, hover text appears that displays the value and corresponding description of the data representation.

PeopleSoft IT Asset Management provides these metrics pagelets:

Pagelet	***Description***
Asset Financial Statistics	Displays a snapshot of enterprise IT asset current valuation.
Assets Not Reporting	Displays devices that have failed to report an inventory, allowing managers to investigate the absences. This pagelet includes charting functionality.
Hardware Inventory	Counts all IT hardware–by subtype–that appears in the third-party inventory and asset repository databases. It also provides a summary count of IT hardware that appears in one database, but not the other. This pagelet includes charting functionality.
Hardware Progress Report	Displays at-a-glance results to date of IT hardware progress achieved against a user defined goal.

Pagelet	***Description***
Integration Data Load Errors	Displays the types of errors that are produced by the load process (IT_LOAD_PROC) for the latest discovery request. Also displayed is the corresponding number of errors for each type: Unmapped Primary User, Unmapped IP Address, Duplicate Serial ID, and GL to HR business unit mapping error. You can drill down from this high-level pagelet to the Integration Data Load Errors details page. This pagelet includes charting functionality.
Inventory Exceptions	Displays a high level view of the differences between the Asset Repository and the third-party inventory database–the difference between what is on the books and the physical inventory for IT assets.
Lease End Metric	Displays IT-related leases that will expire within the next n (user-defined) days, providing a reminder to undertake lease-end inventory activities. You can drill down to the assets that are associated with those leases.
Software Device Monitor	Displays installed software by software device group ID. This metric is designed for IT Subtypes that are based on Serial ID software authorizations and includes a comparison of installed licenses to authorized software licenses. An alert is displayed by software title when the installed software licenses exceed the authorized software licenses.
Software Inventory Monitor	Provides the counts of total licenses versus installed licenses and displays the counts for authorized and unauthorized users.
Software Pending Requisitions	Displays a running scorecard on software licenses that users need to acquire to keep the enterprise in compliance. This pagelet includes charting functionality.
Software Progress Report	Displays at-a-glance results to date of IT software progress achieved against a user defined goal
Software Renewal	Provides alerts to the IT Asset Manager when the contract needs to be renewed or renegotiated.

Generating Metrics

This topic discusses how to generate reporting metrics.

Page Used to Generate Metrics

Page Name	***Definition Name***	***Usage***
Generate Metrics Page	IT_METRIC_RUN	Select options to generate metrics that appear in the pagelets.

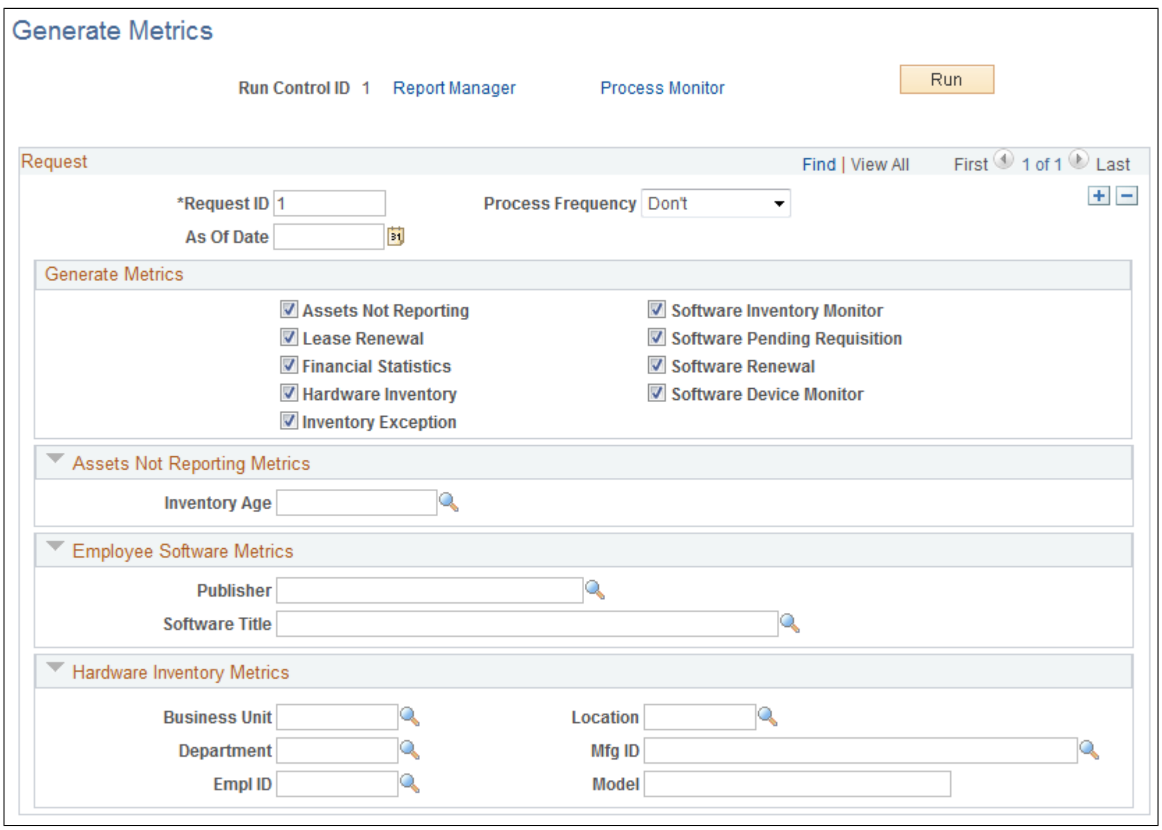
Generate Metrics Page

Use the Generate Metrics page (IT_METRIC_RUN) to select options to generate metrics that appear in the pagelets.

Navigation:

Set Up Financials/Supply Chain > Pagelets > Asset Lifecycle Management > IT Asset Management > Generate Metrics > Generate Metrics

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



Request

Field or Control	*Description*
Process Frequency	Select the frequency for the report to run. Values are: *Always, Don't* and *Once.*

Generate Metrics

Select the metrics to be generated.

Field or Control	*Description*
Assets Not Reporting	If you select **Assets Not Reporting,** the system displays the Assets Not Reporting Metrics group box.
Hardware Inventory	If you select **Hardware Inventory,** the system displays the Hardware Inventory Metrics group box.
Software Inventory Monitor, Software Pending Requisition, and **Software Renewal**	If you select any of these metrics, the system displays the Employee Software Metrics group box.

Field or Control	***Description***
Software Device Monitor	Selecting the Software Device Monitor impacts Software Pending Requisitions and Software Inventory Monitor. The Software Device Monitor calculates the number of licenses associated with devices and needs to update that information in the Software Inventory Monitor as well as Software Pending Requisitions (specifically the Installed column.) The Software Device Monitor is capable of updating the information as it is displayed in Software Device Monitor and Software Pending Requisitions; however, it does not insert new rows into the metric. If the hierarchy of Software Device Groups is six levels or more, the Software Device Monitor issues a warning with respect to its effect on overall performance. It is recommended that the hierarchy be no greater than five levels. Additionally, a warning is issued about the possibility of double counting when a software device is associated with a software title via two different Software Device Groups. This issue should be corrected immediately by removing the device so that it belongs to only one group for a software title. **Note:** There may be software titles that are impacted by the Software Device Monitor that do not already exist in the Software Pending Requisitions or the Software Inventory Monitor. For a completely accurate display of current information, it is recommended that the Software Inventory Monitor as well as the Software Pending Requisition be run whenever the Software Device Monitor runs.

Assets Not Reporting Metrics

Field or Control	***Description***
Inventory Age	Select an inventory age from the Inventory Age table.

Employee Software Metrics

Field or Control	***Description***
Publisher	Select a supplier ID.
Software Title	Select a software title.

Hardware Inventory Metrics

Field or Control	***Description***
Business Unit	Select a business unit.
Department	Select a department.
EmplID	Select an employee ID.
Location	Select a location.
Mfg ID	Select a manufacturer ID.
Model	Enter a model.

Working with Progress Reports

This topic discusses how to edit the progress report template, and run and work with progress reports.

Pages Used to Work with Progress Reports

Page Name	***Definition Name***	***Usage***
Add/Update Progress Report Page	IT_PRGS_TMPL	Create or edit a progress report template.
Progress Report Page	IT_PRGS_RUN	Run the progress report.
Progress Report Detail Page	IT_PRGS_DTL	View progress report details.

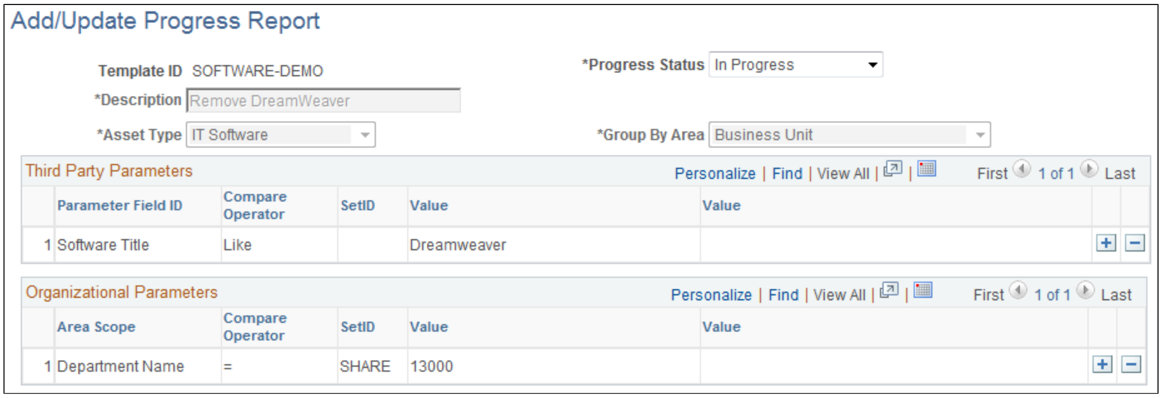
Add/Update Progress Report Page

Use the Add/Update Progress Report page (IT_PRGS_TMPL) to create or edit a progress report template.

Navigation:

IT Asset Management > **IT Asset Management Center** > **Portal Setup** > **Edit Progress Report Template** > **Add/Update Progress Report**

This example illustrates the fields and controls on the Add/Update Progress Report page. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Template ID	The unique identifier for the progress report.
Progress Status	Valid values for **Progress Status** are: *New, In Progress,* and *Complete.* If you select *New,* the first time run result is saved as the target number for the **Group By Area** defined on this page. If the value is *In Progress,* all other fields are greyed out and not available for modification of any parameters. If the value is *Complete* and saved, the target numbers are cleared and all results in the detail table are purged.
Description	Enter a text description. This description appears in the description column on the pagelet.
Asset Type	Select *IT Hardware* or *IT Software* to identify the pagelet for this report.
Group By Area	Select to group the results by area. Values are: *Business Unit, Department ID,* or *Location.*

Field or Control	***Description***
Third Party Parameters	Select parameter fields to define the selection criteria. The **Compare Operator** is a translate value which includes: *=, <>, Like,* and *Not Like.* **Value** is a free-form text field. You must enter at least one parameter. You can list the same attribute multiple times if you use the equal operator. For example if you wanted to search on a manufacturer of TOSHIBA or IBM, you could add another line for MFG ID = IBM. Because the MFG ID attribute is repeated, the condition will be treated as an OR condition. Conditions that are not for the same attribute will be treated as AND conditions. When the attribute is repeated the same operator used in the first instance of that attribute must be repeated. When the user selects *Software* as a parameter, the valid compare operators are *Exists, Not Exists, Like,* and *Not Like.* **Note:** If you are using the User Defined Date field you must enter the date value in the following format: *YYYY-MM-DD.*
Organizational Parameters	Define the **Area Scope** of the project within the organization. Values include: *Business Unit, Department ID,* or *Location.* The **Compare Operator** is a translate value which includes: *>, >=, <, <=, =, <>, Like,* and *Not Like.* **Value** is a free form text field. Enter at least one parameter. The organization parameter is not sent to the third party database; rather it is a filtering criteria that is used once the data is sent back to the PeopleSoft application.

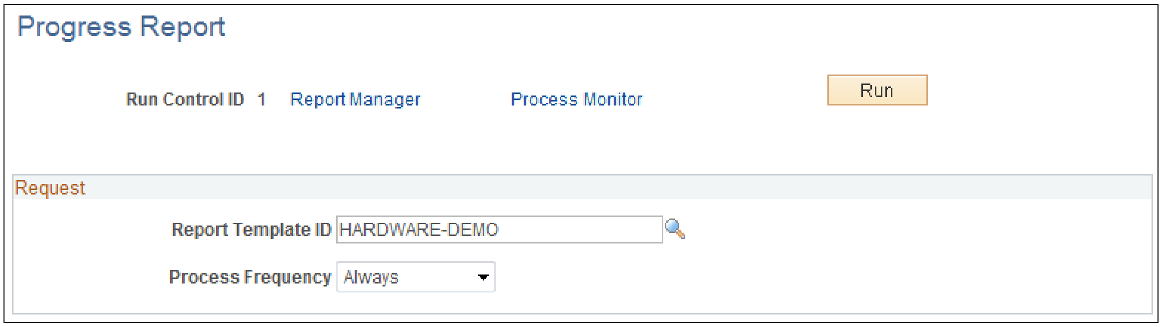
Progress Report Page

Use the Progress Report page (IT_PRGS_RUN) to run the progress report.

Navigation:

Set Up Financials/Supply Chain > Pagelets > Asset Lifecycle Management > IT Asset Management > Run Progress Report > Progress Report

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



Field or Control	***Description***
Report Template ID	Select the **Report Template ID** to run. Only templates with report status of *New* and *In Progress* can be chosen. Leave this field blank to process all report template IDs with a status of *New* or *In Progress.*
Process Frequency	Valid values are: *Always, Don't Run,* and *Process Once.*

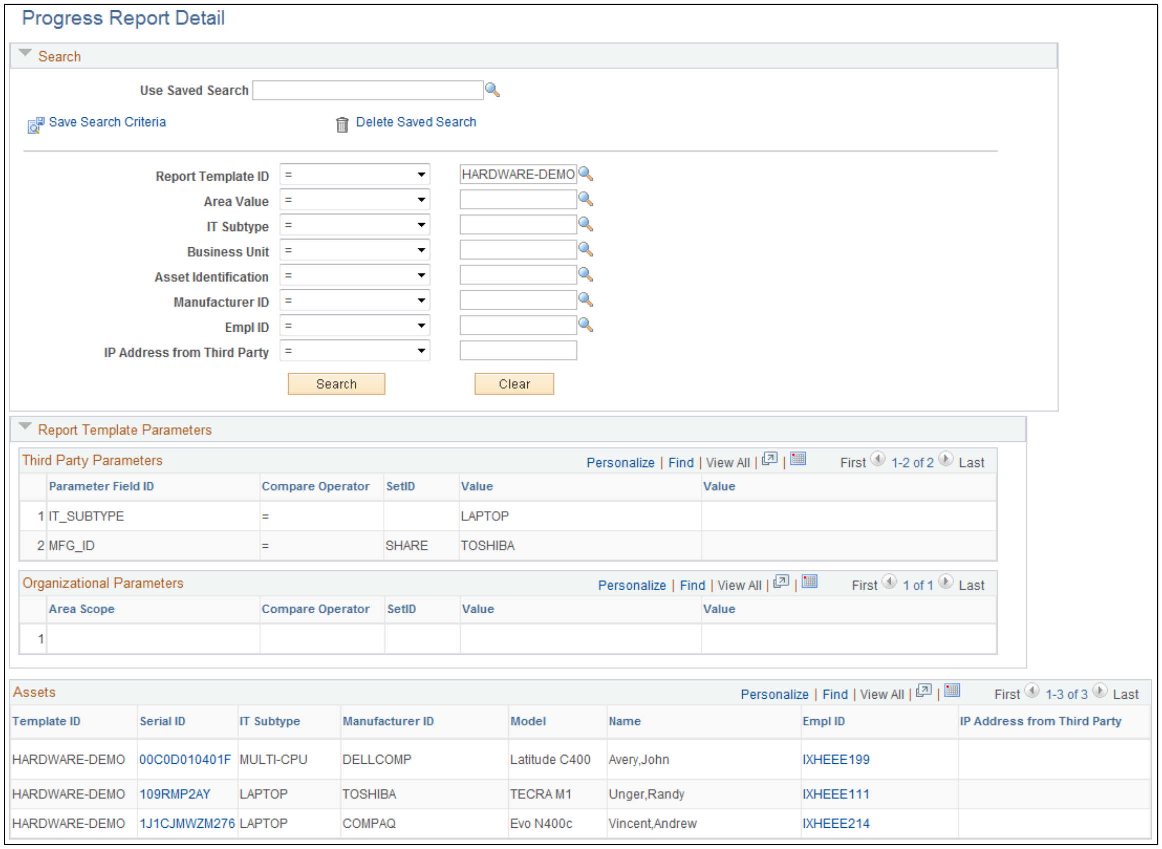
Progress Report Detail Page

Use the Progress Report Detail page (IT_PRGS_DTL) to view progress report details.

Navigation:

IT Asset Management > **Inventory Views** > **Progress Report Detail** > **Progress Report Detail**

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



The Progress Report Detail page displays details for the hardware or software progress reports metric. This page is accessible from the navigation path or drilldown from the Hardware or Software Progress Report pagelets.

Use the common search parameters to display the details for each project. Drill down on the **Serial ID** to access a printable view of the asset or the **EmplID** to access those assets for which a given employee is the custodian.

Report Template Parameters

The report template parameters group box displays the report parameters for the **Report Template ID** that is selected in the Search group box. If no report template ID is selected, then the Report Template Parameters grids do not contain data. The report template parameters are displayed in the following two grids:

- **Third Party Parameters** - lists the parameter field IDs that were used in the Progress Report Request. These values determine the data, if any, that is returned from the third party.
- **Organizational Parameters** - lists the area scope values that were used in the Progress Report Request. These values determine the data, if any, that is returned from the third party. Organizational parameters are optional as part of the Report Template ID definition.

Working with Reporting Metrics Pagelets

This topic discusses how to view and work with pagelets used for reporting metrics.

Pages Used to Work with Reporting Metrics Pagelets

Page Name	***Definition Name***	***Usage***
Asset Financial Statistics Pagelet	IT_PE_FIN_STAT	Review a snapshot of enterprise IT asset current valuation.
Assets Not Reporting Pagelet	IT_PE_UNDISC	Review data and graphic representation of the devices that have failed to report an inventory within a specified time period, allowing managers to investigate the absences.
Hardware Inventory Pagelet	IT_HRDWR_SUM	Count all IT hardware–by subtype–that appears in the third-party and asset repository databases. View a summary count and graphic representation of IT hardware that appears in one database but not the other.
Hardware Progress Report Pagelet	IT_PRGS_HWC	Review up-to-date results of IT asset change or upgrade initiatives.
Integration Data Load Errors Pagelet	IT_LOAD_ERR_SUM	Review summarized totals and graphic representation of the data mapping errors that are encountered during integration of staged data from third-party discovery suppliers.
Inventory Exceptions Pagelet	IT_PE_INV_EXCEPT	Review a summary of the differences between the Asset Repository and the third-party database.
Lease End Metrics Pagelet	AM_LEASE_SUM	Review IT-related leases that will expire within the next n days. Drill down to the assets associated with the leases.
Related Links Pagelet	IT_PE_THIRDLINK	Link to frequently accessed URLs.
Software Device Monitor Pagelet	IT_PE_SWDG_SUM	Review the installed software licenses versus serial ID-based authorized software licenses. An alert displays when installed software licenses exceed the number authorized.

Page Name	***Definition Name***	***Usage***
Software Inventory Monitor Pagelet	IT_SFTWR_INV	Review the counts of total licenses versus installed licenses, the counts for authorized and unauthorized users.
Software Pending Requisitions Pagelet	IT_SFTWR_PEND	Review a list and graphic representation of software licenses that the company must acquire to keep the enterprise in compliance.
Software Progress Report Pagelet	IT_PRGS_SWC	Review the up-to-date results of IT asset change or upgrade initiatives.
Software Renewal Pagelet	IT_SFTWR_RENEW	Review the alerts to the IT Asset Manager when a contract needs to be renewed or renegotiated.

Asset Financial Statistics Pagelet

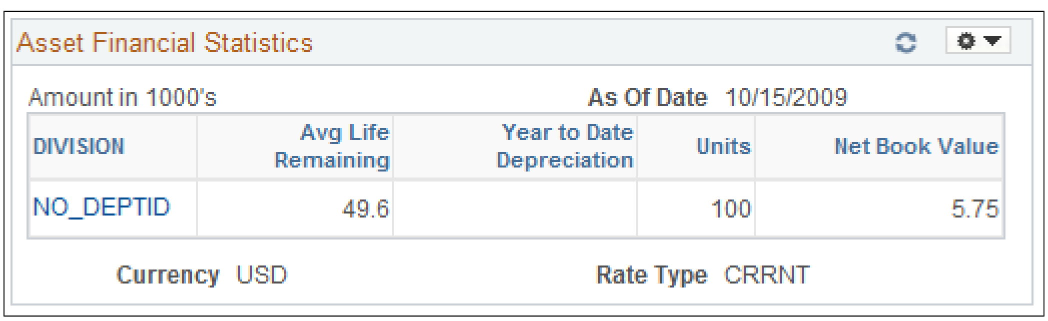
Use the Asset Financial Statistics pagelet (IT_PE_FIN_STAT) to review a snapshot of enterprise IT asset current valuation.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Asset Financial Statistics.**

This example illustrates the fields and controls on the Asset Financial Statistics pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Avg Life Remaining (average life remaining)	Displays a value that is calculated based on the following algorithm: Sum of (Useful life – Life to Date life) / Quantity of assets with useful life available. Depending upon the depreciation method, some assets may not have a useful life attached. In those cases, the asset will not be computed for the algorithm. If quantity equals zero, a not applicable (N/A) legend will appear on that field.
Year to Date Depreciation	Displays the algebraic addition of all the assets to be included in the statistics.
Units	Displays the algebraic addition of quantity field for every asset ID to be included in the statistics.
Net Book Value	Displays the algebraic addition of net book value for every asset to be included in the statistics.

Assets Not Reporting Pagelet

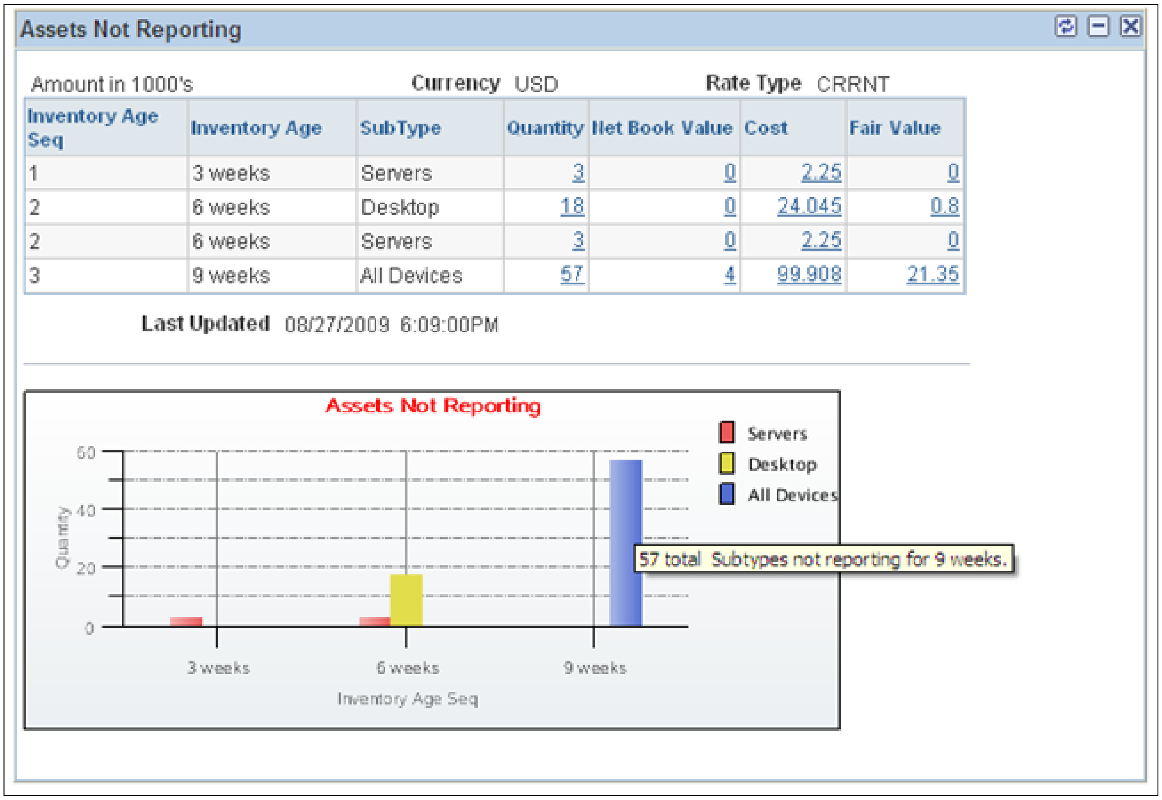
Use the Assets Not Reporting pagelet (IT_PE_UNDISC) to review data and graphic representation of the devices that have failed to report an inventory within a specified time period, allowing managers to investigate the absences.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Assets Not Reporting.**

This example illustrates the fields and controls on the Assets Not Reporting pagelet. You can find definitions for the fields and controls later on this page.



The Assets Not Reporting portal pagelet provides counts of reporting failures for each type of device. It also includes the Assets Not Reporting bar chart of the data.

Field or Control	***Description***
Quantity	Displays the number of assets by subtype that are not reporting. Click the link to drill back to the Assets Not Reporting page and review the assets.
Net Book Value, Cost, and **Fair Value**	Displays the financial information for financial assets. Click the links to access the Assets Not Reporting page. **Note:** The columns for Net Book Value, Cost and Fair Value display on the pagelet only when Financial Impact is enabled on the Installation Options - Asset Management page and when the columns are selected for viewing in User Preferences for a given user. Also select the rounding amount for those values within User Preferences. A user may select to see one, two or all three of the columns. The aggregate values displayed in these three columns apply to only the financial assets that are included in the total number of exceptions, even though the number of exceptions includes both financial and nonfinancial assets.

Field or Control	***Description***
Assets Not Reporting (bar chart)	Included at the bottom of the pagelet. Mouse over the graph to view the number of assets that are not reporting accompanied by the description for each category. The bars are based on the column quantity from the record.

See “Understanding the IT Asset Inventory Tool” (PeopleSoft IT Asset Management).

See “Managing Assets Not Reporting” (PeopleSoft IT Asset Management).

Hardware Inventory Pagelet

Use the Hardware Inventory pagelet (IT_HRDWR_SUM) to count all IT hardware–by subtype–that appears in the third-party and asset repository databases.

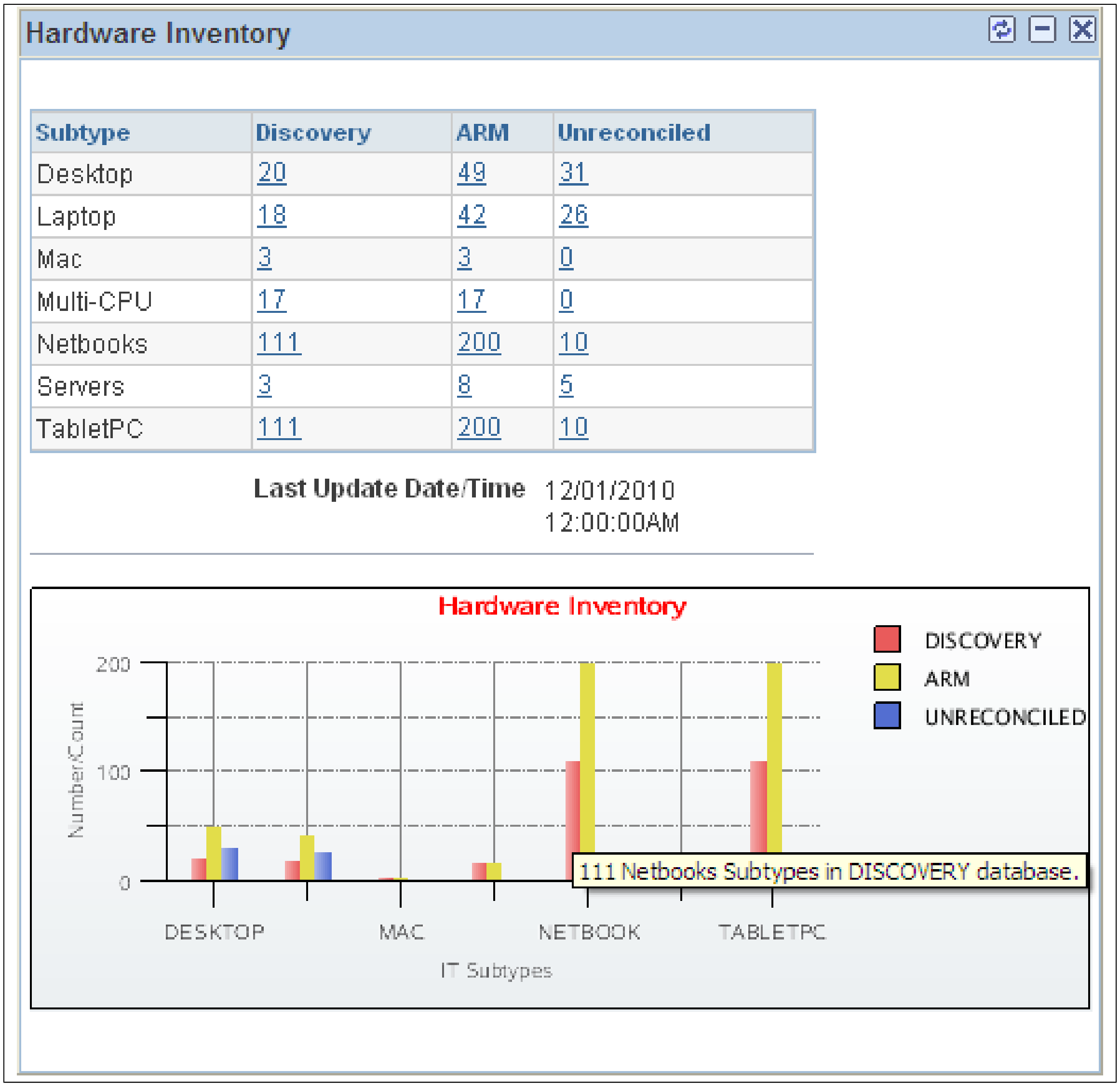
View a summary count and graphic representation of IT hardware that appears in one database but not the other.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Hardware Inventory.**

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



Field or Control	***Description***
Discovery	Displays the number of assets per subtype found in the third-party database. Click the link to access the Hardware Inventory page. On the Hardware Inventory page, the system populates the **IT Subtype** with the link value that you clicked in the pagelet. The system enters *Discovery DB* as the **Source Database.**

Field or Control	***Description***
ARM	Displays the number of assets per subtype found in the asset repository. Click the link to access the Hardware Inventory page. On the Hardware Inventory page, the system populates the **IT Subtype** with the link value that you clicked in the pagelet. The system enters *Asset Repository* as the **Source Database.**
Unreconciled	The Unreconciled Assets column contains the combined count of those assets that exist in only one of the databases—third-party or the asset repository. The system displays the number of assets per subtype that are found in only one database. Click the link to access the Hardware Inventory page. On the Hardware Inventory page, the system populates the **IT Subtype** with the link value that you clicked in the pagelet. The system enters *Both ARM and Discovery* as the **Source Database.** Note that it changes the operator to <> (not equal.) The query returns those assets NOT in ARM ADDED TO the assets NOT in Discovery.
Hardware Inventory (bar chart)	The Hardware Inventory pagelet includes the Hardware Inventory bar chart, which displays the number of assets from Discovery, ARM, and Unreconciled for each Subtype. Mouse over the graph and view the number and description for each Subtype.

Related Links

"Working with Hardware Inventory" (PeopleSoft IT Asset Management)

Hardware Progress Report Pagelet

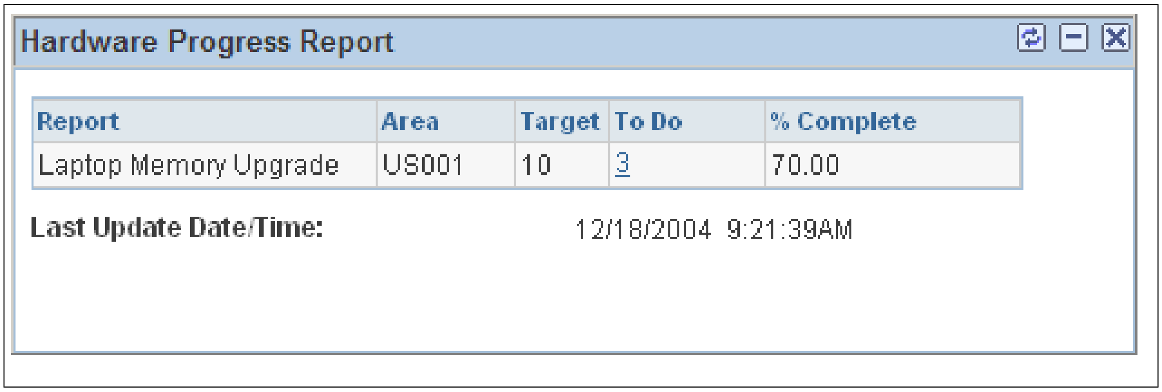
Use the Hardware Progress Report pagelet (IT_PRGS_HWC) to review up-to-date results of IT asset change or upgrade initiatives.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Hardware Progress Report.**

This example illustrates the fields and controls on the Hardware Progress Report pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Report	Defines which template (a container for report parameters) drives this line of data.
Target	Displays the total number of expected actions at the outset of a project such as the count of machines that meet the criteria. This number is generated when the report is run for the first time.
To Do	Displays the number of outstanding actions in a project. Click to access the Progress Report Detail page and view a list of items for a specific project. On the Progress Report Detail page, you can drill down to the details for each item in the project.

Note: Only those hardware assets that are in physical use are analyzed and processed through the progress report.

Integration Data Load Errors Pagelet

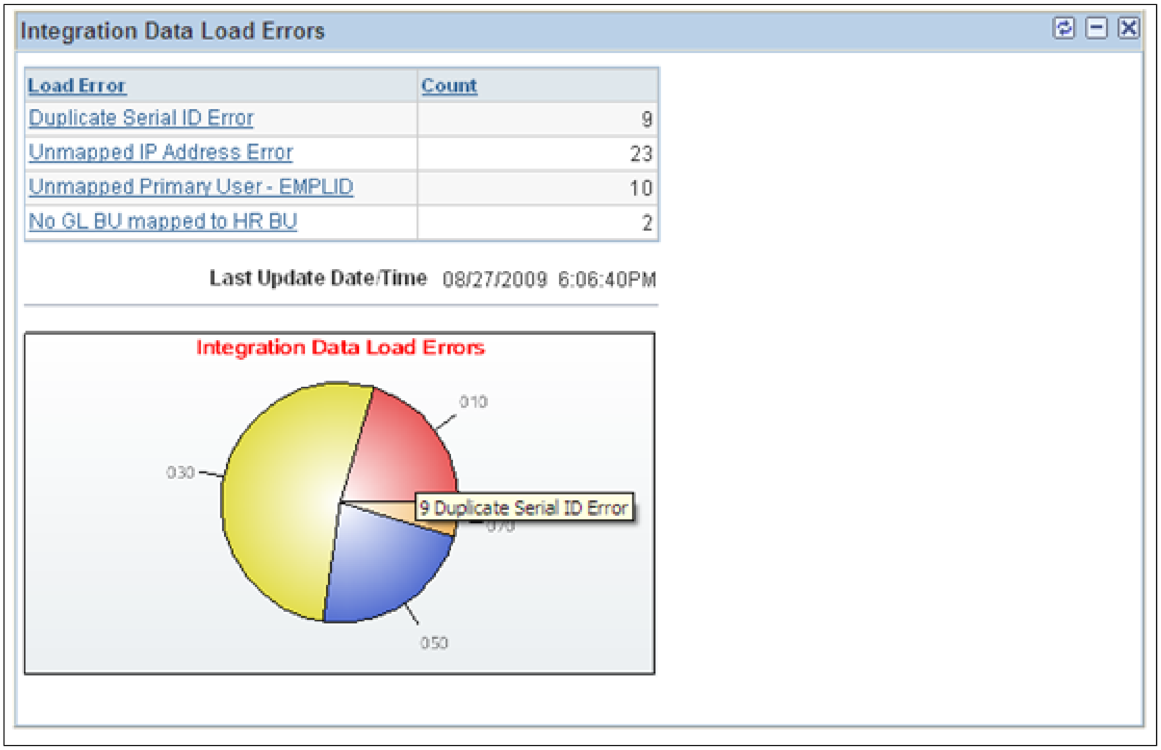
Use the Integration Data Load Errors pagelet (IT_LOAD_ERR_SUM) to review summarized totals and graphic representation of the data mapping errors that are encountered during integration of staged data from third-party discovery suppliers.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Integration Data Load Errors.**

This example illustrates the fields and controls on the Integration Data Load Errors pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	*Description*
Load Error	Displays the summarized totals of the data mapping errors that are encountered during integration of staged data from third-party discovery suppliers. Drill down from the following links to view details on the Integration Data Load Errors page: • **Unmapped Primary User - EMPLID** • **Unmapped IP Address Error** • **Duplicate Serial ID Error** • **Unmapped Manufacturer Error** • **No GL BU mapped to HR BU**
Count	Displays the number of exceptions for each integration data load error.

Note: It is not necessary to run the Generate Metrics process in order to produce these totals. The IT_LOAD_PROC is submitted automatically when the data is received through the integration.

Inventory Exceptions Pagelet

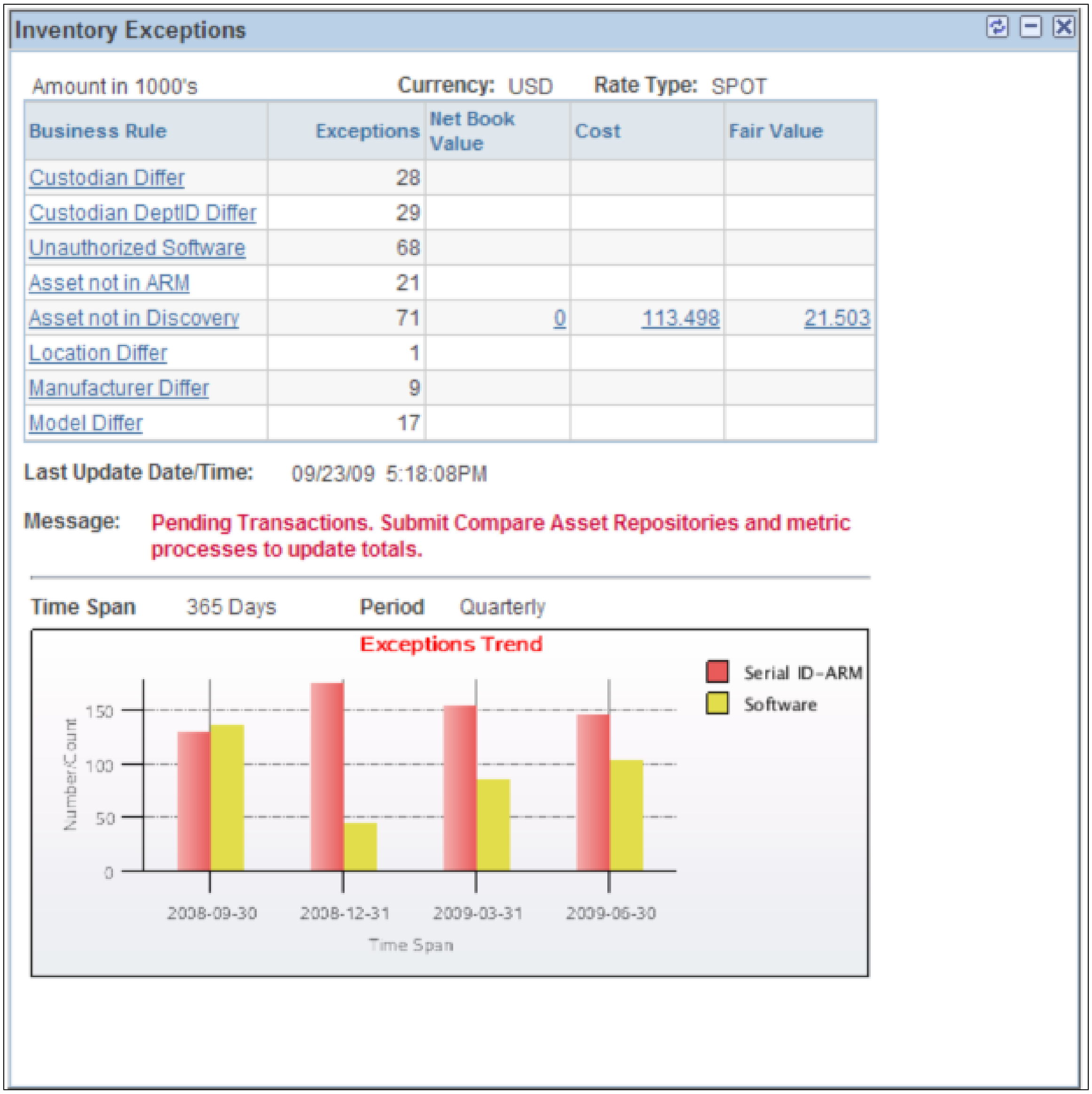
Use the Inventory Exceptions pagelet (IT_PE_INV_EXCEPT) to review a summary of the differences between the Asset Repository and the third-party database.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Inventory Exceptions.**

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



Field or Control	*Description*
Business Rule	Displays each of the business rules that will generate an exception. Click the link to access the Manage Exceptions page.
Exceptions	Displays the number of exceptions for each business rule.

Field or Control	***Description***
Net Book Value	Displays the total net book value (NBV) of the *financial* assets included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the NBV for each financial asset from the Manage Exceptions page.
Cost	Displays the total cost basis of the *financial* assets that are included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the Cost for each financial asset from the Manage Exceptions page.
Fair Value	Displays the total fair value (FV) of the *financial* assets that are included in the exceptions for a business rule that would require a retirement to correct. Click the link to review the FV for each financial asset from the Manage Exceptions page.
Exceptions Trend (graph)	Displays a graph of the business rule exceptions over time. See PeopleSoft IT Asset Management, Managing Exceptions, Viewing Manage Exceptions Trend.

Note: The columns for Net Book Value, Cost and Fair Value display on the Inventory Exceptions pagelet only when Financial Impact is enabled on the Installation Options - Asset Management page and when the columns are selected for viewing in User Preferences for a given user. A user may select to see one, two or all three of the columns. The aggregate values displayed in these three columns apply to only the financial assets that are included in the total number of exceptions, even though the number of exceptions includes both financial and nonfinancial assets.

See “Setting Up Business Rules” (PeopleSoft IT Asset Management).

Lease End Metrics Pagelet

Use the Lease End Metrics pagelet (AM_LEASE_SUM) to review IT-related leases that will expire within the next *n* days.

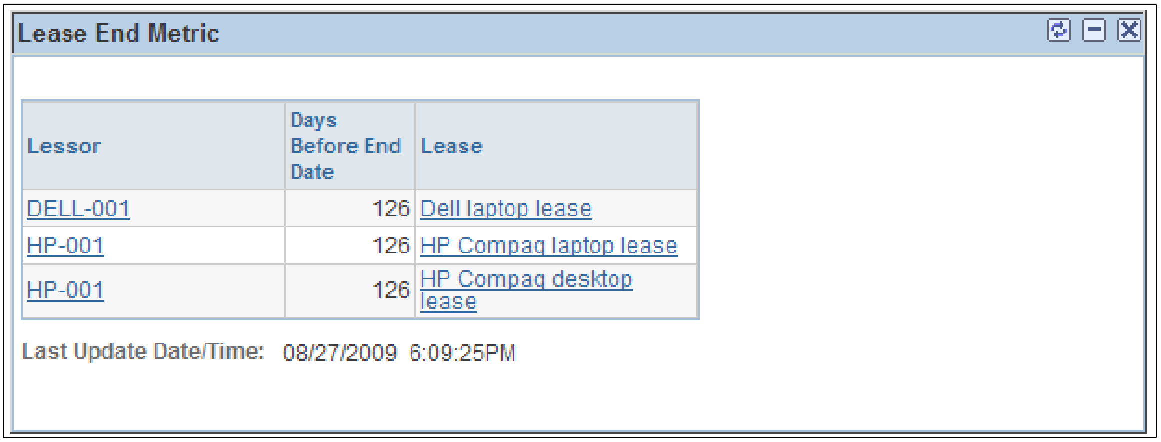
Drill down to the assets associated with the leases.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Lease End Metrics.**

This example illustrates the fields and controls on the Lease End Metric pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Lessor	Click the link to access the Lease Summary by Lessor page.
Days Before End Date	Displays the number of days before lease expiration in ascending order.
Lease	Click the link to access the Link Details page.

See “Working with Leases” (PeopleSoft IT Asset Management).

Related Links Pagelet

Use the Related Links pagelet (IT_PE_THIRDLINK) to link to frequently accessed URLs.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Related Links.**

See “Creating Related Links” (PeopleSoft IT Asset Management).

Software Device Monitor Pagelet

Use the Software Device Monitor pagelet (IT_PE_SWDG_SUM) to review the installed software licenses versus serial ID-based authorized software licenses.

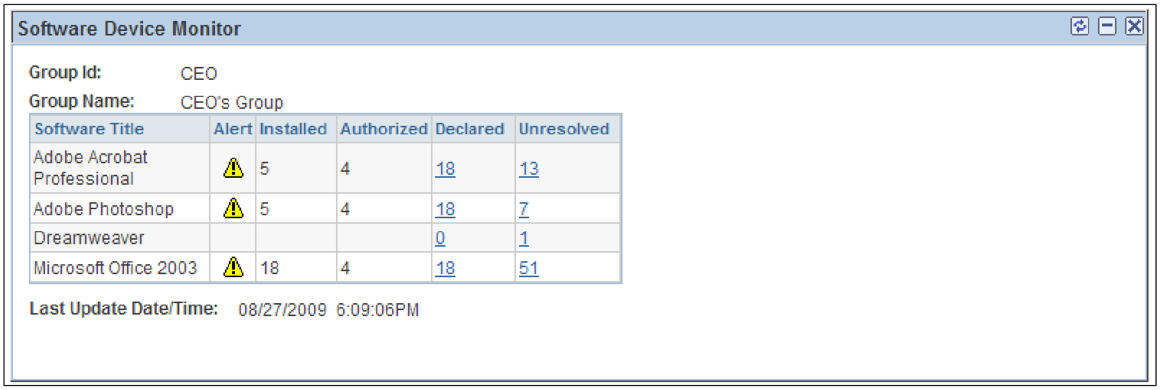
An alert displays when installed software licenses exceed the number authorized.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Software Device Monitor.**

This example illustrates the fields and controls on the Software Device Monitor pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Software Title	Displays the software licenses that are configured for tracking by Software Device Group ID. The Software Device Group is a grouping of machines that is used to associate a Content Manager (EMPLID) to a group of machines by their Serial ID. Group definitions can contain groups as well as machines.
Alert	Displays a warning icon if the number of installed licenses exceeds the number of authorized licenses. Alerts are not displayed for device groups that are defined as count licenses on the Define Software Titles/Users page.
Installed	Displays the count of licenses that are installed based on Serial ID according to the Asset Repository.
Authorized	Displays the count of authorized licenses associated with a serial ID. Count license device groups are not included in the count.
Declared	Displays the count of licenses that are declared for the Software Device Group based on Serial ID. Click the link to access the Software Device Inventory page. The search option for the software title and Group ID will be supplied.

Field or Control	***Description***
Unresolved	Displays the number of licenses associated with devices that do not belong to any Software Device Group, or licenses for devices that are not in the Asset Repository. For those devices in the Asset Repository but not in any Software Device Group, the licenses are counted and the number of CPUs are as defined in the Asset Repository. Machines that are not in the Asset Repository are counted as one per device. Click the link to access the Resolve Device Licenses page. Search by **Software Title** or by **Serial Number.**

See “Resolve Device Licenses Page” (PeopleSoft IT Asset Management).

See “Define Software Titles/Users Page” (PeopleSoft IT Asset Management).

Software Inventory Monitor Pagelet

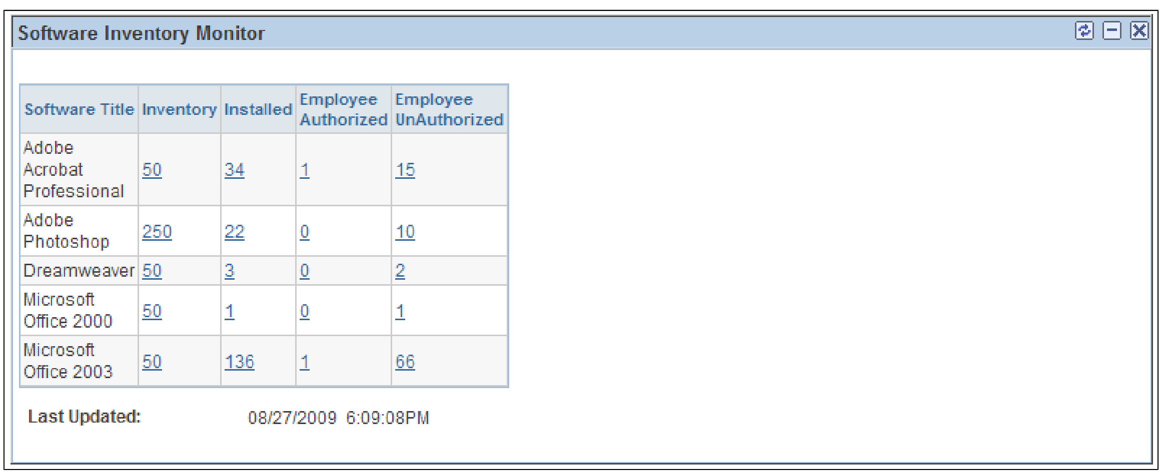
Use the Software Inventory Monitor pagelet (IT_SFTWR_INV) to review the counts of total licenses versus installed licenses, the counts for authorized and unauthorized users.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Software Inventory Monitor.**

This example illustrates the fields and controls on the Software Inventory Monitor pagelet. You can find definitions for the fields and controls later on this page.


Software Inventory Monitor

Software Title	Inventory	Installed	Employee Authorized	Employee UnAuthorized
Adobe Acrobat Professional	50	34	1	15
Adobe Photoshop	250	22	0	10
Dreamweaver	50	3	0	2
Microsoft Office 2000	50	1	0	1
Microsoft Office 2003	50	136	1	66

Last Updated: 08/27/2009 6:09:08PM

Field or Control	***Description***
Software Title	Displays the software licenses that are configured for tracking.

Field or Control	Description
Inventory	Displays the count of purchased software licenses. This column includes both employee and device authorizations. Click the link to access the Software License Inventory page.
Installed	Displays the count of users that installed the specific software This column includes both employee and device authorizations. Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied.
Employee Authorized	Displays the count of authorized users who installed the software. This column excludes device authorizations. Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied as well as the value of **Employee Authorized** in the Authorized Search option.
Employee Unauthorized	Displays the count of unauthorized users who installed the software. This column excludes device authorizations. Click the link to access the Discover Software Inventory page. The search option for the software title will be supplied as well as the value of **Employee Unauthorized** in the Authorized Search option.

See “Working with Software Inventory” (PeopleSoft IT Asset Management).

Software Pending Requisitions Pagelet

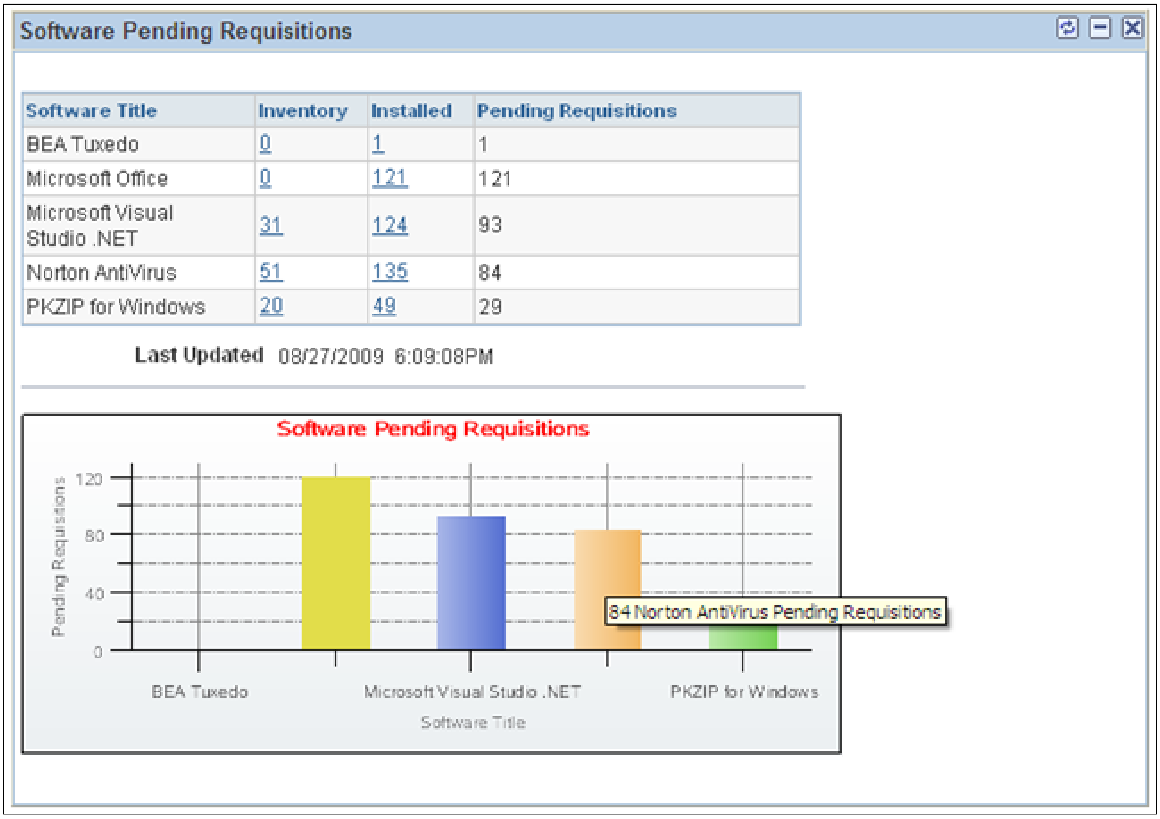
Use the Software Pending Requisitions pagelet (IT_SFTWR_PEND) to review a list and graphic representation of software licenses that the company must acquire to keep the enterprise in compliance.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Software Pending Requisitions.**

This example illustrates the fields and controls on the Software Pending Requisitions pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Software Title	Shows only those software titles that are defined with track requisitions *On* and when the installed copies exceed the purchased copies.
Inventory	Displays the number of purchased copies of the software title. Click the link to access the Software License Inventory page.
Installed	Displays the number of installed copies of the software title. This column includes both employee and device authorizations. Click the link to access the Discover Software Inventory page.
Pending Requisitions	Displays the difference between the number of purchased copies and the number of installed copies.
Software Pending Requisitions (bar chart)	This pagelet includes a corresponding bar chart at the bottom. Mouse over the Software Pending Requisitions bar chart and view the number of pending requisitions with respective software titles.

Software Progress Report Pagelet

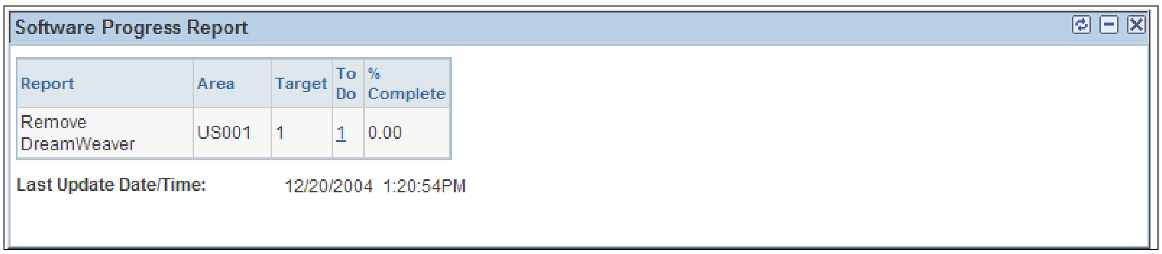
Use the Software Progress Report pagelet (IT_PRGS_SWC) to review the up-to-date results of IT asset change or upgrade initiatives.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Software Progress Report.**

This example illustrates the fields and controls on the Software Progress Report pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Report	Defines which template (a container for report parameters) drives this line of data.
Area	Displays the associated business unit.
Target	Displays the total number of expected actions at the outset of a project such as the count of machines that meet the criteria. This number is generated when the report is run for the first time.
To Do	Displays the number of outstanding actions in a project. Click to view a list of items for a specific project. On the Progress Report Detail page, you can drill down to the details for each item in the project.
% Complete	Displays the percentage of completion for a project.

Software Renewal Pagelet

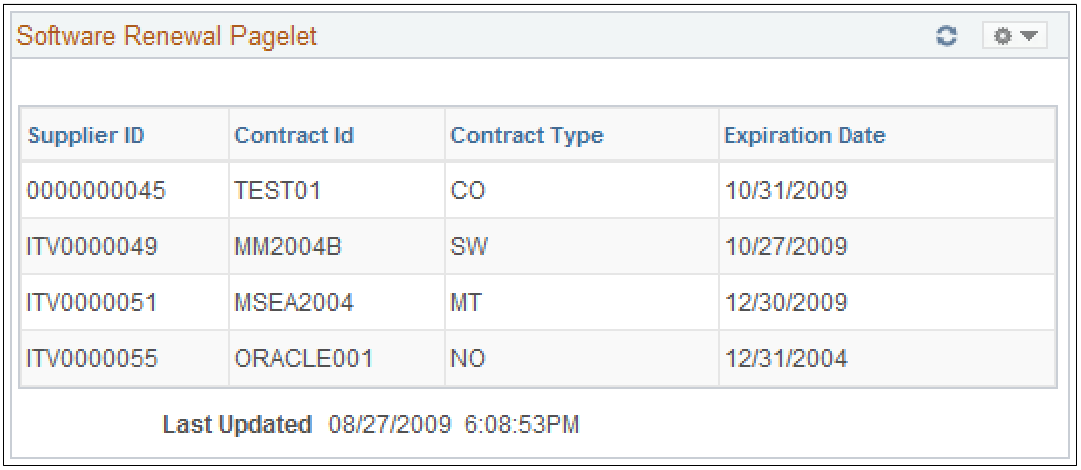
Use the Software Renewal pagelet (IT_SFTWR_RENEW) to review the alerts to the IT Asset Manager when a contract needs to be renewed or renegotiated.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Software Renewal.**

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



Software Renewal Pagelet

Supplier ID	Contract Id	Contract Type	Expiration Date
0000000045	TEST01	CO	10/31/2009
ITV0000049	MM2004B	SW	10/27/2009
ITV0000051	MSEA2004	MT	12/30/2009
ITV0000055	ORACLE001	NO	12/31/2004

Last Updated 08/27/2009 6:08:53PM

Software assets with contracts that have an expiration date, with a status of *Active* and with a Renewal Notice value (that is, the renewal notice is not blank), will be included in the Software Renewal metric if the system date or **As of Date** of the process is greater than the expiration date minus the number of days entered in the Renewal Notice.

Field or Control	***Description***
Supplier ID	Displays values from the supplier table.
Contract Id	Displays the contract number determined during negotiations with supplier.
Contract Type	Displays the user-defined contract type.
Expiration Date	Displays the end date of the contract.

Chapter 19

Using Pagelets Enabled by PeopleSoft Maintenance Management

Setting Up PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack

This topic provides an overview of PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack and lists the pages used to set up Maintenance Management for the ALM Portal Pack.

Pages Used to Set Up PeopleSoft Maintenance Management for the PeopleSoft ALM Portal Pack

Page Name	***Definition Name***	***Usage***
Update Work Order Portal Data Page	WM_PE_RUN	Run a process that summarizes the transaction data and improves the response time for displaying the service request, work order, backlog, and work order task data on the pagelets for PeopleSoft Maintenance Management in the PeopleSoft ALM portal pack. Go to **Set Up Financials/Supply Chain** > **Pagelets** > **Asset Lifecycle Management** > **Maintenance Management** > **Run Work Order Portal Metrics**.
Update Most Costly Asset Data Page	WM_PE_ASSET_RUN	Run a process that summarizes the transaction data and improves the response time for displaying the asset data on the Update Most Costly Assets and the Top Five Problems pagelets for PeopleSoft Maintenance Management in the PeopleSoft ALM portal pack. Go to **Set Up Financials/Supply Chain** > **Pagelets** > **Asset Lifecycle Management** > **Maintenance Management** > **Run Asset Related Metrics** .

Understanding PeopleSoft Maintenance Management for PeopleSoft ALM Portal Pack

If you are currently using PeopleSoft Maintenance Management and want to use the Maintenance Management pagelets in the PeopleSoft ALM Portal Pack, you must schedule and run the Update Work Order Portal Data Application Engine process (WM_PE) and Update Most Costly Asset Data Application Engine process (WM_PE_ASSET). The Update Work Order Portal Data and Update Most Costly Asset Data processes summarize transaction data in order to improve response times when viewing the pagelets. The data is stored in summary tables and is displayed on pagelets according to your personalized settings. While the Update Work Order Portal Data and Update Most Costly Asset Data process greatly improves response times for reading the data, it also imposes limitations on when changes to the transaction data are reflected in the pagelets. Changes in the transaction data are not reflected in the pagelets in real time. You must periodically rerun the process to refresh the pagelets. Oracle recommends setting up a recurring job to execute the Update Work Order Portal Data and Update Most Costly Asset Data process on a periodic basis. How often you run the collector process depends on a number of factors such as:

- How quickly you need the data updated.
- How much data you have in the system—the longer your system operates, the more data has to be summarized, hence the longer the data loader process can take to execute.
- How many system resources are available to your process scheduler.

Viewing Scheduler's Work Orders

This topic discusses how to view the Scheduler's Work Orders pagelet.

Pages Used to View Scheduler's Work Orders

Page Name	***Definition Name***	***Usage***
Scheduler's Work Orders Pagelet	EP_WM_MY_WO	View the work order tasks for which the current logged-in is responsible for scheduling.
Work Order - Schedules Page	WM_WO_TASK_SCHED	View details for a specific work order shown on the Scheduler's Work Orders pagelet. See the Scheduler's Work Orders Pagelet.
Work Order Workbench Page	WM_WOTSK_WORKBENCH	Access and update work order tasks assigned to this scheduler. See the Scheduler's Work Orders Pagelet.

Scheduler's Work Orders Pagelet

Use the Scheduler's Work Orders pagelet (EP_WM_MY_WO) to view the work order tasks for which the current logged-in is responsible for scheduling.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Scheduler's Work Orders.**

This pagelet displays work order tasks that are for the user to schedule.

Field or Control	***Description***
Description	Click this link to access the Work Order - Schedules page for a specific work order. You can view the details associated with the task.
Priority	Displays the importance of the tasks assigned.
Required Date	Displays the date that the task needs to occur.
Task Status	Display the state of the work order task.
Go to Workbench	Click this link to access and update the work orders assigned to this scheduler on the Work Order Workbench.

Viewing My Assigned Work Orders

This topic discusses how to view the My Assigned Work Orders pagelet.

Pages Used to View My Assigned Work Orders

Page Name	***Definition Name***	***Usage***
My Assigned Work Orders Pagelet	EP_WM_MY_WO_TECH	View the work order tasks that have been assigned to the user currently logged into the system.
Work Order - Schedules Page	WM_WO_TASK_SCHED	View details for a specific work order shown on the My Assigned Work Orders pagelet. See the My Assigned Work Orders Pagelet.

Page Name	***Definition Name***	***Usage***
Technician Workbench Page	WM_WOE_WB	Access and update the assigned work order tasks for this user. See the My Assigned Work Orders Pagelet.

My Assigned Work Orders Pagelet

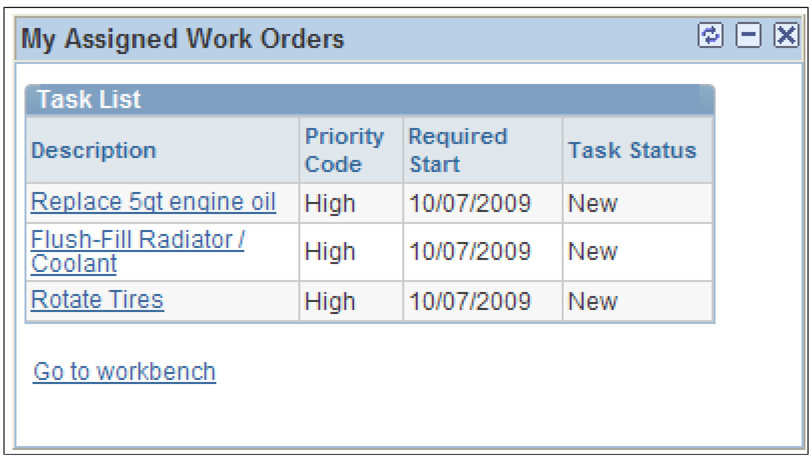
Use the My Assigned Work Orders pagelet (EP_WM_MY_WO_TECH) to view the work order tasks that have been assigned to the user currently logged into the system.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **My Assigned Work Orders.**

This example illustrates the fields and controls on the My Assigned Work Orders page.



This pagelet displays the work orders assigned to the user currently logged into the system, the priority of each work order, the required start date of the work order, and the status of each task associated with the work order that is assigned to this user. Click the **Go to Workbench** link to access the Technician Workbench for this user. The user can update work order tasks on this page as needed.

Viewing My Service Requests

This topic discusses how to view the Viewing My Service Requests pagelet.

Pages Used to View My Service Requests

Page Name	***Definition Name***	***Usage***
My Service Requests Pagelet	EP_WM_MY_WR	View the five most recent work requests that belong to the user logged into the system.
Update Service Request Page	WM_WORK_REQUEST_SS	Click a service request number that appears on the My Service Requests pagelet to view details for a specific work request. See the My Service Requests Pagelet.
My Service Requests Page	WM_MY_REQUESTS	View all service requests opened by the user logged into the system. See the My Service Requests Pagelet.

My Service Requests Pagelet

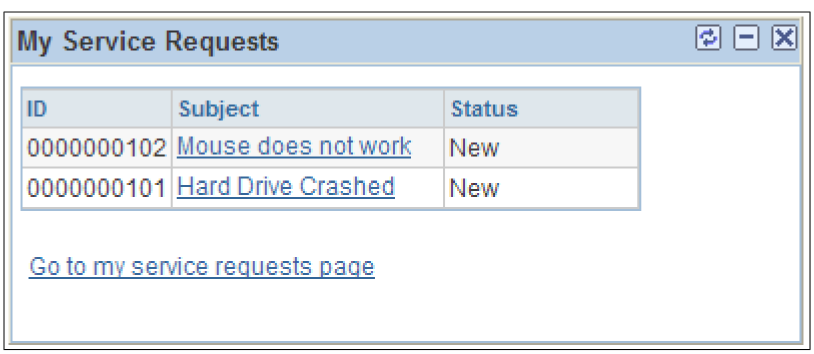
Use the My Service Requests pagelet (EP_WM_MY_WR) to view the five most recent work requests that belong to the user logged into the system.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **My Service Request.**

This example illustrates the fields and controls on the My Service Requests page.



This pagelet displays the five most recent service requests for the user who is logged into the system. The service request ID, subject, and status display.

Field or Control	Description
Subject	Click this link to access the My Service Request page for a specific Service request. This link is not available if you do not have authorization to access this page. The page identifies the problem or issue that needs to be addressed.
Status	Displays the current status of the service request.
Go to my service requests page	Click to view all service requests entered by the user logged into the system on the My Service Requests page (WM_MY_REQUESTS).

Viewing Backlog by Work Order Type

This topic discusses how to view the work order backlog information and personalize the Work Order Portal Personalization page.

Pages Used to View Backlog by Work Order Type

Page Name	Definition Name	Usage
Backlog by Work Order Type Pagelet	EPWM_PE_BACKLOG_GBL	View the backlog of work orders by work order type.
Work Order Workbench Page	WM_WOTSK_WORKBENCH	Click the work order type code link on the Backlog by Work Order Type pagelet to view the workbench for the user logged into the system. See theBacklog by Work Order Type Pagelet.
Work Order Portal Personalization Page	WM_PE_PRS	Define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Backlog by Work Order Type Pagelet

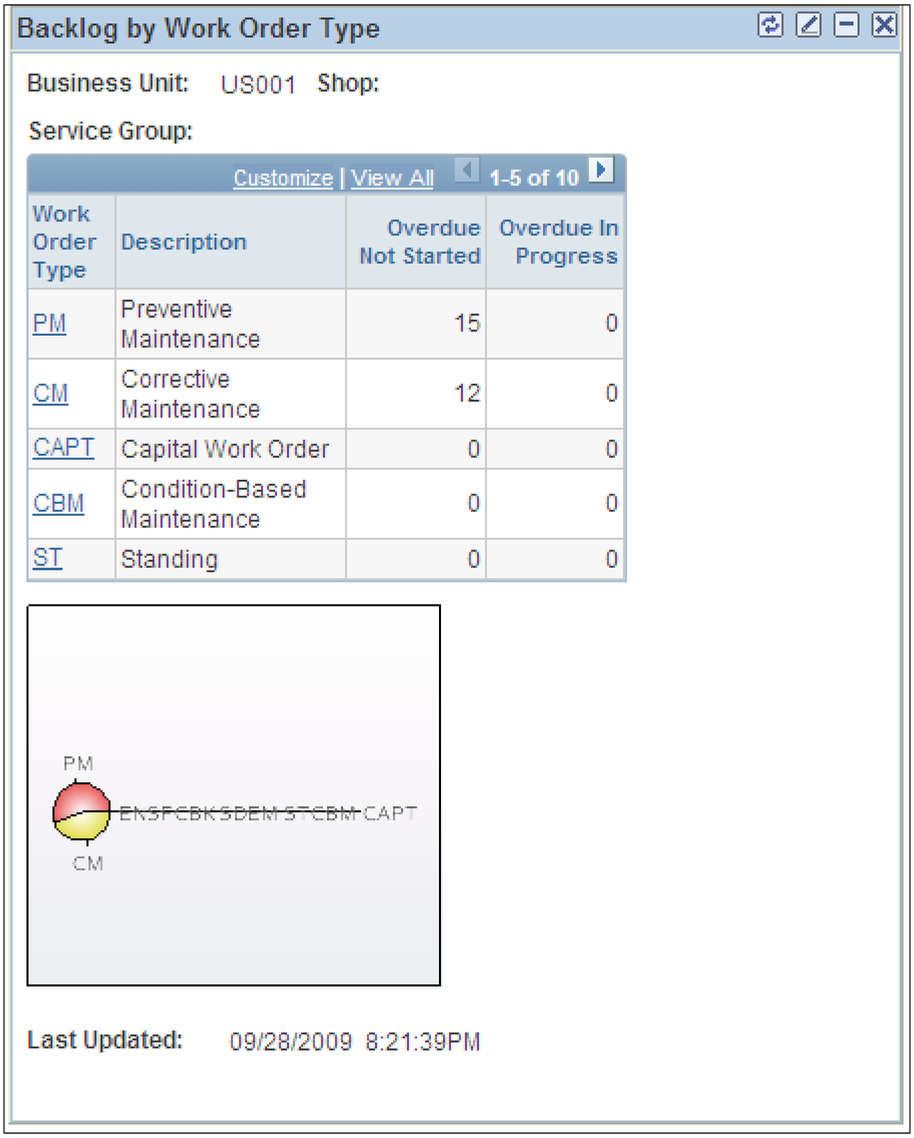
Use the Backlog by Work Order Type pagelet (EPWM_PE_BACKLOG_GBL) to view the backlog of work orders by work order type.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Backlog by Work Order Type.**

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



The Backlog by Work Order Type pagelet provides a high-level statistical summary of the overall backlog of work orders, which are broken down into different categories for a particular work order business unit, service group, and/or shop. This backlog is an accumulation of work orders not started or not complete on time. All work orders need to be dealt with directly in PeopleSoft Maintenance Management until the work is completed and the costs applied.

The pie chart is a visual summarization of the total **Overdue Not Started** and **Overdue In Progress** broken down by **Work Order Type.**

By clicking the **Work Order Type** link, the system navigates to the Work Order Workbench page.

Field or Control	***Description***
Overdue Not Started	Displays the number of work order tasks with a **Required End Date** that is less than the current date, a status that is not equal to *Complete, Closed* or *Cancelled* and the **Actual Start Date** is null.
Overdue in Progress	Displays the number of work order tasks with a **Required End Date** that is less than the current date, a status that is not equal to *Complete, Closed* or *Cancelled,* the **Actual Start Date** is not null and the **Required End Date** is not null, and less than the **Run Time Date.**
	Click this icon to refresh the data on the pagelet.
	Click this icon to access the Work Order Portal Personalization page.
	Click this icon to minimize the displaying page.
	Click this icon to remove the pagelet from the display.

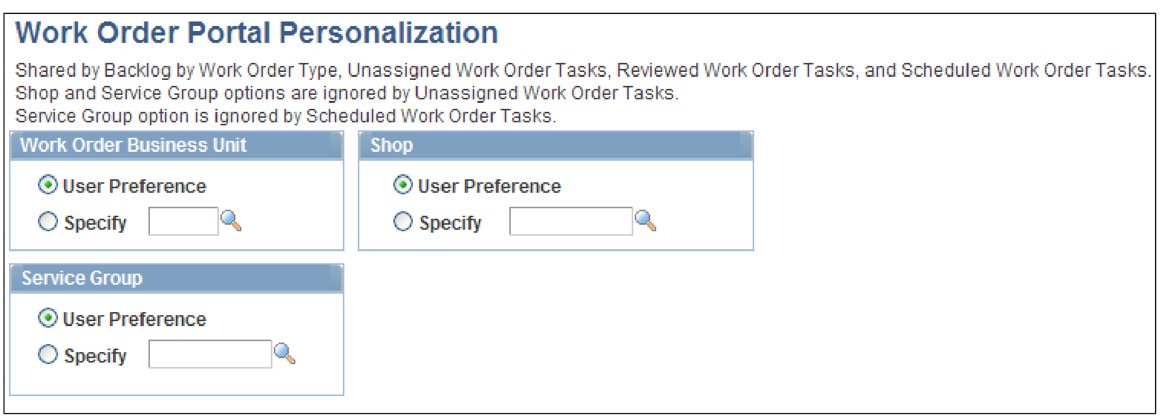
Work Order Portal Personalization Page

Use the Work Order Portal Personalization page (WM_PE_PRS) to define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Navigation:

Click the **Customize Backlog by Work Order Type** icon at the top of the Backlog by Work Order Type pagelet.

This example illustrates the fields and controls on the Work Order Portal Personalization page.



You can either use the default user preferences or select a value for the work order business unit, service group or shop.

Note: The Work Order Portal Personalization page is shared by the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets. Shop and service group options are not used by the Unassigned Work Order Tasks pagelet.
The service group option is not used by the Scheduled Work Order Tasks pagelet.

Viewing Unassigned Work Order Tasks

This topic provides an overview and discusses how to view unassigned work order tasks information.

Pages Used to View Unassigned Work Order Tasks

Page Name	***Definition Name***	***Usage***
Unassigned Work Order Tasks Pagelet	EPWM_PE_INITIAL_GBL	View work order tasks grouped by priority that are *Unassigned* or *Unplanned* status.
Work Order Workbench Page	WM_WOTSK_WORKBENCH	View the Work Order Workbench for the user logged into the system. See the Unassigned Work Order Tasks Pagelet.
Work Order Portal Personalization Page	WM_PE_PRS	Click the **Customize Unassigned Work Order Tasks** icon on the Unassigned Work Order Tasks pagelet to define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Understanding the Unassigned Work Order Tasks Pagelet

It is important to review new work orders in a timely manner. When a work order is first created, the work order is not reviewed and is in an initial stage. The first status of a work order is configurable by the customer. Based on the initial customer defined status, the system infers the work order has not been planned, reviewed, or assigned. Some refer to this view as the *unplanned backlog,* which is often used as a measure of planning efficiency.

This pagelet displays work orders that have an *initial* customer-defined status (unplanned or unassigned) that needs attention and displays the work orders in a prioritized manner, sorted by urgency and age. A count of the work orders is shown for each priority based on age. Each age group is totaled by the end column giving a grand total for the group.

The pie chart is a graphical summarization of the total unassigned work order tasks by priority.

Unassigned Work Order Tasks Pagelet

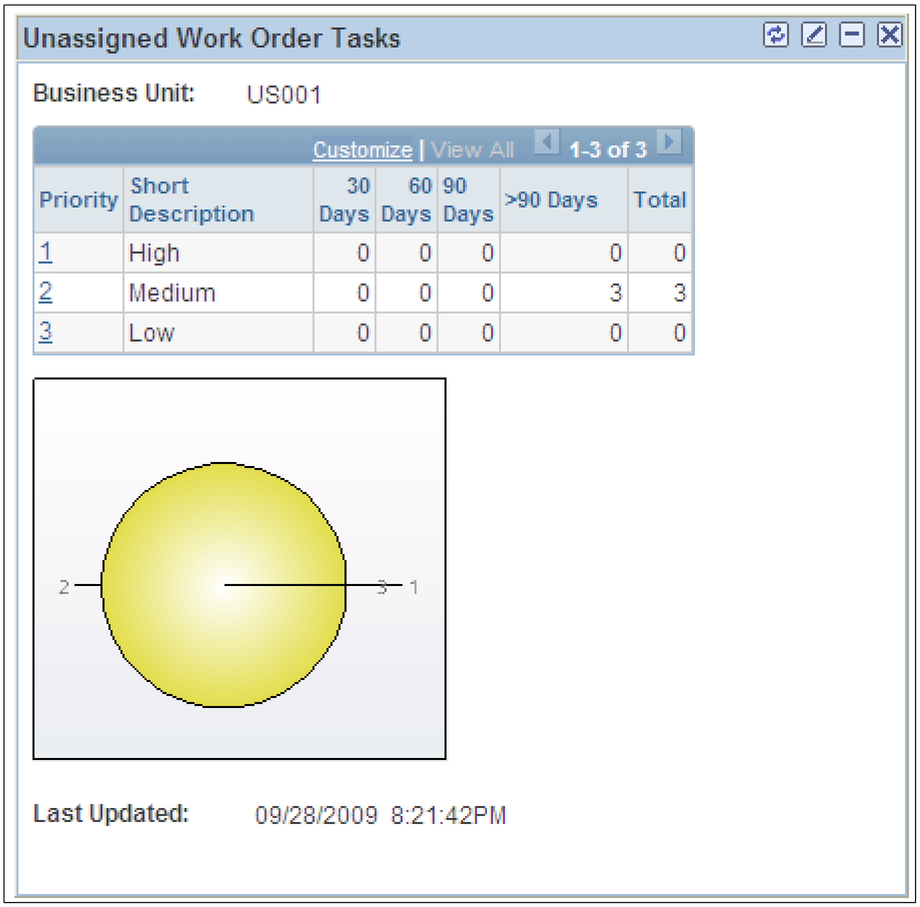
Use the Unassigned Work Order Tasks pagelet (EPWM_PE_INITIAL_GBL) to view work order tasks grouped by priority that are Unassigned or Unplanned status.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Unassigned Work Order Tasks.**

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



Field or Control	***Description***
Priority	Click the **Priority** link to transfer the Work Order Workbench page to view a list of work orders for the selected priority, sorted by descending date. From the list of work orders on the Technician Workbench, click the **Work Order ID** link to view the work order details. **Note:** The **Priority** field is a configurable value.

Field or Control	*Description*
30 Days, 60 Days, 90 Days, and **>90 Days** (greater than 90 days)	Displays the number of work orders unassigned by priority and aging days based on the creation date of the work order.
Total	Displays the total of all columns and represents all work orders for the given priority.

Note: This pagelet is dependent on the **Initial Status** field being set during implementation. The **Initial Status** field is established during system setup, and work orders cannot be created until the initial status is defined.

Note: This pagelet can only be personalized for the work order business unit. The pagelet is restricted in this way so a user does not accidentally filter out important work orders.
See the Personalizing Backlog by Work Order Type section of this topic for information on specifying the work order business unit.

Note: Work orders created from preventive maintenance schedules are not included in this pagelet.

Viewing Reviewed Work Order Tasks

This topic discusses how to view reviewed work order information.

Pages Used to View Reviewed Work Order Tasks

Page Name	*Definition Name*	*Usage*
Reviewed Work Order Tasks Pagelet	EPWM_PE_REVIEWED_GBL	View work orders grouped by priority and age that have been reviewed but not scheduled.
Work Order Workbench Page	WM_WOTSK_WORKBENCH	View the work order workbench for the user logged into the system. See the Reviewed Work Order Tasks Pagelet.
Work Order Portal Personalization Page	WM_PE_PRS	Click the **Customize Reviewed Work Order Tasks** icon on the Reviewed Work Order Tasks pagelet to define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Reviewed Work Order Tasks Pagelet

Use the Reviewed Work Order Tasks pagelet (EPWM_PE_REVIEWED_GBL) to view work orders grouped by priority and age that have been reviewed but not scheduled.

This pagelet displays work orders that have been reviewed. The work orders are known by the planners, have not been scheduled, but are kept in the system for execution at the appropriate time. The work orders are not canceled or scheduled, but are in the queue for processing.

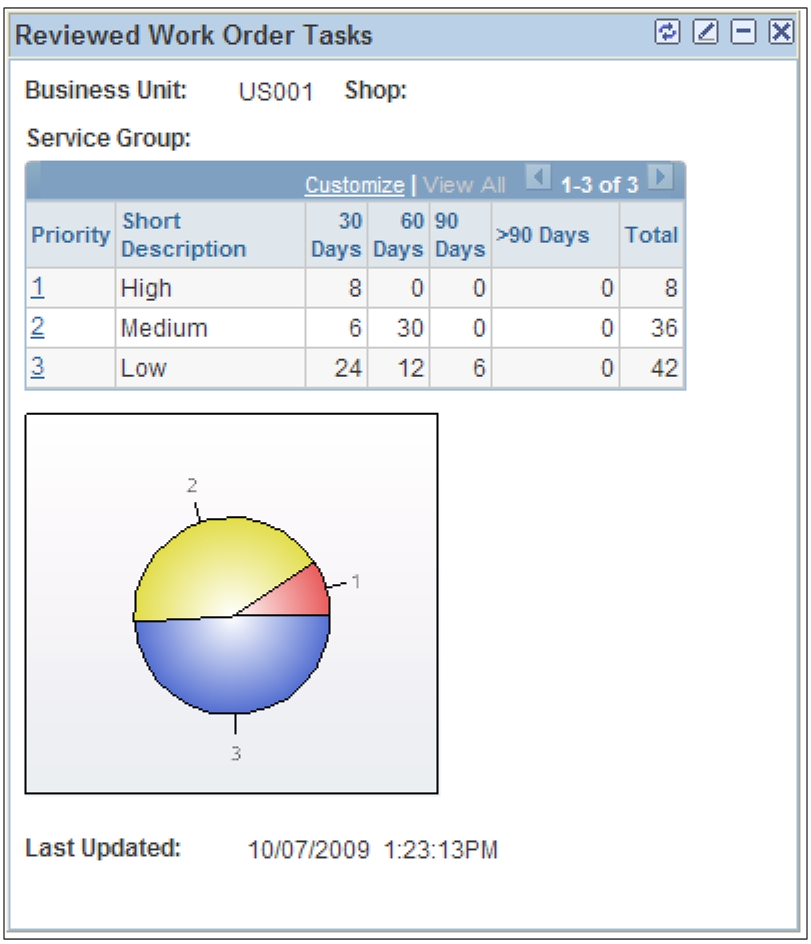
These work orders represent a backlog of work that has been identified as necessary, but has not yet been completely planned and scheduled.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Reviewed Work Order Tasks.**

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


Reviewed Work Order Tasks

Business Unit: US001 Shop:

Service Group:

Customize | View All 1-3 of 3

Priority	Short Description	30 Days	60 Days	90 Days	>90 Days	Total
1	High	8	0	0	0	8
2	Medium	6	30	0	0	36
3	Low	24	12	6	0	42

Last Updated: 10/07/2009 1:23:13PM

Field or Control	*Description*
Priority	Click the **Priority** link to transfer to the Work Order Workbench page to view a list of work orders for the selected priority, sorted by descending date. **Note:** The **Priority** field is a configurable value.
30 Days, 60 Days, 90 Days, and **>90 Days** (greater than 90 days)	Displays the number of work orders reviewed by priority and aging days based on the creation date of the work order.
Total	Displays the total of all columns and represents all work orders for the given priority.

Note: See the Personalizing Backlog by Work Order Type section of this topic for information on personalizing this pagelet.

Note: This pagelet is dependent on the status of the work order. The status must not be equal to an initial status, complete, closed, or canceled. The **Scheduled Start Date** is equal to *Null* and the **Standing Work Order** field is equal to *False.*

Note: This pagelet is dependent on the **Initial Status** field being changed to another active status. This requires a business process the user must establish in order to view the complete backlog. If the status is not changed, the work orders are included in the Backlog by Work Order Type pagelet and do not appear in the Reviewed Work Orders pagelet.

Viewing Scheduled Work Order Tasks

This topic discusses how to view scheduled work order tasks information.

Pages Used to View Scheduled Work Order Tasks

Page Name	*Definition Name*	*Usage*
Scheduled Work Order Tasks Pagelet	EPWM_PE_SCHEDULED_GBL	View work orders grouped by general work type and service group that are scheduled.
Work Order Workbench Page	WM_WOTSK_WORKBENCH	View the Work Order Workbench for the user logged into the system. See the Scheduled Work Order Tasks Pagelet.

Page Name	***Definition Name***	***Usage***
Work Order Portal Personalization Page	WM_PE_PRS	Click the **Customize Scheduled Work Order Tasks** icon on the Scheduled Work Order Tasks page to define default display information for the Backlog by Work Order Type, Unassigned Work Order Tasks, Reviewed Work Order Tasks, and Scheduled Work Order Tasks pagelets.

Scheduled Work Order Tasks Pagelet

Use the Scheduled Work Order Tasks pagelet (EPWM_PE_SCHEDULED_ GBL) to view work orders grouped by general work type and service group that are scheduled.

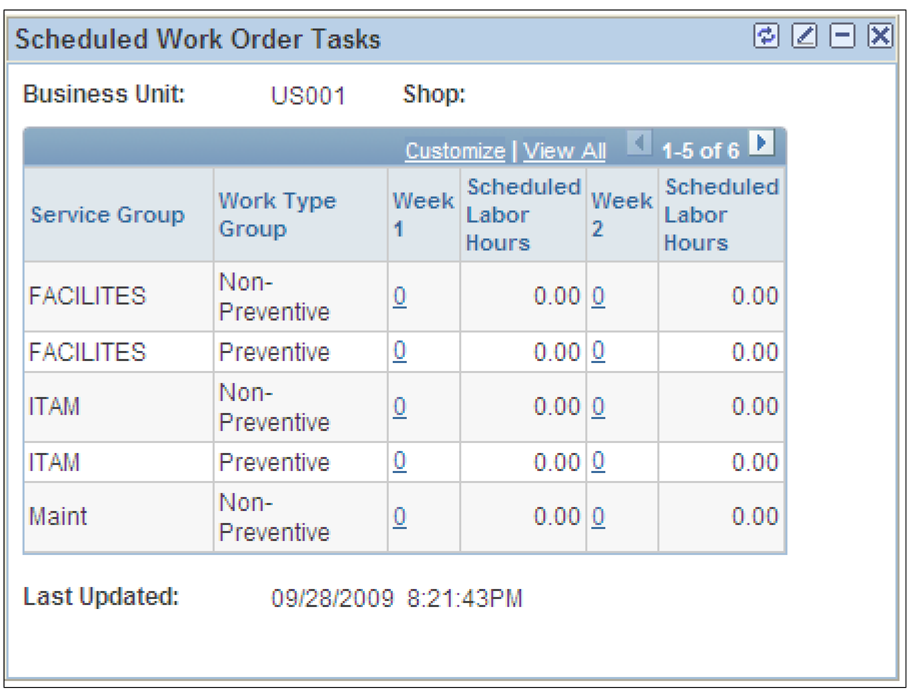
This pagelet is similar to the Unassigned Work Orders Tasks pagelet displaying the task view and lists work order tasks that are scheduled. The pagelet lists tasks grouped by general work type and service group.

Navigation:

Click the **Home** link at the top of the screen to access the PeopleSoft Home page. Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Scheduled Work Order Tasks.**

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



Field or Control	***Description***
Work Type Group	Displays the scheduled work as either preventive or corrective (non-preventive).
Week 1 and **Week 2**	Displays the number of tasks that are scheduled to start that week. By clicking the Count link, the system displays the Work Order Workbench page.
Scheduled Labor Hours	Displays the total hours of the tasks scheduled for that week.

Note: See the Personalizing Backlog by Work Order Type section of this topic for information on personalizing this pagelet.

Note: Work order scheduling and shop configuration settings for scheduling labor are required so labor assignments can be made. Labor assignments are required to provide estimated labor hours.
The work order **Scheduled Start Date** field is required and is within fourteen days of the run time of the pagelet.

Viewing Most Costly Assets to Maintain

This topic discusses how to view the most costly assets to maintain and personalize the Most Costly Assets to Maintain pagelet.

Pages Used to View Most Costly Assets to Maintain

Page Name	***Definition Name***	***Usage***
Most Costly Assets to Maintain Pagelet	WM_TOP_COST_PRS	View the most costly assets to maintain.
Track Service and Repairs Page	ASSET_MAINT_01	Click the asset link on the **Most Costly Assets to Maintain** pagelet to view the service and repair details for that asset. See the Most Costly Assets to Maintain Pagelet.
Most Costly Assets to Maintain Personalization Page	WM_TOP_COST_PRS	Define default display information for the pagelet.

Understanding the Most Costly Assets to Maintain Pagelet

This pagelet graphically represents the most costly assets based on the user personalization options specified. It displays the five pieces of equipment with the highest maintenance costs for the period specified on the Most costly assets to maintain Personalization page. The display contains for each asset the asset description and total maintenance cost for the period. Clicking a link on any of the five assets takes the user to the Track Service and Repair – Event page.

You can select an AM business unit, asset type, asset subtype, make, model, recent number of months and life to date fields. The date fields enable the user to determine which periods of costs to examine: costs incurred during most recent user-defined number of calendar months (user can select from 1-24) or life to date.

Most Costly Assets to Maintain Pagelet

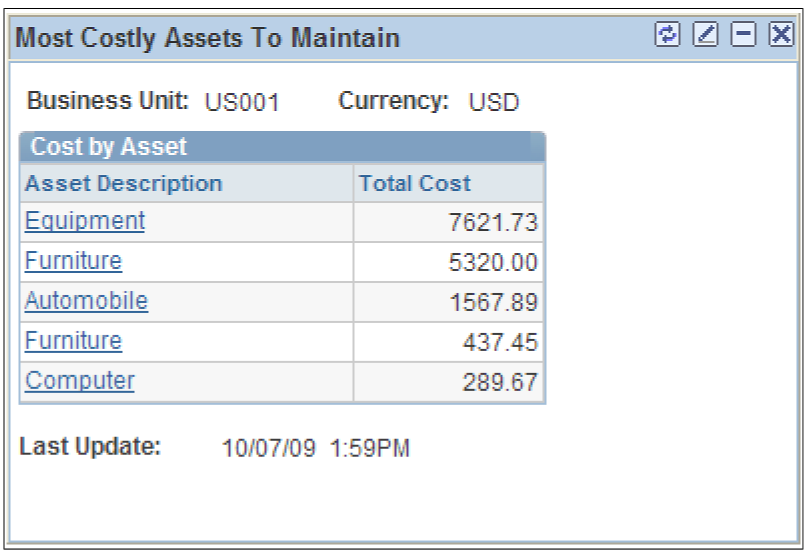
Use the Most Costly Assets to Maintain Personalization pagelet (WM_TOP_COST_PRS) to view the most costly assets to maintain.

Navigation:

Click the **Home** link at the top of the screen to access the PeopleSoft Home page. Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Most Costly Assets to Maintain.**

This example illustrates the fields and controls on the Most Costly Assets To Maintain pagelet. You can find definitions for the fields and controls later on this page.



Field or Control	***Description***
Asset Description	Click the asset link to view details of the asset. You can view the detailed service and repair history for this asset.
Total Cost	Displays the total cost of service and repairs for this asset.

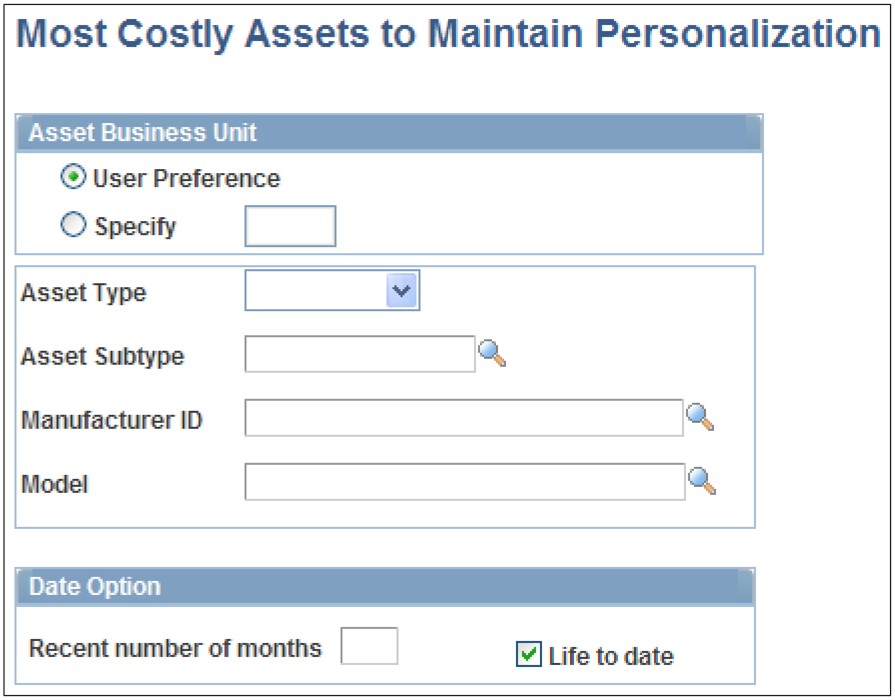
Most Costly Assets to Maintain Personalization Page

Use the Most costly assets to maintain Personalization page (WM_TOP_COST_PRS) to define default display information for the pagelet.

Navigation:

Click the **Customize Most Costly Assets to Maintain** icon on the Most Costly Assets to Maintain pagelet.

This example illustrates the fields and controls on the Most Costly Assets to Maintain Personalization page. You can find definitions for the fields and controls later on this page.



Access the Most costly assets to maintain Personalization page.

Asset Business Unit

You can either use the default user preferences or select a value for the asset business unit

Field or Control	***Description***
Asset Type	Select to filter by an asset type. If nothing is select, the pagelet displays all asset types.
Asset Subtype	Select to filter by an asset subtype. You must select an asset type before you can select a subtype.
Manufacturer ID (manufacturer identification)	Enter a manufacturer to further filter the data.
Model	Enter the model information to further filter the data.

Date Option

Field or Control	*Description*
Recent number of months	Enter the number of months to filter your search. By entering a specific number of months, you can view the costliest asset to maintain based on data for those recent months.
Life to date	Select to calculate cost based on all maintenance history data

Viewing Top Five Problem Codes

This topic discusses how to view the top five problem codes and personalize the Top 5 Problem Codes pagelet.

Pages Used to View Top Five Problem Codes

Page Name	*Definition Name*	*Usage*
Top 5 Problem Codes Pagelet	EP_WM_TOP_PROBLEMS	View the most reported problem codes.
Top 5 Problems Pagelet Personalization Page	WM_TOP_PROB_PRS	Define default display information for the Top 5 Problem Codes pagelet.

Understanding the Top 5 Problem Codes Pagelet

The Top 5 Problem Codes pagelet graphically represents the most reported problem codes based on the user personalization options specified. The bars represent a count of work order tasks.

Note: This pagelet requires problem, cause, and resolution codes to be set up and updated appropriately throughout the life cycle of the work order.

Top 5 Problem Codes Pagelet

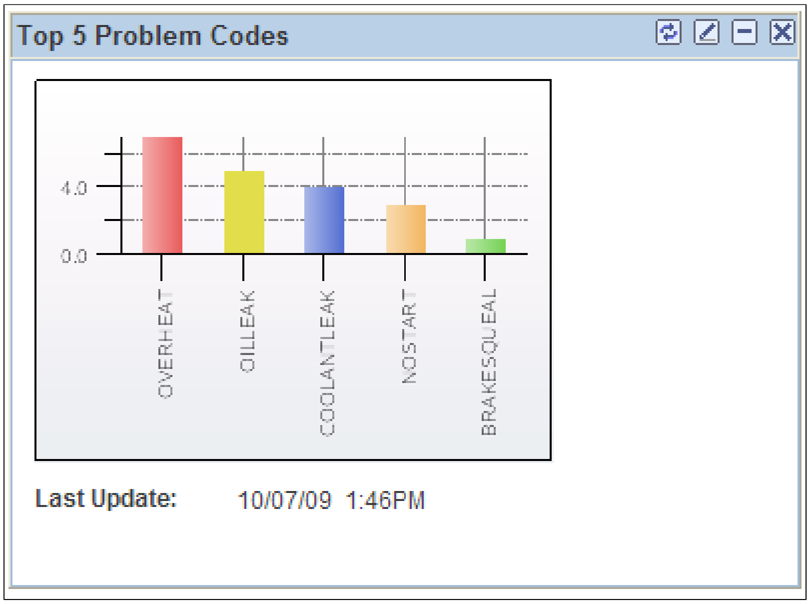
Use the Top 5 Problem Codes pagelet (EP_WM_TOP_PROBLEMS) to view the most reported problem codes.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Top 5 Problem Codes.**

This example illustrates the fields and controls on the Top 5 Problem Codes pagelet.



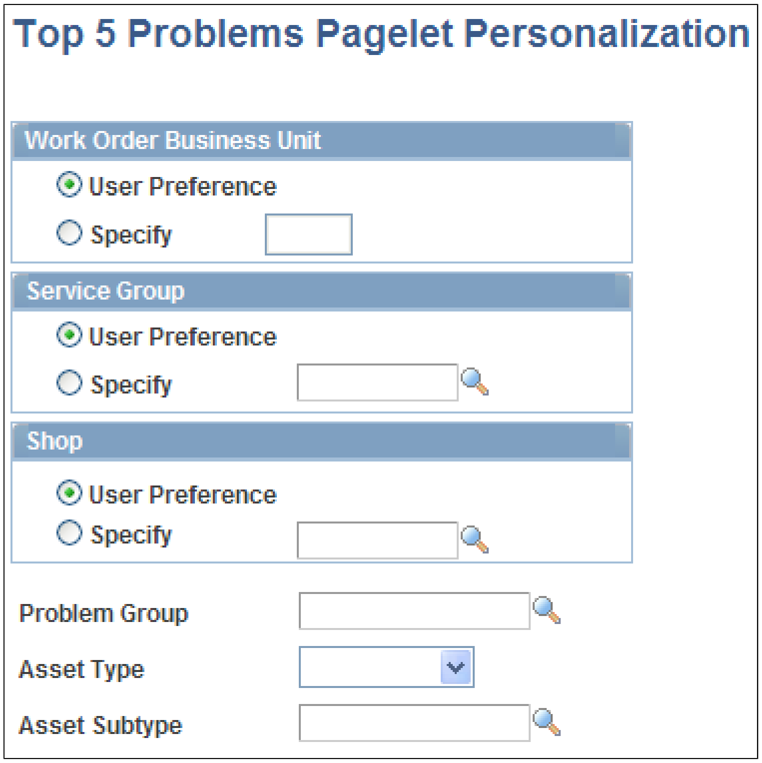
Top 5 Problems Pagelet Personalization Page

Use the Top 5 Problems Pagelet Personalization page (WM_TOP_PROB_PRS) to define default display information for the Top 5 Problem Codes pagelet.

Navigation:

Click the **Customize Top 5 Problem Codes** icon on the Top 5 Problem Codes pagelet.

This example illustrates the fields and controls on the Top 5 Problems Pagelet Personalization page. You can find definitions for the fields and controls later on this page.



Use the fields to filter which group of problem codes to analyze and which assets the pagelet will examine when counting the frequency of problem occurrences. You can use the default business unit that is set up in User Preferences for this user or select a different PeopleSoft Maintenance Management business unit. You can select a service group, shop, problem group, asset type and asset subtype.

Chapter 20

Using Pagelets Enabled by PeopleSoft Lease Administration

Setting Up PeopleSoft Lease Administration for the PeopleSoft ALM Portal Pack

This topic provides an overview of PeopleSoft Lease Administration for the PeopleSoft ALM Portal Pack and lists the page used to set up Lease Administration for the ALM Portal Pack.

Page Used to Set Up PeopleSoft Lease Administration for the PeopleSoft ALM Portal Pack

Page Name	***Definition Name***	***Usage***
Load Pagelet Data Page	RUN_RE_PGLT_DATA	Run a process that creates summary data used by PeopleSoft Lease Administration pagelets in the PeopleSoft ALM Portal Pack. Go to **Set Up Financials/Supply Chain** > **Pagelets** > **Asset Lifecycle Management** > **Lease Administration** > **LA Portal Data Collector**.

Understanding PeopleSoft Lease Administration for the PeopleSoft ALM Portal Pack

If you currently use PeopleSoft Lease Administration and want to use the PeopleSoft Lease Administration pagelets in the PeopleSoft ALM Portal Pack, you must schedule and run the Lease Administration Portal Data Collector Application Engine process (RE_PGLT_DATA). The Lease Administration Portal Data Collector process summarizes transaction data in order to improve response times when viewing the pagelets. The data is stored in summary tables and is displayed on pagelets according to your personalized settings. While the Lease Administration Portal Data Collector greatly improves response times for reading the data, it also imposes limitations on when changes to the transaction data are reflected in the pagelets. Changes in the transaction data are not reflected in the pagelets in real time. You must periodically rerun the Lease Administration Portal Data Collector process to refresh the pagelets. Oracle recommends setting up a recurring job to execute the Lease Administration Portal Data Collector on a periodic basis. How often you run the collector process depends on a number of factors such as:

- How quickly you need the data updated.

- How much data you have in the system—the longer your system operates, the more data has to be summarized, hence the longer the data loader process can take to execute.
- How many system resources are available to your process scheduler.

Setting Up Portal Pack Default Administration

This topic provides an overview and discusses how to set up portal pack default administration.

Page Used to Set Up Portal Pack Default Administration

Page Name	***Definition Name***	***Usage***
Portal Pack Default Administration - Real Estate Management Page	RE_PP_DEF_ADMIN	Define user defaults for each pagelet.

Understanding Portal Pack Default Administration

The portal pack default administration page enables you to establish default filters for your pagelets. When setting up the PeopleSoft Lease Administration system, you need to first identify default filters from an administrative level. The administrative settings provide the default personalization values that individual users inherit if they do not establish their own values. The administration values can only be established at the Administration level. After the administrative default values are defined, each user can establish their own defaults through the Portal Pack Default Administration page.

See "Understanding User Preferences" (Application Fundamentals).

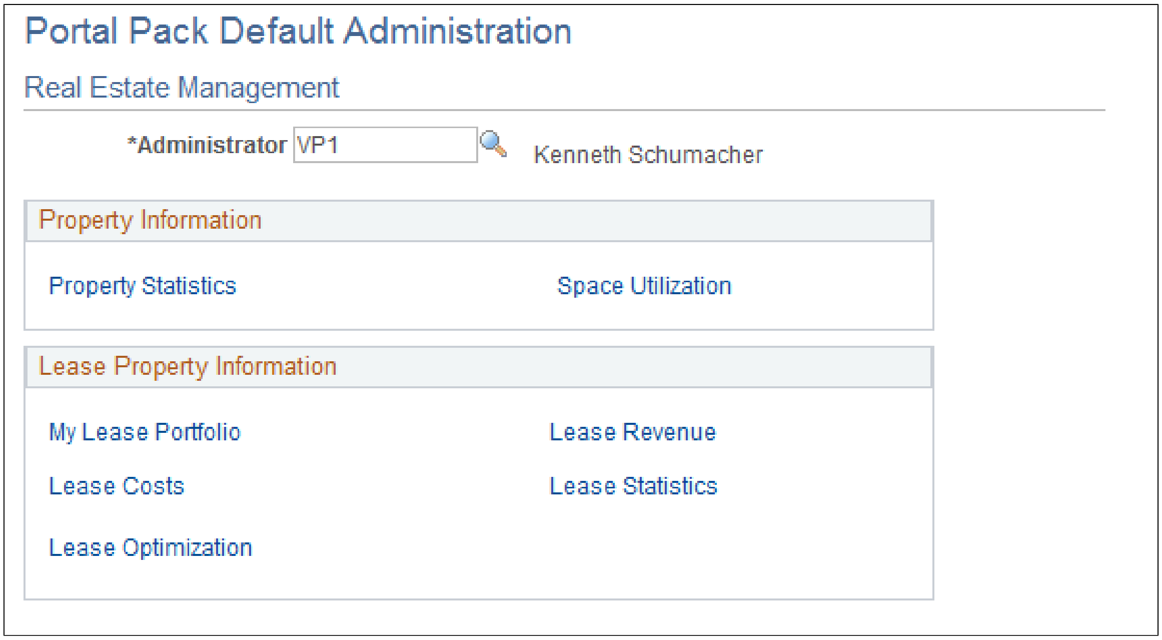
Portal Pack Default Administration - Real Estate Management Page

Use the Portal Pack Default Administration - Real Estate Management page (RE_PP_DEF_ADMIN) to define user defaults for each pagelet.

Navigation:

Set Up Financials/Supply Chain > Pagelets > Asset Lifecycle Management > Lease Administration > LA Portal Pack Defaults

This example illustrates the fields and controls on the Portal Pack Default Administration - Real Estate Management page. You can find definitions for the fields and controls later on this page.



Property Information

Click the links to access the personalization pages used to define pagelet default filters.

Lease Property Information

Click the links to access the personalization pages used to define pagelet default filters.

Reviewing Property Site Acquisition Information

This topic provides an overview of Property Site Acquisition information and discusses how to view site statistics, recently acquired sites, and recent site acquisition request performances.

Pages Used to View Property Site Acquisition Information

Page Name	***Definition Name***	***Usage***
Site Statistics Pagelet	RE_SITEREG_PGLT	View site statistics.
Recently Acquired Sites Pagelet	RE_RASITE_PGLT	View recently acquired sites.
Recent SAR Exec Performance Pagelet	RE_SAR_REP_PGLT	View recently finalized site acquisition requests.

Understanding Property Site Acquisition Information

The Property Site Acquisition pagelets provide you with high level information related to recently acquired sites, site statistics and information on finalized site acquisition requests.

Site Statistics Pagelet

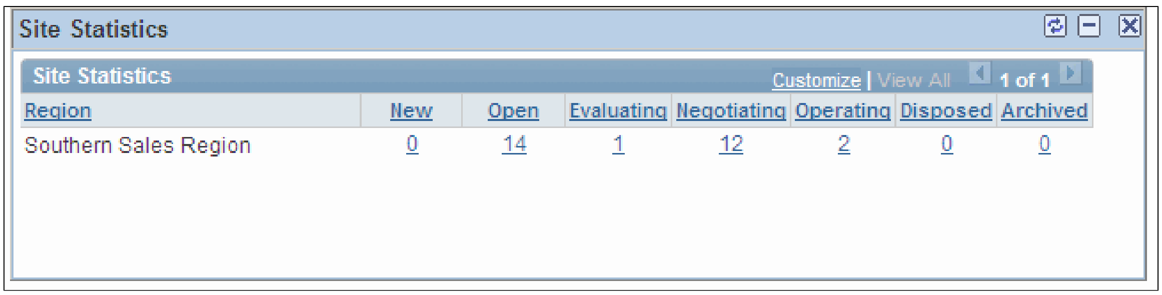
Use the Site Statistics page (RE_SITEREG_PGLT) to view site statistics.

Navigation:

Click the Personalize Content link on the PeopleSoft homepage.

Select Site Statistics.

This example illustrates the fields and controls on the Site Statistics pagelet.



This pagelet shows the number of sites in each region based on the status. The users can drill down into each site from the linked field Site ID.

Recently Acquired Sites Pagelet

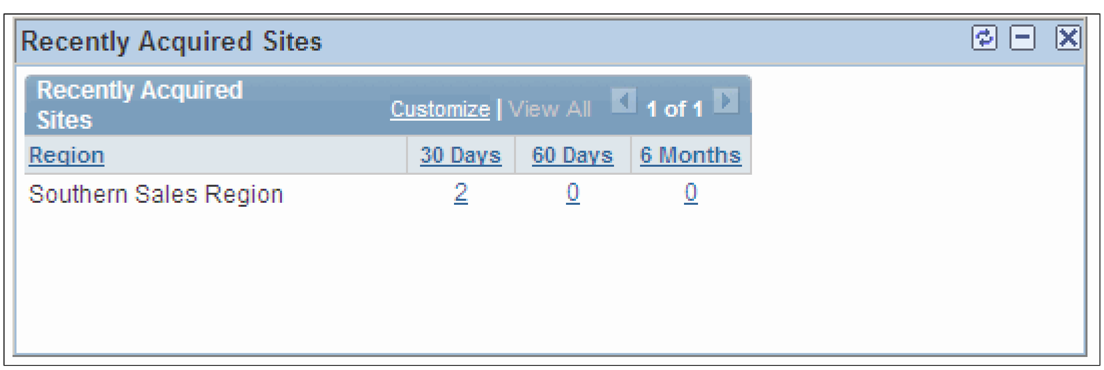
Use the Recently Acquired Sites page (RE_RASITE_PGLT) to view recently acquired sites.

Navigation:

Click the Personalize Content link on the PeopleSoft homepage.

Select Recently Acquired Sites.

This example illustrates the fields and controls on the Recently Acquired Sites pagelet. You can find definitions for the fields and controls later on this page.



This pagelet contains a list of sites that have been finalized as acquired. Linked fields include **Site ID, SAR ID, Lease ID, Asset ID,** and **Project ID.** Users can define the time span this pagelet displays. Options include 30 days, 60 days, 6 months and so on.

Recent SAR Exec Performance Pagelet

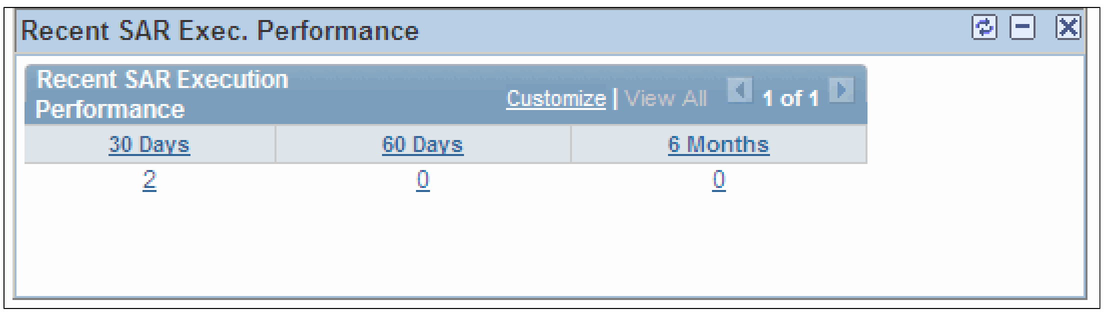
Use the Recent SAR Exec. Performance page (RE_SAR_REP_PGLT) to view recently finalized site acquisition requests.

Navigation:

Click the Personalize Content link on the PeopleSoft homepage.

Select Recent SAR Exec. Performances.

This example illustrates the fields and controls on the Recent SAR Exec. Performance pagelet.



This page displays a list of recent site acquisition requests that have a status of *Finalized.* Users can define the date range they want to view.

Viewing Real Property Statistics

This topic discusses how to view real property statistics, view property breakdown by region, and personalize the Property Statistics pagelet.

Pages Used to View Real Property Statistics

Page Name	***Definition Name***	***Usage***
Property Statistics Pagelet	RE_PROPSTATS_PGLT	View property information such as number of properties, total area and occupancy summarized by business unit, region, and property type.
Property Statistics - Region Page	RE_PROPSTATS_DTL	View property statistic by region.
Personalize Property Statistics - Administration Page	RE_PROPSTATS_PRS	Set up default filter criteria for property statistics data.

Understanding Real Property Statistics

Property statistics provides you with an immediate, high-level statistical summary of your overall property holdings broken down by ownership status. This pagelet contains Asset Management-based property information that you can be view whether PeopleSoft Lease Administration is installed or not. The property statistics pagelet data derives from the area statistics stored in the Asset Repository.

Note: Property statistics data is not dependent on the Computer Aided Facilities Management (CAFM) system.

Property Statistics Pagelet

Use the Property Statistics pagelet (RE_PROPSTATS_PGLT) to view property information such as number of properties, total area and occupancy summarized by business unit, region, and property type.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Property Statistics.**

Field or Control	***Description***
Owned/Leased	Displays whether the property is owned or leased.
Region	Click this link to view the property detail page within that region.
Properties	Displays the total number of properties in that region.
Total Area (x1000) (total area in thousands)	Displays the total area of the property in thousands.
Current Occupancy	Displays the total current number of occupants residing on the property.

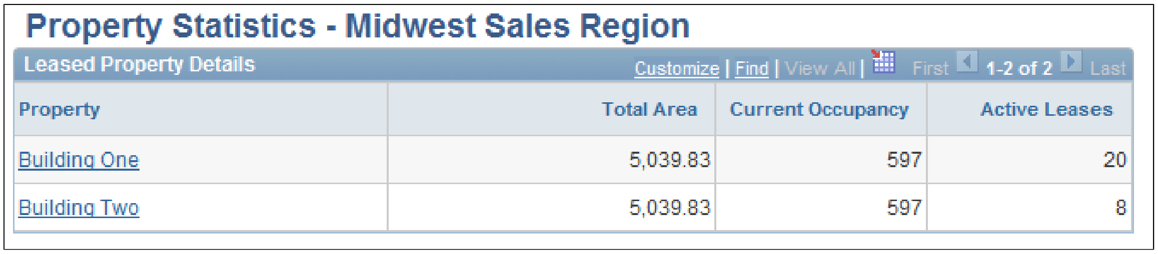
Property Statistics - Region Page

Use the Property Statistics - Region page (RE_PROPSTATS_DTL) to view property statistic by region.

Navigation:

Click the **Region** link on the Property Statistics pagelet.

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



Field or Control	Description
Property	Click the link to view detailed property data stored in the asset repository.
Active Leases	Displays the number of active leases associated with the property. This column is visible only if the **Property Class** filter is set to *Site* or *Building.* This total includes all child properties for the site or building.

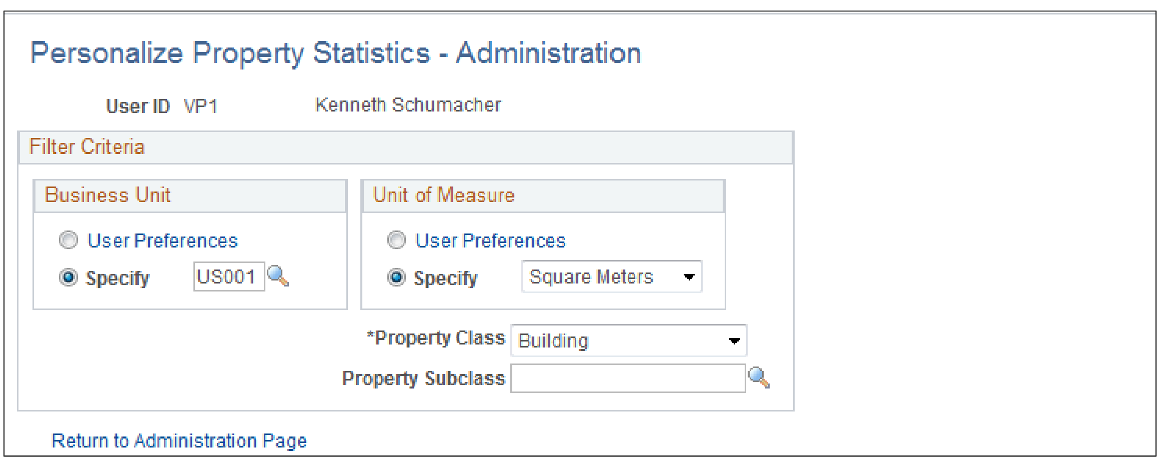
Personalize Property Statistics - Administration Page

Use the Personalize Property Statistics - Administration page (RE_PROPSTATS_PRS) to setup default filter criteria for property statistics data.

Navigation:

Set Up Financials/Supply Chain > **Pagelets** > **Asset Lifecycle Management** > **Lease Administration** > **Portal Pack Defaults** > **Property Statistics** > **Personalize Property Statistics - Administration**

This example illustrates the fields and controls on the Personalize Property Statistics - Administration page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	***Description***
User Preferences	Select to have the system display property statistics for only those properties with the business unit that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display property statistics for properties from a business unit other than the business unit that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must enter a business unit value.

Unit of Measure

Field or Control	***Description***
User Preferences	Select to have the system display property statistics in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display property statistics in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must select a unit of measure value.
Property Class	Select to filter by a specific property class. Values are: *Building* or *Site.*
Property Sub-Class	Select to filter by a subclass. Property subclass is used to further categorize the property class. For instance, a *Building* can be a warehouse, an office building, a retail outlet, and so on. A *Site* can be a campus, a building site, empty land, and so on. **Note:** Property subclass is related to property class. There is a parent-child relationship between the two. You cannot select a subclass without first selecting a property class.

Viewing Space Utilization

This topic discusses how to view space utilization and personalize the Space Utilization pagelet.

Pages Used to View Space Utilization

Page Name	***Definition Name***	***Usage***
Space Utilization Pagelet	RE_SPACEUTL_PGLT	View usage statistics of each property summarized by region and ownership property types.
Personalize Space Utilization - Administration Page	RE_SPACEUTL_PRS	Define default information for the Space Utilization pagelet.

Understanding Space Utilization

View the usage statistics of each property summarized by region and the type of ownership properties with the Space Utilization pagelet. The Space Utilization pagelet enables you to view the total occupied area and the unoccupied area in the properties you selected in the personalization settings. Click the **Region** link to navigate to the detailed page listing all the properties by ownership status. You can display this pagelet only if ALM is installed.

Space Utilization Pagelet

Use the Space Utilization pagelet (RE_SPACEUTL_PGLT) to view usage statistics of each property summarized by region and ownership property types.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Space Utilization.**

Field or Control	***Description***
Occupied (x1000) (occupied per thousand)	Displays the total occupied space (in thousands) for all properties within the specified region.
Vacant (vacant per thousand)	Displays the total vacant space (in thousands) for all properties within the specified region.
Occupancy Rate	Displays the percentage of occupied space for all properties within the specified region. Calculation method: (Occupied Space / (Occupied Space + Vacant Space)) × 100.

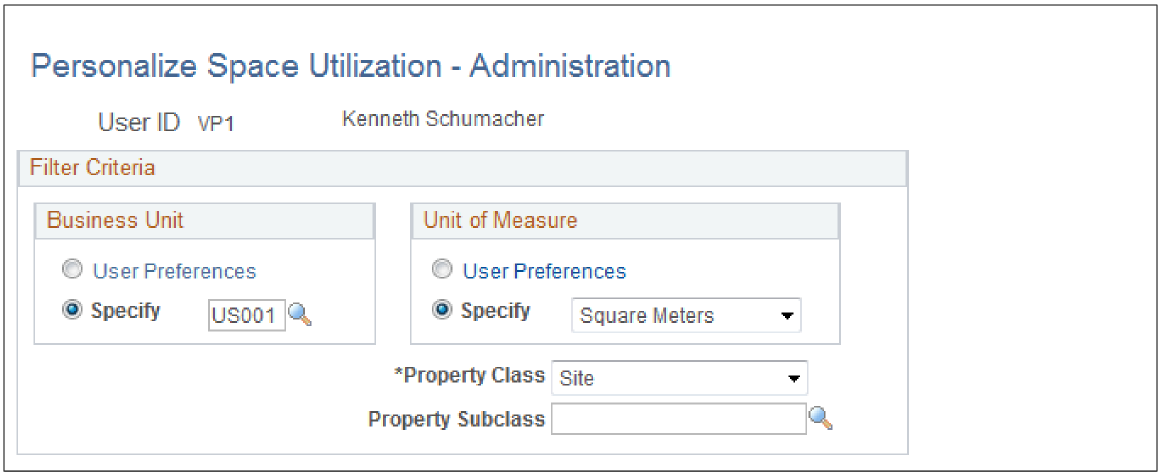
Personalize Space Utilization - Administration Page

Use the Personalize Space Utilization - Administration page (RE_SPACEUTL_PRS) to define default information for the Space Utilization pagelet.

Navigation:

Set Up Financials/Supply Chain > Pagelets > Asset Lifecycle Management > Lease Administration > Portal Pack Defaults > Space Utilization > Personalize Space Utilization - Administration

This example illustrates the fields and controls on the Personalize Space Utilization - Administration page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	***Description***
User Preferences	Select to have the system display usage statistics for only those properties with the business unit that is specified in your user preferences on the Asset Management - User Preferences page.
Specify	Select to have the system display usage statistics for properties from a business unit other than the business unit that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must enter a business unit value.

Unit of Measure

Field or Control	***Description***
User Preferences	Select to have the system display usage statistics in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display property statistics in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must select a unit of measure value.
Property Class	Select to filter by a specific property class. Values are: *Building* or *Site.*
Property Sub-Class	Select to filter by a subclass. Property subclass is used to further categorize the property class. For instance, a *Building* can be a warehouse, an office building, a retail outlet, and so on. A *Site* can be a campus, a building site, empty land, and so on. **Note:** Property subclass is related to property class. There is a parent-child relationship between the two. You cannot select a subclass without first selecting a property class.

Viewing My Lease Portfolio

This topic discusses how to view the My Lease Portfolio and personalize the My Lease Portfolio pagelet.

Pages Used to View My Lease Portfolio

Page Name	***Definition Name***	***Usage***
My Lease Portfolio Pagelet	RE_MYLEASES_PGLT	View a summary of leases you've added to your portfolio broken down by lease types and regions.
My Lease Portfolio Page	RE_MYPRTFL	Click the **Region** link to view all leases in that region or to add leases to your portfolio.

Page Name	***Definition Name***	***Usage***
Personalize My Lease Portfolio - Administration Page	RE_MYLEASES_PRS	Define default display information for the My Lease Portfolio pagelet.

Understanding My Lease Portfolio

The My Lease Portfolio pagelet is summarized by the lease type—payable, receivable, and sublease. You can view the total number of leases for each lease type and region, the total area of all leases of that region by lease type, and the average life or the sum of all the leases term divided by total number of leases in a region. The total rented area is shown in 000s (rounded to thousands).

Note: This pagelet displays only leases that you add to your portfolio; otherwise this pagelet is blank.

My Lease Portfolio Pagelet

Use the My Lease Portfolio pagelet (RE_MYLEASES_PGLT) to view a summary of leases you've added to your portfolio broken down by lease types and regions.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **My Lease Portfolio.**

Field or Control	***Description***
Leases	Displays the number of leases in your portfolio by lease type and region.
Area Rented (x1000) (area rented in thousands)	Displays the total rented area of all leases for that region by lease type.
Avg. Life (Yrs) (average life in years)	Displays the sum of all the lease terms divided by total number of leases in a region. This is displayed in thousands.

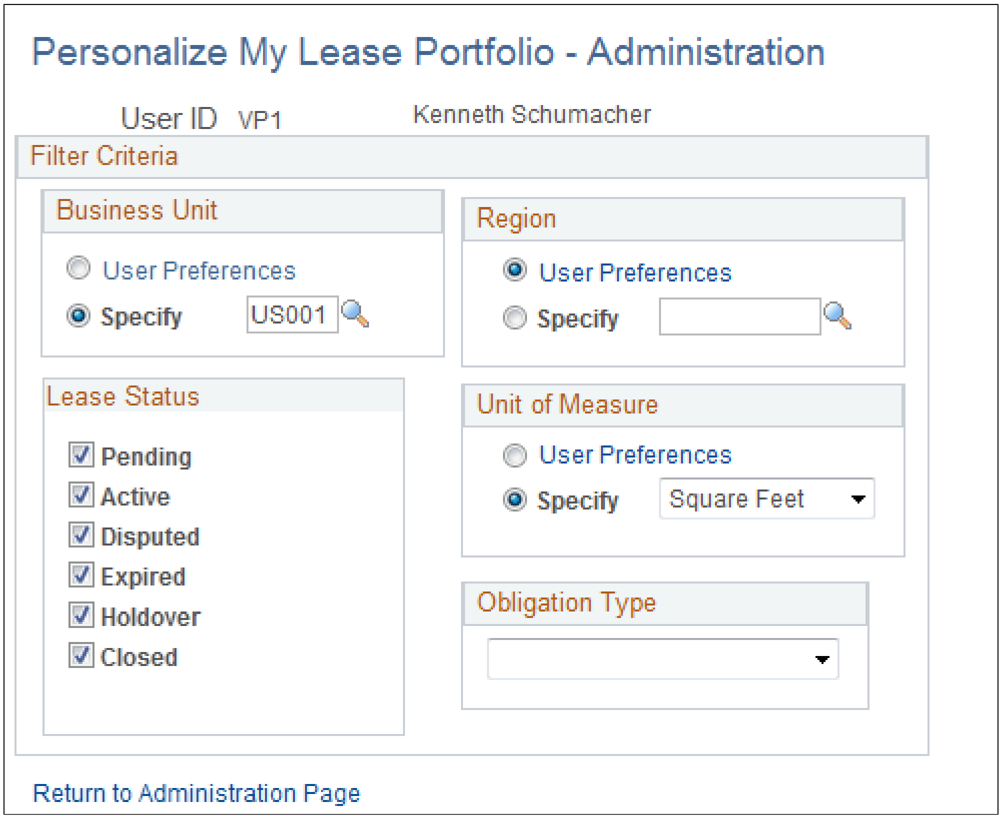
Personalize My Lease Portfolio - Administration Page

Use the Personalize My Lease Portfolio - Administration page (RE_MYLEASES_PRS) to define default display information for the My Lease Portfolio pagelet.

Navigation:

Set Up Financials/Supply Chain > **Pagelets** > **Asset Lifecycle Management** > **Lease Administration** > **Portal Pack Defaults** > **My Lease Portfolio** > **Personalize My Lease Portfolio - Administration**

This example illustrates the fields and controls on the Personalize My Lease Portfolio - Administration page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	***Description***
User Preferences	Select to have the system display leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.
Specify	Select to have the system display leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a business unit value.

Region

Field or Control	*Description*
User Preferences	Select to have the system display leases for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display leases from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a region value.

Lease Status

Select to filter by one or more lease statuses.

Unit of Measure

Field or Control	*Description*
User Preferences	Select to have the system display the area rented in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display the area rented in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must select a unit of measure value.

Obligation Type

Select to filter by a specific obligation type. Values are: *Receivable Lease, Payable Lease,* or *Sub-Lease.*

Viewing Lease Revenue

This topic discusses how to view lease revenue and personalize the Lease Revenue pagelet.

Pages Used to View Lease Revenue

Page Name	*Definition Name*	*Usage*
Lease Revenue Pagelet	RE_LEASESREV_P	View revenues from receivable leases summarized by regions.
Personalize Lease Revenue - Administration Page	RE_LEASEREV_PRS	Define default information for the Lease Revenue pagelet.

Understanding Lease Revenue

The Lease Revenue pagelet summarizes the revenue from receivable leases that are in the status of *Processed* in the transaction queue. The revenue includes the recurring and nonrecurring transactions for a lease. The information is summarized by region and the amounts are rounded to the thousands. The system uses the user personalization settings for unit of measure to calculate area and the currency to display the results.

Lease Revenue Pagelet

Use the Lease Revenue pagelet (RE_LEASESREV_P) to view revenues from receivable leases summarized by regions.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Lease Revenue.**

Field or Control	*Description*
Region	Displays the region. Click to access the Payment Transaction page. The system passes the current filter values through to the page so that the transaction totals match the amounts that are in the pagelet.
Amount (x1000) (amount in thousands)	Displays the revenue from receivables lease in a region. The amount that the system displays is based on the filters that you select on the Personalize Lease Revenue - Administration page.
Revenue per Rent Sq. ft. (revenue per rentable square foot)	Displays the average rent revenue per unit of measure of rentable area. This is calculated as (Total lease revenue of all receivable leases) ÷ (Rentable area on all receivable leases). The unit of measure is based on the value selected on the Personalize Lease Revenue - Administration page. The system uses the currency from the Personalize Lease Revenue - Administration page.

Field or Control	***Description***
Revenue per Total Sq. ft. (revenue per total square feet)	Displays the average revenue per unit of measure of total area. This is calculated as (Total lease revenue of all receivable leases) ÷ (Total area on all receivable leases). The unit of measure is based on the value selected on the Personalize Lease Revenue - Administration page.

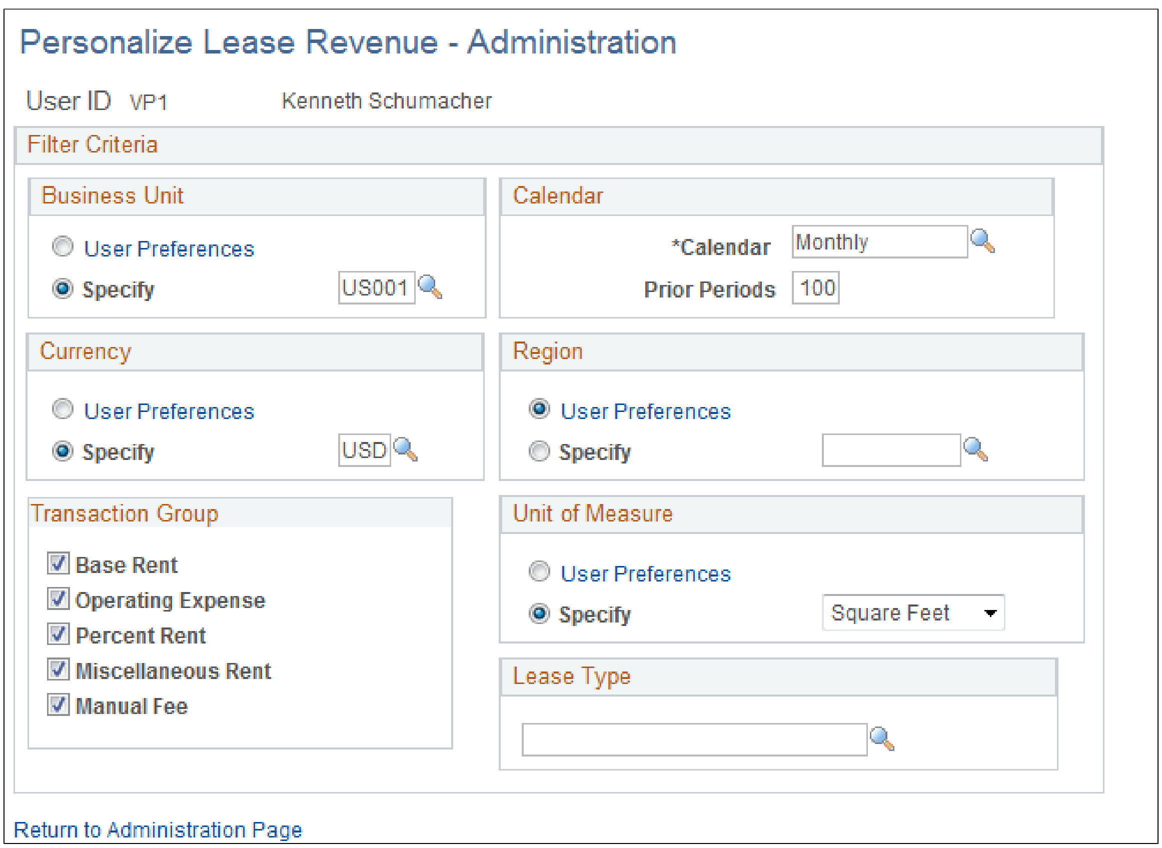
Personalize Lease Revenue - Administration Page

Use the Personalize Lease Revenue - Administration page (RE_LEASEREV_PRS) to define default information for the Lease Revenue pagelet.

Navigation:

Set Up Financials/Supply Chain > **Pagelets** > **Asset Lifecycle Management** > **Lease Administration** > **Portal Pack Defaults** > **Lease Revenue** > **Personalize Lease Revenue - Administration**

This example illustrates the fields and controls on the Personalize Lease Revenue - Administration page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	*Description*
User Preferences	Select to have the system display revenue for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.
Specify	Select to have the system display revenue for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a business unit value.

Calendar

The Administrator sets the maximum number of periods worth of data that will appear.

Field or Control	*Description*
Calendar	Enter the calendar that the system uses to calculate the TimeSpan for which data is summarized in the pagelet. The system uses this value in combination with the value in the **Prior Periods** field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and *2* for prior periods, the system populates the pagelet data for the previous two months.
Prior Periods	Specify the number of prior accounting periods from current period to be included in the calculation

Currency

Field or Control	*Description*
User Preferences	Select to have the system display the revenue from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display revenue from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a currency value.

Region

Field or Control	***Description***
User Preferences	Select to have the system display lease revenue for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value
Specify	Select to have the system display lease revenue from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a region value.

Transaction Group

Select to filter by one or more transaction groups.

Unit of Measure

Field or Control	***Description***
User Preferences	Select to have the system display lease revenue in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display the revenue in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must select a unit of measure value.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

Viewing Lease Costs

This topic discusses how to view a summary of lease costs and personalize the Lease Costs pagelet.

Pages Used to View Lease Costs

Page Name	***Definition Name***	***Usage***
Lease Costs Pagelet	RE_LEASECOST_PGLT	View a summary of the costs of maintaining PeopleSoft Payables leases.
Payment Transactions Page	RE_TXN_MANAGER	Click the **Region** link to view the transaction queue. The data on this page is summarized on the Lease Cost pagelet. Displays the details that make up the summary of costs for maintaining payable leases. See the Lease Costs Pagelet.
Personalize Lease Costs - Administration Page	RE_LEASECOST_PRS	Define default display information for Lease Costs pagelet.

Understanding Lease Costs

The Lease Costs pagelet is a summary of the costs of maintaining payable leases. Lease costs include the recurring and nonrecurring transactions for a lease. The information is summarized by region and the amounts are rounded to the thousands. The system uses the user personalization settings for unit of measure to calculate area and the currency to display the results.

Lease Costs Pagelet

Use the Lease Costs pagelet (RE_LEASECOST_PGLT) to view a summary of the costs of maintaining PeopleSoft Payables leases.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Lease Costs.**

Field or Control	***Description***
Region	Displays the region. Click to access the Payment Transactions page. The system passes the current filter values through to the page so that the transaction totals match the amounts that are in the pagelet.
Amount (x1000) (amount in thousands)	Displays the costs from payables leases in a region. The amount that the system displays is based on the filters that you select on the Personalize Lease Cost - Administration page.

Field or Control	***Description***
Cost per Rent Sq. ft. (cost per rentable square foot)	Displays the average cost per unit of measure of rentable area. This is calculated as *(Lease cost of all payable leases)* ÷ *(Rentable area on all payable leases)* where the unit of measure is based on the value selected on the Personalize Lease Cost - Administration page.
Cost per Total Sq. ft. (cost per total square feet)	Displays the average cost per unit of measure of total area. This is calculated as *(Total lease cost of all payable leases)* ÷ *(Total area on all payable leases)* where the unit of measure is based on the value selected on the Personalize Lease Cost - Administration page.

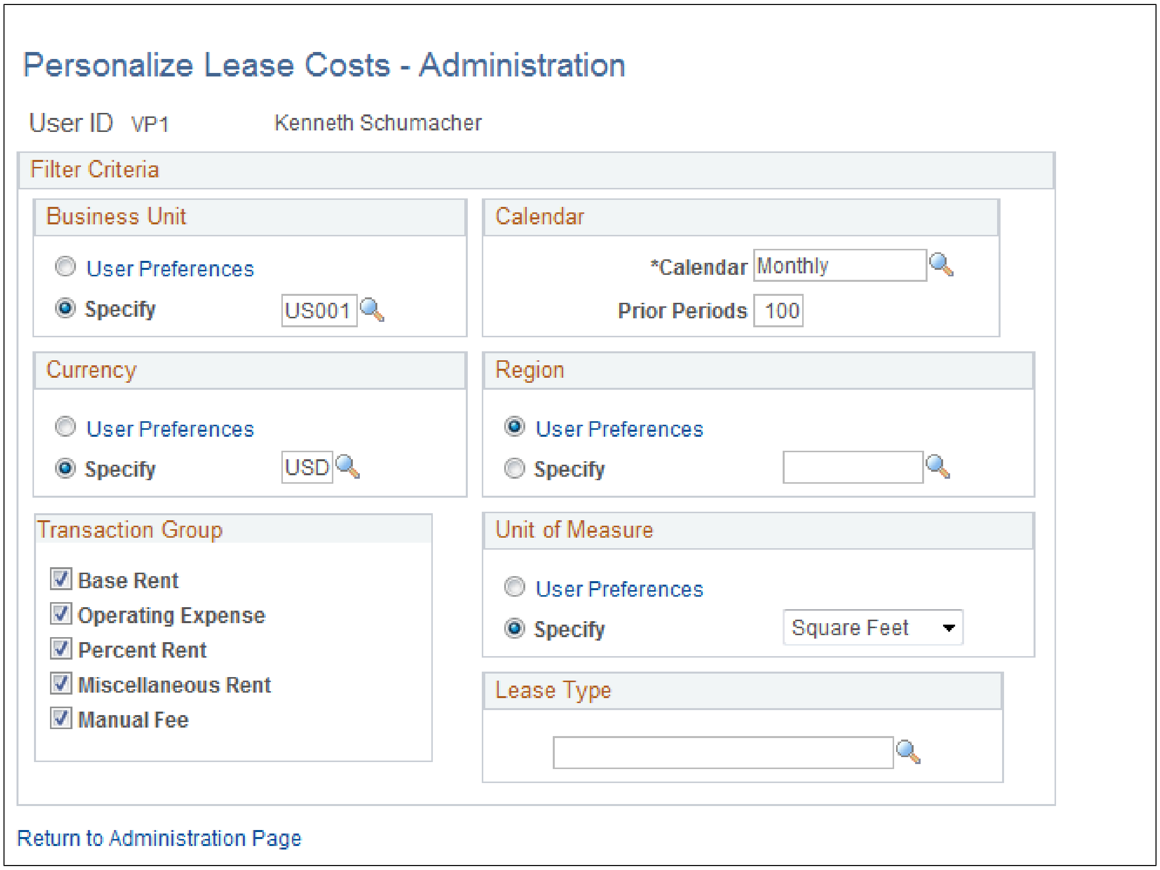
Personalize Lease Costs - Administration Page

Use the Personalize Lease Costs - Administration page (RE_LEASECOST_PRS) to define default display information for Lease Costs pagelet.

Navigation:

Set Up Financials/Supply Chain > **Pagelets** > **Asset Lifecycle Management** > **Lease Administration** > **Portal Pack Defaults** > **Lease Costs** > **Personalize Lease Costs - Administration**

This example illustrates the fields and controls on the Personalize Lease Costs - Administration page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	***Description***
User Preferences	Select to have the system display costs for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.
Specify	Select to have the system display costs for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a business unit value.

Calendar

Field or Control	***Description***
Calendar	Enter the calendar that the system uses to calculate the TimeSpan for which data is summarized in the pagelet. The system uses this value in combination with the value in the **Prior Periods** field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and *2* for prior periods, the system populates the pagelet data for the previous two months.
Prior Periods	Specify the number of prior accounting periods from current period to be included in the calculation.

Currency

Field or Control	***Description***
User Preferences	Select to have the system display the costs from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display costs from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a currency value.

Region

Field or Control	***Description***
User Preferences	Select to have the system display lease costs for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value
Specify	Select to have the system display lease costs from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a region value.

Transaction Group

Select to filter by one or more transaction groups.

Unit of Measure

Field or Control	*Description*
User Preferences	Select to have the system display lease costs in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display the revenue in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must select a unit of measure value.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

Viewing Lease Statistics

This topic discusses how to view lease statistics and personalize the Lease Statistics pagelet.

Pages Used to View Lease Statistics

Page Name	*Definition Name*	*Usage*
Lease Statistics Pagelet	RE_LEASEOPT_PGLT	View the ratio of total area, usable area and area actually rented, summarized by region. You can navigate to Lease Maintenance search page to see the list of leases for the region selected.
Personalize Lease Statistics - Administration Page	RE_LEASEOPT_PRS	Define default information for the Lease Statistics pagelet.

Understanding Lease Statistics

The Lease Statistics pagelet lists the ratio of total area, usable area and rented area summarized by region. You can navigate to the Lease Maintenance search page to see the list of leases of the region clicked.

The information displayed is summarized by region. You can view the total area data, usable area, and rented area specified by your personalization filters. The total area is the sum of the total area of the filtered leases by region; usable area is the sum of total usable area of the filtered leases; and rented area displays the total rented area of the filtered leases. All the area calculations are in 000s (rounded to thousands). Clicking the **Region** link takes you to the Lease Maintenance search page, which lists all of the filtered leases for that region.

Lease Statistics Pagelet

Use the Lease Statistics pagelet (RE_LEASEOPT_PGLT) to view the ratio of total area, usable area and area actually rented, summarized by region.

You can navigate to Lease Maintenance search page to see the list of leases for the region selected.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Lease Statistics.**

Field or Control	*Description*
Region	Displays the region. Click to access the Lease Maintenance search page, which lists all of the filtered leases for that region.
Total Area	Displays the sum of the total area of the leases by region.
Rentable	Displays the sum of the total rental area of the leases by region.
Usable	Displays the sum of the total usable area of the leases by region.

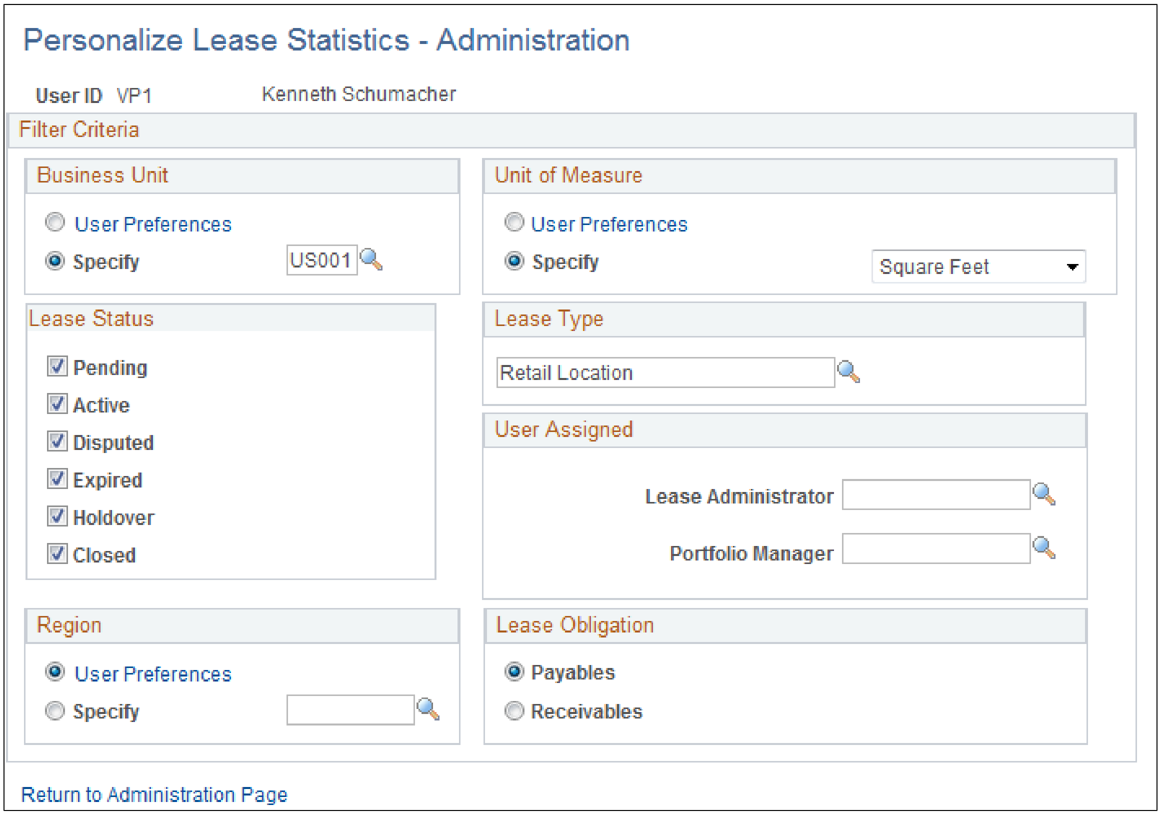
Personalize Lease Statistics - Administration Page

Use the Personalize Lease Statistics - Administration pagelet (RE_LEASEOPT_PRS) to define default information for the Lease Statistics pagelet.

Navigation:

Set Up Financials/Supply Chain > **Pagelets** > **Asset Lifecycle Management** > **Lease Administration** > **Portal Pack Defaults** > **Lease Statistics** > **Personalize Lease Statistics - Administration**

This example illustrates the fields and controls on the Personalize Lease Statistics - Administration page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	***Description***
User Preferences	Select to have the system display the area for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.
Specify	Select to have the system display the area for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a business unit value.

Unit of Measure

Field or Control	***Description***
User Preferences	Select to have the system display the area in the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display the area in a unit of measure other than the unit of measure that is specified in your user preferences on the Asset Management - User Preferences page. If you select **Specify,** you must select a unit of measure value.

Lease Status

Select to filter by one or more lease statuses. If you do not select any statuses, then no data appears in the pagelet.

Lease Type

Select to filter by lease types. The values are user-defined and established at implementation.

User Assigned

Field or Control	***Description***
Lease Administrator and **Portfolio Manager**	Select to filter by specific lease administrator or portfolio manager.

Region

Field or Control	***Description***
User Preferences	Select to have the system display the area for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value
Specify	Select to have the system display the area from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select Specify, you must enter a region value.

Lease Obligation

Select **Payables** or **Receivables** to display the total, rentable, and usable area in the pagelet for the payables leases or the receivables leases.

Viewing Lease Optimization

This topic discusses how to view lease optimization and personalize the Lease Optimization pagelet.

Pages Used to View Lease Optimization

Page Name	*Definition Name*	*Usage*
Lease Optimization Pagelet	RE_LSOPTIMIZE_PGLT	View the ratio of subleasing with respect to total leased area and the ratio of recovery of lease cost by subleasing activity.
Lease Cost - <Region> Page	RE_LSCOSTS_DTL	Click a lease cost link in the Lease Optimization pagelet to view the details for the summary of costs for payable leases. See the Lease Optimization Pagelet.
Sublease Revenue - <Region> Page	RE_SUBLSREV_DTL	Click a sublease revenue link in the Lease Optimization pagelet to view the details for the summary of sublease revenues. See the Lease Optimization Pagelet.
Personalize Lease Optimization - Administration Page	RE_LSOPTIMIZE_PRS	Define default information for the Lease Optimization pagelet.

Understanding Lease Optimization

The Lease Optimization pagelet summarizes the costs of maintaining payable leases and the revenues from subleasing activity. It also provides information on the subleasing ratio and cost recovery ratio. The subleasing ratio is the ratio of subleased area to the total area of subleased payable leases. The cost recovery ratio is the ratio of sublease revenue to the costs of subleased payable leases. Lease costs include the recurring and nonrecurring transactions for all payable leases which are subleased and sublease revenue includes recurring and nonrecurring transactions from subleasing.

You can view the lease cost, sublease revenue, sublease ratio, and cost recovery ratio based on your personalization filters. The system displays the information summarized by region. The lease cost and sublease revenue are in the thousands. You can click a lease cost to transfer to the Lease Cost page on which you can view all of the filtered leases for the region row that you select. You can click a sublease revenue to access the Sublease Revenue page on which you can view all of the filtered leases from the region row that you select.

Lease Optimization Pagelet

Use the Lease Optimization pagelet (RE_LSOPTIMIZE_PGLT) to view the ratio of subleasing with respect to total leased area and the ratio of recovery of lease cost by subleasing activity.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **Lease Optimization.**

Field or Control	*Description*
Lease Cost (x1000)	Displays the sum of recurring and nonrecurring financial terms for all payables leases that have sublease activity. The system displays the amount based on all of the filters defined on the Personalize Lease Optimization - Administration page. The system includes processed transactions for this pagelet.
Sublease Revenue (x1000)	Sum of recurring and nonrecurring financial terms for subleases. The amount will be subject to all the filters defined. The system displays the amount based on all of the filters defined on the Personalize Lease Optimization - Administration page. The system includes processed transactions for this pagelet.
Sublease Ratio	Displays the sublease ratio that is calculated as (Total area of all subleases) ÷ (Total area of all payable leases that are subleased).
Cost Recovery Ratio	Displays the cost recovery ratio that is calculated as (Sublease revenue) ÷ (Lease cost).

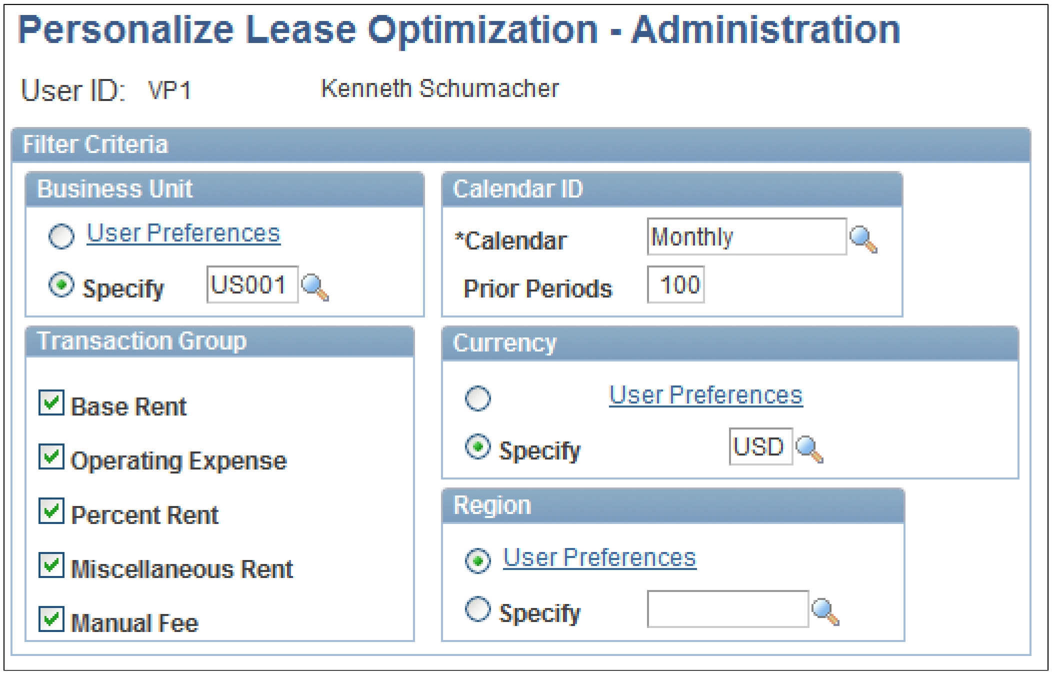
Personalize Lease Optimization - Administration Page

Use the Personalize Lease Optimization - Administration page (RE_LSOPTIMIZE_PRS) to define default information for the Lease Optimization pagelet.

Navigation:

Set Up Financials/Supply Chain > **Pagelets** > **Asset Lifecycle Management** > **Lease Administration** > **Portal Pack Defaults** > **Lease Optimization** > **Personalize Lease Optimization - Administration**

This example illustrates the fields and controls on the Personalize Lease Optimization - Administration page. You can find definitions for the fields and controls later on this page.



Business Unit

Field or Control	***Description***
User Preferences	Select to have the system display values for only those leases with the business unit that is specified in your user preferences on the Lease Administration - User Preferences page.
Specify	Select to have the system display the values for leases from a business unit other than the business unit that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a business unit value.

Calendar ID

Field or Control	*Description*
Calendar	Enter the calendar that the system uses to calculate the TimeSpan for which data is summarized in the pagelet. The system uses this value in combination with the value in the **Prior Periods** field to specify the start and end date filters for pagelet data. For example, if you enter *Monthly* for calendar and *2* for prior periods, the system populates the pagelet data for the previous two months.
Prior Periods	Specify the number of prior accounting periods from current period to be included in the calculation.

Transaction Group

Select to filter by one or more transaction groups. .

Currency

Field or Control	*Description*
User Preferences	Select to have the system display the values from leases in the currency that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value.
Specify	Select to have the system display the values from leases in a currency other than the currency that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a currency value.

Region

Field or Control	*Description*
User Preferences	Select to have the system display values for the region that is specified in your user preferences on the Lease Administration - User Preferences page. Click the link to review or adjust the value

Field or Control	Description
Specify	Select to have the system display values from a region other than the region that is specified in your user preferences on the Lease Administration - User Preferences page. If you select **Specify,** you must enter a region value.

Viewing My Tasklist

This topic discusses how to view your tasklist and critical dates.

Pages Used to View My Tasklist

Page Name	Definition Name	Usage
My Tasklist Pagelet	RE_MYTASKS_PGLT	View a summary of all critical dates for a specific user.
My Critical Dates Page	RE_OPT_RECIP	View all leases with the specified lease option within the supplied date range.

Understanding the Tasklist

You can view a summary of all critical dates assigned to you. This pagelet displays the details and the critical date assignments summarized into incremental timelines. The option column shows the different types of lease options with critical dates assigned. This column provides a link enabling you to drill down into the Lease Maintenance search page showing all the leases and the selected lease options by lease and timeline.

My Tasklist Pagelet

Use the My Tasklist pagelet (RE_MYTASKS_PGLT) to view a summary of all critical dates for a specific user.

Navigation:

Click the **Personalize Content** link on the PeopleSoft Home page.

Select **My Tasklist.**

Field or Control	Description
Option	Displays the different types of lease options with critical dates assigned.

Field or Control	***Description***
Urgent	Displays the count of lease options with critical dates that fall within this timeline (0 - 7 days from report date). You can click the number link to view the lease options that require action.
30 Days	Displays the count of lease options with critical dates that fall within this timeline (8 - 59 Days from report date). You can click the number link to view the lease options that require action.
60 Days	Displays the count of lease options with critical dates that fall within this timeline (60 - 89 Days from report date). You can click the number link to view the lease options that require action.
90 Days	Displays the count of lease options with critical dates that fall within this timeline (90 Days + from report date). You can click the number link to view the lease options that require action.

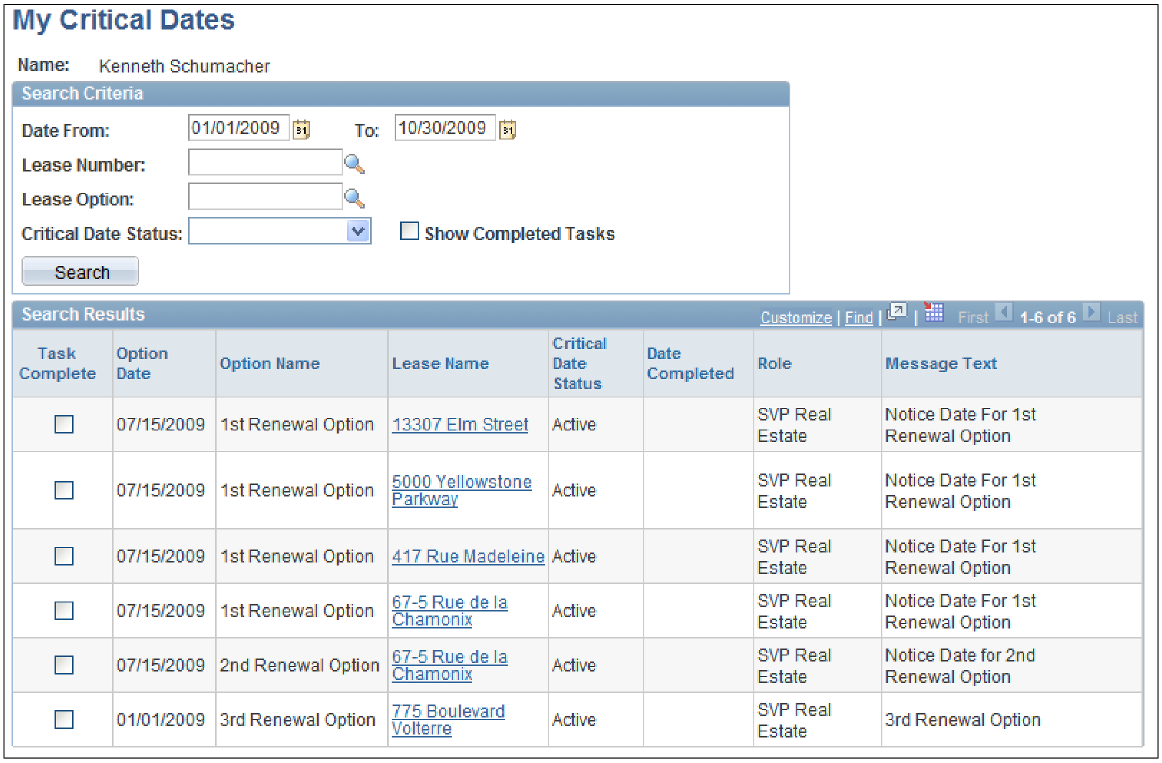
My Critical Dates Page

Use the My Critical Dates page (RE_OPT_RECIP) to view all leases with the specified lease option within the supplied date range.

Navigation:

Click the link in the **Options** column on the My Tasklist page.

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



Field or Control	***Description***
Date From and **To**	Select to filter lease options by the date range. You can view all lease options that fall within that date range.
Lease Option	Select to filter by lease options. You can view all critical dates associated with that option.
Critical Date Status	Select to view active or inactive statuses for that critical date.
Show Completed Tasks	Select to display all tasks you've marked completed.
Task Complete	Select to mark the task as complete for the option. By selecting the task as complete, you can filter your search to view only tasks that require action. **Note:** This is not part of PeopleSoft Workflow. This enables you to keep track of actions you have taken with the lease options.
Option Date	Display the lease option expiration date. Any action required for this option needs to occur prior to this date.

Field or Control	Description
Lease Name	Click the link to view all lease options associated with the lease. This link takes you to the Options page in the Maintain Lease component.
Date Completed	Displays the date the you completed the task. When you mark a task complete, the system populated this field with the date you completed the task.

Chapter 21

Understanding PeopleSoft Supply Chain Portal Pack Pagelets

PeopleSoft Supply Chain Management Portal Pack Pagelets Overview

This table lists the pagelets that comprise the PeopleSoft Supply Chain Portal Pack, and identifies:

- The functional role of individual using the pagelet.
- The audience for the pagelet: employees, or customers.
- The usage of the pagelet.
- The enabling application.

  (The enabling application provides the data that appears in the pagelet.)

Note: When combined with employee in the audience column, the customer refers only to a broker user, who is an external customer who conducts business on behalf of other customers, and does not refer to an individual consumer.

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
Availability (CDT_AVAIL_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	PeopleSoft Order Management
Buying Agreements (CDT_SCONSUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays buying agreements. Employees can navigate into buying agreement details.	PeopleSoft Order Management.

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
Current Product Summary (CDT_PROD_SUM_ PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays information about the selected product, including the description. Employees can navigate to see detailed product information, view the list prices by inventory business unit, and check price and availability.	PeopleSoft Order Management.
Customer Notes (CDT_CUSTNOTE_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays notes that are assigned to a customer.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.
Customer Promotions Calendar (TD_NATIONAL _PGLT, TD_ NATIONAL_PGLTW)	Broker, Salesperson.	Employee	Lists customer promotions and promotion details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, customer ID, customer name, and dates). **Note:** In the three-column format, the description and customer name columns don't appear on the pagelet.	PeopleSoft Promotions Management
Customer Search (CDT_CUST_SRCH_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Enables employees to search for existing customers to populate the additional pagelets with customer data.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
Discretionary Funding Status (TD_MY_ CHECKBOOK)	Broker, Salesperson.	Employee	Displays available discretionary fund total amounts (from top down funds and accrual funds) for which a user is authorized for a given period, as well as the amounts that are committed, planned, spent, and returned against all discretionary funds. **Note:** This pagelet is only available in the two column format.	PeopleSoft Promotions Management
Discretionary Funding Status — Details by Fund pagelet TD_DISC_FUND_ STAT)	Broker, Salesperson.	Employee	Displays available discretionary fund details (from top down funds and accrual funds) for each fund for which a user is authorized for a given period, as well as the amounts that are committed, planned, spent, and returned against these discretionary funds.	PeopleSoft Promotions Management.
Discretionary Funding Status — Fund Details by Customer and Promotion pagelet (TD_FUND_STAT_ DTLS)	Broker, Salesperson.	Employee	Displays available discretionary fund total amounts by customer and promotion for a specific fund for which a user is authorized, as well as the amounts that are committed, planned, spent, and returned against this discretionary fund. **Note:** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
Expiring Buying Agreements (CDT_SCONDT_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	PeopleSoft Order Management
Invoice Summary (CDT_INVCSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays summarized invoice information. Employees can navigate into invoice details.	PeopleSoft Billing.
Last 10 Product Purchases (CDT_RECPROD_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays the last ten purchases for a customer. Employees can navigate to see order and product information.	PeopleSoft Order Management
Last 10 Shipments (CDT_RECSHIP_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays the last ten shipments for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management
Most Recent Bills	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click View All Bills to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
Most Recent Consolidated Bills (WC_BILL_LIST_C_SS)	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing.
My Promotions (MY_PROMO_PGLT, MY PROMO_PGLTW)	Broker, Salesperson	Employee	Displays all customer promotions and national allowances for the user with promotion details (promotion description, status, customer name, and first and last order dates). **Note:** In the three-column format, first order and last order date columns don't appear and the customer ID displays on the pagelet instead of the customer name.	PeopleSoft Promotions Management
Nat'l Allow & Promo Calendar (National Allowance and Promotional Calendar) (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	Lists national allowance and customer promotion details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, customer ID, customer name and dates). **Note:** In the three-column format, the description and customer name columns don't appear on the pagelet.	PeopleSoft Promotions Management

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
National Allowances Calendar (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	Lists national allowance details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, and dates). **Note:** In the three-column format, the promotion description column does not appear on the pagelet.	PeopleSoft Promotions Management
Planned Promotional Funds (TD_PLAN_PROMO_FUND)	Broker, Salesperson.	Employee	Displays the promotion description, customer ID, promotion costs (fixed and variable), net incremental sales, and return on investment for all promotions the user is authorized to that are not canceled, closed, or customer approved. **Note:** This pagelet is only available in the two column format.	PeopleSoft Promotions Management
Product Alternates (CDT_PALT_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays alternates for a product. Employees can navigate to view product information.	PeopleSoft Order Management
Product Notes (CDT_PRODNOTE_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson	Employee, Customer	Displays notes that are assigned to a product.	PeopleSoft Order Management

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
Product Sales (TD_PRODUCT _SALES, TD_ PRODUCT_SALESW)	Broker, Salesperson, Sales Manager, Customer Service Representative	Employee	Displays in graphic format the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products that the user is authorized for on the PeopleSoft Promotions Management active product tree.	PeopleSoft Promotions Management
Product Search (CDT_PROD_SRCH_ PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson	Employee, Customer	Enables employees to search for existing products to populate the additional pagelets with product data.	PeopleSoft Order Management
Product Specifications (CDT_PSPECS_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson	Employee, Customer	Displays product specifications for a product.	PeopleSoft Order Management
Recent Conversations (CDT_CONVSUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add new conversations.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft eBill Payment, PeopleSoft Billing, or PeopleSoft Receivables.
Recent Orders (CDT_ORDSUM)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent orders. Employees can navigate into order details.	PeopleSoft Order Management
Recent Quotes (CDT_QUOTESUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent quotes. Employees can navigate into quotation details.	PeopleSoft Order Management
Recent RMAs (CDT_RMASUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays recent quotes. Employees can navigate into RMA details.	PeopleSoft Order Management

Pagelet Name	***Roles***	***Audience***	***Usage***	***Enabling Application(s)***
Review Promotions (REVIEW_PROMO_PGLT, REVIEW PROMO_PGLTW)	Broker, Salesperson	Employee	Displays all customer promotions and national allowances for the user with promotion details (description, status, customer ID, entered on date, contact ID, calendar code and promotion period). **Note:** In the three-column format, contact ID, calendar code and promotion period columns don't appear on the pagelet.	PeopleSoft Promotions Management
Sales History by Customer (TD_SALES_HIST)	Broker, Salesperson, Sales Manager, Customer Service Representative	Employee	Displays customers with the expected promotional sales amount from all promotions for the user, the actual sales amount for the current period, and the actual sales amount from the same period last year. **Note:** This pagelet is only available in the two column format.	PeopleSoft Promotions Management
Schedule Past Due Date (CDT_PASTSHIP_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays schedules past the ship date for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management
Trade Promotions (CDT_PROMO_PGL)	Customer Service Representative, Customer Service Manager, Salesperson	Employee	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	PeopleSoft Promotions Management

Chapter 22

Using Employee-Facing Supply Chain Management (SCM) Pagelets

Identifying Pagelets by Functional Role

PeopleSoft provides these employee-oriented role groupings as examples of how to organize pagelet access by function. This topic discusses:

- Broker pagelets.
- Customer Service Manager and Customer Service Representative pagelets.
- Salesperson pagelets.
- Sales Manager pagelets.

Broker Pagelets

These pagelets enable brokers to view key information about customers and products and effectively manage promotions:

- Availability.
- Current Product Summary.
- Customer Promotions Calendar.
- Discretionary Funding Status.
- Discretionary Funding Status — Details by Fund.
- Discretionary Funding Status — Fund Details by Customer and Promotion.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar. (national allowance and promotions calendar)
- National Allowance Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.

- Product Sales.
- Product Search.
- Product Specification.
- Review Promotions.
- Sales History by Customer.

Note: Brokers also use many of the customer service-oriented pagelets. Additional broker-oriented pagelets are discussed in the "Customer-Facing Supply Chain Management Pagelets" topic.

Customer Service Manager and Customer Service Representative (CSR) Pagelets

These pagelets enable customer service managers and representatives to view key information about customers and products and effectively manage promotions:

- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Search.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Recent Orders.

- Recent Quotes.
- Recent RMAs (recent returned material authorizations).
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Salesperson's Pagelets

These pagelets enable salespersons to view key information about customers and products and effectively manage promotions:

- Availability.
- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Promotions Calendar.
- Customer Search.
- Discretionary Funding Status.
- Discretionary Funding Status — Details by Fund.
- Discretionary Funding Status — Fund Details by Customer and Promotion.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar. (national allow and promotions calendar)
- National Allowances Calendar.

- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications
- Recent Orders.
- Recent Quotes.
- Recent RMAs (returned material authorizations)
- Review Promotions.
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Sales Manager Pagelets

These pagelets enable sales managers to effectively manage promotions:

- Product Sales.
- Sales History by Customer.

Viewing Product Sales

This topic discusses the Product Sales pagelet and the Sales History by Customer pagelet.

Viewing the Product Sales Pagelet

Use the Product Sales pagelet to display, in bar chart format, the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products for which the user is authorized on the active product tree defined on the Promotions Options - General Options page in PeopleSoft Promotions Management. If returns have been received for the product, the returned amount is subtracted from the actual sales amount.

Related Links

“Understanding Sales Order Entry” (PeopleSoft Order Management)

Sales History by Customer Pagelet

Access the Sales History by Customer pagelet.

Displays customers with the expected promotional sales amount from all promotions, the actual sales amount for the current period, and the actual sales amount from the same period last year. The expected promotional sales amount is the sum of all planned ship quantities multiplied by the product prices defined on the promotions. The actual sales amounts include all invoiced amounts for the customer, not just invoiced amounts for promotional activity, minus any returns received for the customer.

Note: This pagelet is only available in the two column format.

Viewing Customer Information

This topic discusses the pagelets used to view customer information.

Pagelets Used to View Customer Information

Use the following pagelets to view customer information.

Pagelet Name	***Usage***	***For More Information***
Buying Agreements	Displays buying agreements. Employees can navigate into buying agreement details.	See “Understanding Buying Agreements” (PeopleSoft Order Management).
Customer Account Balances	Displays account balances for a customer.	See “General Information - Credit Profile - General Page” (PeopleSoft Order to Cash Common Information).
Customer Aging	Displays customer aging information.	See “General Information - Credit Profile - General Page” (PeopleSoft Order to Cash Common Information).
Customer Conversations	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add a new conversation.	See “Understanding Conversations” (PeopleSoft Order to Cash Common Information).
Customer Notes	Displays notes that are assigned to a customer.	See “General Information - Notes Page” (PeopleSoft Order to Cash Common Information).
Customer Search	Enables employees to search for existing customers to populate the additional pagelets with customer data.	See “Adding General Customer Information” (PeopleSoft Order to Cash Common Information). See .

Pagelet Name	***Usage***	***For More Information***
Expiring Buying Agreements	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	See “Setting Up Buying Agreements” (PeopleSoft Order Management).
Invoice Summary	Displays summarized invoice information. Employees can navigate into invoice details.	See “Standard Billing - Add a New Value Page” (PeopleSoft Billing).
Last 10 Product Purchases	Displays the last 10 purchases for a customer. Employees can navigate to see order and product information.	See “Establishing Product Definitions” (PeopleSoft Order to Cash Common Information).
Last 10 Shipments	Displays the last 10 shipments for a customer. Employees can navigate to see order and shipping information.	See “Maintaining Order Schedule Information” (PeopleSoft Order Management).
Recent Orders	Displays recent orders. Employees can navigate into order details.	See “Understanding Sales Order Entry” (PeopleSoft Order Management). See “Maintaining Header and Line Information” (PeopleSoft Order Management). See “Maintaining Order Schedule Information” (PeopleSoft Order Management).
Recent Quotes	Displays recent quotes. Employees can navigate into quotation details.	See “Understanding Sales Order and Quotation EIPs in PeopleSoft Order Management” (PeopleSoft Order Management).
Recent RMAs	Displays recent returns. Employees can navigate into RMA details.	See “Understanding Sales Order and Quotation EIPs in PeopleSoft Order Management” (PeopleSoft Order Management).
Schedules Past Ship Date	Displays schedules that are past the ship date for a customer. Employees can navigate to see order and shipping information.	See “Maintaining Additional Order Schedule Information” (PeopleSoft Order Management).
Trade Promotions	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	

Viewing Product Information

This topic discusses pagelets used to view:

- Availability.
- Current Product Summary.
- Product Alternates.
- Product Notes.
- Product Search.
- Product Specifications.

Pagelets Used to View Product Information

Use the following pagelets to view product information.

Pagelet Name	*Usage*	*For More Information*
Availability	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	See “Maintaining Order Schedule Information” (PeopleSoft Order Management).
Current Product Summary	Displays information about the product, including the description. Employees can navigate to see detail product information, view the list prices by inventory business unit, and check price and availability.	See “Establishing Product Definitions” (PeopleSoft Order to Cash Common Information).
Product Alternates	Displays alternates for a product. Employees can navigate to view product information.	See “Attachments Page ” (PeopleSoft Order to Cash Common Information).
Product Notes	Displays notes that are assigned to a product.	See “Notes Page ” (PeopleSoft Order to Cash Common Information).
Product Search	Enables employees to search for existing products to populate the additional pagelets with product data.	See “Notes Page ” (PeopleSoft Order to Cash Common Information).
Product Specifications	Displays product specifications for a product.	See “Product Specifications Page ” (PeopleSoft Order to Cash Common Information).

Chapter 23

Using Customer-Facing Supply Chain Management Pagelets

Pagelets by Functional Role

PeopleSoft provides these customer-oriented role groupings as examples of how to organize pagelet access by function.

This topic discusses:

- Broker pagelets.
- Customer pagelets.

Note: The sample data contains customer and broker roles that you can use as examples for organizing access and security.

Broker Pagelets

These pagelets enable a broker, an external user who conducts business on behalf of customers, to effectively manage promotions and view customer billing information:

- Availability.
- Current Product Summary.
- Customer Promotions Calendar.
- Discretionary Funding Status.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar.
- National Allowance Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.

- Product Search.
- Product Specifications.
- Review Promotions.
- Sales History by Customer.

Note: Many of the broker-oriented pagelets are also used by customer service employees and are documented in the Employee-Facing Supply Chain Management Pagelets topic.

Related Links

Identifying Pagelets by Functional Role

Customer Pagelets

These pagelets enable customers to view billing information:

- Most Recent Bills.
- Most Recent Consolidated Bills.

Viewing Billing Information

This topic discusses how to view billing information.

Pagelets Used to View Billing Information

Use the following pagelets to view billing information.

Pagelet Name	***Usage***	***For More Information***
Most Recent Consolidated Bills.	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	See “Understanding PeopleSoft Classic eBill Payment Self-Service Transactions” (PeopleSoft eBill Payment).
Most Recent Bills.	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click **View All Bills** to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	See “Viewing PeopleSoft eBill Payment Pagelets” (PeopleSoft eBill Payment).

