PeopleSoft®

PeopleSoft Supply Chain Portal Pack 8.8 PeopleBook

December 2003

PeopleSoft Supply Chain Portal Pack 8.8 PeopleBook
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Open Source Disclosure

Contents

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

Preface

This preface discusses related documentation.

Related Documentation

This PeopleBook provides information about your PeopleSoft Supply Chain Portal Pack pagelets. However, additional, essential information describing the applications that enable the PeopleSoft Supply Chain Portal Pack pagelets appears in the PeopleBooks specific to those applications.

Additional information about portals appears in the *PeopleSoft Enterprise Portal PeopleBook* as well as the current installation guides ("Portal Solutions Installation Guide" and "Portal Products Installation Guide") posted on the PeopleSoft Customer Connection website.

CHAPTER 1

Getting Started With the Supply Chain Portal Pack

This chapter discusses implementing PeopleSoft Supply Chain Portal Pack.

PeopleSoft Supply Chain Portal Pack Business Processes

PeopleSoft Supply Chain Portal Pack provides data from PeopleSoft Order Management, PeopleSoft Promotions Management, and PeopleSoft Billing in pagelets. Employees and customers can view pertinent information when they log into the system.

PeopleSoft Supply Chain Portal Pack Implementation

PeopleSoft Supply Chain Portal Pack does not require table-loading implementation steps. In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*, with information about where to find the most current version of each.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook,* “PeopleSoft Application Fundamentals PeopleBook Preface”.

CHAPTER 2

Introducing the PeopleSoft Supply Chain Portal Pack

This chapter provides an overview of the PeopleSoft Supply Chain Portal Pack and discusses the PeopleSoft Supply Chain Portal Pack pagelets.

Understanding the PeopleSoft Supply Chain Portal Pack

The PeopleSoft Supply Chain Portal Pack is a collection of portal pagelets for corporate intranet or extranet homepages that provides access to key data and transactions that are within the PeopleSoft Supply Chain Management applications for use in employee and customer portal registries.

When you install the PeopleSoft Supply Chain Portal Pack, users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft role-based security ensures that users can access only the pagelets that are appropriate to their roles.

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

Some pagelets support personalization; the Customize button in the pagelet title bar alerts you to this capability. Click the button to access the personalization page.

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

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, “PeopleSoft Application Fundamentals PeopleBook Preface”

Audience

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

- Employee.
- Customer.

Pagelet Security

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

PeopleSoft groups pagelets into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before users can access them, or use the permission list definitions that PeopleSoft delivers in the sample data. We deliver sample data security objects (roles and permission lists) that you can use as an example of how to set up pagelet access.

The sample roles that include access to PeopleSoft Supply Chain Portal Pack pagelets are:

Employee (Internal)

Buyer.

Customer service manager.

Customer service representative.

Employee.

Purchasing manager.

Salesperson.

Warehouse manager.

Warehouse personnel.

Customer (External)

Broker

Customer

Note. We provide a breakdown of pagelets by functional role in the beginning of each audience-oriented chapter.

See Also

Chapter 3, "Employee-Facing Supply Chain Management Pagelets," page 15

Chapter 4, "Customer-Facing Supply Chain Management Pagelets," page 35

PeopleSoft Enterprise Portal 8.8 PeopleBook

PeopleSoft Supply Chain Portal Pack Pagelets

The following table lists all of the pagelets that make up the PeopleSoft Supply Chain Portal Pack, and identifies:

- The audience for the pagelet: employees, or customers.

- The functional role of the person who uses the pagelet.
- The pagelet's enabling application.

  (The enabling application provides the data that appears in the pagelet.)

Note. When combined with employee in the audience column, customer refers only to a broker user, an external customer who conducts business on behalf of other customers, and not to an individual consumer.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Availability (CDT_AVAIL_ PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	PeopleSoft Order Management.
Buying Agreements (CDT_ SCONSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays buying agreements. Employees can navigate into buying agreement details.	PeopleSoft Order Management.
Current Product Summary (CDT_PROD_ SUM_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays information about the selected product, including the description. Employees can navigate to see detailed product information, view the list prices by inventory business unit, and check price and availability.	PeopleSoft Order Management, PeopleSoft eBill Payment, PeopleSoft Billing, and PeopleSoft Receivables.
Customer Notes (CDT_ CUSTNOTE_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays notes that are assigned to a customer.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Customer Promotions Calendar (TD_ NATIONAL_PGLT, TD_NATIONAL_ PGLTW)	Broker, Salesperson.	Employee	Lists customer promotions and promotion details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, promotion description, customer ID, customer name, and dates). **Note.** In the three-column format, the description and customer name columns don't appear on the pagelet.	PeopleSoft Promotions Management.
Customer Search (CDT_CUST_ SRCH_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Enables employees to search for existing customers to populate the additional pagelets with customer data.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.
Discretionary Funding Status (TD_MY_ CHECKBOOK)	Broker, Salesperson.	Employee	Displays available discretionary fund total amounts (from fixed funds and accrual funds) for a period, as well as the amounts that are committed, planned, and spent against all discretionary funds. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Expiring Buying Agreements (CDT_SCONDT_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	PeopleSoft Order Management.
Invoice Summary (CDT_INVCSUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays summarized invoice information. Employees can navigate into invoice details.	PeopleSoft Billing.
Last 10 Product Purchases (CDT_RECPROD_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays the last ten purchases for a customer. Employees can navigate to see order and product information.	PeopleSoft Order Management.
Last 10 Shipments (CDT_RECSHIP_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays the last ten shipments for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management.
Most Recent Bills (WC_BILL_LIST_ SS)	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click View All Bills to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Most Recent Consolidated Bills (WC_BILL_LIST_ C_SS)	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing.
My Promotions (MY_PROMO_ PGLT, MY PROMO_PGLTW)	Broker, Salesperson.	Employee	Displays all customer promotions and national allowances for the user with promotion details (description, status, customer name, and first and last order dates). **Note.** In the three-column format, first order and last order date columns don't appear and the customer ID displays on the pagelet instead of the customer name.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Nat'l Allow & Promo Calendar (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	Lists national allowances and customer promotion details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, promotion description, customer ID, customer name and dates). **Note.** In the three-column format, the description and customer name columns don't appear on the pagelet.	PeopleSoft Promotions Management.
National Allowances Calendar (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	Lists national allowances and promotion details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, promotion description, and dates). **Note.** In the three-column format, the promotion description column does not appear on the pagelet.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Planned Promotional Funds (TD_PLAN_ PROMO_FUND)	Broker, Salesperson.	Employee	Displays the promotion description, customer ID, promotion costs (fixed and variable), net incremental sales, and return on investment for all promotions that are not canceled, closed, or customer approved. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.
Product Alternates (CDT_PALT_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays alternates for a product. Employees can navigate to view product information.	PeopleSoft Order Management.
Product Notes (CDT_ PRODNOTE_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays notes that are assigned to a product.	PeopleSoft Order Management
Product Sales (TD_PRODUCT_ SALES, TD_ PRODUCT_ SALESW)	Broker, Salesperson, Sales Manager, Customer Service Representative.	Employee	Displays in graphic format the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products that the user is authorized for on the PeopleSoft Promotions Management product tree.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Product Search (CDT_PROD_ SRCH_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Enables employees to search for existing products to populate the additional pagelets with product data.	PeopleSoft Order Management.
Product Specifications (CDT_PSPECS_ PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays product specifications for a product.	PeopleSoft Order Management, PeopleSoft eBill Payment, PeopleSoft Billing, and PeopleSoft Receivables.
Recent Conversations (CDT_ CONVSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add new conversations.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft eBill Payment, PeopleSoft Billing, or PeopleSoft Receivables.
Recent Orders (CDT_ORDSUM)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent orders. Employees can navigate into order details.	PeopleSoft Order Management.
Recent Quotes (CDT_ QUOTESUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent quotes. Employees can navigate into quotation details.	PeopleSoft Order Management, PeopleSoft eBill Payment, PeopleSoft Billing, and PeopleSoft Receivables.
Recent RMAs (CDT_RMASUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent quotes. Employees can navigate into RMA details.	PeopleSoft Order Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Review Promotions (REVIEW_ PROMO_PGLT, REVIEW PROMO_PGLTW)	Broker, Salesperson.	Employee	Displays all customer promotions and national allowances for the user with promotion details (description, status, customer ID, entered on date, contact ID, and promotion period). **Note.** In the three-column format, contact ID and promotion period columns don't appear on the pagelet.	PeopleSoft Promotions Management.
Sales History by Customer (TD_SALES_ HIST)	Broker, Salesperson, Sales Manager, Customer Service Representative.	Employee	Displays customers with the expected promotional sales amount from all promotions, the actual sales amount for the current period, and the actual sales amount from the same period last year. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Schedules Past Ship Date (CDT_PASTSHIP_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays schedules past the ship date for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management.
Trade Promotions (CDT_PROMO_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	PeopleSoft Promotions Management.

CHAPTER 3

Employee-Facing Supply Chain Management Pagelets

The PeopleSoft Supply Chain Portal Pack includes pagelets for use in the employee portal registry. This chapter discusses how to:

- Identify pagelets by functional role.
- Personalize PeopleSoft Promotions Management pagelets.
- View promotions.
- View promotion fund information.
- View product sales.
- View customer information.
- View product information.
- View buyer information.

Note. Pagelets are documented in a Pagelets Used to <Task Description> table when they do not require extensive discussion.

Pagelets by Functional Role

PeopleSoft provides these employee-oriented role groupings as examples of how to organize pagelet access by function.

This section discusses:

- Broker pagelets.
- Customer Service Manager and Customer Service Representative (CSR) pagelets.
- Salesperson pagelets.
- Sales Manager pagelets.

Note. Brokers also use many of the customer service-oriented pagelets. Additional broker-oriented pagelets are discussed in the "Customer-Facing Supply Chain Management Pagelets" chapter.

See Also

Chapter 2, "Introducing the PeopleSoft Supply Chain Portal Pack," Pagelet Security, page 4

Chapter 4, "Customer-Facing Supply Chain Management Pagelets," Broker Pagelets, page 35

Broker Pagelets

These pagelets enable brokers to view key information about customers and products and effectively manage promotions:

- Availability.
- Current Product Summary.
- Customer Promotions Calendar.
- Discretionary Funding Status.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat’l Allow & Promo Calendar.
- National Allowance Calendar.
- Planned Promotion Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Review Promotions.
- Sales History by Customer.

Customer Service Manager and Customer CSR Pagelets

These pagelets enable customer service managers and representatives to view key information about customers and products and effectively manage promotions:

- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Search.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.

- Most Recent Bills.
- Most Recent Consolidated Bills.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Recent Orders.
- Recent Quotes.
- Recent RMAs.
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Salesperson Pagelets

These pagelets enable salespersons to view key information about customers and products and effectively manage promotions:

- Availability.
- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Promotions Calendar.
- Customer Search.
- Discretionary Funding Status.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat’l Allow & Promo Calendar.

- National Allowances Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Recent Orders.
- Recent Quotes.
- Recent RMAs.
- Review Promotions.
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Sales Manager Pagelets

These pagelets enable sales managers to effectively manage promotions:

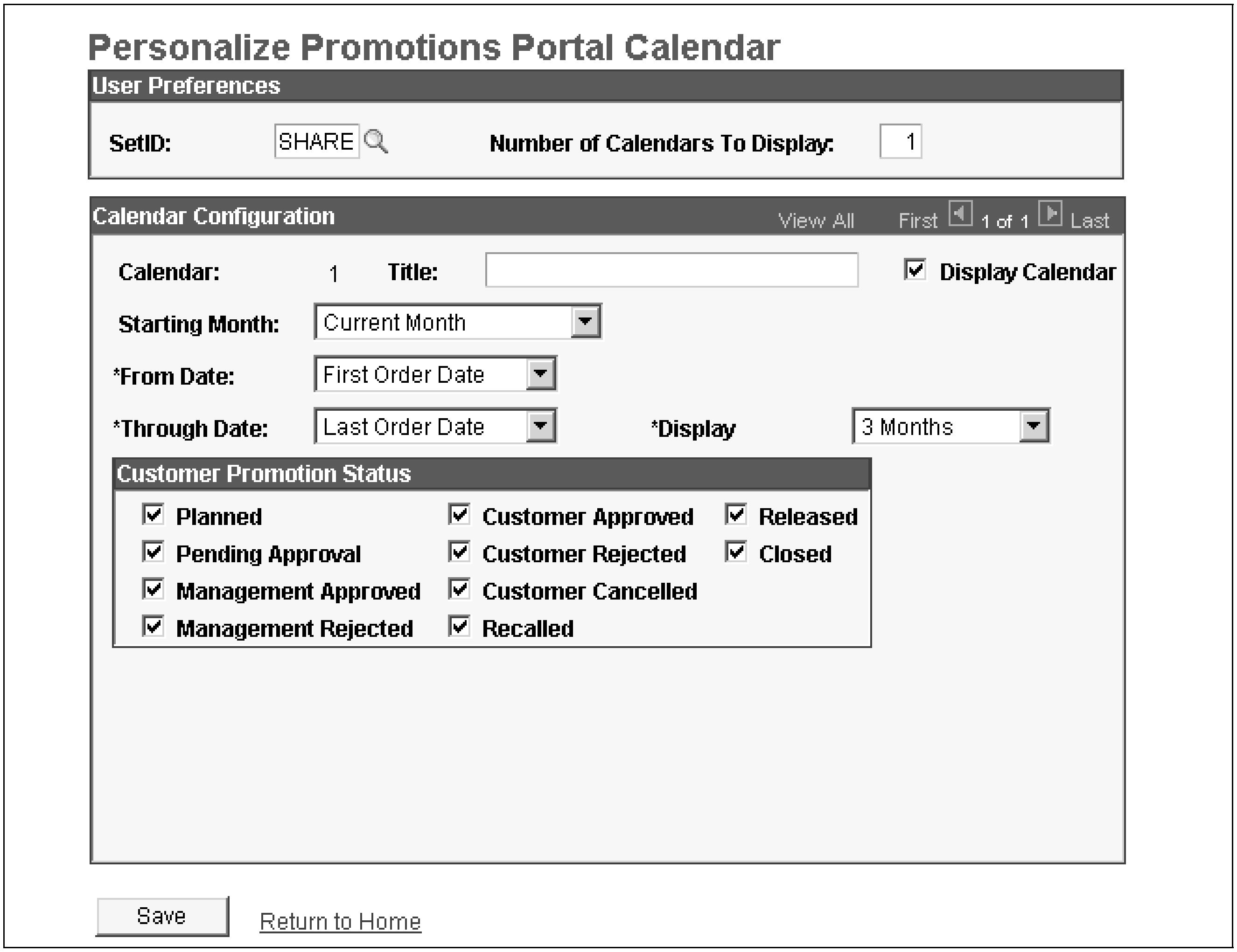
- Product Sales.
- Sales History by Customer.

Personalizing PeopleSoft Promotions Management Pagelets

This section discusses how to personalize promotion calendar options.

Personalizing Promotion Calendar Options

Access the Personalize Promotions Portal Calendar page.



Personalize Promotion Calendar Options page

Employees can decide what months they want to display on the calendar pagelets and what customer promotion and national allowance statuses they want to include in the calendar data.

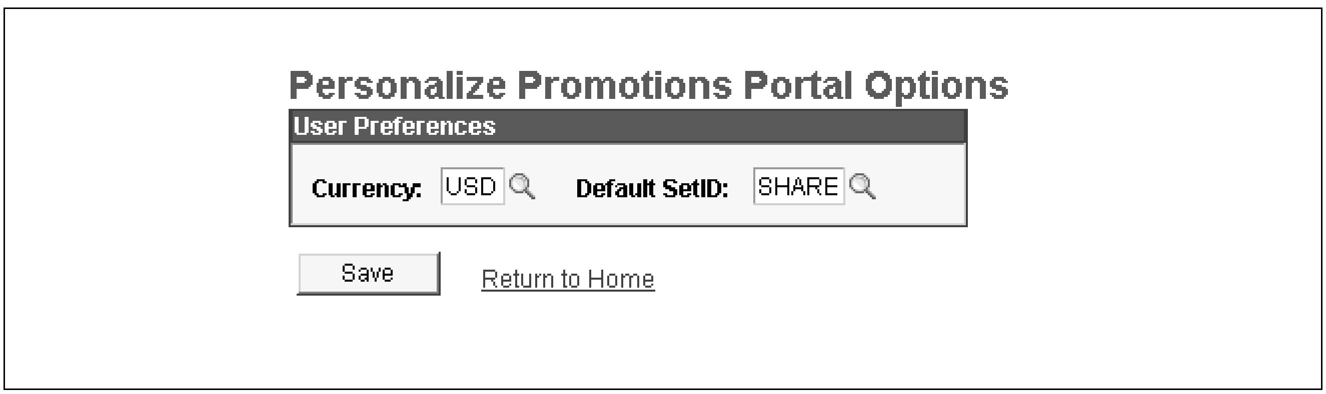
This page is dynamic. The status fields that appear are different depending on the calendar pagelet from which you access this page.

Display Calendar`	Select to show the calendar on the pagelet.
Display	Select the number of months to show on the pagelet.
Starting Month	Select the starting month for the calendar pagelet. Options are: *Current Minus x Months:* The system displays data on the calendar beginning with the current month minus the number of months that is entered in the x Months field. *Current Month* (default): The system displays data on the calendar beginning with the current month. *Current Plus x Months:* The system displays data on the calendar beginning with the current month plus the number of months that is entered in the x Months field.

	User Defined: Use this option if you want the system to display the calendar by using a user-defined option. This option requires custom coding to enable the calendar to work with the user-defined option.
From Date	Select the promotion date that the system uses to determine if a promotion appears on the calendar. Options are: *First Arrival Date, First Order Date,* or *First Ship Date.*
Through Date	Select the promotion date that the system uses to determine if a promotion appears on the calendar. Options are: *Last Arrival Date, Last Order Date,* or *Last Ship Date.*
Display	Select the number of months, one to six, to display for this calendar.
Customer Promotion Status	Select the customer promotion statuses for which you want to view data on the calendar.
National Allowance Status	Select the national allowance statuses for which you want to view data on the calendar.

Personalizing Promotions Portal Options

Access the Personalize Promotions Portal Options page.



Personalize Promotions Portal Options page

Users can select the currency and default setID in which to display the information on the pagelet.

Note. The default setID is used to determine the currency in which to display the data if one is not specified on this page. The default setID does not determine what promotions data is displayed because the user can view data from all setIDs for which they are authorized.

Viewing Promotions

This section discusses:

- My Promotions pagelet.
- Review Promotions pagelet.
- Customer Promotions Calendar.
- National Allowances Calendar.

- Nat’l Allow & Promo Calendar.

Pagelets Used to View Promotions

Use the following pagelets to view promotions information.

Paglets	Usage	For More Information
Customer Promotions Calendar.	Lists customer promotions and promotion details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, customer ID, customer name, first order, and last order). **Note.** In the three-column format, the description and customer name columns don’t appear on the pagelet.	See *PeopleSoft Promotions Management 8.8 PeopleBook*, “Defining Promotions”.
My Promotions	Displays all customer promotions and national allowances for the user with promotion details (description, status, customer name, first order date, and last order date). **Note.** In the three-column format, first order and last order date columns don’t appear and the customer ID displays on the pagelet instead of the customer name.	See *PeopleSoft Promotions Management 8.8 PeopleBook*, “Defining Promotions”.
National Allowances Calendar	Lists national allowance details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, first order and last order dates). **Note.** In the three-column format, the description column doesn’t appear on the pagelet.	See *PeopleSoft Promotions Management 8.8 PeopleBook*, “Defining Promotions”.

Paglets	Usage	For More Information
Nat’l Allow & Promo Calendar	Lists national allowances and customer promotion details, in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, customer ID, customer name, first order and last order dates). **Note.** In the three-column format, the description and customer name columns don’t appear on the pagelet. In addition, the customer ID and customer name columns are not populated for a national allowance on the pagelet.	See *PeopleSoft Promotions Management 8.8 PeopleBook*, “Defining Promotions”.
Review Promotions	Displays all customer promotions and national allowances for the user with promotion details (promotion, status, customer ID, entered on date). **Note.** In the three-column format, contact ID and promotion period columns don’t appear on the pagelet.	See *PeopleSoft Promotions Management 8.8 PeopleBook*, “Defining Promotions”.

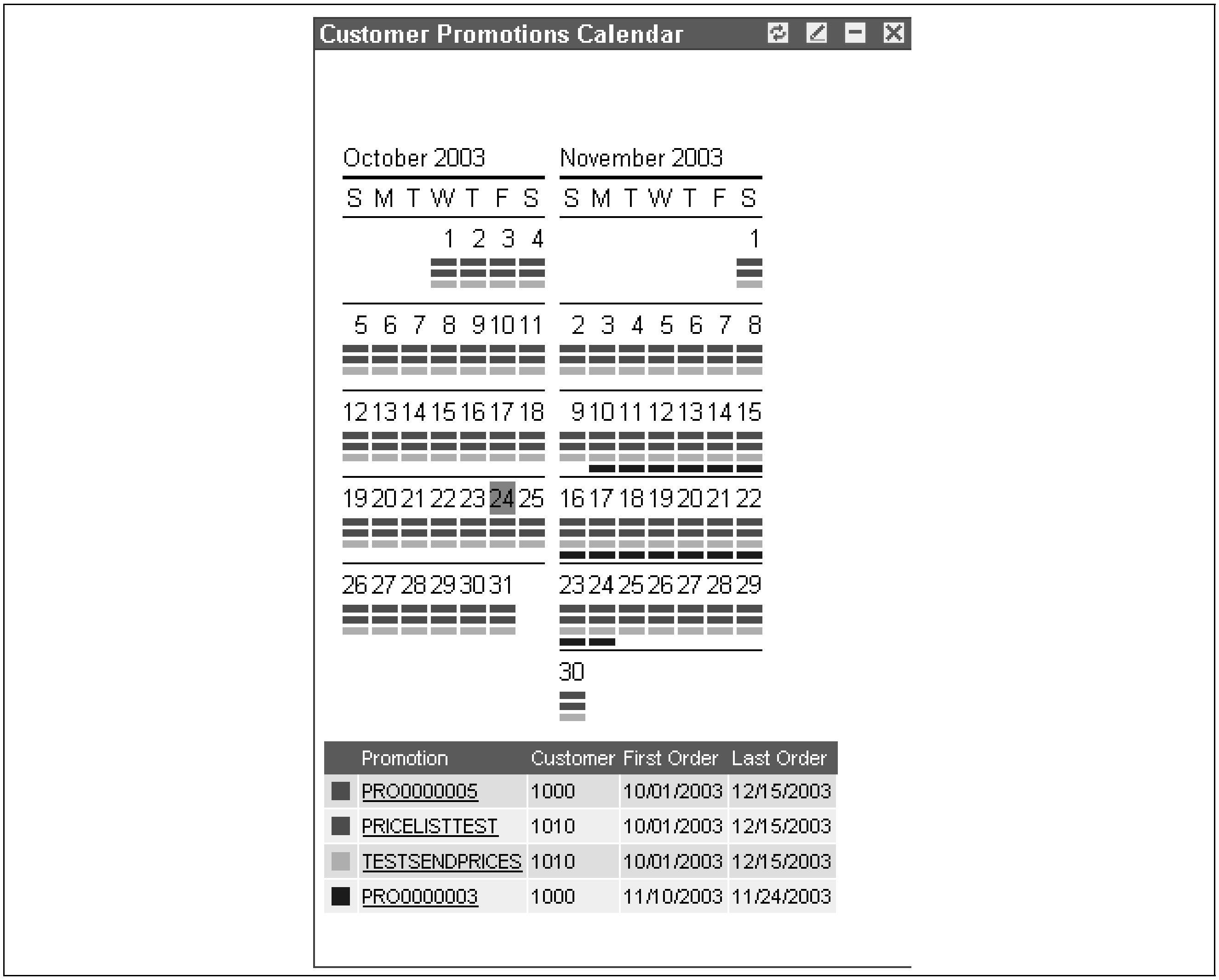
Viewing Calendar Information

This section discusses:

- Customer Promotions Calendar pagelet.
- Nat’l Allow & Promo pagelet.
- National Allowance Calendar pagelet.

Customer Promotions Calendar pagelet

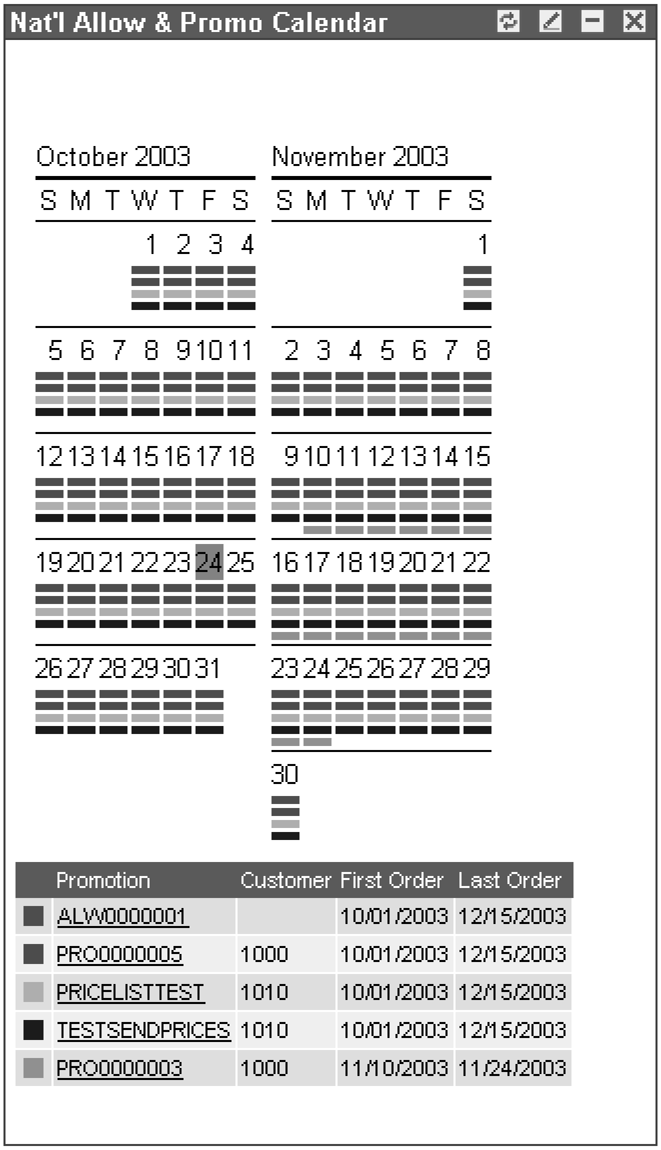
Access the Customer Promotions Calendar pagelet.



Customer Promotions Calendar pagelet

Nat’l Allow & Promo pagelet

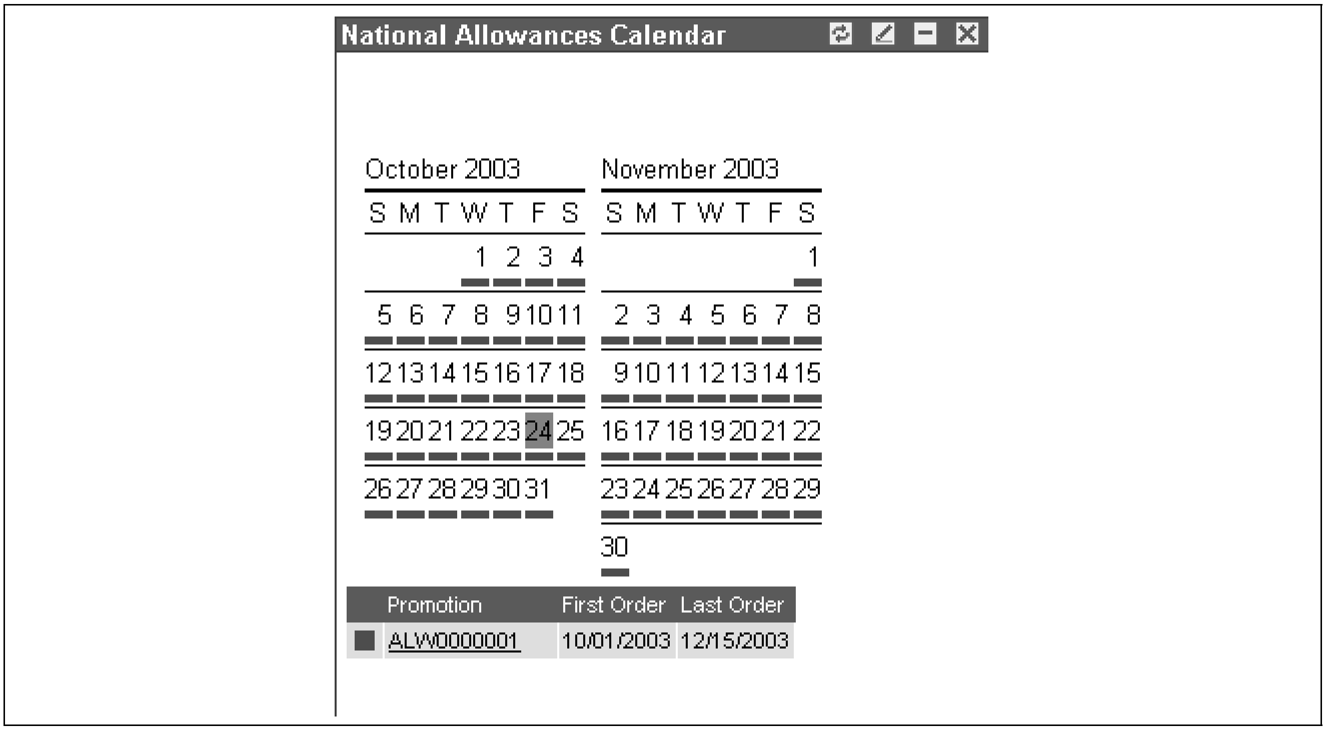
Access the Nat’l Allow & Promo pagelet.



Nat'l Allow & Promo pagelet

National Allowance Calendar pagelet

Access the National Allowance Calendar pagelet.



National Allowance Calendar pagelet

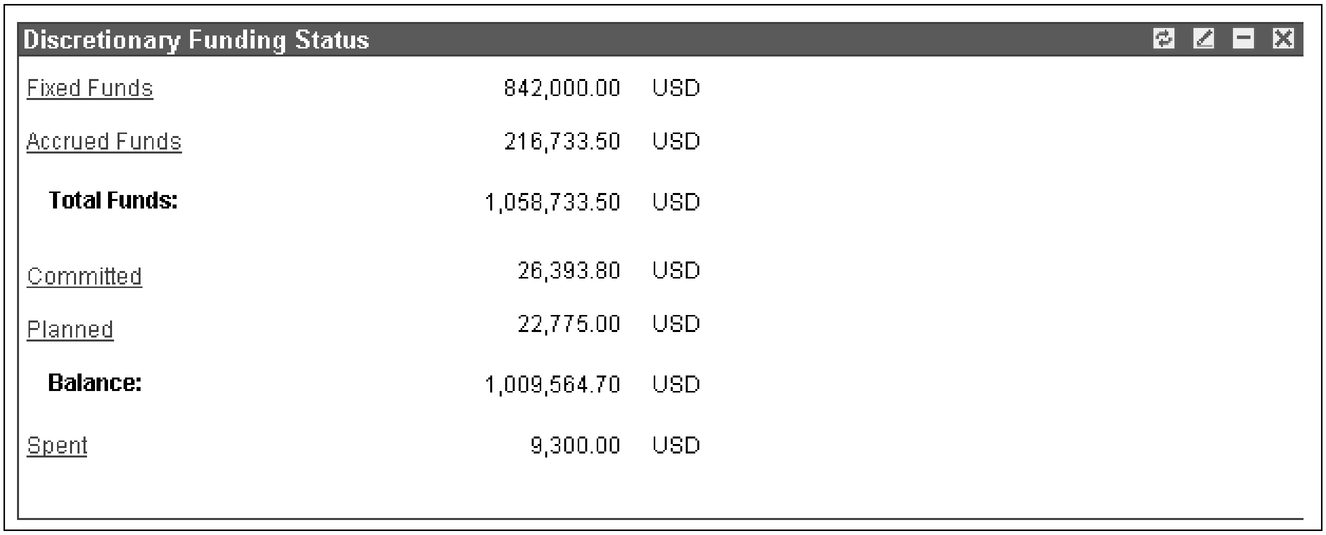
Viewing Promotion Fund Information

This section discusses:

- Discretionary Funding Status pagelet.
- Planned Promotional Funds pagelet.

Discretionary Funding Status Pagelet

Access the Discretionary Funding Status pagelet.



Discretionary Funding Status pagelet

Displays available discretionary fund total amounts for a period (from fixed funds and accrual funds), as well as the amounts that are committed, planned, and spent against all discretionary funds.

Committed The amount is summed from all customer promotions with a status of Customer Approved.

Planned The amount is summed from all customer promotions with statuses of planned, released, pending approval, and management approved.

Balance Balance is calculated as total funds minus committed minus planned.

Spent The amount is summed from all off-invoice discounts that are given, all credits that are given, all deductions that are written off, all checks that are written and all overhead costs that are accumulated for promotions against discretionary funds.

Note. This pagelet is only available in the two column format.

See Also

PeopleSoft Promotions Management 8.8 PeopleBook, “Defining Funds”

PeopleSoft Promotions Management 8.8 PeopleBook, “Defining Funds”

Planned Promotional Funds Pagelet

Access the Planned Promotional Funds pagelet.

Planned Promotional Funds

Description	Customer ID	Promotion Costs		Net Incremental Sales		Return On Investment	
Buy One Ge	1000	20,700.00	USD	0.00	USD	-20,700.00	USD
New Year's	1001	975.00	USD	0.00	USD	-975.00	USD
New Year's	1002	100.00	USD	0.00	USD	-100.00	USD
New Year's	1004	900.00	USD	0.00	USD	-900.00	USD
New Year's	1010	100.00	USD	0.00	USD	-100.00	USD

Planned Promotional Funds pagelet

Displays the promotion description, customer ID, promotion costs (fixed and variable), net incremental sales, and return on investment for all promotions that are not canceled, closed, or customer approved.

Note. This pagelet is only available in the two column format.

See Also

PeopleSoft Promotions Management 8.8 PeopleBook, “Defining Funds”

PeopleSoft Promotions Management 8.8 PeopleBook, “Defining Promotions”

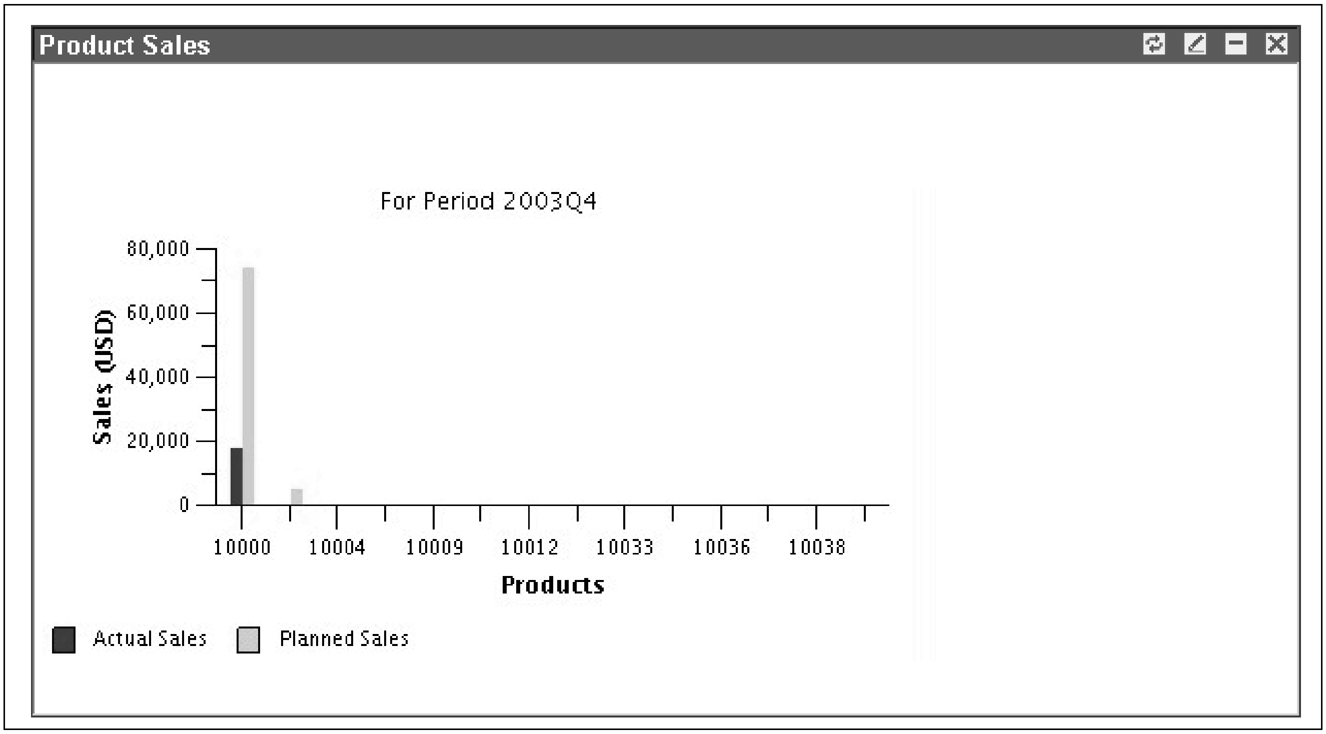
Viewing Product Sales

This section discusses:

- Product Sales pagelet.
- Sales History by Customer pagelet.

Product Sales Pagelet

Access the Product Sales pagelet.



Product Sales pagelet

Displays in bar chart format the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products that the user is authorized for on the PeopleSoft Promotions Management product tree.

See Also

PeopleSoft Promotions Management 8.8 PeopleBook, "Defining Promotions"

PeopleSoft Promotions Management 8.8 PeopleBook, "Setting Up PeopleSoft Promotions Management," Establishing Product Trees

PeopleSoft Order Management 8.8 PeopleBook, "Introduction to Sales Order Entry"

Sales History by Customer Pagelet

Access the Sales History by Customer pagelet.

Sales History by Customer

Customer	Expected Promotional Sales		Actual 2003Q4 Sales		Actual Prior Year Period Sales	
Alliance Group	256,150.00	USD	-3,710.00	USD	0.00	USD
Apex Systems	3,500.00	USD	0.00	USD	0.00	USD
Easy Solutions	4,600.00	USD	0.00	USD	0.00	USD
Central Association	4,600.00	USD	0.00	USD	0.00	USD
Advanced Consulting	3,300.00	USD	0.00	USD	0.00	USD
Golden Inc.	2,400.00	USD	0.00	USD	0.00	USD
Sara Outdoor	0.00	USD	0.00	USD	0.00	USD
Surplus Co.	0.00	USD	0.00	USD	0.00	USD
Adventure 54	0.00	USD	0.00	USD	0.00	USD
Tropical Outdoor Equipment	0.00	USD	0.00	USD	0.00	USD
Florence Garden	40,600.00	USD	0.00	USD	0.00	USD
Consolidated Business	0.00	USD	0.00	USD	0.00	USD
Delta Outdoor Equipment	0.00	USD	0.00	USD	0.00	USD
New World Outdoor Equipment, Inc.	0.00	USD	0.00	USD	0.00	USD
Cracker Barrell Restaurant	0.00	USD	0.00	USD	0.00	USD
Western Pacific Wholesaler	0.00	USD	0.00	USD	0.00	USD
Benicia Unified School District	0.00	USD	0.00	USD	0.00	USD

Sales History by Customer pagelet

Displays customers with the expected promotional sales amount from all promotions, the actual sales amount for the current period, and the actual sales amount from the same period last year. The expected promotional sales amount is the sum of all planned ship quantities multiplied by the product prices defined on the promotions. The actual sales amounts include all invoiced amounts for the customer, not just invoiced amounts for promotional activity.

Note. This pagelet is only available in the two column format.

See Also

PeopleSoft Promotions Management 8.8 PeopleBook, “Defining Promotions”

PeopleSoft Order Management 8.8 PeopleBook, “Introduction to Sales Order Entry”

Viewing Customer Information

This section discusses:

- Buying Agreements.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Search.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Recent Orders.
- Recent Quotes.
- Recent RMAs.
- Schedules Past Ship Date.
- Trade Promotions.

Pagelets Used to View Customer Information

Use the following pagelets to view customer information.

Pagelet Name	Usage	For More Information
Buying Agreements	Displays buying agreements. Employees can navigate into buying agreement details.	See *PeopleSoft Order Management 8.8 PeopleBook*, “Creating Buying Agreements”.
Customer Account Balances	Displays account balances for a customer.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Maintaining General Customer Information,” Entering Credit Limits and Additional Credit Parameters.
Customer Aging	Displays customer’s aging information.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Maintaining General Customer Information,” Entering Credit Limits and Additional Credit Parameters.
Customer Conversations	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add a new conversation.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Managing Conversations”.

Pagelet Name	Usage	For More Information
Customer Notes	Displays notes that are assigned to a customer.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, "Maintaining General Customer Information," Entering Customer Notes.
Customer Search	Enables employees to search for existing customers to populate the additional pagelets with customer data.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, "Maintaining General Customer Information". See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, "Maintaining Additional Customer Information".
Expiring Buying Agreements	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	See *PeopleSoft Order Management 8.8 PeopleBook*, "Creating Buying Agreements".
Invoice Summary	Displays summarized invoice information. Employees can navigate into invoice details.	See *PeopleSoft Billing 8.8 PeopleBook*, "Entering Bills Online".
Last 10 Product Purchases	Displays the last 10 purchases for a customer. Employees can navigate to see order and product information.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, "Setting Up Products".
Last 10 Shipments	Displays the last 10 shipments for a customer. Employees can navigate to see order and shipping information.	See *PeopleSoft Order Management 8.8 PeopleBook*, "Maintaining Order Schedule Information".
Recent Orders	Displays recent orders. Employees can navigate into order details.	See *PeopleSoft Order Management 8.8 PeopleBook*, "Introduction to Sales Order Entry". See *PeopleSoft Order Management 8.8 PeopleBook*, "Maintaining Order Header and Line Information". See *PeopleSoft Order Management 8.8 PeopleBook*, "Maintaining Order Schedule Information".
Recent Quotes	Displays recent quotes. Employees can navigate into quotation details.	See *PeopleSoft Order Management 8.8 PeopleBook*, "Maintaining Quotation Information".
Recent RMAs	Displays recent returns. Employees can navigate into RMA details.	See *PeopleSoft Order Management 8.8 PeopleBook*, "Maintaining Quotation Information".

Pagelet Name	Usage	For More Information
Schedules Past Ship Date	Displays schedules that are past the ship date for a customer. Employees can navigate to see order and shipping information.	See *PeopleSoft Order Management 8.8 PeopleBook*, “Maintaining Order Schedule Information”.
Trade Promotions	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	See *PeopleSoft Promotions Management 8.8 PeopleBook*, “Viewing Promotional Activity”.

Viewing Product Information

This section discusses:

- Availability.
- Current Product Summary.
- Product Alternates.
- Product Notes.
- Product Search.
- Product Specifications.

Pagelets Used to View Product Information

Use the following pagelets to view product information.

Pagelet Name	Usage	For More Information
Availability	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	See *PeopleSoft Order Management 8.8 PeopleBook*, “Maintaining Order Schedule Information”.
Current Product Summary	Displays information about the product, including the description. Employees can navigate to see detail product information, view the list prices by inventory business unit, and check price and availability.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products”.
Product Alternates	Displays alternates for a product. Employees can navigate to view product information.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products,” Establishing Product Alternates.

Pagelet Name	Usage	For More Information
Product Notes	Displays notes that are assigned to a product.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products,” Establishing Product Notes.
Product Search	Enables employees to search for existing products to populate the additional pagelets with product data.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products”.
Product Specifications	Displays product specifications for a product.	See *PeopleSoft Working with Customers and Orders 8.8 PeopleBook*, “Setting Up Products,” Establishing Product Specifications.

CHAPTER 4

Customer-Facing Supply Chain Management Pagelets

The PeopleSoft Supply Chain Portal Pack includes pagelets for use in the customer portal registry. This chapter discusses how to:

- View pagelets by functional role.
- View billing information.

Note. Pagelets are documented in a Pagelets Used to <Task Description> table when they do not require extensive discussion.

Pagelets by Functional Role

PeopleSoft provides these customer-oriented role groupings as examples of how to organize pagelet access by function.

This section discusses:

- Broker pagelets.
- Customer pagelets.

Note. The sample data contains customer and broker roles that you can use as examples for organizing access and security.

Broker Pagelets

These pagelets enable a broker, an external user who conducts business on behalf of customers, to effectively manage promotions and view customer billing information:

- Product Search.
- Product Alternates.
- Product Notes.
- Product Specifications.
- Most Recent Bills.
- Most Recent Consolidated Bills.

Note. Many of the broker-oriented pagelets are also used by customer service employees and are documented in the Employee-Facing Supply Chain Management Pagelets chapter.

See Also

Chapter 3, “Employee-Facing Supply Chain Management Pagelets,” page 15

Customer Pagelets

These pagelets enable customers to view billing information:

- Most Recent Bills.
- Most Recent Consolidated Bills.

Viewing Billing Information

This section discusses how to view billing information.

Pagelets Used to View Billing Information

Use the following pagelets to view billing information.

Pagelet Name	Usage	For More Information
Most Recent Consolidated Bills.	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	See *PeopleSoft eBill Payment 8.8 PeopleBook*, “PeopleSoft eBill Payment Self-Service Transactions,” Viewing Consolidated Bills.
Most Recent Bills.	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click View All Bills to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	See *PeopleSoft eBill Payment 8.8 PeopleBook*, “PeopleSoft eBill Payment Self-Service Transactions,” Viewing Bills.

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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