PeopleSoft®

PeopleSoft Common Partner Registration for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook

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PeopleSoft Common Partner Registration for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook
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About These PeopleBooks

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (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.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you’re administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** — Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager — Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Common Partner Registration Preface

This preface provides an overview of PeopleSoft Common Partner Registration.

PeopleSoft Common Partner Registration

PeopleSoft Common Partner Registration enables an enterprise to share PeopleSoft applications with outside parties. This book describes the implementation of PeopleSoft Common Partner Registration and discusses how to recruit, register, and approve potential partners.

In PeopleSoft Common Partner Registration, an *enterprise* is the company that owns PeopleSoft Common Partner Registration and recruits, registers, and approves potential partners for services. A *partner* is an outside party that has registered and been approved for services that are created and offered by the enterprise.

CHAPTER 1

Getting Started with PeopleSoft Common Partner Registration

This chapter provides an overview of PeopleSoft Common Partner Registration and discusses:

- PeopleSoft Common Partner Registration business processes.
- PeopleSoft Common Partner Registration implementation tasks.

PeopleSoft Common Partner Registration Overview

PeopleSoft Common Partner Registration enables an enterprise to share its PeopleSoft applications with outside parties, which reduces the enterprise's workload and streamlines its processes.

In order for the enterprise to share its applications, the outside party must become registered for one or more services that are created and offered by the enterprise. When at least one registration is approved, the outside party becomes a partner of the enterprise. An outside party can become registered for services in the following ways:

- The outside party registers through a recruitment event that is sent by the enterprise.
- The enterprise registers a preexisting customer or vendor for services.
- The enterprise manually adds a new partner into PeopleSoft Common Partner Registration.

See Also

Chapter 4, "Recruiting Potential Partners," page 23

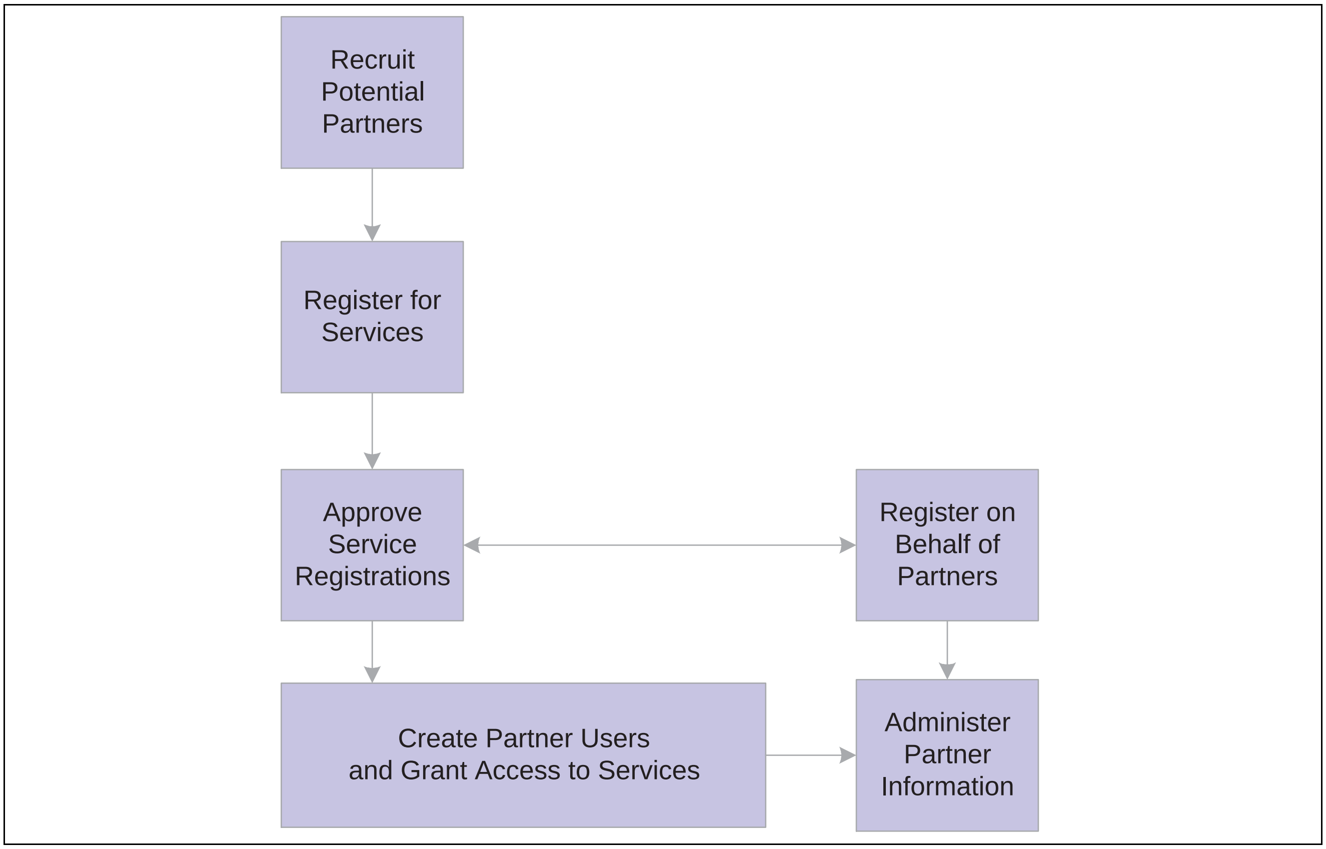
Chapter 5, "Registering Partners For Services," page 31

Appendix A, "Self-Service Registration," page 49

Chapter 6, "Approving Service Registrations," page 43

PeopleSoft Common Partner Registration Business Processes

The following diagram illustrates the business process flow for PeopleSoft Common Partner Registration:



PeopleSoft Common Partner Registration business process flow

PeopleSoft Common Partner Registration Implementation

The PeopleSoft Common Partner Registration implementation can be divided into the following two phases. Complete these phases to support PeopleSoft Common Partner Registration features:

- Setting up features in related applications.
- Setting up core PeopleSoft Common Partner Registration features.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of implementation, including the installation guides and business process maps.

Setting Up Features in Related Applications

To prepare for PeopleSoft Common Partner Registration, you perform the following steps:

Step	Reference
1. Set up email notifications.	Chapter 2, “Setting Up Features in Related Applications,” Setting Up Email Notifications, page 5
2. Set up PeopleSoft Integration Broker.	Chapter 2, “Setting Up Features in Related Applications,” Setting Up PeopleSoft Integration Broker, page 7

Step	Reference
3. Set up security for the guest user account.	Chapter 2, "Setting Up Features in Related Applications," Setting Up a Guest User Account, page 11

Setting Up Core PeopleSoft Common Partner Registration Features

PeopleSoft Common Partner Registration enables an enterprise to give outside parties access to PeopleSoft applications by making the outside parties partners of an enterprise business unit. For an outside party to become a partner of a business unit, you perform the following steps:

Step	Reference
1. Define business units.	Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Defining Business Units, page 14
2. Define partner services.	Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Defining Services, page 15
3. Define service groups.	Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," (Optional) Defining Service Groups, page 18
4. Define notification templates.	Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Defining Notification Templates, page 22
5. Select a storage location for attachments.	Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Selecting a Storage Location for Attachments, page 22

CHAPTER 2

Setting Up Features in Related Applications

This chapter discusses how to:

1. Set up email notifications.
2. Set up PeopleSoft Integration Broker.
3. Set up a guest user account.

Setting Up Email Notifications

This section discusses how to:

- Update Simple Mail Transport Protocol (SMTP) settings.
- Configure the publish/subscribe servers.
- Set user profile attributes.
- Send attachments.

Updating SMTP Settings

SMTP settings must be modified to enable email notifications to users. Perform this task for the application server and the PeopleSoft Process Scheduler server.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler.

PeopleTools 8.44 PeopleBook: PeopleSoft Server Tools Administration.

Configuring the Publish/Subscribe Servers

To enable the publish/subscribe server for the application server:

1. Launch the PSADMIN utility, located at <pshome>\appserv\psadmin.exe.
2. Select Application Server.
3. Choose to administer a domain.
4. Select a domain.
5. Choose to configure the domain.

6. Answer all prompts until you are asked if you want to configure the publish/subscribe server.
7. Type *Y* and press ENTER.
8. Load and boot the domain.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Server Tools Administration.

Setting User Profile Attributes

Specify workflow settings and a valid primary email address for all PeopleSoft Common Partner Registration users who need to receive notifications.

To specify workflow settings and a primary email address:

1. Select PeopleTools, Security, User Profiles, User Profiles, Workflow.
2. Select Routing Preferences for Worklist User and E-mail User.
3. Select the General tab.
4. Click the Edit Email Address link.
5. Select the email type, and select the Primary Email Account check box.

   Workflow notification emails will be sent to this email address.
6. Click Save.

See Also

PeopleTools 8.44 PeopleBook: PeopleTools Security.

Sending Attachments

To send attachments along with email notifications:

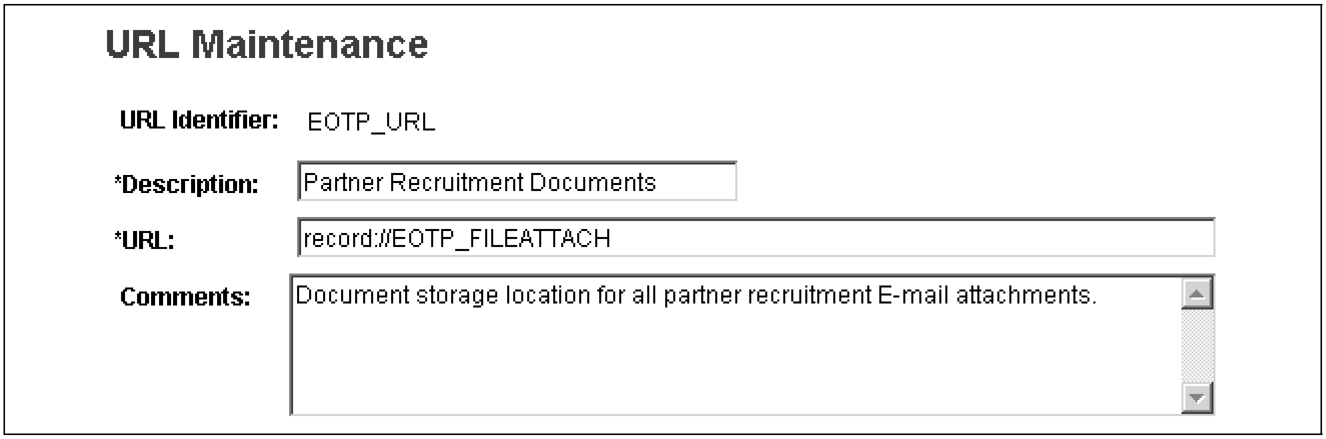
- Define the Temp directory.
- Define URLs for partner recruitment event email attachments.

Defining the Temp Directory

On the application server, ensure that the environment variable TEMP is defined and has write access to the path so that PeopleSoft Common Partner Registration can temporarily store email attachments while sending recruitment notifications.

Defining URLs for Partner Recruitment Event Email Attachments

To access the URL Maintenance page, select PeopleTools, Utilities, Administration, URLs.



URL Maintenance page

To define URLs for partner recruitment event email attachments:

1. Ensure that a URL identifier for a file server or database record has been specified for storing attachments.
   - If you are storing attachments on a file server, use the following format: ftp://user:password@localhost
   - If you are storing attachments in a database record, use the following format: record://EOTP_FILEATTACH

   Note. PeopleSoft Common Partner Registration uses the record EOTP_FILEATTACH for storing files in the database.

   ---
2. Click Save.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Server Tools Administration.

Setting Up PeopleSoft Integration Broker

This section discusses how to:

- Add application messages to the local node.
- Set up the integrationGateway.properties file.
- Set up local gateway properties.
- Set message channel status.
- Activate the application message and message subscription.

Adding Application Messages to the Local Node

To add application messages to the local node:

1. Select PeopleTools, Integration Broker, Node Definitions.
2. Open the node that is identified as the local node.

3. Access the Transactions page.
4. Add the EOTP_APPROVE_SERVICE message as both outbound asynchronous and inbound asynchronous.
5. Save the node.
6. Shut down and restart publish and subscribe services from the application server.

Setting Up the IntegrationGateway.properties File

To set up the integrationGateway.properties file:

1. Navigate to the integrationGateway.properties file.

   The file should be located on the web server directory. The path should be similar to the following:

   c:\bea\wlserver6.1\config\<domain name>\applications\PSIGW\Web-inf\integrationGateway.properties
2. Enter the values for the following variables:

   ```
   ig.isc.serverURL=//<machine name>:<jolt port>
   ig.isc.userid=<database user id>
   ig.isc.password=<database password>
   ig.isc.toolsRel=<peopletools release version>
   ```

   For example:

   ```
   ig.isc.serverURL=//SKULKAR28100:9000
   ig.isc.userid=PS
   ig.isc.password=8T+SA8zGqEM=
   ig.isc.toolsRel=8.42-K2
   ```
3. Save and close the file.
4. Restart the web server.

Note. The password must be encrypted.

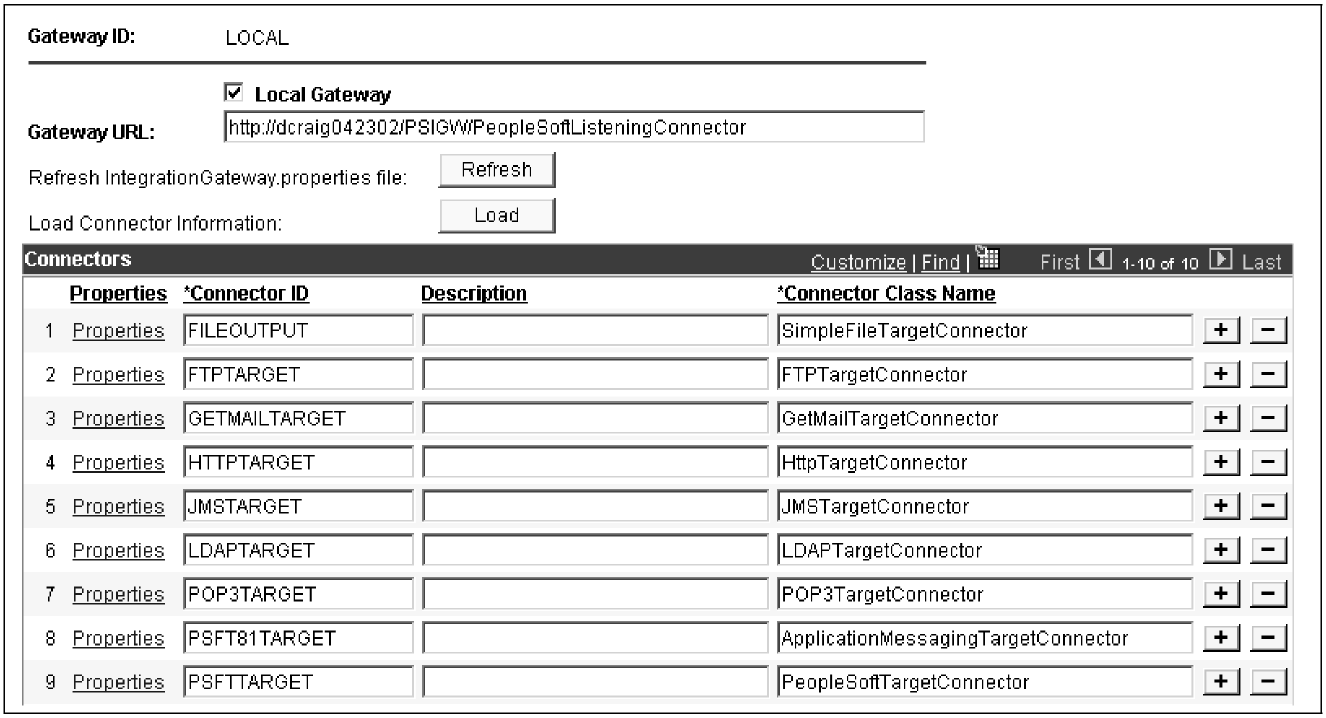
To obtain the encrypted value for your password:

1. Go to the command prompt.
2. Navigate to c:\bea\wlserver6.1\config\peoplesoft.
3. Run the command PSCipher <password>.

   The encrypted value for the password is displayed.
4. Paste the encrypted password in the ig.isc.password field.

Setting Up Local Gateway Properties

To access the Gateways page, select PeopleTools, Integration Broker, Gateways.



Gateways page

To set up local gateway properties:

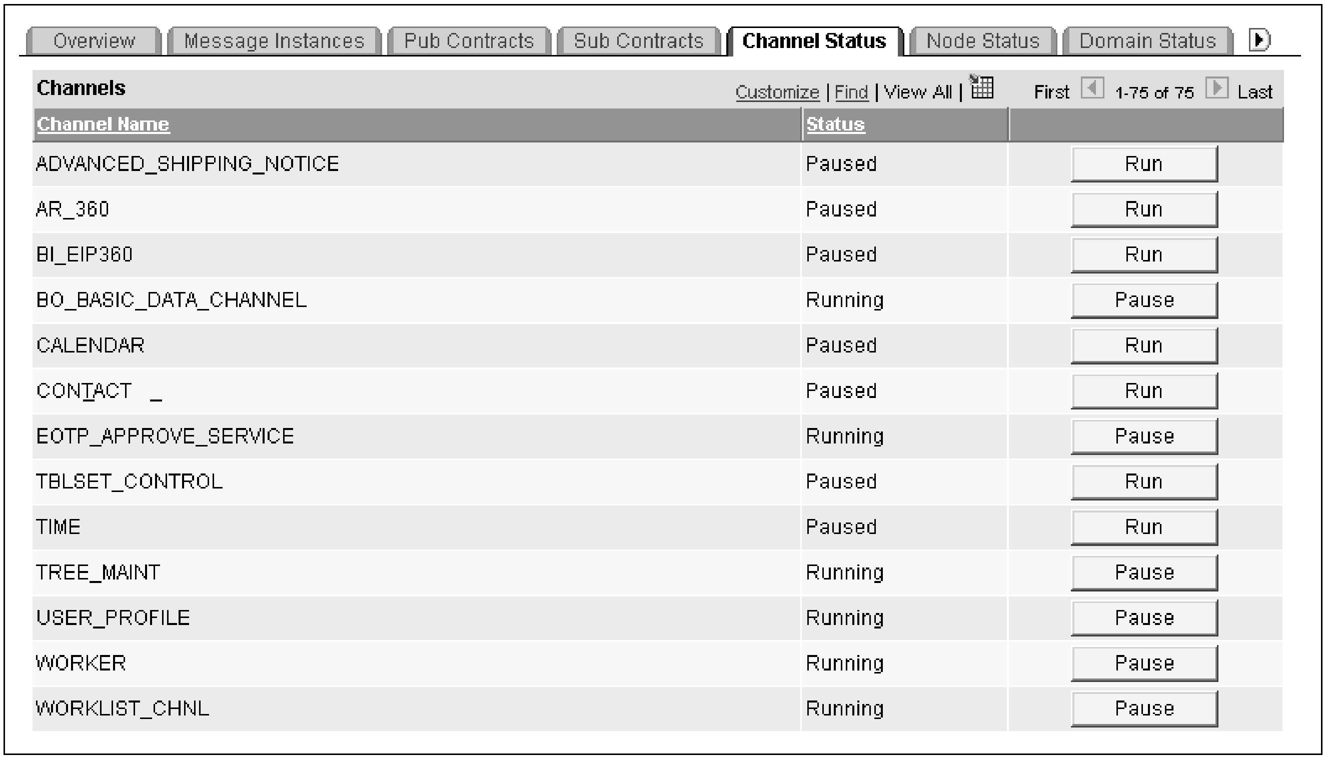
1. Select the gateway ID for the local gateway.
2. Enter the gateway URL for the selected gateway's PeopleSoft listening connector.

   Specify the URL with this format: http://<*gatewayserver*>/PSIGW/PeopleSoftListeningConnector

   <*Gatewayserver*> is the machine name and port, host name, or IP address of the web server hosting the gateway. The gateway uses the PeopleSoft listening connector to receive messages from an integration engine node or a remote gateway.
3. Click Save.
4. Click Refresh, then OK.
5. Click Load, then OK.
6. Click Save.

Setting Message Channel Status

To access the Channel Status page, select PeopleTools, Integration Broker, Monitor, Monitor Message, Channel Status.



Channel Name	Status	
ADVANCED_SHIPPING_NOTICE	Paused	Run
AR_360	Paused	Run
BI_EIP360	Paused	Run
BO_BASIC_DATA_CHANNEL	Running	Pause
CALENDAR	Paused	Run
CONTACT	Paused	Run
EOTP_APPROVE_SERVICE	Running	Pause
TBLSET_CONTROL	Paused	Run
TIME	Paused	Run
TREE_MAINT	Running	Pause
USER_PROFILE	Running	Pause
WORKER	Running	Pause
WORKLIST_CHNL	Running	Pause

Channel Status page

Ensure that the EOTP_APPROVE_SERVICE message channel is up and running. If the message channel EOTP_APPROVE_SERVICE is paused, click Run.

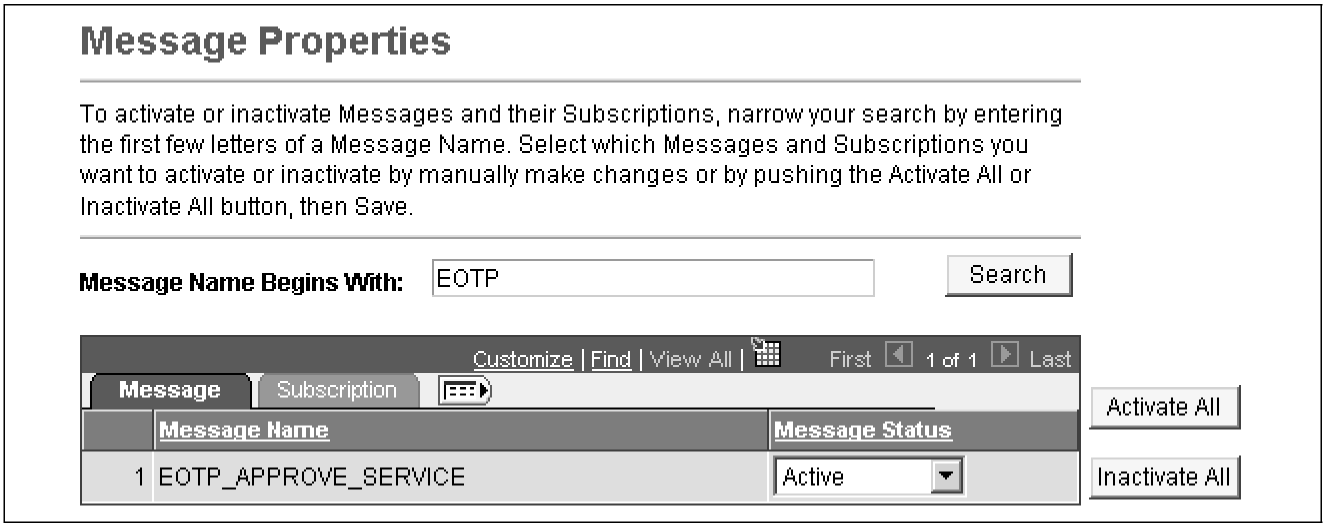
Note. If the EOTP_APPROVE_SERVICE message does not appear, then you do not have the proper security to access the message channel. To grant access to the message channel, either assign yourself the delivered role Partner Administrator or update any permission list assigned to your user profile and enable the EOTP_APPROVE_SERVICE message channel for the permission list.

See Also

PeopleTools 8.44 PeopleBook: PeopleTools Security

Activating the Application Message and Message Subscription

To activate the EOTP_APPROVE_SERVICE message and message subscription, select Enterprise Components, El Repository, Message Properties.



Message Properties page

Note. You need to have the EIR Administrator role to access this page.

Message Name Begins With Enter *EOTP* and click Search to narrow your search for the EOTP_APPROVE_SERVICE message.

Message Status Select *Active* as the status associated with the EOTP_APPROVE_SERVICE message. Click Save.

Subscription Tab

Select the Subscription tab.

Subscription Status Select *Active* as the status associated with the EOTP_APPROVE_SERVICE subscription. Click Save.

Setting Up a Guest User Account

This section discusses how to:

- Set up a guest account.
- Enable guest access to PeopleSoft Common Partner Registration components.

Setting Up a Guest Account

Users should access PeopleSoft Common Partner Registration with a URL placed on a forum or website, or included in the recruitment invitation email.

This URL bypasses the initial sign-in procedure and uses the default account, which you set to GUEST in the configuration.properties file.

To set up auto sign-in with the guest account:

1. Access the configuration.properties file on the web server.

   This file is located in the directory that is specified when you run PeopleSoft internet setup. The relative path is: \bea\wlserver6.1\config\peoplesoft\applications\PORTAL \WEB-INF\psftdocs\ps\configuration.properties

   ---

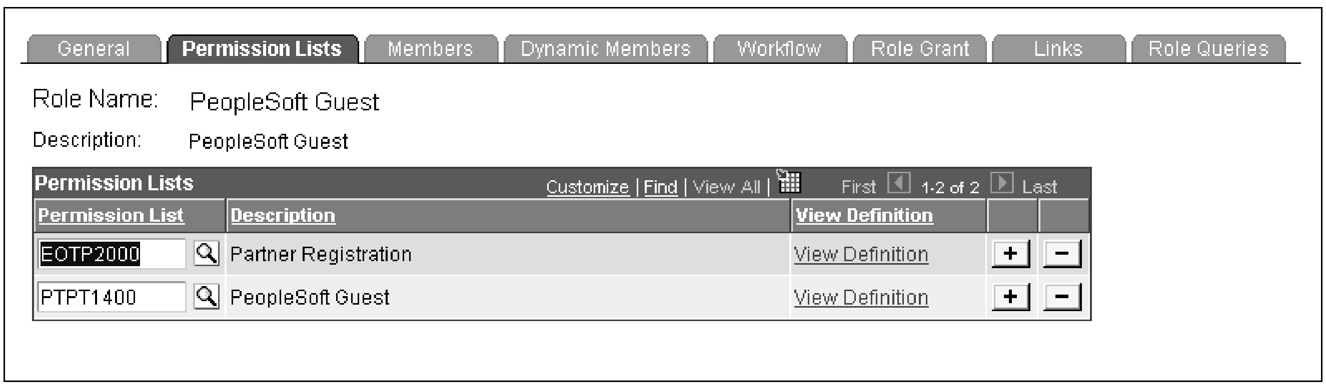
   Note. The *ps* near the end of the path represents your site's name.

   ---

2. Set the values for the configuration variables as follows:
   - byPassSignOn=true
   - defaultUSERID=GUEST
   - defaultPWD=GUEST
3. Save the configuration.properties file.

Enabling Guest Access to PeopleSoft Common Partner Registration Components

Select PeopleTools, Security, Permissions & Roles, Roles, and search for the PeopleSoft Guest role.



Permission Lists page

To give outside parties access to the Partner Registration page, you associate the PeopleSoft Guest role with the EOTP2000 permission list.

Most outside parties access PeopleSoft Common Partner Registration components using the supplier portal. However, PeopleSoft Customer Relationship Management partners access components using the customer portal.

CHAPTER 3

Setting Up Core PeopleSoft Common Partner Registration Features

This chapter provides an overview of PeopleSoft Common Partner Registration details and discusses how to:

- Define business units.
- Define services.
- (Optional) Define service groups.
- Define notification templates.
- Select storage location for attachments.

Understanding PeopleSoft Common Partner Registration Details

PeopleSoft Common Partner Registration allows an enterprise to give outside parties access to PeopleSoft applications by making the outside parties partners of the business unit.

For an outside party to become a partner of a business unit, the partner administrator must:

1. Load the business unit into PeopleSoft Common Partner Registration.
2. Create the services for which the partner will be registered.

   Services can be arranged together in service groups.
3. Assign the service to the setID used by the business unit that is providing the service.

   Note. To enable multiple business units to give partners access to the same application, the partner administrator creates a service using a setID that is shared by these business units.
4. Select the roles that will be assigned to the partner user upon service approval.
5. Identify predefined processes that will run upon approval.

The partner administrator must also assign PeopleSoft-delivered roles to enterprise users of the business unit who will perform administrative tasks for PeopleSoft Common Partner Registration.

See Also

Appendix B, "Setting PeopleSoft Common Partner Registration Security," page 51

Defining Business Units

This section discusses how to:

- Load business units.
- Define business unit security.
- Define setIDs for tableset sharing.
- Create business units.

Pages Used to Define Business Units

Page Name	Object Name	Navigation	Usage
Load Business Units	EOTP_LOADBU_PG	Partners, Define Partner Details, Load Business Units	Load business units from a record into PeopleSoft Common Partner Registration.
BU/Role Security Associations	EOTP_BUSEC	Partners, Define Partner Details, BU/Role Security Associations	Determine which roles may access transactions by business unit.
Business Unit	EOTP_CREATE_BU_PG	Partners, Define Partner Details, Business Unit	Create business units.
TableSet Control	SETID_TABLE	PeopleTools, Utilities, Administration, TableSet IDs	Define a default setID for business units created in PeopleSoft Common Partner Registration.

Loading Business Units

Access the Load Business Units page.

Load the business units currently used by other PeopleSoft products into Common Partner Registration.

Record (Table) Name Select the record that contains the business units.

Note. If you have already loaded business units from a record but want to load another business unit that has been added to that record, select the record and perform another load. Common Partner Registration loads only the business unit that has been added since the last load.

Run Click to trigger a process request to load the business units from the record into PeopleSoft Common Partner Registration. The Process Scheduler Request page is displayed.

Process Monitor Click to access the Process Monitor page and check the status of the request.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler.

Defining Business Unit Security

Access the BU/Role Security Associations page.

Roles	Select each role that you want to have permission to access transactions for a business unit.

See Also

Appendix B, “Setting PeopleSoft Common Partner Registration Security,” page 51

Defining SetIDs for Tableset Sharing

Access the TableSet Control page.

A setID for sharing must be defined if you plan on creating a business unit in PeopleSoft Common Partner Registration. The setID that you define is used as the default setID when you create business units within PeopleSoft Common Partner Registration. When business units share setIDs, each business can see the same set of services.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Application Designer.

Creating Business Units

Access the Business Unit page.

Use this page only if you do not have preexisting business units and you cannot create business units in your application.

Note. When a business unit is created using PeopleSoft Common Partner Registration, it exists solely in PeopleSoft Common Partner Registration.

SetID	Select a setID for this business unit. **Note.** You create setIDs on the TableSet Control page.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Application Designer.

Defining Services

This section discusses how to:

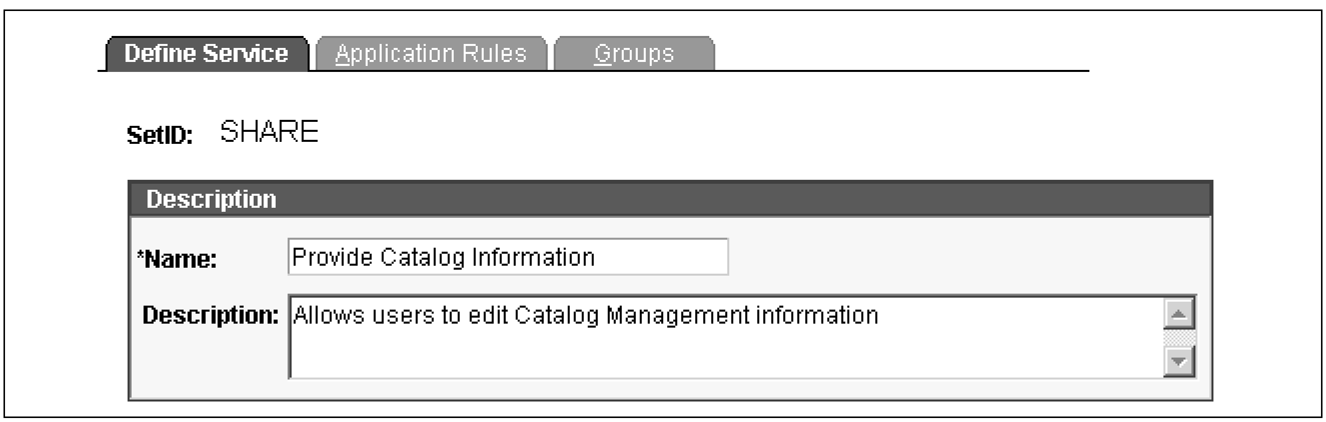
- Create services.
- Define application rules.
- Add a service to a service group.

Pages Used to Define Services

Page Name	Object Name	Navigation	Usage
Define Service	EOTP_SVC_INFO	Partners, Define Partner Details, Services	Define the service name and description. Services group a set of functionality or applications that a partner uses.
Application Rules	EOTP_SVC_APPL	Partners, Define Partner Details, Services, Application Rules	Determine rules for the selected service.
Groups	EOTP_SVC_GRPS	Partners, Define Partner Details, Services, Groups	Add the selected service to a group.
Add Groups	EOTP_GRPS_WRK	Click the Add to Groups button on the Groups page.	Add the selected service to groups.
Group Details	EOTP_GRP_DTL	Click the Service Group Name link on the Groups page.	View the services currently assigned to the selected service group.

Creating Services

Access the Define Service page

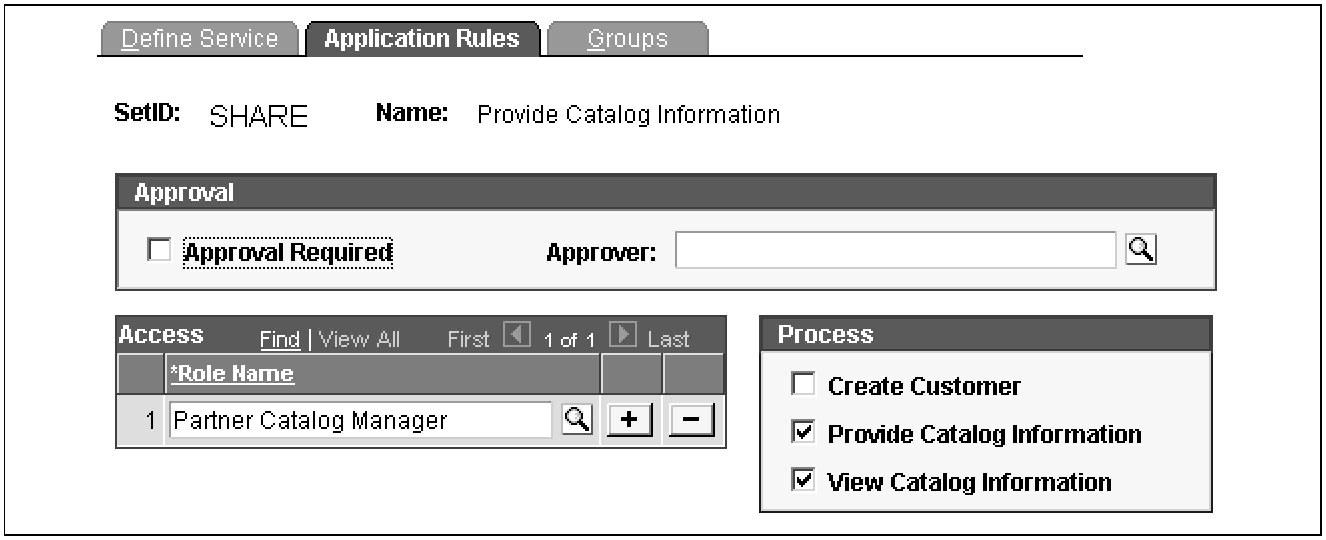


Define Service page

Use the Define Service page to create new services. Enter a unique name and description, and then click Save. Continue and define application rules for this service, and then assign it to groups, if required.

Defining Application Rules

Access the Application Rules page.



Application Rules page

Approval Required

Select if registrations for this service should be manually approved before partners gain access to the service.

Approver

If approval is required, select the roles to approve or deny registrations for this service.

Note. PeopleSoft Common Partner Registration delivers the Partner Service Approver role to approve service registrations. To use a different role to approve service registrations, you must associate that role with the permission list EOTP1100.

Role Name

Select the roles to assign to the partner upon approval for this service.

Create Customer

(PeopleSoft Financials and PeopleSoft Supply Chain Management [SCM] only). Select if the user associated with this service needs to create customer profiles.

Note. If you use a PeopleSoft Customer Relationship Management (CRM) system and create a service that includes the Create Customer process, you must set up automatic numbering for the number types Cust ID and Contact ID for the setID that is used by this service. If you do not set up automatic numbering, the customer is not successfully created upon service approval.

Create Vendor

(PeopleSoft Financials and PeopleSoft SCM only). Select if the user associated with this service needs to create vendor profiles.

Provide Catalog Information

Select if the user associated with this service performs catalog management tasks and activities.

View Catalog Information

Select if the user associated with this service needs to view the catalog only.

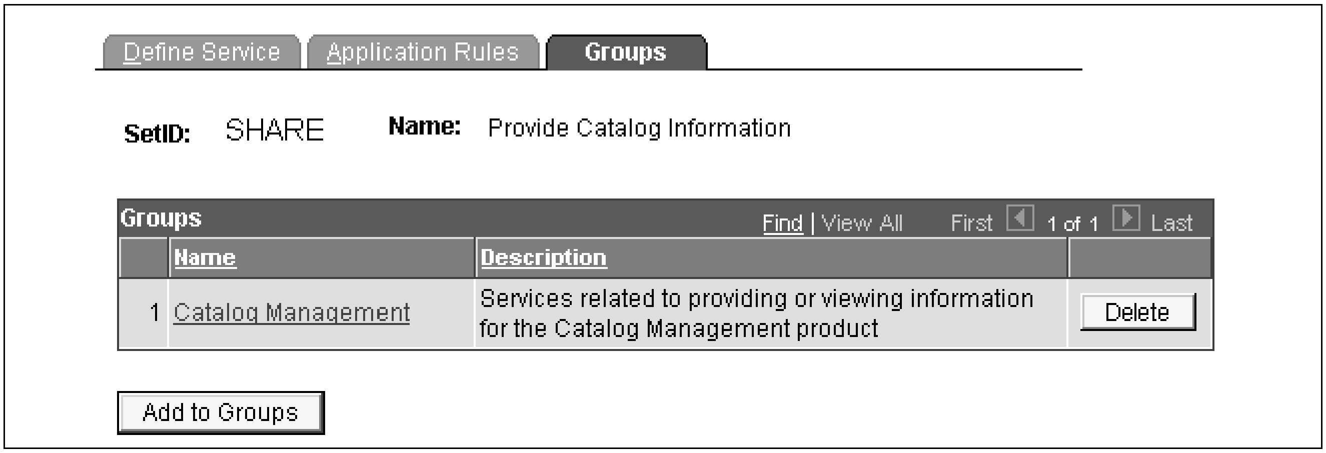
See Also

Appendix B, "Setting PeopleSoft Common Partner Registration Security," page 51

PeopleSoft PeopleBook 8.8: CRM Application Fundamentals.

Assigning Services to Service Groups

Access the Groups page.



Groups page

Note. You must define service groups prior to using this page.

Name

Displays the names of service groups this service is currently assigned. Click the name of the group to access the Group Details page and view a list of services currently assigned to the group.

Delete

Click to remove the service from the associated service group.

Note. The service is only removed from the service group. It is not deleted from the database.

Add to Groups

Click to access the Add Groups page and assign the service to additional service groups.

(Optional) Defining Service Groups

Service groups centralize services under a category, to organize and simplify recruitment event creation.

This section discusses how to:

- Create service groups.
- Add and remove services.
- Add services to a service group.

• View service details.

Common Elements Used in this Section

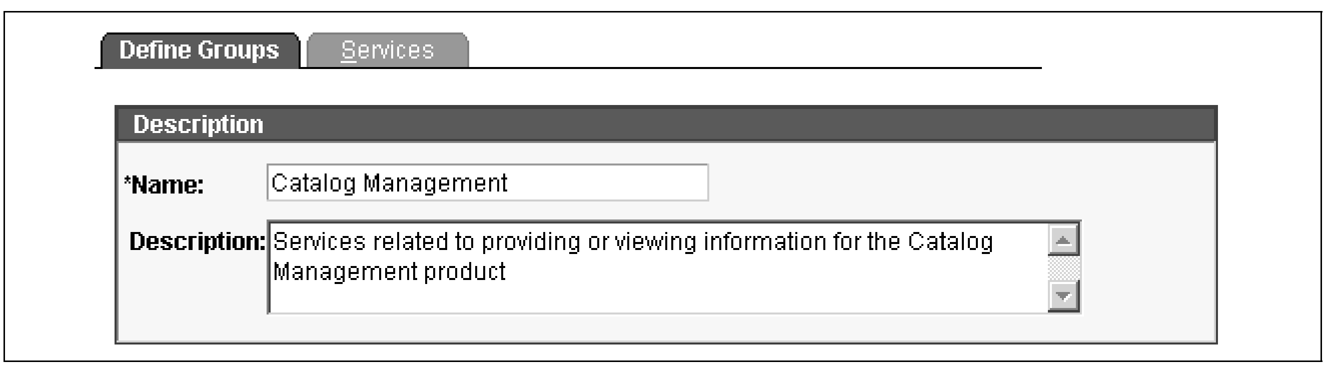
Name Displays the names of services currently assigned to this service group. Click the name of a service to access the Service Detail page and view detailed information about the service.

Pages Used to Define Service Groups

Page Name	Object Name	Navigation	Usage
Define Groups	EOTP_GROUP	Partners, Define Partner Details, Service Groups, Define Groups	Define a service group name and description.
Services	EOTP_GRP_SVCS	Partners, Define Partner Details, Service Groups, Services	View and remove services that are currently assigned to a service group.
Add Services	EOTP_SVCS_WRK	Click the Add Services button on the Services page.	Add additional services to a service group.
Service Detail	EOTP_SERVICE	• Click the service name link on the Services page. • Partners, Define Partner Details, Service Groups, Services, Add Services Click the service name link.	View service details.

Creating Service Groups

Access the Define Groups page.

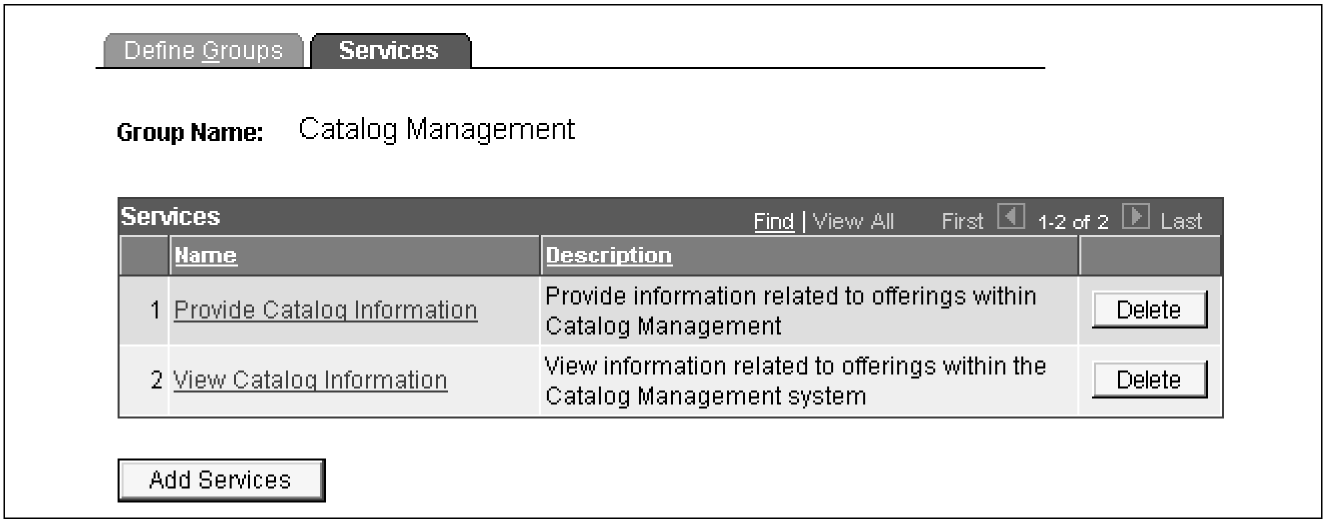


Define Groups page

Use the Define Groups page to create new service groups. Enter a unique name and description, and then click Save. Continue and assign services to this group.

Adding and Removing Services

Access the Services page.



Services page

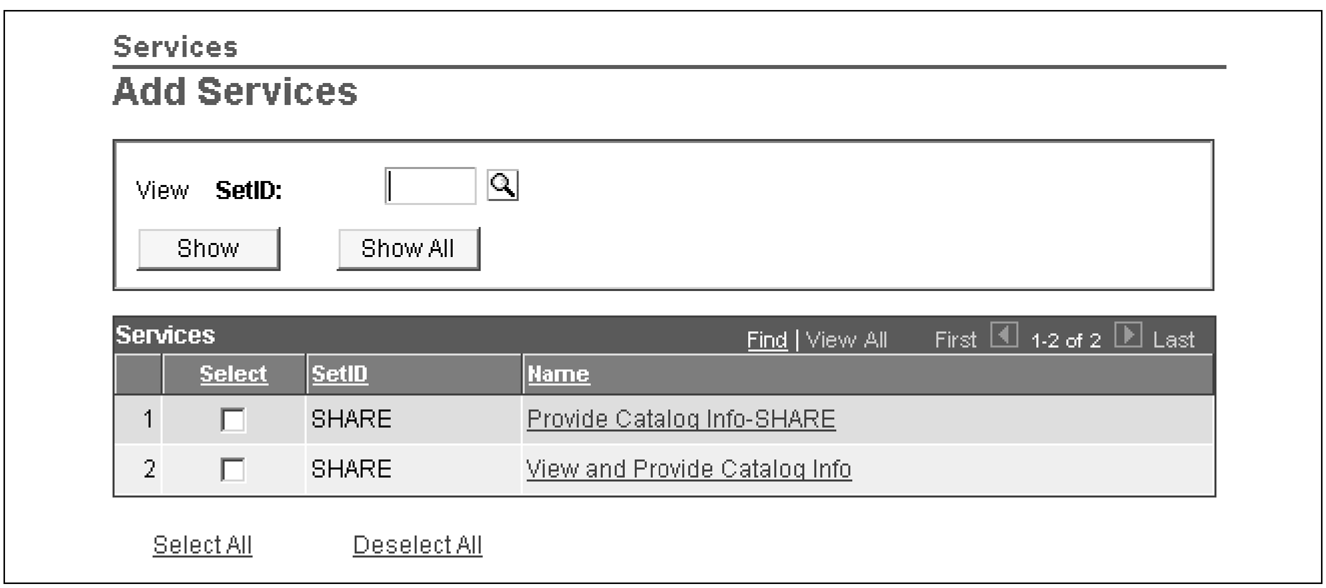
Delete Click to remove the service from this service group.

Note. The service is only removed from the service group. It is not deleted from the database.

Add Services Click to access the Add Services page and assign additional services to the service group.

Adding Services to a Service Group

Access the Add Services page.



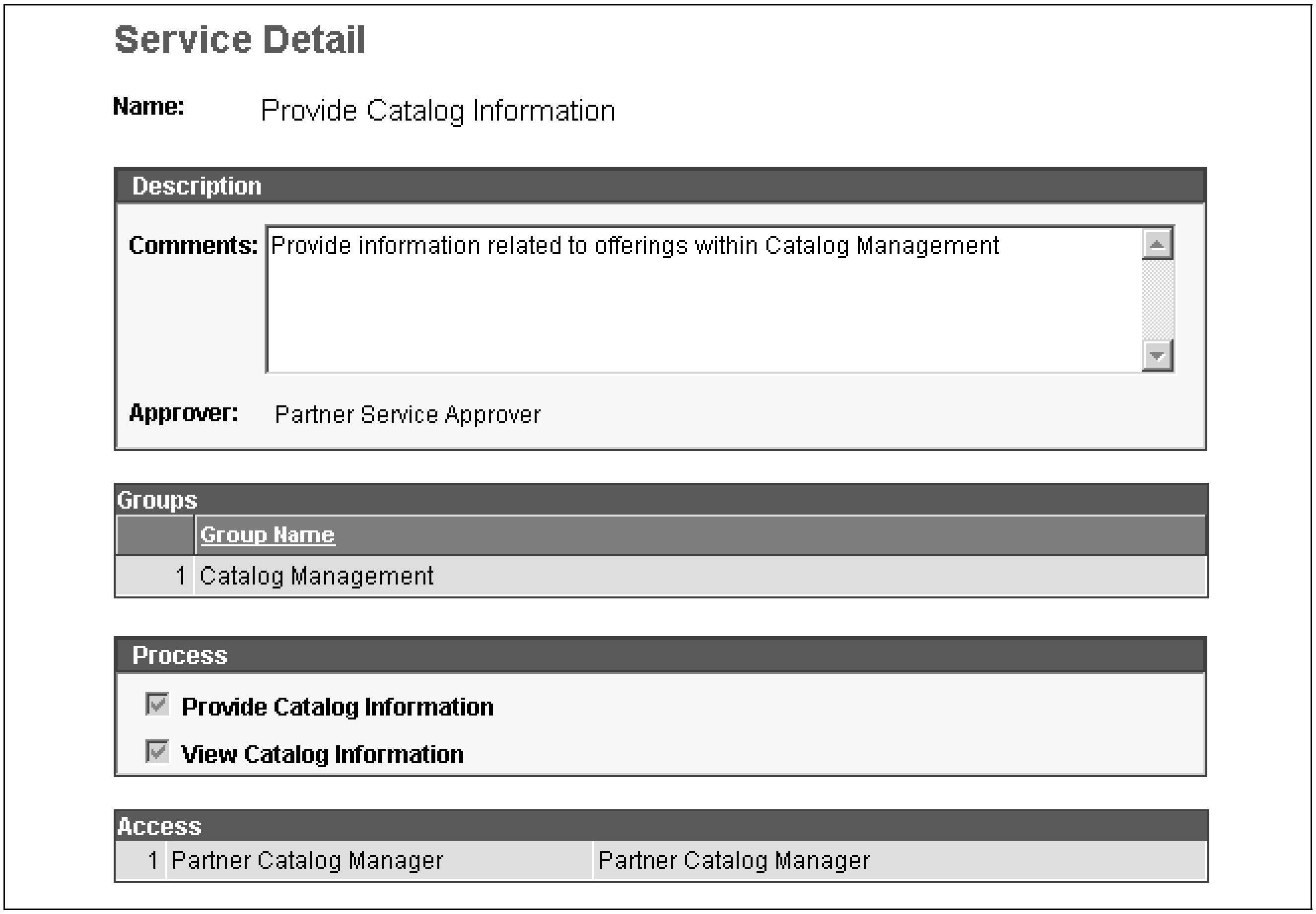
Add Services page

SetID and **Show** — Click Show to list services associated with the selected setID only.

Select — Select to assign the associated service to the group.

Viewing Service Details

Access the Service Detail page.



Service Detail page

Approver — Displays the role selected for approving this service when manual approval is required.

Groups — Lists the service groups that this service is assigned.

Process — Displays the processes associated with this service.

Access — Displays the role or roles which assigned to the partner upon approval for this service.

Defining Notification Templates

To access the Generic Template Definition page select PeopleTools, Workflow, Notifications, Generic Templates.

Notification templates establish a common format when sending email notifications. Within PeopleSoft Common Partner Registration, notification templates are used for registration confirmation, partner service approval, and partner service denial. PeopleSoft delivers templates for each of these activities.

To define a notification template:

1. Add a value for the name of the notification template, such as Partner Recruitment.
2. Complete the fields as required.

   The instructional text is directed towards partner analysts.

   The message text is included in the email notification.
3. Click Save.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Workflow.

Chapter 4, "Recruiting Potential Partners," Customizing and Sending Event Notifications, page 27

Selecting a Storage Location for Attachments

Use the Options page to define a location for attachments sent in recruitment events.

Page Used to Select a Storage Location for Attachments

Page Name	Object Name	Navigation	Usage
Options	EOTP_GENOPTIONS	Partners, Define Partner Details, Options	Select the storage location for an attachment sent in a private recruitment event.

Selecting a Storage Location

Access the Options page.

URL ID Enter the URL defined for sending attachments.

File Size Limit Enter the maximum possible size in kilobytes of the attachment.

See Also

Chapter 2, "Setting Up Features in Related Applications," Sending Attachments, page 6

CHAPTER 4

Recruiting Potential Partners

This chapter provides an overview of the recruitment process and discusses how to:

- Create recruitment events.
- Customize and send event notifications.

Understanding the Recruitment Process

This section lists common elements and discusses recruitment events.

Common Elements Used in This Chapter

Notify

Select a notification template, customize the notification template, and send the notification.

Before you send the notification, you are prompted to select an email notification template. If you have already sent the notification, you are prompted to confirm that you want to send the notification again.

Note. You create email notification templates on the Generic Template Definition page.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Workflow.

Recruitment Events

Recruitment events are used to set up public or private invitations for potential partners to subscribe to services. Public invitations are accessed by a link, which may be placed on a forum or website. Private invitations are accessed by a link that is placed in a customized email notification, which may also include one or more attachments.

Both public and private invitations include pages in which potential partners subscribe to services and enter personal and company information.

See Also

Appendix A, "Self-Service Registration," page 49

Creating Recruitment Events

This section discusses how to:

- Define event details.
- Add recruitment contacts.
- Add and remove services.
- Add attachments to an event.

Pages Used to Create Recruitment Events

Page Name	Object Name	Navigation	Usage
Recruit Partners	EOTP_RECRUIT_PG	Partners, Create Recruitment Event, Recruit Partners	Enter the name and description of a recruitment event, and specify the event as public or private.
Contacts	EOTP_REC_CNTCT_PG	Partners, Create Recruitment Event, Recruit Partners, Contacts	Add recipients to a private recruitment event.
Services	EOTP_REC_SVC_PG	Partners, Create Recruitment Event, Recruit Partners, Services	Remove the services you are currently offering to recipients.
Add Services	EOTP_SVC_SEL_PG	Click Add Services on the Services page.	Use to select the services to offer recipients.
Attachments	EOTP_REC_ATTACH_PG	Partners, Create Recruitment Event, Recruit Partners, Attachments	Add attachments to the event notification.

Defining Event Details

Access the Recruit Partners page.

Recruit Partners page

Status

Displays the status of the event:

Open: An event notification has not yet been sent to the potential partner.

Sent: An event notification has been sent.

Public Recruitment Event

Select to create a URL that enables users to subscribe to services.

Note. If you select Public Recruitment Event, you cannot specify contacts, attach documents, or send an event notification.

URL

Displays the URL, which may be placed on a forum or website as a link for public recruitment events.

Adding Recruitment Contacts

Access the Contacts page.

Contacts page

Note. This page is not available if this is a public recruitment event.

Add a row for each potential partner contact.

E-mail Address, First Name, and **Last Name**

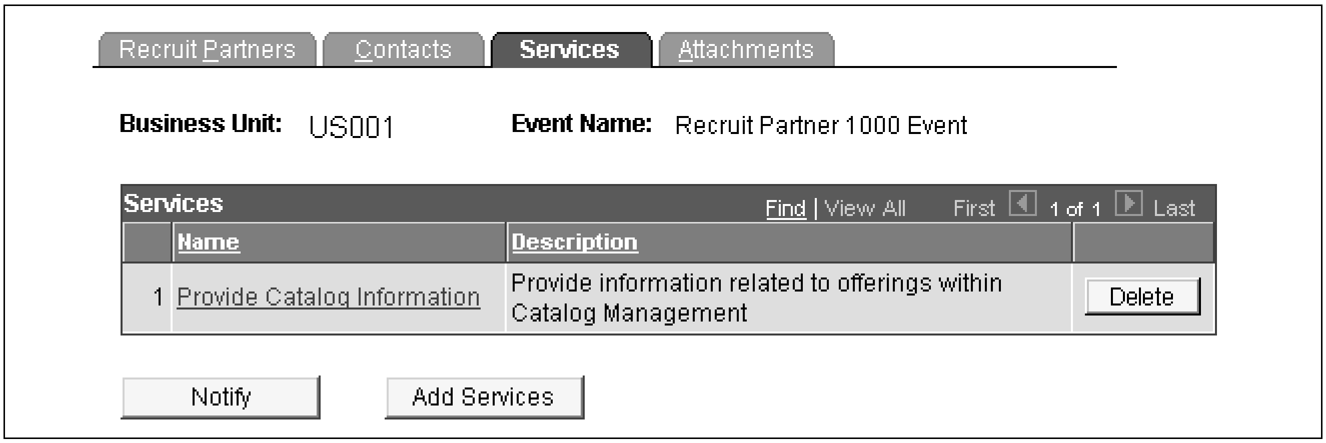
Select an email address that already exists in the database, or enter a new email address. If an address is selected from the database, the first and last names of the contact are automatically displayed, if they also exist in the database. Otherwise, enter the names.

Note. Notifications are sent to the email addresses listed here.

You cannot add contacts once the event notification has been sent.

Adding and Removing Services

Access the Services page.



Services page

Name

Displays the names of the services currently attached to this recruitment event. Click the name of a service to access the Service Detail page and view detailed information about the service.

Delete

Click to remove the service from this recruitment event.

Note. The service is only removed from the recruitment event. It is not deleted from the database.

Add Services

Click to access the Add Services page and attach additional services to this recruitment event.

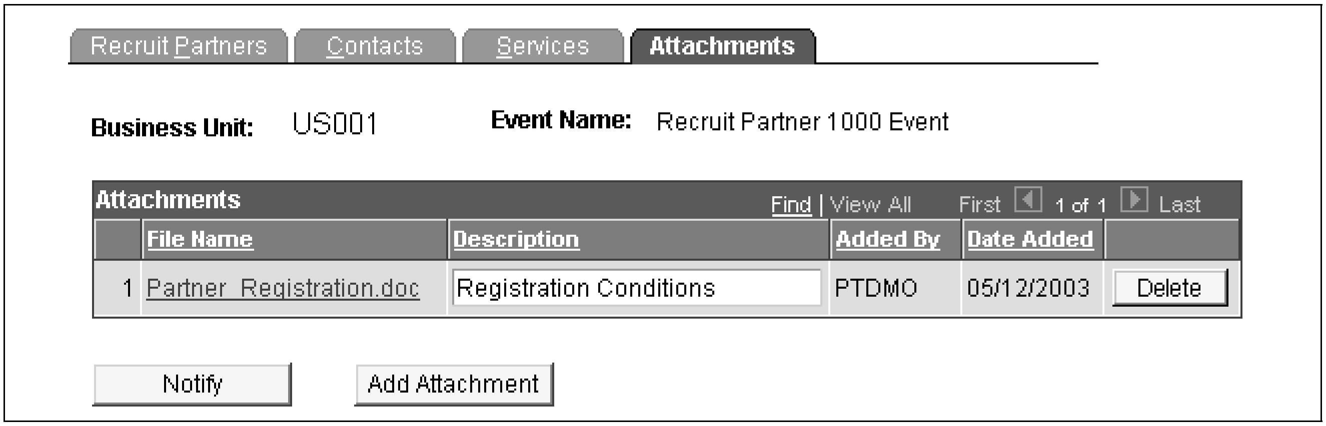
Note. You cannot add services once the event notification has been sent.

See Also

Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Viewing Service Details, page 21

Adding Attachments to an Event

Access the Attachments page.



Attachments page

Note. This page is not available if this is a public recruitment event.

File Name Displays the name of the attachment. Click to open the attachment.

Delete Click to remove the associated attachment from the event.

Add Attachment Click to browse your local drive and select a document to attach to the event. Click Upload to attach the selected document.

Customizing and Sending Event Notifications

This section provides an overview of event notifications and discusses how to:

- Customize event notification templates.
- Preview event notifications.

Understanding Event Notifications

You use event notifications to send potential partners a link to access a private invitation and subscribe to services. The notification contains basic information about the subscription and can be modified to include additional information such as instructions, information regarding attachments, or personal references for the potential partner.

See Also

Chapter 3, “Setting Up Core PeopleSoft Common Partner Registration Features,” Defining Notification Templates, page 22

PeopleTools 8.44 PeopleBook: PeopleSoft Workflow.

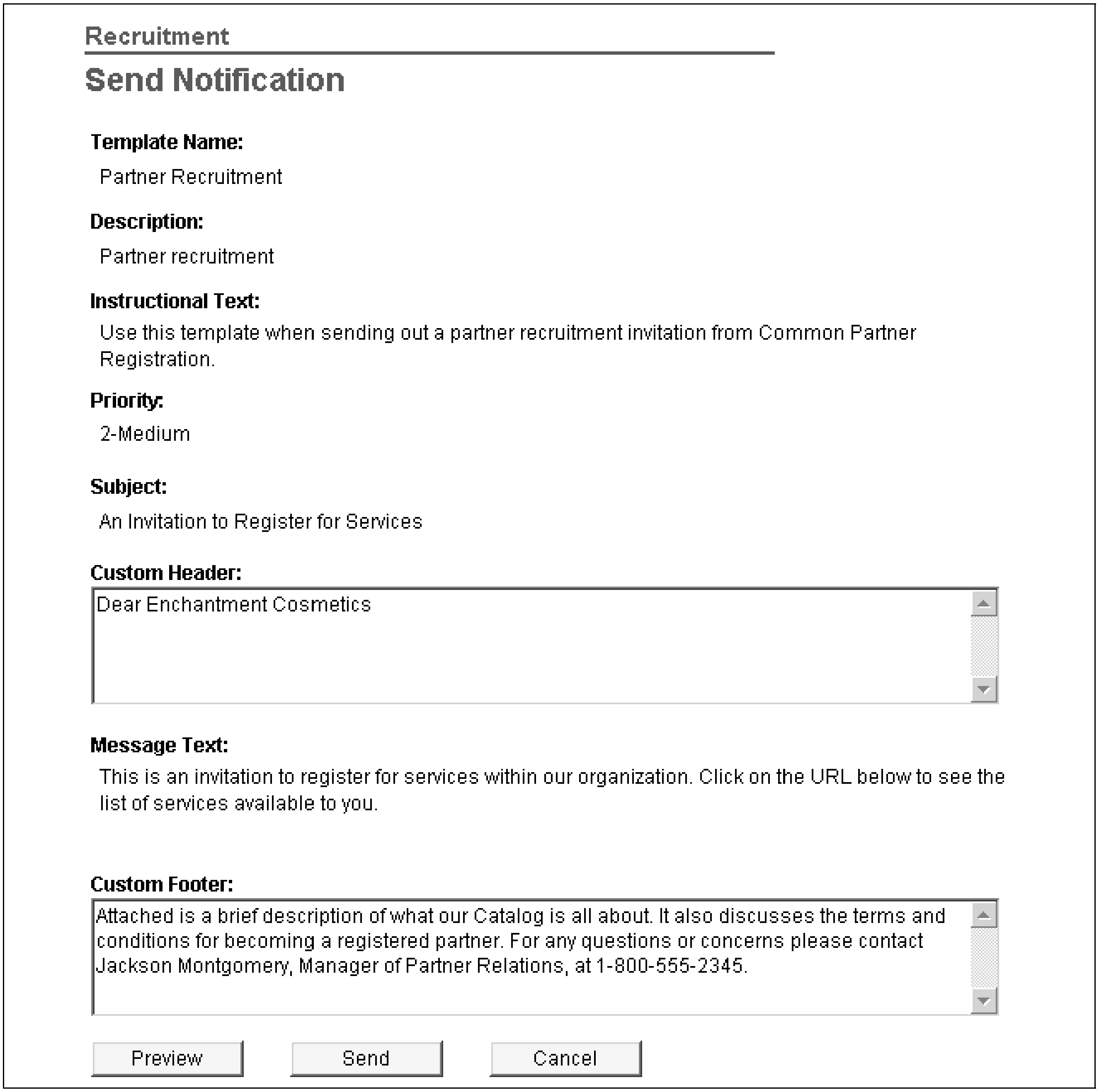
Chapter 4, “Recruiting Potential Partners,” Creating Recruitment Events, page 24

Pages Used to Customize and Send Event Notifications

Page Name	Object Name	Navigation	Usage
Send Notification	EOTP_TEMPLATE_GEN	• Partners, Create Recruitment Event, Recruit Partners Click Notify. • Partners, Create Recruitment Event, Recruit Partners, Contacts Click Notify. • Partners, Create Recruitment Event, Recruit Partners, Services Click Notify. • Partners, Create Recruitment Event, Recruit Partners, Attachments Click Notify.	Review the contents of the recruitment event notification template and add a custom header and footer.
Notification Preview	EOTP_NOTIF_PREVIEW	Click Preview on the Send Notification page.	Review the customized recruitment event notification and check for errors before sending.

Sending Notifications

Access the Send Notification page.



Send Notification page

You can add a person’s name as a custom header, and add a custom footer such as “For any questions or concerns, please contact a customer service representative.”

Preview	Click to access the Notification Preview page and see the notification before you send it.
Send	Click to send the notification to email addresses listed on the Contacts page.

CHAPTER 5

Registering Partners For Services

This chapter lists common elements and discusses how to:

- Register potential partners for services.
- Register existing enterprise partners for services.
- Add and maintain partner users.

Common Element Used in This Chapter

Delete	Click to remove associated contacts or services from a partner's registration.

Registering Potential Partners For Services

This section discusses how to:

- Add partner information.
- Add contacts.
- Add contact details.
- Add addresses.
- Add address details.
- Select services.

Potential partners who are entered into the system manually must still go through the approval process. If approval is required, a partner service approver must approve the registrations. If approval is not required, the partnership is approved automatically.

See Also

Chapter 5, "Registering Partners For Services," Registering Existing Enterprise Partners For Services, page 36

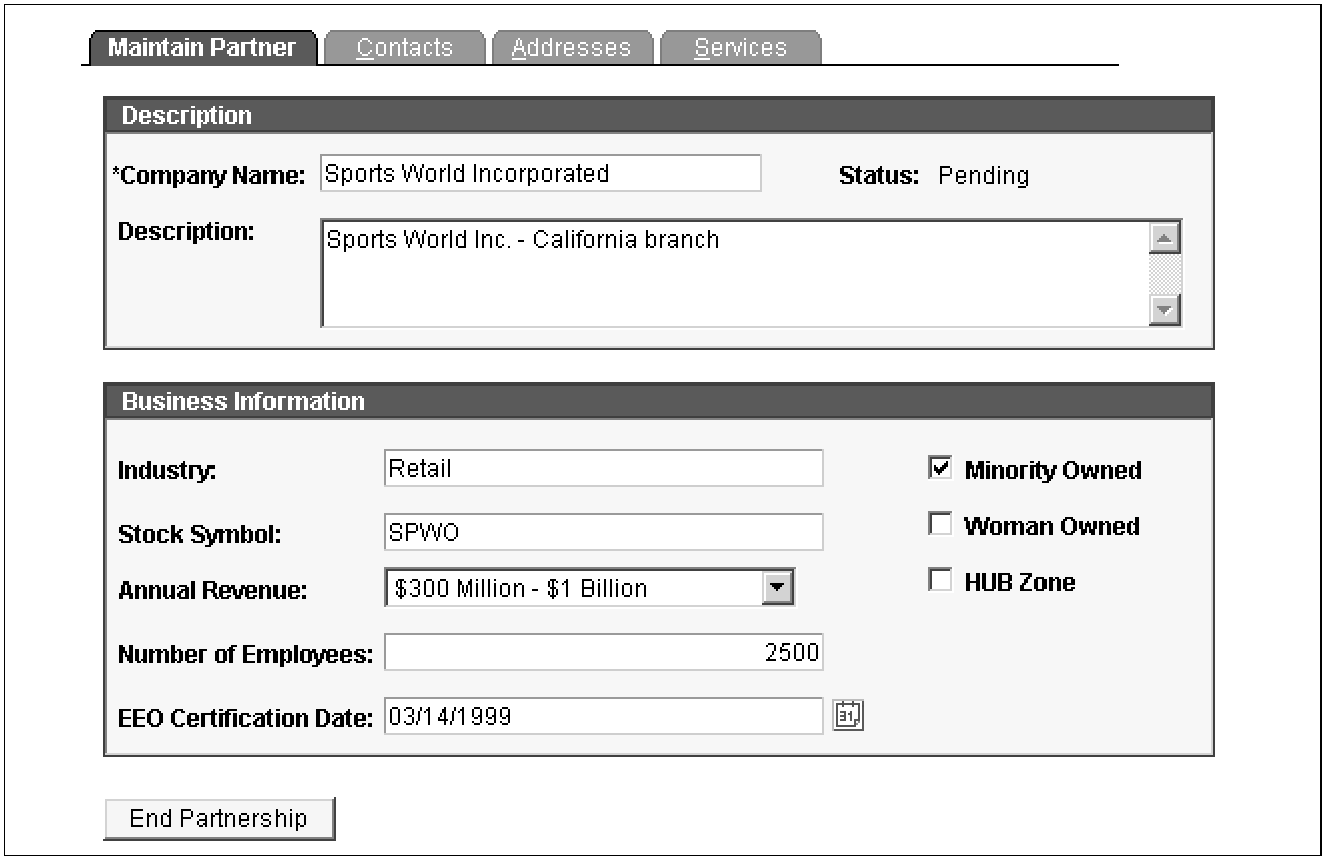
Chapter 6, "Approving Service Registrations," page 43

Pages Used to Register Potential Partners For Services

Page Name	Object Name	Navigation	Usage
Maintain Partner	EOTP_PRT_INFO	Partners, Maintain Partner Details, Maintain Partner	Add or update a partner's company information.
Contacts	EOTP_PRT_CNTC	Partners, Maintain Partner Details, Maintain Partner, Contacts	View or delete a company's contact information.
Contacts Information	EOTP_CNTC_WRK	• Click the Add Contact button on the Contacts page. • Click the contact's email link on the Contacts page.	Add or edit contact information.
Addresses	EOTP_PRT_ADDR2	Partners, Maintain Partner Details, Maintain Partner, Addresses	Select the company's country location and add an alternate address.
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Addresses page.	Add or edit company address information.
Services	EOTP_PRT_SVCS	Partners, Maintain Partner Details, Maintain Partner, Services	View or remove services currently assigned for this partner's registration.
Add Services	EOTP_SVCS_WRK	Click the Add Services button on the Services page.	Select services for this partner's registration.
Service Detail	EOTP_SERVICE	• Click the service name link on the Services page. • Click the service name link on the Add Services page.	View the selected service's detail information.
View Types	EOTP_TYPES	Partners, Maintain Partner Details, Maintain Partner, Types	Determine whether a partner is also a customer or vendor. **Note.** The View Types page is only available for enterprise partners.

Adding Partner Information

Access the Maintain Partner page.



Maintain Partner page

Status

The approval status of the registration remains pending until the registration for one of the requested services has been approved. At that time the status changes to *Partner. Cancelled* means the partnership has been terminated.

Industry

Enter the type of business. For example, industrial, retail, or technical.

EEO Certification Date (equal employment opportunity certification date)

Select the date when the company became certified for EEO reporting.

HUB Zone (historically underutilized business zone)

Select if the company qualifies for HUB classification.

End Partnership

Click to remove the partner from the list of partners.

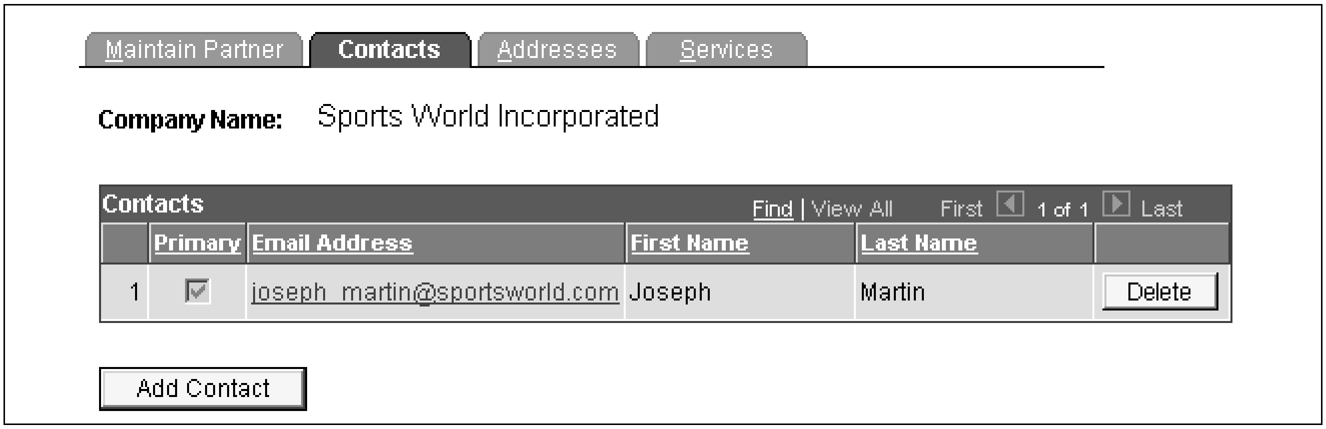
When a partnership ends, the system revokes sign-in privileges to all the users for this partner, and deletes all user profiles. All services are canceled. Only the partner company information, contacts, addresses, services, and partner types records are retained.

If the partner is also a supplier or a customer, then the partner manager must manually inactivate the supplier or customer profiles by accessing their respective maintenance pages.

Warning! Any vendor or customer self-service users that were registered as partners lose their profiles in the system.

Adding Contacts

Access the Contacts page.



Contacts page

Primary When selected, indicates the primary contact.

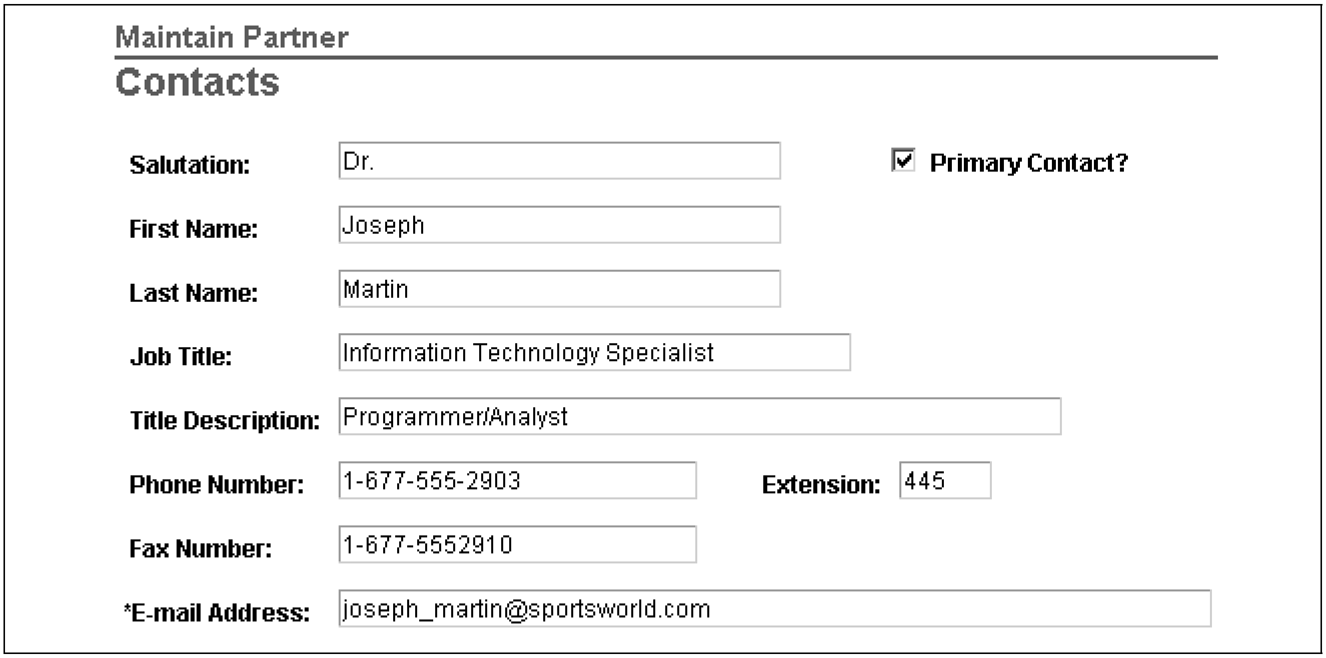
Note. A primary contact is required to save the partner record.

Email Address Displays the contact's email address as a link. Click to access the Contact Information page and view this contact's detail information.

Add Contact Click to access the Contact Information page and enter contact detail information.

Adding Contact Details

Access the Contacts Information page.



Contacts Information page

Enter detailed information for this contact. Phone and fax numbers can be in any format.

Information entered for the first name, last name, and email address is displayed on the Contacts page.

Primary Contact — Select to indicate the primary contact.

Adding Addresses

Access the Addresses page.

Note. Address fields shown on the page are specific to the chosen country.

Corporate Address and **Alternate Address** — Corporate Address is automatically selected when you first open this page. If you add a second address, Alternate Address is automatically selected.

> **Note.** Only two addresses can be added for a single partner.

Address fields — Displays the company’s address once it has been entered.

Adding Address Details

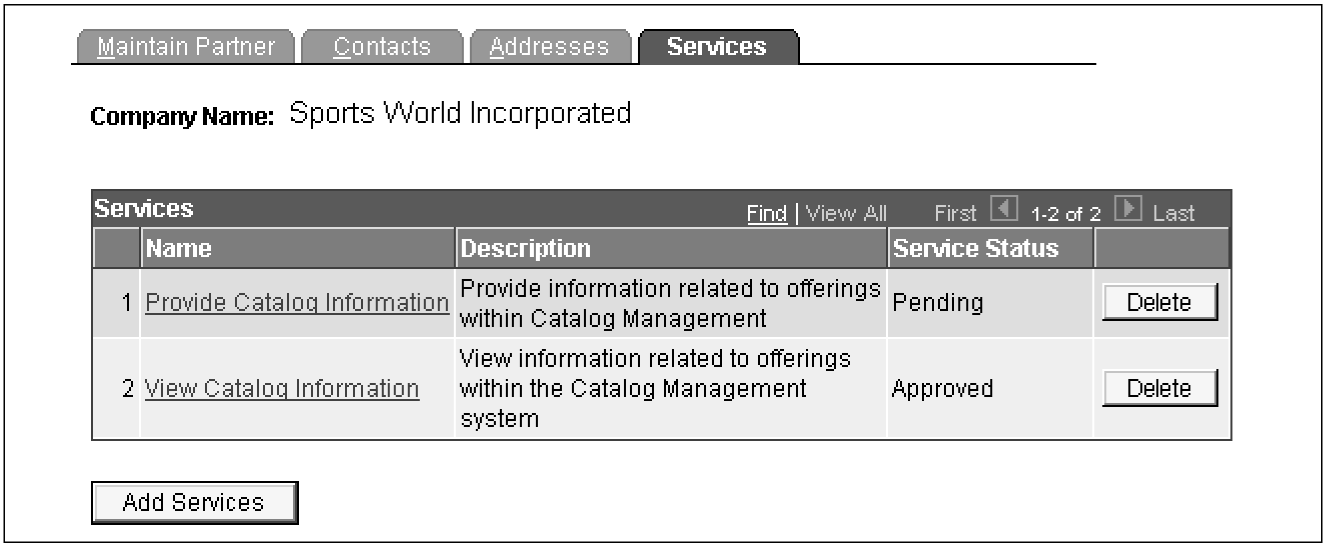
Access the Edit Address page.

Country — Displays the country selected on the Addresses page. Click the Change Country link to change the selected country.

> **Note.** If you change the country, any address information entered is removed.

Selecting Services

Access the Services page.



Services page

Name Displays the name of the service as a link. Click to access the Service Detail page and view detailed information about this service.

Service Status Displays the registration status for the associated service: *Pending, Approved,* or *Denied.*

Add Services Click to access the Add Service page and add services to this registration request.

See Also

Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Viewing Service Details, page 21

Registering Existing Enterprise Partners For Services

This section provides an overview of the process for registering existing partners and discusses how to register existing enterprise partners.

Understanding the Process For Registering Existing Partners

A representative from the enterprise can register an existing customer or vendor for services. A customer or vendor is considered to be a partner of the enterprise; however the customer or vendor is not yet registered as a partner in PeopleSoft Common Partner Registration. To register existing partners for services, the partner manager runs the application engine (EOTP_CUSTREG) process which performs the following tasks:

- Creates a partner profile in the system for the customers or vendors specified.

- Attempts to determine all existing users for the customers or vendors and makes them partner users.
- Reads all contacts for the customers or vendors and makes them partner contacts.
- Attempts to determine the primary contact and if there is an existing user ID for that contact.

  If successful, the primary contact becomes a partner administrator and has access to all services specified in the selected event. If unsuccessful, the enterprise representative must make at least one partner user an administrator. Use the Maintain Partner Users page to determine if the primary contact has been made an administrator.

  Either the partner administrator or the enterprise representative must then give all partner users access to the approved services.

Note. If approval is required, a partner service approver must approve the registrations before the enterprise partner becomes a partner in PeopleSoft Common Partner Registration.

See Also

Chapter 5, “Registering Partners For Services,” Adding and Maintaining Partner Users, page 38

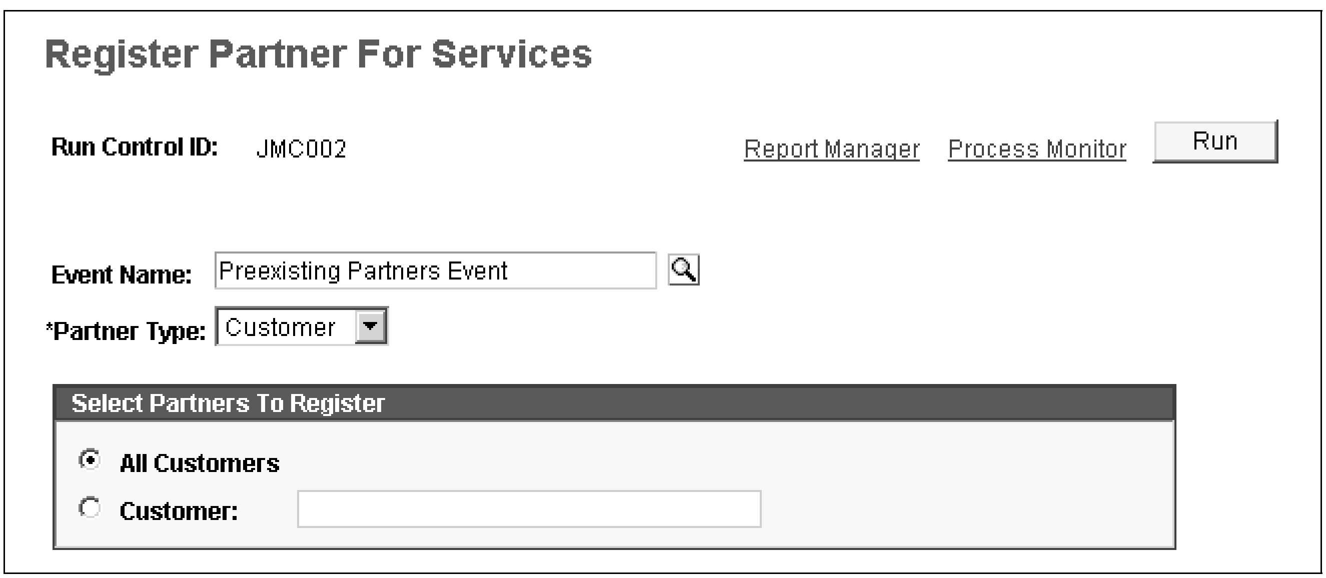
Chapter 6, “Approving Service Registrations,” page 43

Pages Used to Register Existing Enterprise Partners For Services

Page Name	Object Name	Navigation	Usage
Register Partner for Services	EOTP_LOAD_CUSTOMER	Partners, Register for Services	Register a preexisting customer or vendor for services.

Registering Existing Enterprise Partners

Access the Register Partner for Services page.



Register Partner for Services page

Event Name Select a recruitment event.

	The selected event must include the services for which you want to register customers or vendors.
Partner Type	Select *Customer* or *Vendor.*
	Note. On a PeopleSoft CRM system, the partner type is always set to *Customer.*
All Customers and **All Vendors**	Select to register all existing customers or vendors for services.
Customer and **Vendor**	Select to register a single customer or vendor. Select the customer or vendor that you want.
Run	Click to trigger a process request to register existing enterprise partners for services. The Process Scheduler Request page is displayed.
Process Monitor	Click to access the Process Scheduler Process Monitor page to check the status of the request.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler.

Adding and Maintaining Partner Users

Partners entered into the system using the Maintain Partner Details component do not have a user ID automatically generated. To create a user ID, use the Maintain Partner Users component to add at least one user, preferably the corresponding partner contact.

This section discusses how to:

- Add and delete partner users.
- Enter partner user details.
- Modify partner user information.

Note. Once a partner user has been added and assigned administrator privileges, the enterprise representative can manually send the partner an email acknowledging registration approval, along with the URL, user ID and password required to access the PeopleSoft system. The partner administrator can then add individual partner users.

Common Elements Used in This Section

Group Name, Business Unit, Show, and **Show All**	Select a service group and business unit for filtering. Click Show to list services matching the selected filtering criteria only. Click Show All to list all available services.

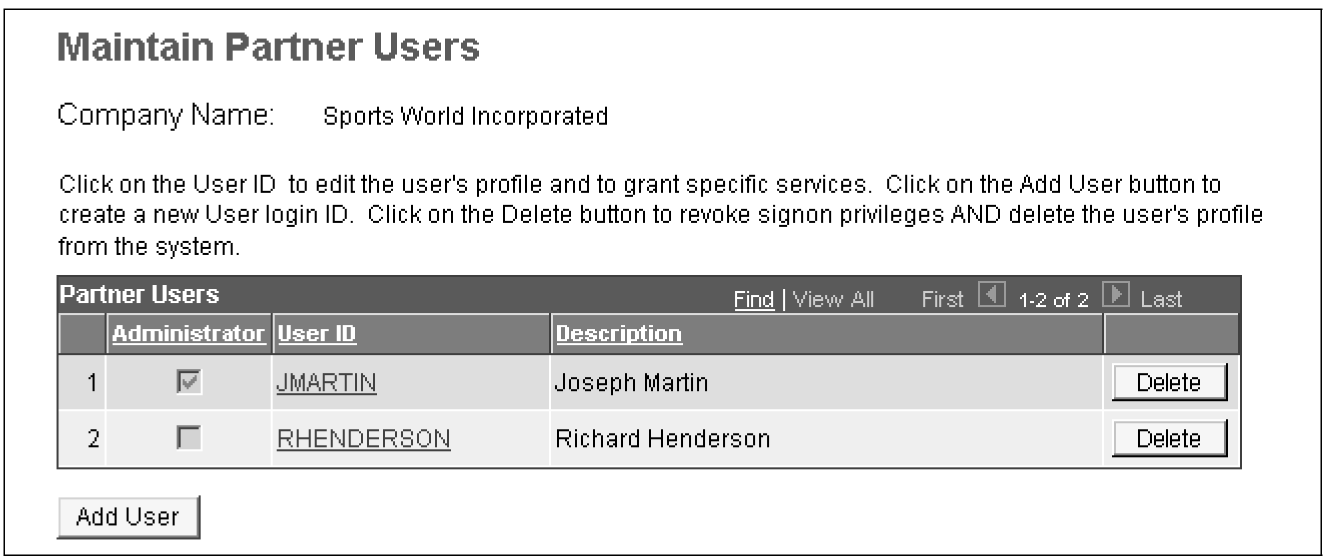
Note. Partner users can only be granted access to a subset of services that the registered partner has been assigned. For example, if the registered partner is granted access to only view catalog information then, that is the only service available for partner users.

Pages Used to Add and Maintain Partner Users

Page Name	Object Name	Navigation	Usage
Maintain Partner Users	EOTP_PARTNER_USER	Partners, Maintain Partner Users, Maintain Partner Users	View existing users, add new users, modify existing users, and delete existing users.
Add User	EOTP_PARTNR_USRSVC	Click the Add User button on the Maintain Partner Users page.	Add a new partner user for this partner.
Modify User	EOTP_PARTNR_USRSV2	Click a user ID link on the Maintain Partner Users page.	Modify existing partner user information.

Adding and Deleting Partner Users

Access the Maintain Partner Users page.



Maintain Partner Users page

Administrator If selected, the associated user has been granted administrator privileges.

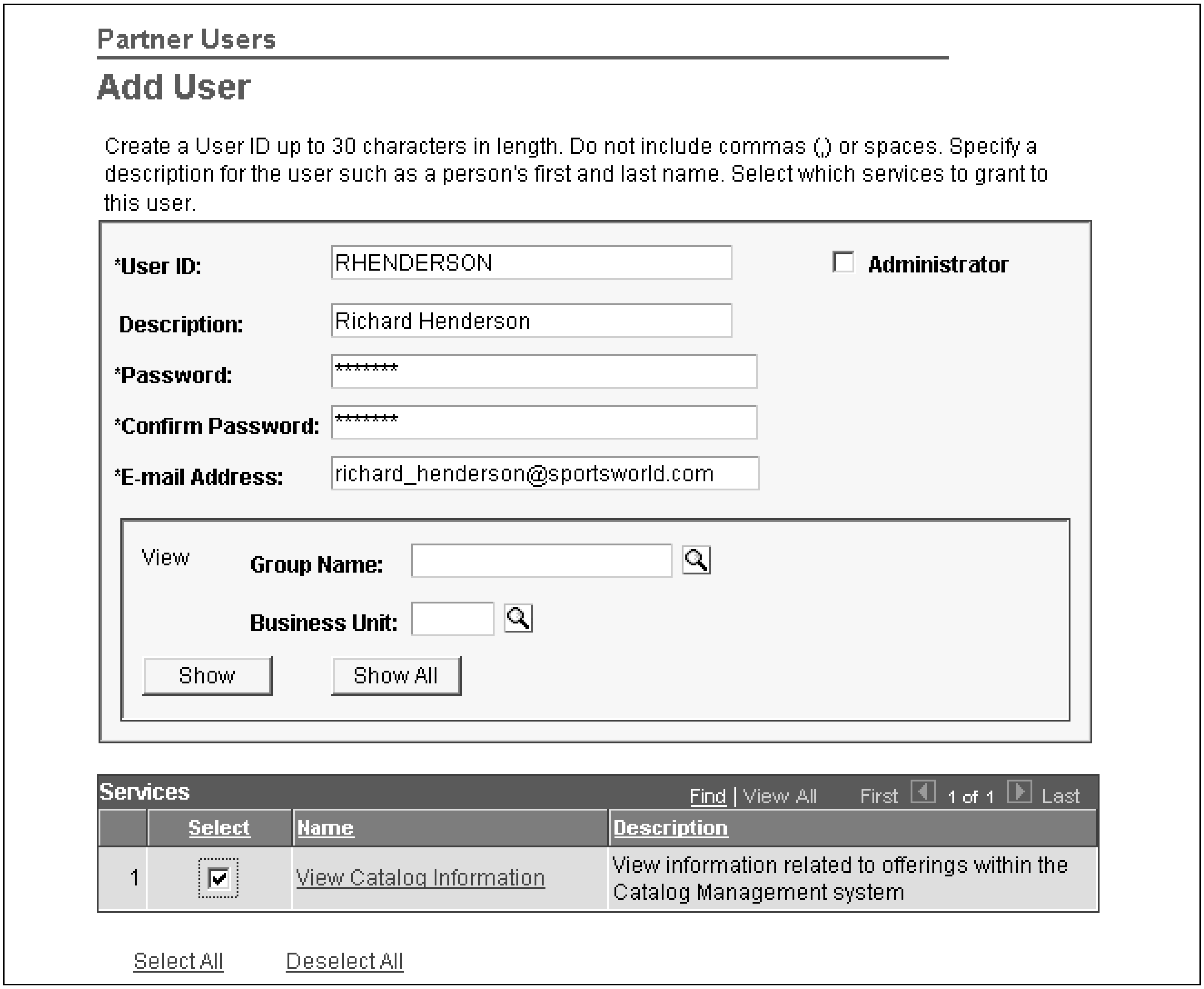
User ID Click a user ID to modify information.

Delete Click to delete the associated partner user. The association to the registered partner is removed, and the user’s profile is deleted from the database.

Add User Click access the Add User page and associate a new user with this registered partner.

Entering Partner User Details

Access the Add User page.



Add User page

User ID and **Password** — Enter a unique ID and password that the user will use to access the PeopleSoft system. Do not include commas or spaces.

Confirm Password — Reenter the password for confirmation.

Administrator — Select if this user is an administrator.

> **Note.** Partner administrators have access to the Maintain Partner Users component to add or delete partner users, and revoke or assign services to existing partner users.

Select — Select to grant access to the associated service.

Name Displays the name of the service. Click to access the Service Details page and view service details.

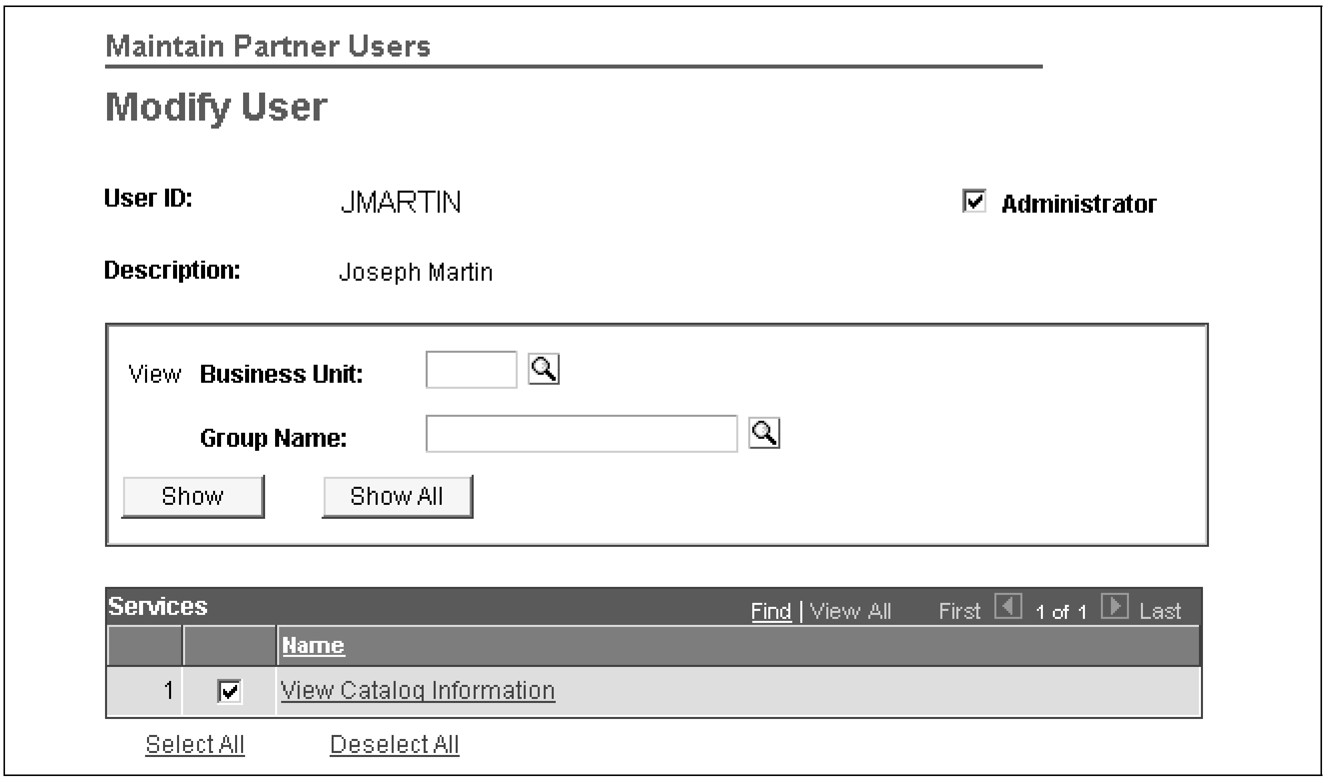
See Also

Appendix B, “Setting PeopleSoft Common Partner Registration Security,” User Profiles, Roles, and Permission Lists, page 51

Chapter 3, “Setting Up Core PeopleSoft Common Partner Registration Features,” Viewing Service Details, page 21

Modifying Partner Users

Access the Modify User page.



Modify User page

Note. Once a partner user profile has been saved, its attributes cannot be changed on this page. All changes must be made through PeopleTools Security. This procedure is discussed in the documentation for setting up user profiles.

See *PeopleTools 8.44 PeopleBook: PeopleTools Security.*

Administrator Select if this user is an administrator.

Select Select to grant access to the associated service.

Name Displays the name of the service. Click to access the Service Details page and view service details.

See Also

Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Viewing Service Details, page 21

CHAPTER 6

Approving Service Registrations

This section provides an overview of the approval process and discusses how to approve or deny a service registration request.

Understanding the Approval Process

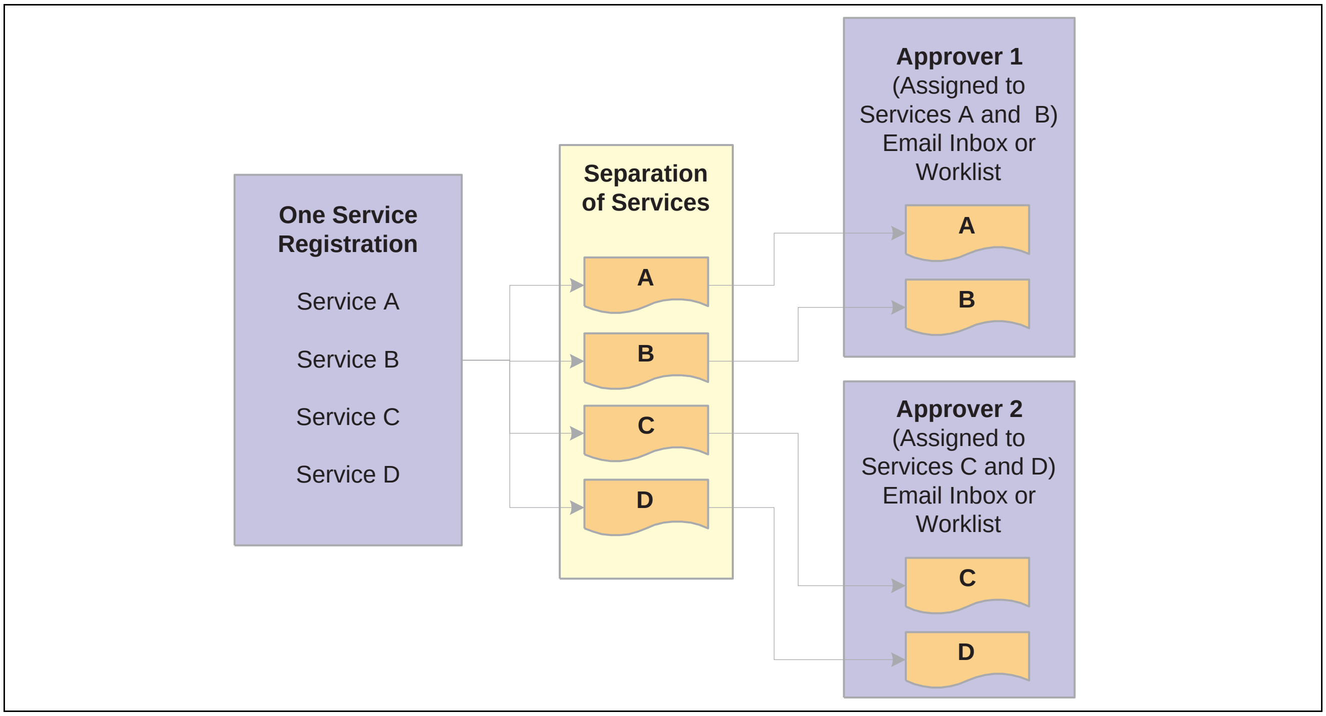
Once a potential partner has submitted a registration request for a service that requires approval, the request is forwarded to the partner service approvers assigned to the service. Requests can be received from one of the following:

- An invitation recipient.
- An enterprise representative who registers an existing enterprise partner for services.
- An enterprise representative who manually enters potential partner information.

Once a potential partner has been approved for at least one service, that company becomes a partner in PeopleSoft Common Partner Registration.

Partner service approvers are given the rights to approve or deny access to services rather than to approve or deny a service registration request that contains many services. For this reason, even though an invitation recipient has sent only one service registration request, one notification for each service requiring approval is sent separately to those assigned to approve these services. The enterprise administrator can assign one approver to approve or deny access to all services, or assign several approvers to approve or deny some services.

The following diagram illustrates how a service registration request can be forwarded to two partner service approvers:



Example of how a service registration request can be forwarded to partner service approvers

Because approvals are service-based rather than registration-based, service registration requests are forwarded to the appropriate partner service approvers according to the services applied for. For instance, if a potential partner has registered for Services A, B, C and D, and all services have been assigned to the Approver 1 role, each person belonging to the Approver 1 role is notified four times: one time for each service.

However, if Services A and B have been assigned to the Approver 1 role and Services C and D have been assigned to the Approver 2 role, then each person belonging to the Approver 1 role receives notifications for Services A and B, and each person belonging to the Approver 2 role receives notifications for Services C and D.

A service registration request for a partner needs to be approved or denied only once; if Service A has been assigned to the Approver 1 role and more than one person belongs to this role, then the approval or denial is taken from the first person assigned to Approver 1 role who approves or denies the service registration request. If this approver has clicked the Approve or Deny button, but the system is still in process, other partner service approvers assigned to Service A can view details of the service, but cannot approve or deny. Once the system has completed the process, none of the approvers assigned to Service A can view details of the service.

See Also

Chapter 3, "Setting Up Core PeopleSoft Common Partner Registration Features," Defining Application Rules, page 16

Chapter 5, "Registering Partners For Services," page 31

Appendix A, "Self-Service Registration," page 49

Approving or Denying a Service Registration Request

You use the Service Approval page to manage requests.

Page Used to Approve or Deny a Service Registration Request

Page Name	Object Name	Navigation	Usage
Service Approval	EOTP_APPROVE	Partners, Approve Service Registrations	Approve or deny service requests.

Approving or Denying Requests

Access the Service Approval page.

Service Approval page

Service Name
Displays the name of the service for registration approval. Click to access the Service Details page and view detail information about this service.

Approve
Click to approve the registration request for this service.

An email is automatically sent to the new partner, with confirmation of approval, a URL to access the PeopleSoft system, and a user ID and password for signing in.

Note. If the registration request was entered by a representative from the enterprise on behalf of the potential partner, then the email must be sent manually.

Deny Click to deny the registration request for this service.

An email is automatically sent to the potential partner, with confirmation of denial, for each service that has been denied.

See Also

Chapter 3, “Setting Up Core PeopleSoft Common Partner Registration Features,” Viewing Service Details, page 21

APPENDIX A

Self-Service Registration

This appendix discusses how to implement self-service registration.

Implementing Self-Service Registration

This section provides an overview of self-service registration and lists self-service pages.

Understanding Self-Service Registration

After receiving a recruitment event notification, a potential partner registers for services by accessing PeopleSoft Registration using the URL included in the event notification, subscribing to services, and entering company and contact information.

Note. Security for the guest user account must be set up to bypass the sign-in page for outside parties.

Once approved, an email is automatically sent to the new partner confirming access to services. For first-time partners, the registrant becomes the administrator.

The administrator is responsibility for handling administrative tasks at the partner company including:

- Adding and deleting users.
- Granting and removing user access to services.
- Adding and deleting administrators.

See Also

Chapter 2, “Setting Up Features in Related Applications,” Setting Up a Guest User Account, page 11

Pages Used to Register For Services

Page Name	Object Name	Navigation	Usage
Services	EOTP_REG_SVCSEL_PG	Recruitment Event Notification - Click Access URL Website or Forum - Click URL	Use to select desired services.
Partner	EOTP_REG_PRT_INFO	Access URL, Services, Partner.	Use to enter company and business information.
Contact Information	EOTP_REG_CNCT_INFO	Access URL, Services, Partner, Contact Information.	Use to enter the company primary contact's information.
Address	EOTP_PRT_ADDR2	Access URL, Services, Partner, Contact Information, Address.	Use to select the company's country location and to add an alternate address.
Edit Address	EO_ADDR_USA_SEC	Access URL, Services, Partner, Contact Information, Address, Edit Address.	Use to add or edit company address information.

APPENDIX B

Setting PeopleSoft Common Partner Registration Security

This appendix provides an overview of security and discusses how to implement security.

Understanding Security

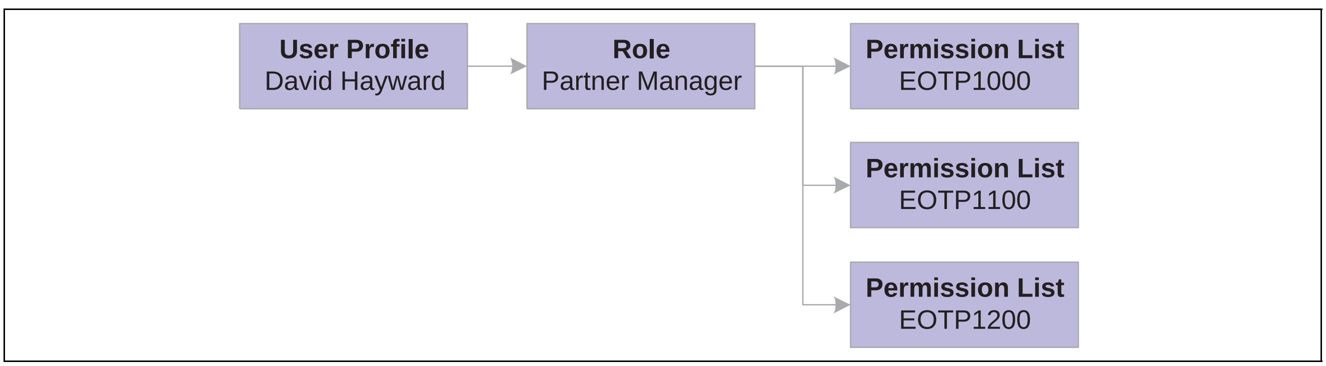
This section discusses:

- User profiles, roles, and permission lists.
- Delivered roles and permission lists.

User Profiles, Roles, and Permission Lists

You assign roles to user profiles. Roles link user profiles to permission lists, which groups authorizations. Permission lists store sign-in times, page access, PeopleTools access, and so on. You can assign multiple roles to a user profile, and you can assign multiple permission lists to a role.

The following diagram illustrates the interaction between user profiles, roles, and permission lists:



Security definition hierarchy

Delivered Roles and Permission Lists

Access to PeopleSoft Common Partner Registration is based on roles and permission lists attached to user IDs.

PeopleSoft delivers the following roles that are configured to perform PeopleSoft Common Partner Registration functions:

Role	Permission List Access	Responsibilities
Partner Administrator	EOTP1000 EOTP1100 EOTP1200 EOTP1300	Performs all enterprise tasks related to PeopleSoft Common Partner Registration, including system setup, creating recruitment events, managing partner details, and approving service registration.
Partner Analyst	EOTP1000	Creates recruitment events, selects email templates, and sends notifications out to prospective partners.
Partner Manager	EOTP1000 EOTP1100 EOTP1200	Performs all enterprise tasks related to PeopleSoft Common Partner Registration, except system setup.
Partner	EOTP2100	Manages partner information, such as contacts, company details, user administration and company addresses. Also has access to view current services. **Note.** Partners roles can only access information that pertains to themselves.
Partner Service Approver	EOTP1100	Approves service registrations.
Guest User	EOTP2000	Provides outside parties with access to the partner registration page.

Permission lists are delivered to support PeopleSoft Common Partner Registration features. The following table shows the components attached to each of the delivered permission lists:

Permission List	Component	Description
EOTP1300	EOTP_OPTIONS EOTP_CREATE_BU_CMP EOTP_LOADBU_CMP EOTP_SERVICE EOTP_GROUP EOTP_BUSEC	Define options. Create business units. Load business units. Define services. Define groups. Associate business units and roles.
EOTP1000	EOTP_RECRUIT_CMP EOTP_TEMPL_GEN_CMP	Recruit partners. Select recruitment notification templates.
EOTP1100	EOTP_SVC_APPR	Approve service registrations.
EOTP1200	EOTP_PARTNER_USER EOTP_PARTNER_INFO EOTP_EXIST_REG	Maintain partner users. Maintain partner details. Register partners for services.
EOTP2000	EOTP_PRTNR_REG_CMP	Register partners.
EOTP2100	EOTP_EXT_ADDR2 EOTP_EXT_CNTC EOTP_EXT_INFO EOTP_EXT_SVCS EOTP_PARTNER_USER	Maintain partner addresses. Create partner contacts Update company details. Review services. Maintain partner users.

Implementing Security

This section discusses how to:

- Enable the user profile type PTN.
- Enable partner service approvers to approve services.
- Update permission lists for PeopleSoft Financials and Supply Chain Management (SCM).

Enabling the User Profile Type PTN

To create partner user profiles for PeopleSoft Common Partner Registration, the user profile type PTN must be enabled. Select PeopleTools, Security, Security Objects, User Profile Types. Select the ID type *PTN* and verify that the Enabled check box is selected.

Note. Partner users created from the registration process are assigned this user profile type when the associated PeopleTools user is created.

Enabling Partner Service Approvers to Approve Services

You must associate the permission list EOTP1100 with all roles that are assigned to approve services.

Note. PeopleSoft delivers the Partner Service Approver role for this purpose.

To associate the permission list EOTP1100 with a role:

1. Select PeopleTools, Security, Permissions & Roles, Roles.
2. Enter a role.
3. Access the Permission List page.
4. Add the permission list EOTP1100 to the list of permission lists currently attached to the role.
5. Click Save.

Updating Permission Lists for PeopleSoft Financials and SCM

If you are running PeopleSoft Common Partner Registration on a PeopleSoft Financials or SCM system, you must modify the permission list EOTP1200 to include full access rights to the VNDR_ID, CUSTOMER, and CUSTOMER_CONTACT component interfaces.

Note. If you do not configure this security, the process associated with the Register Partner for Services page will not complete.

See Also

Chapter 5, “Registering Partners For Services,” page 31

Glossary of PeopleSoft Terms

absence entitlement — This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take — This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class — In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date — The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split — The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator — You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason — The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template — In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object*.

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage
In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation
In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state
In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable
In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration
Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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