PeopleSoft®

PeopleSoft 8.8
eDevelopment PeopleBook

December 2002

PeopleSoft 8.8
eDevelopment PeopleBook
SKU HRMS88EDV-B 1202

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Contents

About This PeopleBook

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 Website. 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 Website, 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 Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website 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 Website, 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: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

Description
Enter up to 30 characters of text.

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

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

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

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

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

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft 8.8 eDevelopment Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents 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.

PeopleSoft Application Fundamentals

The *PeopleSoft eDevelopment PeopleBook* provides you with implementation and processing information for your PeopleSoft eDevelopment system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS applications you are implementing, 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.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With…	This chapter discusses application implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other applications. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding…	This is an introductory chapter that broadly explains the application and the functionality within the application.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of an application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

Chapter 1

Getting Started With PeopleSoft eDevelopment

This chapter provides an overview of PeopleSoft eDevelopment transactions and discusses PeopleSoft eDevelopment implementation tasks.

PeopleSoft eDevelopment Transactions

PeopleSoft eDevelopment has the following transactions:

- Review Professional Information.
- Complete training requests.
- Complete a self-evaluation.
- Complete profession compliance reviews.

Implementing PeopleSoft eDevelopment

The PeopleSoft eDevelopment table-loading implementation includes setting up the following:

- Setting up PeopleSoft HRMS foundation tables.
- Setting up PeopleSoft eDevelopment core tables.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation documentation and table-loading sequences.

Note. The order in which you set up the tables that are required to implement PeopleSoft eDevelopment may vary. The order may depend on the features that you want to use and whether you are implementing more than one PeopleSoft application. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft eDevelopment requires the setup of fundamental HRMS tables that are common to multiple HRMS applications. The information defined in these tables is the basis for the PeopleSoft eDevelopment setup.

Step	Reference
1. Set up the HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Getting Started With PeopleSoft HRMS"
2. Set up the HR foundation tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Getting Started With PeopleSoft HRMS"

Setting Up Core PeopleSoft eDevelopment Tables

The steps discussed in this section suggest an order in which you define the information in your core eDevelopment tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Step	Reference
1. Set up the Human Resources: Administer Training business process core tables.	*PeopleSoft 8.8 Human Resources PeopleBook: Administer Training*, "Getting Started with PeopleSoft Human Resources Administer Training"
2. Set up the Human Resources: Manage Competencies business process core tables.	*PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*, "Getting Started With PeopleSoft Human Resources Manage Competencies"
3. If you are using Human Resources: Manage Professional Compliance, set up the core application tables.	*PeopleSoft 8.8 Human Resources PeopleBook: Manage Professional Compliance*, "Getting Started With the PeopleSoft Human Resources Manage Professional Compliance"

CHAPTER 2

Understanding PeopleSoft eDevelopment

This chapter discusses:

- The components of PeopleSoft eDevelopment.
- PeopleSoft eDevelopment integrations.
- Navigation in PeopleSoft eDevelopment.
- Roles and security within PeopleSoft eDevelopment.

Understanding eDevelopment Components

PeopleSoft eDevelopment is comprised of self-service transactions that interface with the PeopleSoft Human Resources system. Employees use eDevelopment to:

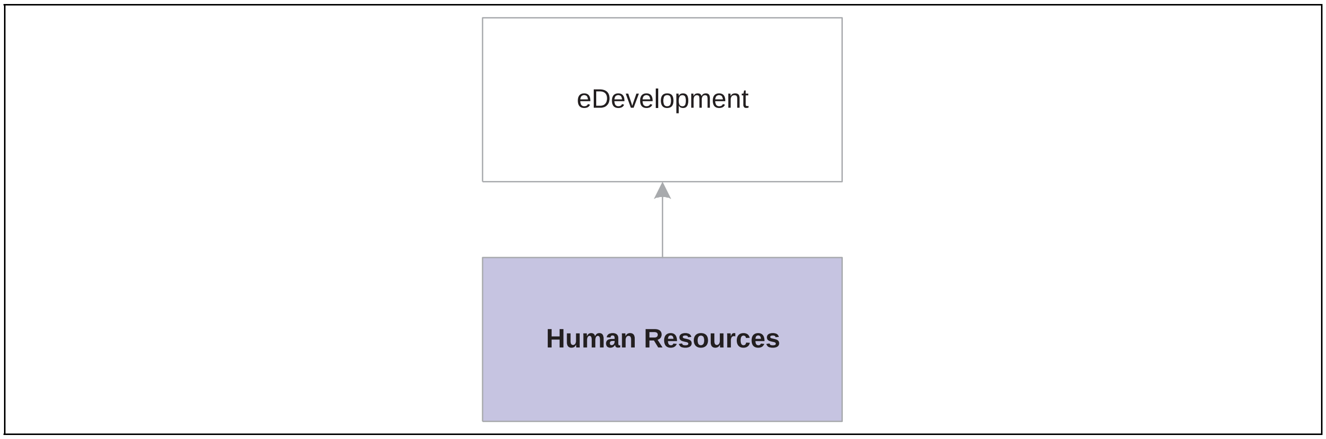
- Request Training.
- Review their training information.
- Enter personal development information.
- Complete their self-evaluation form.

Managers use eDevelopment to:

- Request training for their direct reports.
- Review training information for their direct reports.
- Complete performance reviews for their reports.
- Approve their direct reports self-evaluations.
- Complete reviews and observations for regulated employees.

PeopleSoft eDevelopment Integrations

PeopleSoft eDevelopment integrates with the following PeopleSoft applications:



PeopleSoft eDevelopment integration flow with other PeopleSoft applications

Navigating In PeopleSoft eDevelopment

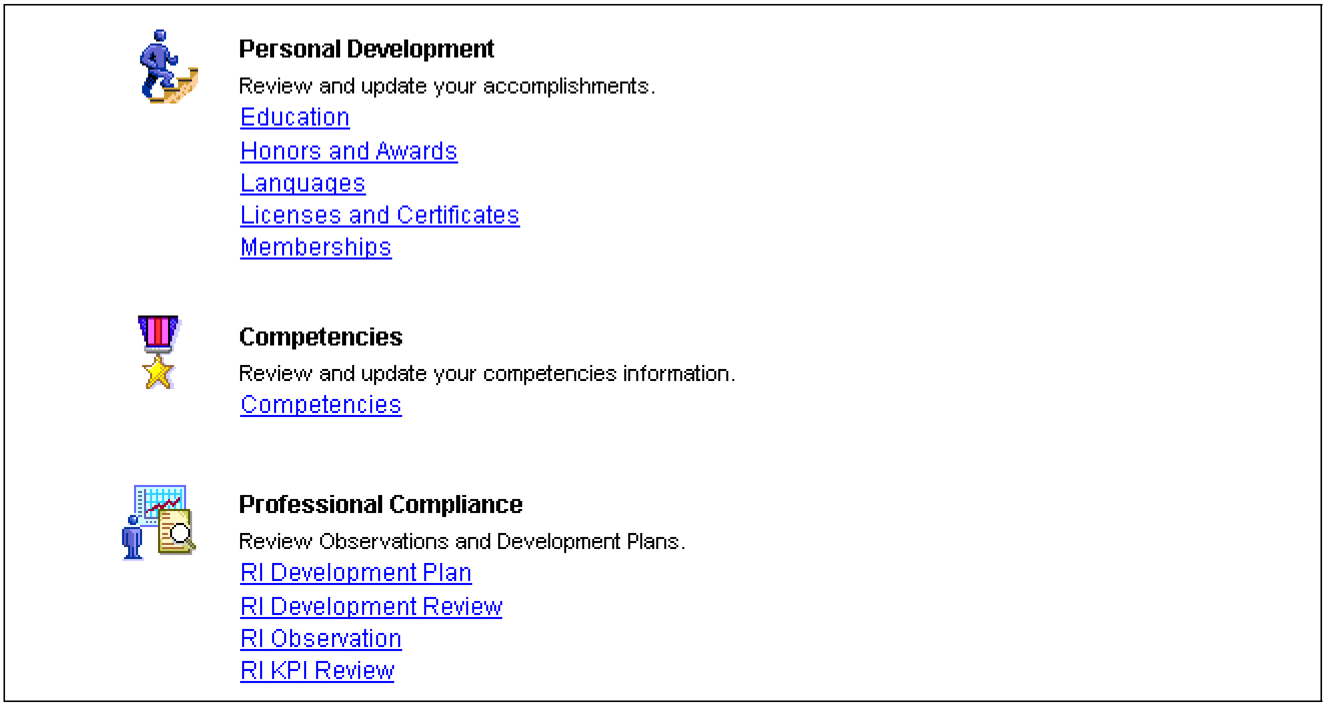
There are two ways to access self-service transactions:

- Homepages.
- Standard menu navigation path.

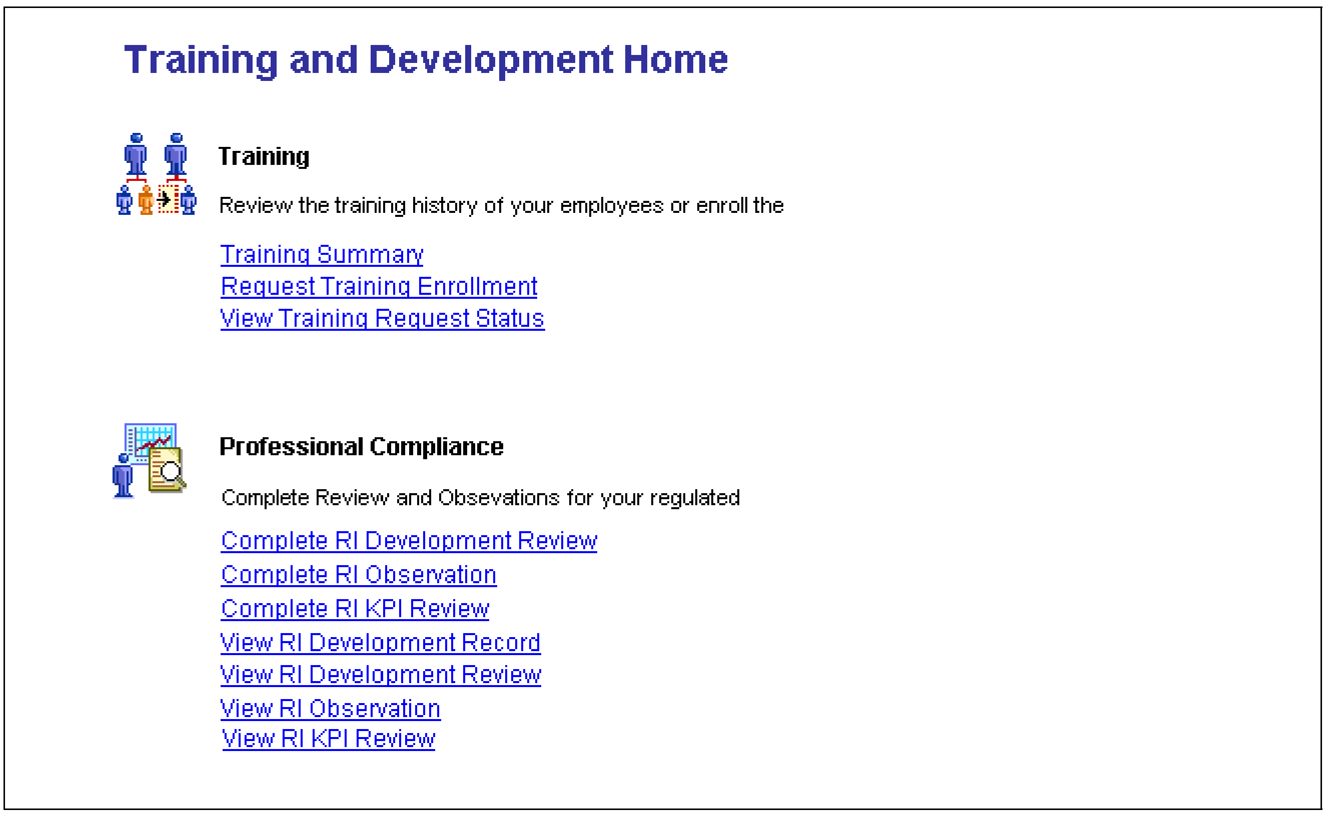
Homepages

The homepage presents a simple interface design and direct navigation for the end user. The links that appear on a homepage depend on which collaborative applications have been purchased and whether the application has been selected on the Installation table.

Employee’s Training and Development homepage (1 of 2)



Employee’s Training and Development homepage (2 of 2)



Manager’s Training and Development homepage

Standard Menu Navigation

The standard menu-driven navigation path is the standard access method. Homepages are easier to navigate for employees who are not PeopleSoft users.

Training and Development standard navigation path

Chapter 3

Entering Personal Development Information

This chapter describes the features offered by of PeopleSoft eDevelopment for entering personal development information such as:

- Professional Training.
- Education information.
- Honors and awards.
- Languages.
- Licenses and certificates.
- Memberships.
- Activities.
- Administrative posts.
- Committees.
- Presentations.
- Special Projects.
- Student Advising.
- Teaching Responsibilities.

Reviewing and Updating Training Information

Employees and faculty members can enter information about any specialized training the have received.

Pages Used to Enter Training Information

Page Name	Object Name	Navigation	Usage
Professional Training	HR_PROF_TRAINING	Employee Self-Service, Training and Development, Professional Training	Employees enter or update information about professional training courses they have completed.
Professional Training Detail	HR_PROF_TRN_DETAIL	Click the Edit or Add a Professional Training Course button from the Professional Training page.	Employees add the detailed information about the training course.
Professional Training	EG_SSTRAINING_L	Employee Self-Service, Training and Development, Faculty Event Tracking, Professional Training	Faculty members add the detailed information about the training course.
Professional Training — Add a Course, Professional Training — Change a Course	EG_SSTRAINING_D	Click the Edit or Add a Professional Training Course button from the Professional Training page.	Faculty members add the detailed information about the training course.

Reviewing and Updating Education Information

Employees and faculty members can enter information about their educational background.

See Also

Chapter 3, "Entering Personal Development Information," Reviewing and Updating Training Information, page 7

Pages Used to Review and Update Education Information

Page Name	Object Name	Navigation	Usage
Education	HR_EDUCATION	Employee Self Service, Training and Development, Education	Employees review, add, update, or delete information about the education that they have received that has resulted or will result in a degree.
Education Detail	HR_EDUCATION_DET	Click Edit or Add a Degree from the Education page.	Enter the detailed information about degree.
Professional Education	EG_SSEDUCATION_L	Employee Self Service, Training and Development, Faculty Event Tracking, Professional Education	Faculty members review, add, update, or delete information about the post-secondary education that they have received that has resulted or will result in a degree.
Education Detail	EG_SSEDUCATION_D	Click Edit or Add an Education button on the Professional Education page.	Faculty members create new professional education records, and review and edit details of professional education records already assigned to them.
School Education	EG_SSSCHOOL_EDUC_D	Employee Self Service, Training and Development, Faculty Event Tracking, School Education	Faculty members can enter information about their secondary education.

Reviewing and Updating Honors and Awards Information

The Honors and Awards Detail page enables employees and faculty members to record information about the honors or awards that they have received, including the type of honor or award, the grantor or presenter the issue date and any relevant end date.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments”

Pages Used to Review and Update Honors and Awards Information

Page Name	Object Name	Navigation	Usage
Honors and Awards	HR_HONORS_AWARDS	Employee Self Service, Training and Development, Honors and Awards	Employees review, add, update, or delete information about the honors or awards that they have received.
Honor/Award Detail	HR_HONOR_DETAIL	Click Edit or Add an Honor/Award from the Honor and Awards page.	Employees add or update the detail information about the award or honor they received.
Honors and Awards	EG_SSHON_AWDS_LIST	Employee Self Service, Training and Development, Faculty Event Tracking, Honors and Awards	Faculty members review, add, update, or delete information about the honors or awards they received.
Honors and Awards — Add Honor or Award	EG_SSHON_AWDS_DET	Click Edit or the Add Honor or Award button on the Your Honors and Awards page.	Faculty members add or update the detail information about the award or honor they received.

Reviewing and Updating Language Information

Employees use the Languages self-service transaction to review, add, update, or delete records of their proficiency in a language. The Languages page enables employees to record information about their proficiency in a selected language, including their speaking, reading, and writing proficiency and their ability to translate or teach in this language.

Pages Used to Enter Languages

Page Name	Object Name	Navigation	Usage
Languages	HR_LANGUAGE	Employee Self Service, Training and Development, Languages	Employees review, add, update, or delete information about their proficiency in a selected language, including their speaking, reading, and writing proficiency and their ability to translate or teach in this language.
Language Detail	HR_LANGUAGE_DETAIL	Click the Edit or the Add a Language button on the Languages page.	Employees create new language records, and review and edit details of language records already assigned to them.

Reviewing and Updating License and Certificate Information

Faculty members and employees use the Licenses and Certificates self-service transaction to review, add, update, or delete licenses and certifications records. The Licenses and Certificates page enables faculty members and employees to record information about licenses and certifications that are pertinent to their job, including the license or certificate code, issue date, license number, and the licensing or certifying organization.

Pages Used to Enter License and Certificate Information

Page Name	Object Name	Navigation	Usage
Licenses and Certificates	HR_LIC_CERT	Employee Self Service, Training and Development, Licenses and Certificates	Employees review, add, update, or delete information about licenses and certifications that are pertinent to their job, including the license or certificate code, issue date, license number, and the licensing or certifying organization.
License/Certificate Detail	HR_LIC_CERT_DET	Click Edit or the Add a License/Certificate button on the Licenses and Certificates page.	Employees enter new licenses and certificates records, and review or edit details of licenses and certificates records already assigned to them.
Licenses and Certificates	EG_SSLIC_CERTIFS_L	Employee Self Service, Training and Development, Faculty Event Tracking, Licenses and Certificates	Faculty members review, add, update, or delete information about licenses and certifications that are pertinent to their job, including the license or certificate code, issue date, license number, and the licensing or certifying organization.
License or Certificate Detail	EG_SSLIC_CERTIFS_D	Click Edit or the Add a License or Certificate button on the Licenses and Certificates page.	Faculty members create new licenses and certificates records, and review and edit details of licenses and certificates records already assigned to them.

Reviewing and Updating Membership Information

Employees and faculty members use the Memberships self-service transaction to review, add, update, or delete membership records. The Membership Detail page enables users to record information about their professional memberships, including the organization's name, mandate, and their membership date.

Pages Used to Manage Professional Memberships

Page Name	Object Name	Navigation	Usage
Memberships	HR_MEMBERSHIPS_	Employee Self Service, Training and Development, Memberships	Employees review, add, update, or delete membership information about their professional memberships, including the organization's name and their membership date.
Membership Detail	HR_MEMBER_DETAIL	Click the Edit or Add a Membership button on the Memberships page.	Employees add or edit detailed membership information.
Memberships	EG_SSMEMBERSHIPS_L	Employee Self Service, Training and Development, Faculty Event Tracking, Memberships	Faculty members review, add, update, or delete membership information about their professional memberships, including the organization's name and their membership date.
Membership Detail	EG_SSMEMBERSHIPS_D	Click the Edit or Add a Membership button on the Your Professional Memberships page.	Faculty members create new professional membership records, and review and edit details of professional membership records already assigned to them.

Reviewing and Updating Activity Information

Faculty members use the Activities self-service transaction to review, add, update, or delete records of their academic activities. The Activity Detail page enables faculty members to record information about their academic activities, such as activity type, sponsor, and beginning and end dates.

Pages Used to Manage Your Activities

Page Name	Object Name	Navigation	Usage
Activities	EG_SSACTIVITY_LIST	Employee Self Service, Training and Development, Faculty Event Tracking, Activities	Faculty members review, add, update, or delete information about their academic activities, such as activity type, sponsor, and beginning and end dates.
Activity Detail	EG_SSACTIVITY_DET	Click the Edit or Add button on the Your Activities page.	Faculty members create new activity records, and review and edit details of activity records already assigned to them.

Reviewing and Updating Administrative Post Information

Faculty members use the Administrative Posts self-service transaction to review, add, update, or delete Administrative Post records. The Administrative Post Detail page enables faculty members to enter details about their administrative posts, such as post type, begin and end dates, and organization.

Before you can track administrative posts, you'll need to define administrative posts on the Administrative Post Table. Examples of an administrative post are Department Head and Chairperson.

Pages Used to Set Up Administrative Posts

Page Name	Object Name	Navigation	Usage
Administrative Posts	EG_SSADMIN_POSTS_L	Employee Self Service, Training and Development, Faculty Event Tracking, Administrative Posts	Faculty members review, add, update, or delete information about their administrative posts, such as post type, begin and end dates, and organization.
Add Administrative Post	EG_SSADMIN_POSTS_D	Click the Edit or Add Administrative Post button on the Administrative Posts page.	Faculty members create new administrative post records, and review and edit details of administrative post records already assigned to them.

Reviewing and Updating Committee Information

Faculty members use the Committee self-service transaction to review their committee membership information. The Committee Detail page displays the committee name, the dates of membership, and role in the committee.

In order for faculty members to view their committee memberships you need to set up the following three tables:

- Use the Committee Type Table page to maintain different committee types and committee roles within each type. The committee types that you set up in this page are used in the Committee page.
- Use the Committee page to establish a committee and attach a committee type to it. For example, you can establish the research Committee Type and attach it to the research and development committee.
- Use the Committee Members page to assign faculty members to a committee type within the committee.

Pages Used to Manage Your Committees

Page Name	Object Name	Navigation	Usage
Committees	EG_SSCOMMIT_MBR_L	Employee Self Service, Training and Development, Faculty Event Tracking, Committees	Faculty members review their committee membership information.
Committee Details	EG_SSCOMMIT_MBR_D	Click a Committee Start Date or the Add button on the Committees page.	Faculty members review details of administrative post records already assigned to them.

Reviewing and Updating Presentation Information

Faculty use the Presentations self-service transaction to review, add, update, or delete records of their presentations. The Presentation Detail page enables faculty members to record information about the presentations they have given, including the presentation type, date, title, and the audience or function at which they gave the presentation.

Pages Used to Manage Your Presentations

Page Name	Object Name	Navigation	Usage
Presentations	EG_SSPRESENTATN_L	Employee Self Service, Training and Development, Faculty Event Tracking, Presentations	Faculty members review, add, update, or delete information about the presentations they have given, including the presentation type, date, title, and the audience or function at which they gave the presentation.
Presentation Detail	EG_SSPRESENTATN_D	Click the Edit or Add Presentation button on the Presentations page.	Faculty members create new presentation records, and review and edit details of presentation records already assigned to them.

Reviewing and Updating Special Project Information

Faculty members use the Special Projects self-service transaction to review, add, update, or delete records of their special projects. The Special Project Detail Page enables faculty members to record details about special projects that benefit their professional standing, including a description of the project and the department and organization with which they carried out the special project. A special project would include things that don’t fall into the publication or presentation area, for example designing a computer database for use in another department.

Pages Used to Enter Your Significant Special Projects

Page Name	Object Name	Navigation	Usage
Significant Special Projects	EG_SSSPECIAL_PRJ_L	Employee Self Service, Training and Development, Faculty Event Tracking, Significant Special Projects	Faculty members review, add, update, or delete information about special projects that benefit their professional standing.
Special Project Detail	EG_SSSPECIAL_PRJ_D	Click the Edit or Add Special Project button on the Significant Special Projects page.	Faculty members create new special project records, and review and edit details of special project records already assigned to them.

Reviewing and Updating Student Advising Information

Faculty members use the Student Advising self-service transaction to review, add, update, or delete student advisee records. The Student Advising Detail Page enables faculty members to record information about their student advisees, including the level at which they are advising the students, the dates they will be advising the students, and the student's projects.

Pages Used to Review and Update Student Advising Information

Page Name	Object Name	Navigation	Usage
Student Advising	EG_SSADVISING_LIST	Employee Self Service, Training and Development, Faculty Event Tracking, Student Advising	Faculty members review, add, update, or delete information about their student advisees, including the level at which they are advising the students, the dates they will be advising the students, and the student's projects.
Student Advising Detail	EG_SSADVISING_DET	Click the Edit or Add Student Advising button on the Student Advising page.	Faculty members create new student advising records, and review and edit details of student advising records already assigned to them.

Reviewing and Updating Teaching Responsibility Information

Faculty members use the Teaching Responsibilities self-service transaction to review, add, update, or delete Teaching Responsibilities records. The Teaching Responsibility Detail page enables faculty members to record information about their teaching responsibilities, including course type and description, units, term, percent taught (if they are sharing teaching with another faculty member) and the type of enrollment (such as undergrad).

Pages Used to Enter Your Teaching Responsibilities

Page Name	Object Name	Navigation	Usage
Teaching Responsibilities	EG_SSTEACH_RESP_L	Employee Self Service, Training and Development, Faculty Event Tracking, Teaching Responsibilities	Faculty members review, add, update, or delete information about their teaching responsibilities.
Teaching Responsibility Detail	EG_SSTEACH_RESP_D	Click the Edit or Add Teaching Responsibility button on the Teaching Responsibilities page.	Faculty members create new teaching responsibility records, and review and edit details of teaching responsibility records already assigned to them.

CHAPTER 4

Completing Self-Evaluations

This chapter describes how employee competency self-evaluations are entered and approved.

Understanding the Self-Evaluation Process

PeopleSoft provides two self-service transactions that enable employees to rate their competencies and managers to approve the employee's self-evaluation.

- Competencies

  Employees access the Competencies page. If there is a current evaluation that has not been submitted, the page displays this evaluation. If ePerformance is used, completed employee evaluations created through ePerformance can also be viewed.

  The employee can: create a new evaluation, update an existing evaluation that hasn't been submitted, or update an evaluation that was denied.

  Once the evaluation is submitted, the status is set to Submit and a worklist/email is sent to the manager. At this point, the employee cannot make any changes to the evaluation.

  Evaluation data is stored in the CM_EVALUATIONS and COMPETENCIES tables.

- Approve Competencies

  The manager accesses the Approve Competencies page. The manager will see a list of the self-evaluations for his direct reports waiting for approval. When the manager selects an evaluation, the details for that evaluation are displayed. The manager can enter any relevant comment and either approve or deny the evaluation. When the manager clicks either the Approve or Deny button, an email is sent to the employee.

  Approval information is stored in the HR_CM_EVAL_STA table.

Prerequisites

Before employees can enter their self evaluations, you must:

1. Activate workflow.
2. Set up competency and rating models.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Self-Service Transactions”

PeopleSoft Human Resources PeopleBook: Manage Competencies

Creating New Evaluations

This sections lists the pages used to complete a self-evaluation.

Pages Used to Create an Evaluation

Page Name	Object Name	Navigation	Usage
Competency Evaluation	HR_CM_EVALUATN_NEW, HR_CM_EVALUATN_CURR	Employee Self Service, Training and Development, Competencies	Employees enter a new competency self-evaluation or modify an existing one.
Competency Details	HR_COMP_DETAIL	Click the Edit button on the Competency Evaluation page.	Employees add or modify details about a specific competency.
Add Competencies	HR_COMP_ASSIGN	Click the Add Competencies button on the Competency Evaluation page.	Employees use this page to add a competency to their self-evaluation.
Your Previous Competency Self-Evaluation	HR_CM_EVALUATN_HST	Click the View Previous Evaluations link on the Competency Evaluation page.	Employees view the details of previous competency evaluations. Evaluations can originate from the Your Competency Evaluation self-service transaction, HR-Manage Competencies, or ePerformance.
Approve Competencies	HR_APPR_COMP_MGR	Manager Self Service, Training and Development, Approve Competencies	Managers approve or deny self-evaluations for their direct report.

CHAPTER 5

Requesting Employee Training

This chapter describes the self-service training development process and discusses how to:

- Submit, approve, and review training requests.
- Handle errors and warnings.

Understanding Self-Service Training Development Process

PeopleSoft provides four self-service transactions that improve the efficiency of employee development.

- Request Training Enrollment.

  An employee or manager accesses the Request Training Enrollment transaction. Employees request training on their own behalf and managers request training for their direct reports. Whether you are an employee or manager submitting the request, the system considers you the originator.

  The originator selects a method for searching for classes that were set up in Human Resources: Administer Training. The system displays a list of available courses and the originator can pick the course and session that meets their needs.

  The system checks to see if there are any prerequisites that must be met. For managers, the system displays a list of their direct reports. There can be two lists: employees who meet the prerequisites and those who don't. If an employee is scheduled to take a course that meets the prerequisite for the selected course, the system will consider this employee as meeting the requirement.

  Managers select the employees they want to enroll in the course. The system displays a summary of the course. Employees or managers can enter any relevant comment and request to be placed on a waitlist if the course is full.

- Approve Training Request.

  An administrator or manager accesses the Approve Training Request transaction. The approver either approves or denies a request. Information about the request cannot be changed. However, the approver can enter a comment.

- View Training Request Status.

  Employees and managers can check on the status of a request using the View Training Request Status transaction.

- Training Summary.

  Employees and managers can display a summary of all employees completed, currently confirmed, and waitlisted training courses.

Note. If a manager is requesting training for a group of direct reports and the class gets full in the middle of the enrolling the group, the system will enroll the entire group into the class. Their statuses will show as enrolled. An administrator will be notified to handle this situation.

Prerequisites

Before you submit a training request, complete the following:

1. Activate workflow.
2. Set up group build if you plan to use group ID as the access type for a manager to request training for his or her direct reports.
3. Set up the access type for HR_DR_TRN_SUMMARY and TRN_REQUEST_LNK on the Direct Reports Setup page.
4. Define the rules for Training Enrollment and Training Enrollment by Manager on the Configuration Options, Notification Setup and Component Interface Setup pages.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Self-Service Transactions”

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Groups”

Requesting Training

This section lists the pages used by employees or managers to submit a training request.

Pages Used to Submit Training Requests

Page Name	Object Name	Navigation	Usage
Request Training Enrollment	TRN_SELCOURSE_MGR	• Employee Self-Service, Training and Development, Request Training Enrollment • Manager Self-Service, Training and Development, Request Training Enrollment	Employees or managers select the method by which they want to search for training courses.
Course Search	HR_TRN_SRCH_COURSE	Click one of the four search method links.	Employees or managers enter the appropriate information to display a list of courses that match their criteria.
Course Detail	HR_TRN_ENROLL_DESC	Click the Information button on the Course Search page.	Employees or managers review detailed information about the course.
View Available Sessions	HR_TRN_COURSE_SESS	Click the View Available Sessions link on the Course Search page.	Employees or managers review the available course sessions and select the desired session.
Session Detail	HR_TRN_SESS_DETAIL	Click the session ID on the View Available Sessions page.	Employees click Submit to process the training request or be placed on the waitlist. Managers click Continue select the employees they want to enroll in this course or place on a waitlist.
Select Employees	TRN_OPRROWS_MULTI	Click Continue from the Session Detail page.	Managers select the employees they want to enroll in the selected course.
Submit Request	TRN_REQUEST_MGR	Click Continue from the Select Employee page or the Session Detail page.	Managers or employees enter any comments and submit the request.

Approving Training Requests

This section lists the pages used by the approving manager to approve training requests.

Pages Used to Approve Training Requests

Page Name	Object Name	Navigation	Usage
Approve Training Request	SS_LIST	Manager Self-Service, Training and Development, Approve Training Request	Managers approve or deny each employee's training request and enter any relevant comments.
Save Confirmation	SS_CONFIRM	Click Approve or Deny from the Approve Transaction page.	Managers approve or deny the request.

Viewing the Status of Training Requests

This section lists the pages used to view the status of training requests.

Page Used View the Status of Training Requests

Page Name	Object Name	Navigation	Usage
Training Request Status	TRN_REQUEST_STL	• Employee Self-Service, Training and Development, Training Request Status • Manager Self-Service, Training and Development, View Training Request Status	Displays the current status of the training request. Managers first select the employee whose Training Summary they want to view.

Reviewing Training History Information

This section lists the pages used to view a training history.

Page Used to Review Training History

Page Name	Object Name	Navigation	Usage
Training Summary	HR_TRN_SUMMARY	• Employee Self-Service, Training and Development, Training Summary • Manager Self-Service, Training and Development, Training Summary	Displays a summary of completed, currently confirmed, or waitlisted training courses. Managers first select the employee whose training summary they want to review.
Training Summary — Course Detail	HR_TRN_CRSDESC	Click the Course Name link on the Training Summary page.	Displays detailed information about the training course.

Handling Errors or Warnings

The Workflow Inquiry page enables administrators to review all transactions that:

- Successfully updated the database.
- Require further processing.

This page also provides an audit trail of who made the update to the database. To display information about the training requests, go to Workflow Inquiry page. Enter either an employee ID or select a transaction name. If you select a transaction name, select either HR_TRAIN_ENROLL for employee requests or HR_TRAIN_ENROLL_MGR for manager requests.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Working With Self-Service Transactions”

CHAPTER 6

Managing Professional Compliance

This chapter discusses professional compliance and describes how to:

- Complete a development review.
- Complete an observation.
- Complete a KPI review.
- View RI development records.
- View RI development reviews.
- View RI observation history.
- View KPI review history.

Understanding Professional Compliance

Professional Compliance is a business process in PeopleSoft Human Resources Management System. The Professional Compliance process enables you to manage the professional certification of both employees and non-employees.

With Professional Compliance, you can:

1. Define the certification requirements established by a regulatory authority.
2. Set up classifications used to define the status of regulated individuals (for example, an individual can be classified as compliant or noncompliant with the requirements for certification).
3. Assign regulated individuals to compliance managers/supervisors.
4. Enroll regulated individuals in development plans designed to help individuals obtain a level of competence to attain a specified classification.
5. Monitor individuals in their progress by completing reviews, observations, and key performance indicators (KPIs), and checks.

Using Self-Service Transactions with Professional Compliance

The Professional Compliance process provides self-service transactions for both compliance supervisors/managers and regulated individuals.

- Supervisors/managers can view the status of regulated individuals, and perform such actions as completing development reviews, entering observations, and completing KPI (key performance indicator) reviews.
- Regulated individuals can view key data related to their compliance status and development plans.

See Also

PeopleSoft 8.8 Human Resources PeopleBook: Manage Professional Compliance, "Monitoring Regulated Individuals"

PeopleSoft 8.8 Human Resources PeopleBook: Manage Professional Compliance, "Entering and Maintaining Regulated Individual Data"

Completing a Development Review

Compliance managers/supervisors use this transaction to select regulated individuals from a list and then review their development plans. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor, and the development plans available for review include only those for which the Expected Completion Date (defined on the Development Record page) has not yet passed.

Before you can complete this transaction, you must define your development plans and enroll individuals in these plans as part of the setup of Professional Compliance in PeopleSoft Human Resources.

Page Used to Complete a Development Review

Page Name	Object Name	Navigation	Usage
RI Development Review (regulated individual development review)	HR_PCMP_T_DEVREV, HR_PCMP_T_DEVREV2, HR_PCMP_T_DEVREV3	Manager Self Service, Training and Development, Complete RI Development Review	Managers complete development reviews.

Completing an Observation

Compliance managers/supervisors use this transaction to select regulated individuals from a list and complete an observation. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete an observation, you must define observation elements and construct observation models as part of the setup of Professional Compliance in PeopleSoft Human Resources.

Pages Used to Complete an Observation

Page Name	Object Name	Navigation	Usage
RI Observation (regulated individual observation)	HR_PCMP_T_RIOBS, HR_PCMP_T_RIOBS2, HR_PCMP_T_RIOBS3	Manager Self Service, Training and Development, Complete RI Observation	Enter an observation.

Completing a KPI Review

Compliance managers/supervisors use this transaction to select regulated individuals from a list and then enter KPI (key performance indicator) review details. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete a review of an individual's progress against key performance indicators (KPIs), you must define the specific indicators you want to use as part of the setup of Professional Compliance in PeopleSoft Human Resources. PeopleSoft includes the following broad categories of performance indicators as part of the delivered application; within these categories, however, you must choose (and in some cases set up) the exact indicators you want to use:

- Complaints – Number of complaints against the individual versus those against the company.
- Persistency (of business sold) – Percentage of business sold that is still in force.
- Spread of Business – Measure the range of applications being sold by the individual.
- Not Taken Up (NTU) – Number of proposals submitted, but not put into force.
- Factfind Completion – Check on accuracy, completeness and quality of service.

Note. The key performance indicators (KPIs) listed here are directly targeted at the UK financial services arena. However, the key structure of the KPI records, and the way the functionality is incorporated within Professional Compliance, can be used as a guide for creating additional, modified KPIs.

Pages Used to Complete a KPI Review

Page Name	Object Name	Navigation	Usage
RI KPI Review (regulated individual key performance indicators review)	HR_PCMP_T_RIKPI, HR_PCMP_T_RIKPI2, HR_PCMP_T_RIKPI3	Manager Self Service, Training and Development, Complete RI KPI Review	Perform a KPI (key performance indicator) review.

Viewing RI Development Records

Compliance managers/supervisors use this transaction to view details of a development plan for a regulated individual, and employees use this transaction to view details of their own development plans.

Before you can view details of a development plan, you must define your development plans and enroll individuals in them as part of the setup of Professional Compliance in PeopleSoft Human Resources.

Pages Used to View RI Development Records

Page Name	Object Name	Navigation	Usage
RI Development Record (regulated individual development record) , Development Record	HR_PCMP_DEVREC2	• Manager Self-Service, Training and Development, View RI Development Record • Employee Self-Service, Training and Development, RI Development Plan	Compliance managers/supervisors view details of development plans for regulated individuals. Employees can view details of their own development plans.

Viewing RI Development Reviews

Compliance managers/supervisors use this transaction to view the development review history of a regulated individual, and regulated individuals use this transaction to see details of their own development reviews.

To view a development review, you must have already created the review using the RI Development Review page in eDevelopment, or the RI Dev Review and RI Dev Area Review pages in PeopleSoft Human Resources.

Pages Used to View Development Reviews

Page Name	Object Name	Navigation	Usage
RI Development Review (regulated individual development review), Development Review	HR_PCMP_DEVREV2	• Manager Self Service, Training and Development, View RI Development Review • Employee Self-Service, Training and Development, RI Development Review	Compliance managers/supervisors view development review histories of regulated individuals. Employees can view details of their own development reviews.

Viewing RI Observation History

Compliance managers/supervisors use this transaction to view observations of regulated individuals, and regulated individuals use this transaction to view details of their own observations.

To view an observation, you must have already created the observation using the RI Observation page in eDevelopment, or the RI Observation and Obs Elements pages in PeopleSoft Human Resources.

Pages Used to View RI Observation History

Page Name	Object Name	Navigation	Usage
RI Observation (regulated individual observation) , Regulated Individual Observation	HR_PCMP_RIOBS2	• Manager Self Service, Training and Development, View RI Observation • Employee Self-Service, Training and Development, RI Observation	Compliance managers/supervisors View observation history. Employees can also view details of their own observation history.

Viewing KPI Review History

Compliance managers/supervisors use this transaction to view the KPI (key performance indicator) reviews of regulated individuals, and regulated individuals use this transaction to view details of their own KPI reviews.

To view a KPI review, you must have already created the review using the RI KPI Review page in eDevelopment, or the KPI Review and KPI Statistics pages in PeopleSoft Human Resources.

Pages Used to View KPI Review History

Page Name	Object Name	Navigation	Usage
RI KPI Review (regulated individual key performance indicators review), Key Performance Indicators Review	HR_PCMP_RIKPI2	• Manager Self Service, Training and Development, View RI KPI Review • Employee Self-Service, Training and Development, RI KPI Review	Compliance managers/supervisors view KPI (key performance indicator) reviews. Employees can also view details of their own KPI (key performance indicator) reviews.

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.

account — You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

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 entry — A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

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 anotherand 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.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

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.

application agent An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

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

attachment In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.

background process In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.

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.

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 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).

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.

category In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.

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.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
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.
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.
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 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.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
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.

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.

data row Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.

data validation In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.

DAT file This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.

delivery method In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.

delivery method type In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.

distribution The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.

double byte character If youre working with Japanese or other Asian employees, you can enter the employee’s name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].

dynamic tree A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values 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 job Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.

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.

equipment In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event — Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect 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.

external system — In PeopleSoft, any system that is not directly compiled with PeopleTools servers.

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.

filter — In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.

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 — Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

homepage — Users can personalize the homepage, or the page that first appears when they access the portal.

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.

key — 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.

learner group — In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.

learning activity — See *activity.*

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

learning plan — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.

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.

level — A section of a tree that organizes groups of nodes.

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 — The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.

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 addressesfor 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 locationindicated by a *1*is the address you use most often and may be different from the main address.

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.

material — In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.

message definition — An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.

meta-SQL — Meta-SQL constructs expand into platform-specific 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 — Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.

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

objective — In PeopleSoft Enterprise Learning Management, an individual’s learning goal. An example of a learning goal is a competency gap.

override — In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.

pagelet — Each block of content on the homepage 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.

parent node A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

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 *participant object.*

payout In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.

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 an 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.

per seat cost In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.

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 contextif 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 section In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.

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.

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.
private view	A user-defined view that is available only to the user who created it.
process	See *Batch Processes.*
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 an SQR, a COBOL 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.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
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.

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.

results management process — In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

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.

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.

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

routing — Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

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.

self-service application — Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

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 activitycharacteristics 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.

sibling A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

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.

SQR See *Structured Query Report (SQR).*

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.

Structured Query Report (SQR) A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

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 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.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
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.
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 loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
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.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
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.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k
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.

URL See *uniform resource locator (URL).*

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.

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

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.

workflow The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

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.

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.

Index