PeopleSoft®

PeopleSoft 8.8
eRecruit PeopleBook

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PeopleSoft 8.8
eRecruit PeopleBook
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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 eRecruit Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

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 eRecruit PeopleBook* provides you with implementation and processing information for your PeopleSoft eRecruit 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 products 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 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 product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • 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 product and the functionality within the product.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, 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 a product, 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 product'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 eRecruit

This chapter provides an overview of PeopleSoft eRecruit business processes and discusses PeopleSoft eRecruit implementation tasks.

PeopleSoft eRecruit Business Processes

PeopleSoft eRecruit includes the following business processes:

- Job application.
- Job agent.
- Applicant referrals.
- Interviewee evaluations.
- Interview schedule review.

Implementing PeopleSoft eRecruit

The eRecruit table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- eRecruit application tables.
- Additional eRecruit application tables.

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

Note. The order in which you set up tables required to implement PeopleSoft eRecruit may vary; each individual application isn't necessarily set up in sequence. For example, you may set up core Human Resources tables, then tables for eRecruit, then several tables specific to the country or industry you operate in, followed by additional eRecruit core tables. In addition, the order in which you set up tables may also depend on the features you want to use. 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 eRecruit requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the eRecruit setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, “Getting Started With PeopleSoft HRMS”

Setting Up Core PeopleSoft eRecruit Tables

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

Setting up these core tables prepares your system to support these business processes:

- Job application
- Interview schedule review
- Interviewee evaluation

Step	Reference
1. Set up the Recruit Workforce business process.	*PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce*, “Getting Started With PeopleSoft Human Resources: Recruit Workforce”
2. Set up the Apply for Job transaction.	Chapter 4, “Applying for Jobs,” page 11

Setting Up Additional PeopleSoft eRecruit Tables

These steps define information in additional eRecruit tables. The information that you define in your core tables lays the foundation for this additional setup.

Completing these additional steps prepares your system to support these job application tasks:

- Auto-populate with Apply for Job
- Refer a Friend

Step	Reference
1. (Optional). If you want to use the auto-populate feature, set up PeopleSoft Resume Processing.	*PeopleSoft 8.8 Resume Processing PeopleBook*, “Getting Started With PeopleSoft Resume Processing”
2. (Optional). Set up the Refer a Friend transaction.	Chapter 4, “Applying for Jobs,” page 11

CHAPTER 2

Understanding PeopleSoft eRecruit

This chapter describes the self-service transactions available in of eRecruit and explains:

- PeopleSoft eRecruit integrations.
- Accessing eRecruit transactions.
- Understanding roles and security.

Understanding eRecruit Self-Service Transactions

PeopleSoft eRecruit provides self-service transactions targeted at two audiences: external applicants and employees.

With eRecruit external applicants can:

- View information about current job opening in the organization.
- Apply for a position within the organization.
- Update existing application information.
- Search for a job posting that matches the employee's criteria.

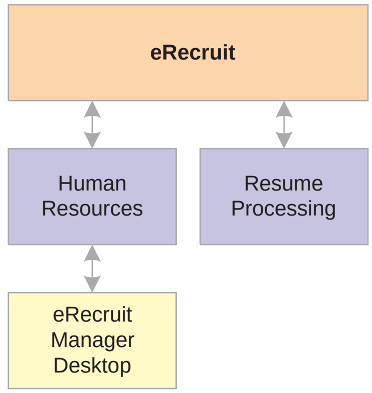
With eRecruit employees can:

- View a weekly calendar that displays scheduled interviews in which they are part of the interview team.
- View a list of the requisitions in which they are a part of the interview team.
- Enter interview evaluations.
- If the organization uses employee referral programs, employees can enter an employee referral and track the progress of the referral.
- View information about current job openings in the organization.
- Apply for a position within the organization.
- Update existing application information.
- Submit additional information such as reference information or cover letters.
- Search for a job posting that matches the employee's criteria.

You can integrate PeopleSoft eRecruit with PeopleSoft eRecruit Manager Desktop, which provides a robust suite of Web-enabled transactions for hiring managers and recruiters.

PeopleSoft eRecruit Integrations

PeopleSoft eRecruit integrates with the following PeopleSoft applications.



PeopleSoft eRecruit integration flow with other PeopleSoft applications

Accessing eRecruit Transactions

There are two ways to access the eRecruit self-service transactions:

- Homepages.
- Standard menu navigation path.

Homepages

The home page presents a simple user interface design and direct navigation for the end user.

There are two eRecruit homepages: a homepage for external applicants and an employee homepage.

Standard Menu Navigation

The standard menu driven navigation path is the traditional PeopleSoft access method.

Understanding Roles and Security

User roles and security determine:

- The self-service transactions that users can access.
- The information that users can view.

Self-service transactions are targeted to specific roles, such as applicant and employee.

User profiles determine default access to transactions. You create user profiles on the Maintain Security page in the User Profile component. You assign a role to each user profile.

Profiles are linked to access control lists. Each access control list identifies the pages that users can access. To modify access to specific Web pages for each role, you modify the access control list.

You also define which data the user can access in the user profile.

See Also

PeopleTools PeopleBook:PeopleTools Security

CHAPTER 3

Setting Up eRecruit

This chapter discusses setting up eRecruit installation parameters.

Setting Up eRecruit Parameters

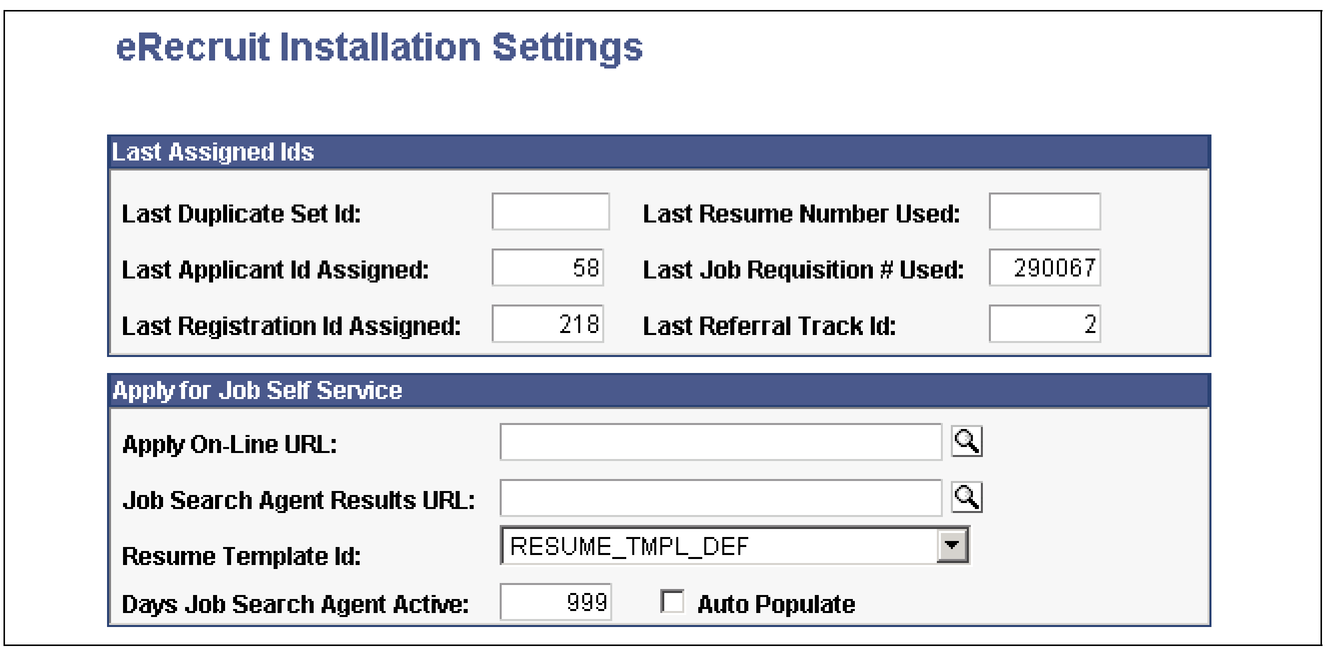
This section describes the various parameters necessary for accepting resumes online.

Pages Used to Set Up eRecruit

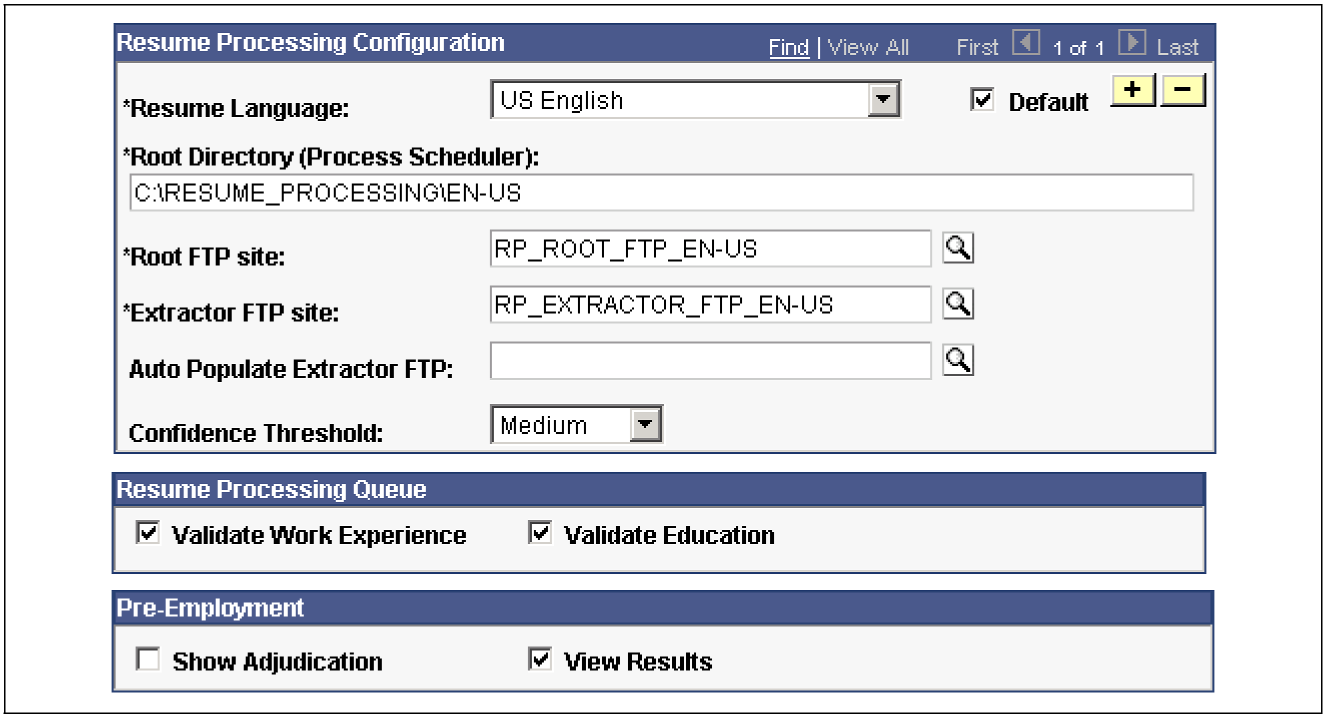
Page Name	Object Name	Navigation	Usage
eRecruit Installation Options	ER_INSTALLATION	Set Up HRMS, Install, Product and Country Specific, eRecruit Installation	Define parameters for your recruitment applications.

Setting Up Apply For Job

Access the eRecruit Installation Options page.



eRecruit Installation Options page (1 of 2)



eRecruit Installation Options (2 of 2)

Last Assigned IDs

This group box defines system parameters used by Recruit Workforce, eRecruit, eRecruit Manager Desktop, and Resume Processing. This is fully documented in the PeopleSoft HRMS – Recruit Workforce PeopleBook.

Apply for Job Self Service

This group box defines the parameters for accepting documents online.

Apply On-Line URL

Select the URL identifier you have defined that points to the page on your organization's web site where applicants can access the Apply for Job self-service transaction.

The system includes this URL in the email sent to external applicants who apply online to enable them to review or update their resume.

You also need to complete this field if you have integrated your system with RecruitUSA. The URL is sent to RecruitUSA for inclusion in your posting to online job boards. External applicants viewing the job board use this URL to apply online for the position.

Job Search Agent Results URL

Select the URL address that points to the page on your organization's web site where applicants can access their results from the Job Search Agent process.

Note. If you have purchased and are using Resume Processing, you cannot store documents in the database. You will need to follow the set up procedures for Resume Processing.

Extractor FTP Site

Complete this field if you selected the Auto Populate check box. Select the URL of the FTP address that points to the Resume Extractor directory that you want to use for the auto populate. The default is *RP_EXTRACTOR_FTP*. However, if you have a separate installation of Resume Extractor for Apply for Job, select *AUTOPOP_EXTRACTOR_FTP*.

This is explained in more detail in the PeopleSoft Resume Processing PeopleBook.

Resume Template ID Select the default resume template for the Apply for Job self-service transaction. The system uses the default template if applicants don't apply for a specific job opening. The template defines the pages to include in the transaction and the ordering of those pages.

Days Job Agent Profile Active Defines the number of days to hold an applicant's job agent profile. The maximum number of days a profile can stay active is 999.

This date is used by the Job Agent Process to determine whether a profile is out of date and should be deleted.

Auto Populate Select to enable automatic population of the Apply for Job self-service transaction. . When applicants attach their resume the system automatically extracts applicant data and completes fields in the Apply for Job pages.

You can only use this feature if you have PeopleSoft Resume Processing installed. You must also complete the Attachment FTP Site and the Extractor FTP Site fields for automatic population to work.

Resume Processing Configuration

This group box is used if you have purchased PeopleSoft Resume Processing. It defines various parameters necessary for Resume Processing. This group box is fully documented in the PeopleSoft Resume Processing PeopleBook.

Pre-Employment

This group box is used if you have purchased eRecruit Manager Desktop and are integrating with HireRight. This group box is fully documented in the PeopleSoft eRecruit Manager Desktop PeopleBook.

CHAPTER 4

Applying for Jobs

This chapter provides an overview of how employees and external applicants can apply for positions within your organization.

Understanding Job Applications

PeopleSoft eRecruit provides three avenues for your organization to fill open job requisitions. Employees and external applicants can:

- Submit an application and resume for a specific job.
- Employee referrals.
- Submit an application and resume without linking it to a job requisition.

In addition to these features, eRecruit also enables users to:

- Submit references and other documents.
- Search for jobs that match their interests.

Applying for Specific Jobs

This section provides an overview of:

- The process behind applying for jobs.
- How auto-populate works when applicants apply for a job.

Understanding the Apply for Jobs Process

External and internal applicants use the Job Postings transaction to view information on current job openings in your organization. Applicants first search for job postings based on various criteria such as: job category, location, keywords, full-time/part-time, and minimum salary.

The system searches for jobs that match the entered criteria according to the following rules:

If the applicant enters a	The system compares it to the
Keyword	Posting title and job description.
Salary amount	Default salary range associated with the job code.
Job Category	Job family associated with the job code. For federal, it searches GVT_PATOCB_CD
Regular or Temporary	Job requisition
Full or Part Time	Job requisition
Country or Location	Job requisition

Applicants can only view job postings that meet the following criteria:

- The current date is within the job posting opening and closing dates.

  Once the closing date has passed, employees and applicants can no longer view the details of that job.
- The job requisition has an open status.

  Requisition statuses are designated open if the job requisition is active and recruitment is in progress. For example, the requisition status *Applied* is an open status, but *Hold* is not. You define which requisition statuses are open in the Status/Reason table.
- The job requisition has an approval status of *All Approved.*
- External applicants can view jobs with a Posting Type of *External* and a Medium of *Internet*.
- Internal applicants can view jobs with a Posting Type of *Internal* and a Medium of *Internet*.

If applicants find job openings that they're interested in applying for, they add the requisitions to a *job basket.* The job basket enables applicants to apply for multiple requisitions at one time. When applicants click the Apply for Jobs in Basket button, the system automatically transfers the applicant to the Apply for Job transaction.

The next step in the process is to complete the application information in Apply for Job. Apply for Job works differently for internal applicants and external applicants:

- The system already has some information on internal applicants, and that information automatically appears when they create a resume.
- External applicants have to register and enter information from scratch. The system uses their email address and user-entered password to locate the resume.

The process for entering detailed resume information is the same for internal and external applicants. Once a resume is on file, the Applicant pages are used to connect a resume to a specific job.

Understanding How to Use Auto Populate with Apply for Job

If you have PeopleSoft Resume Processing installed, you can use it to automatically populate the fields on the Apply for Job pages by extracting information from the applicant's resume. This feature is available to new external applicants, who haven't submitted a resume, to save them time when entering information.

The auto populate feature works as follows:

1. Applicants attach their resume file or paste the resume text into a scrolling region.
2. PeopleSoft Resume Processing extracts recognized applicant information from the resume and the populates Personal Information , Work Experience, and Education pages in Apply for Job.
3. When the extraction is complete, the system displays the Apply for Job pages in the order you specify in the resume template.

   The resume template is determined from the recruitment templates associated with the jobs being applied for. If the applicant isn't applying for a specific job, the system uses the default resume template.
4. Applicants check the information, update fields, and provide additional information, as required.

Setting Up Apply for Job

To set up the Apply for Job transaction:

1. Create resume templates.

   See *PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce*, "Creating Recruitment Templates," Creating Resume Templates.
2. Link resume templates to your recruitment templates on the Recruitment Template Settings page.

   See *PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce*, "Creating Recruitment Templates," Creating Recruitment Templates.
3. (Optional). For US users enable the self-identification transaction on the eRecruit Installation page.

   See *PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce*, "Creating Recruitment Templates," Creating Resume Templates.
4. (Optional). Set up an attachments directory and FTP address.

   See *PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce*, "Setting Up Recruit Workforce," Defining Attachment Types.
5. (Optional). Set up auto populate.

   See *PeopleSoft 8.8 Resume Processing PeopleBook*, "Setting Up PeopleSoft Resume Processing," Setting Up Resume Processing Parameters.

Pages Used in Applying for Jobs

Page Name	Object Name	Navigation	Usage
Required Job Competencies Summary	HR_JOB_RQMTS_SUMM	Employee Self Service, Recruiting Activities, Job Requirements	View a list of the competencies and accomplishments that are associated with a particular job code. Competencies and accomplishments are assigned to jobs from Manage Competencies.
Current Career Position Descr	CM_COMP_DETAIL_SEC	Click a competency on the Required Job Competencies Summary page.	View a description of the selected competency.
Identification	HR_IDENTIFY_1_APP	Employee Self Service, Recruiting Activities, Job Postings/Apply for Job	External applicants use this page to sign into your PeopleSoft system. This page isn't displayed for employees. Applicants supply their email address and a password. Applicants who haven't submitted a resume click Register and returning applicants click the Sign On button.
Your Online Resume	HR_RES_A_WLCM_APP	Click Next on the Identification page.	Informational page. If you have auto populate set up, new external applicants have the option to attach their resume or paste their resume text. In the Refer a Friend transaction it displays instructions on how to refer a friend.
Auto Populate Paste Resume	AUTOPOP_PASTE	Click the Auto-Populate link on the Identification page.	This page appears if auto populate is set up and the applicant selects the paste option from the Your Online Resume page. The applicant copies their resume text into the scrolling region and resume processing starts extracting applicant data. When the extraction is complete, the system displays the Apply for Job pages populated with extracted data.

Page Name	Object Name	Navigation	Usage
Contact Details	HR_RES_A_CONT_APP	Click the Next link.	Used to enter contact information. This page is also used in the Refer a Friend transaction for employees to enter contact information for the applicant being referred.
Preferences	HR_RES_A_PREFS_APP	Click Next link.	Applicants enter their preferences for location and type of work they want.
Full Text Resume	HR_RES_A_TEXT_APP	Click the Next link.	Applicants copy their full resume into the application. If you have set up an attachment directory and FTP address, this page has an Add Attachment button to enable applicants to attach their resume to their application.
Current and Prior Employment	HR_RES_A_EMP_APP	Click the Next link.	Lists the applicant's current and prior employers.
Employment Details	HR_RES_D_EMP_APP	Click the Next link.	Applicants enter or update their current and prior employment history.
Federal Employment Details	GVT_HR_RES_D_EP_AP	Click the Next link.	This Federal page only appears if applicants are applying for a U.S. Federal Government position.
How Did You Find Out About Us	HR_RES_A_RFRR_APP	Click the Next link.	Used to enter referral information. If you have set up employee referral programs, when applicants specify an employee as the referral source, the system creates a referral record.
Competencies	HR_RESUME_COMPS	Click Next link.	Applicants rate their level of proficiency in competencies required for the job requisitions. The system omits this page if there are no competencies defined for the job requisitions.
Education	HR_RES_A_EDUCA_APP	Click the Next link.	Applicants enter their educational background and qualifications.
School Education Details	HR_RES_D_EDU_1_APP	Click the Next link.	Applicants enter details of schools attended
College/University Education Details	HR_RES_D_EDU_2_APP	Click the Next link.	Applicants enter details of colleges or university attended.

Page Name	Object Name	Navigation	Usage
Honors and Awards	HR_RES_A_HONOR_APP	Click the Next link.	Lists the honors or awards that the applicant has received.
Honor or Awards Detail	HR_RES_D_HONOR_APP	Click the Next link.	Applicants enter or update details of honors or awards that they have received.
Languages	HR_RES_A_LANG_APP	Click the Next link.	Lists the applicant's language skills.
Languages Detail	HR_RES_D_LANG_APP	Click the Next link.	Applicants enter or update details of languages in which they are proficient.
Licenses and Certificates	HR_RES_A_LIC_APP	Click the Next link.	Lists the applicant's licenses and certificates.
Licenses and Certificates Detail	HR_RES_D_LIC_APP	Click the Next link.	Applicants enter details of licenses or certificates that they have obtained.
Professional Memberships	HR_RES_A_MMBR_APP	Click the Next link.	Lists the organizations to which the applicant belongs.
Professional Memberships Details	HR_RES_D_MMBR_APP	Click the Next link.	Applicants enter or update details of any professional organizations to which they belong.
References	HR_RES_A_REFS_APP	Click the Next link.	Lists the applicant's references.
References Detail	HR_RES_D_REFS_APP	Click the Next link.	Used to provide reference names and contact information.
Training	HR_RES_A_TRAIN_APP	Click the Next link.	Lists the training courses that the applicant has completed.
Training Details	HR_RES_D_TRAIN_APP	Click the Next link.	Applicants enter or update information about training course that they have completed.
Federal Preferences	GVT_HR_RES_A_PF_AP	Click the Next link.	Applicants provide detailed information about prior employment with the U.S. Federal government.
Federal Priority Placement Information	GVT_HR_RES_A_PP_AP	Click the Next link.	Lists the applicant's priority placement information.
Employment Details	GVT_HR_RES_D_PP_AP	Click the Next link.	Enter and update priority placement information. This priority status is usually a result of involuntary displacement, a reduction in workforce, or an involuntary position change that entitles the applicant to a period of grade retention.

Page Name	Object Name	Navigation	Usage
Personal Information	HR_RES_A_PER_APP	Click the Next link.	Enter specific personal information. The Marital Status, Date of Birth, and Gender fields appear only if they have been set up on the Resume Options page.
Submit Resume	HR_RES_A_SUB_APP	Click the Next link.	Used to save and submit an application.
Screening Questions	ER_QUESTIONNAIRE	Click the Next link.	Applicants answer the screening questions associated with the job requisitions that they are applying for. The system omits this page if there are no questions defined for the job requisitions.
Submit Confirmation	HR_RES_SUB_CONFIRM	Click the Next link.	Confirms that the application or referral is completed and submitted correctly.
Invitation to Provide Self Identification Information	ER_SELF_ID_INVITE	Click the Next link.	For external applicants only. This page is displayed after submitting a resume if you have enabled self-identification and the applicant applies for a job in the USA. If applicants click the Accept button, the Self Identification Details page is displayed.

Referring a Friend

Employee referral programs enable you to reward employees for referring qualified applicants who become hired employees. Employee referral transactions enable both employees and applicants to submit referrals online.

- Employees refer applicants and submit the applicants' resumes through the Refer a Friend transaction.
- External applicants submit referrals by identifying the employee who referred them on a page in the Apply for Job transaction.

Employees can review the eligibility and payment status of the referrals they've submitted.

The Refer a Friend transaction uses the same pages as Apply for Job and View Job Postings transactions to view job postings, view job descriptions, and enter contact details. See the documentation of these transactions for details of the pages.

You can add additional pages to Refer a Friend when you set up the REFERRAL resume template on the Resume Options page.

Understanding the Referral Resume Template

Edit the resume template that employees use to refer an applicant in all Refer a Friend transactions.

Access the Resume Options page and select the REFERRAL template on the search page. For all Refer a Friend referrals you must use the REFERRAL resume template, which you can design according to your needs. The REFERRAL resume template is automatically associated with the Refer a Friend transaction. You do not have to associate it with a recruitment template.

This page is the same as the Resume Options page in the Apply for Job Transaction. Full documentation of the page is available for that transaction.

About Including the How Did You Find Out About Us Page

One of the pages available for templates on the Resume Options page is the "How did you find out about us?" page. This page enables the applicant to identify a referral source, including an employee who referred them. Whether you include this page in your template depends upon the purpose of the template.

- You do not need to include this page in the REFERRAL template because employees are automatically associated with the applicants they refer.
- You must include this page in resume templates for external applicants if you want to enable applicants to initiate an employee referral when they apply for jobs.

Understanding Employee Referrals

Following is a summary of the process of an employee referring an applicant using the Refer a Friend transaction:

- Employees can refer an applicant for specific job requisitions or without specifying any requisitions.
- They select requisitions on the View Job Postings page. They can access the View Job Postings page from the Refer a Friend transaction or go there directly and click a button to access the Refer a Friend transaction.
- Both internal and external job postings are available for selection on the View Job Postings page.
- The external applicant referred for an internal position is not visible to the manager or recruiter in the Requisition Activity or Search for Applicants transactions until the job is designated as external.
- The default referral template supplied by PeopleSoft requests employees to enter contact information for the applicant being referred and supply the applicant's resume. Only the name and email information is required.
- The employee's ID is automatically recorded as the applicant's referral source.
- The system provides error messages if all information is not complete when the employee clicks Submit. If information is complete, the employee sees a confirmation page.
- Upon successful submittal, the employee receives an email that includes the URL for viewing referral information and the applicant ID and application date associated with the referral.
- Applicants receive a confirmation email every time a referral is submitted.

  Applicants receive an email containing a URL and the user ID and password necessary to enter additional required information. They can also review and modify the information provided by the employee.

Understanding Applicant Referrals

Following is a summary of the process of an applicant submitting an employee as a referral source:

1. In the Apply for Job transaction, the applicant names the employee as the referral source.

   On the How Did You Find Out About Us page, the applicant supplies the employee's name and (if known) email address.

2. The applicant receives an email requesting additional application information and confirming that the employee referral has been received.

   If the applicant did not supply the employee's email address, the email requests the applicant to pass a referral track ID and a password to the employee, who can then contact the HR department to confirm the referral.

3. The employee receives an email requesting confirmation of the referral.

   The email includes a link to the Confirm Referral page with the necessary information to identify the referral.

   The email also contains a link to the Review Referral page where the employee can track the status of the referral.

4. The employee confirms or cancels the referral using the Confirm Referral transaction.

   The employee must confirm the referral and the applicant must be hired before any eligibility and award criteria can be evaluated.

Pages Used to Submit, Confirm, and Review a Referral

Page Name	Object Name	Navigation	Usage
Refer a Friend	HR_RES_REFER_APP	• Employee Self Service, Recruiting Activities, Refer a Friend Click the Refer a Friend button on the View Job Postings page. • Employee Self Service, Recruiting Activities, View Job Postings Click the Refer a Friend button on the View Job Postings page.	Elect whether to refer a friend to a specific job or to any open requisition.
Confirm Referral	ER_REF_CONFIRM1	Employee Self Service, Recruiting Activities, Confirm Referral	Employee enters the referral track ID and password received by email.
Confirm Referral	ER_REF_CONFIRM2	Click the Submit button on the Confirm Referral page	Employee confirms or cancels the referral initiated by the applicant.
Review Referral	ER_EE_REVW_DTL	Employee Self Service, Recruiting Activities, Review Referral	Employees view the current status of their referrals by applicant. Employees can view the eligibility and award payment status for each applicant they refer.

Entering Self Identification Information

The Self Identification transaction invites external applicants to provide gender and ethnicity information for EEOC reporting purposes. This transaction isn't for internal applicants, and it is not a mandatory part of the application process.

If you enable the transaction, applicants may access the transaction in two ways:

- On completion of Apply for Job.

  When external applicants apply for jobs located in the USA, the self-identification transaction is triggered after the applicant has submitted an application.

- From the eRecruit Applicant Homepage.

  When you enable the transaction, the system adds a link to the eRecruit Applicant Homepage for external applicants to provide self identification information at any time.

The information that the applicant supplies isn't part of the application or recruitment process, and access to the data is restricted.

Enable the transaction on the eRecruit Homepage Options page.

Page Used to Enter Self Identification Information

Page Name	Object Name	Navigation	Usage
Self Identification Details	ER_APP_SELF_ID	eRecruit Applicant Homepage, Self Identification	Enter gender and ethnicity information.

Entering Additional Requested Information

The Additional Requested Information transaction enables applicants to submit information that is required for requisition screening, such as competency information or screening questions. For example, if applicants submit a resume without applying for a specific job opening, they may later be required to answer screening questions defined for a job opening they want to apply for.

External applicants and employees access the Additional Requested Information transaction from the eRecruit Applicant Home page or the eRecruit Employee Home page.

The Additional Requested Information link is displayed if the applicant has been asked to provide additional information. Once the applicant has provided the information this link is removed.

When an applicant clicks the Additional Requested Information link, the system displays the Apply for Job pages, populated with the applicant's existing information. The pages displayed and the ordering are based on the resume template associated with the job requisitions that require additional information. Applicants review and edit the existing information, and enter additional information required.

Creating and Updating Resumes

Once applicants have a resume on file, the system automatically displays options for applicants to review and update their details. The system displays the applicant's most recent resume. Applicants can submit a new resume or update their contact information. If they decide to submit a new resume, the system displays the Apply for Job pages populated with the applicant's existing information.

Applicants can't apply for the same job twice unless they have been screened and rejected for that job. If they attempt to apply for a job they are already linked to, the system removes the job from the job basket.

Pages Used to Update Contact and Resume Information

Page Name	Object Name	Navigation	Usage
Resume	HR_RES_V_MAIN_APP	Employee Self Service, Create/Update Resume	Displays the applicant's submitted resume. The system displays only those sections required by the resume template associated with the jobs applied for.
Update Resume	HR_RES_V_UPD_APP	Click the My Resume Has Changed link on the Resume page	Applicants decide whether to update their contact information or submit a new resume. If applicants click Submit a new resume, the system displays the Your Online Resume page at the start of Apply for Job.
Contact Details	HR_RES_U_CONT_APP	Click Update Contact Details link on the Update Resume page.	Review and update name, address, telephone, or email information.
Previously submitted resumes	HR_RES_V_LIST_APP	Click the View resume History link on the Resume page.	Lists previous application dates. Applicants select the resume that they want to view.
Jobs Applied For	HR_RES_V_JOBS_APP	Click the Jobs Applied For link on the Resume page.	Applicants view the jobs that they applied for with that resume.
Job Detail	HR_RES_V_JOB_D_APP	Click a job title on the Jobs Applied For page	View the description of the selected job.

Submitting Additional Attachments

It might be necessary to applicants to submit additional documents such as:

- References
- Certifications
- Drug test results

The Additional Attachments transaction enables applicants to submit this information.

Prerequisites

Before you can use Additional Attachments, define the Attachment Types on the Attachment Type page.

See *PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce*, "Setting Up Recruit Workforce".

Page Used to Submit Additional Attachments

Page Name	Object Name	Navigation	Usage
Additional Attachments	ER_APP_ATTACHMENT	Employee Self Service, Recruiting Activities, Additional Attachments	Submit additional required documents.

Viewing Application Status

Applicants use Application Status to view the progress of their applications.

Page Used to View Application Status

Page Name	Object Name	Navigation	Usage
Application Status History	ER_POSN_STATUS	eRecruit Applicant Homepage, View Application Status eRecruit Employee Homepage, View Application Status	Applicants view a summary of the jobs applied for, and the application status.

Viewing the Interview Schedule

Applicants use the Interview Schedule self-service transaction to view their interview schedule. For each job the applicant has applied for the schedule includes the date and time, the interviewer's name, and location of the interview.

Recruiting administrators set up interviews using Schedule Interview in Human Resources − Recruit Workforce. If you have PeopleSoft eRecruit Manager Desktop, hiring managers and recruiters can also set up interviews using the Schedule Applicant for Interview self-service transaction.

Page Used to View Applicant Interview Schedule

Page Name	Object Name	Navigation	Usage
Interview Schedule	ER_INTVW_SCHED_APP	Applicant Home, Interview Calendar	Applicants view a summary of their scheduled interviews, listed by job requisition.

CHAPTER 5

Using the Job Agent

This chapter provides an overview of the Job Search Agent feature and describes how to

- Enter job agent profiles.
- Match job agent profiles to job requisitions.

Understanding the Job Agent Feature

The Job Agent feature has two self-service transactions:

- Job Search Agent
- Job Search Agent Results

Job Search Agent enables anyone to create, update, or delete a job search profile. The user can remain anonymous to use this feature and only supply an email address. This job search profile is a list of criteria describing the type of position the person is interested in applying for.

A system administrator runs a process that compares the profile criteria to open job requisitions. If a match is found, an email is sent to the person notifying them of the position.

The email contains links to Job Search Agent Results that enables the users to view the jobs that match their profile.

Prerequisites

Enter the number of days you want the system to hold an applicant's job agent profile. Recruiting Administrators enter this number in the Days Job Agent Profile Active field, located on the eRecruit Installation page.

See Also

Chapter 3, "Setting Up eRecruit," page 7

Entering Job Agent Profiles

This section provides an overview of entering a job agent profiles and discusses how to create job agent profiles.

Understanding How to Enter Job Agent Profiles

An applicant or employee signs on to the self-service system. Applicants that have not applied for a job can remain anonymous and only provide an email address and password. If they are already registered, they enter their email address and password.

From the eRecruit Applicant Homepage or eRecruit Employee Homepage, the applicant or employee selects Job Search Agent. The user can create and save a set of criteria that identifies the type of job they are interested in applying for. The user can have only one set of criteria at any one time. Each time they enter a new set of criteria it will write over the previously stored set.

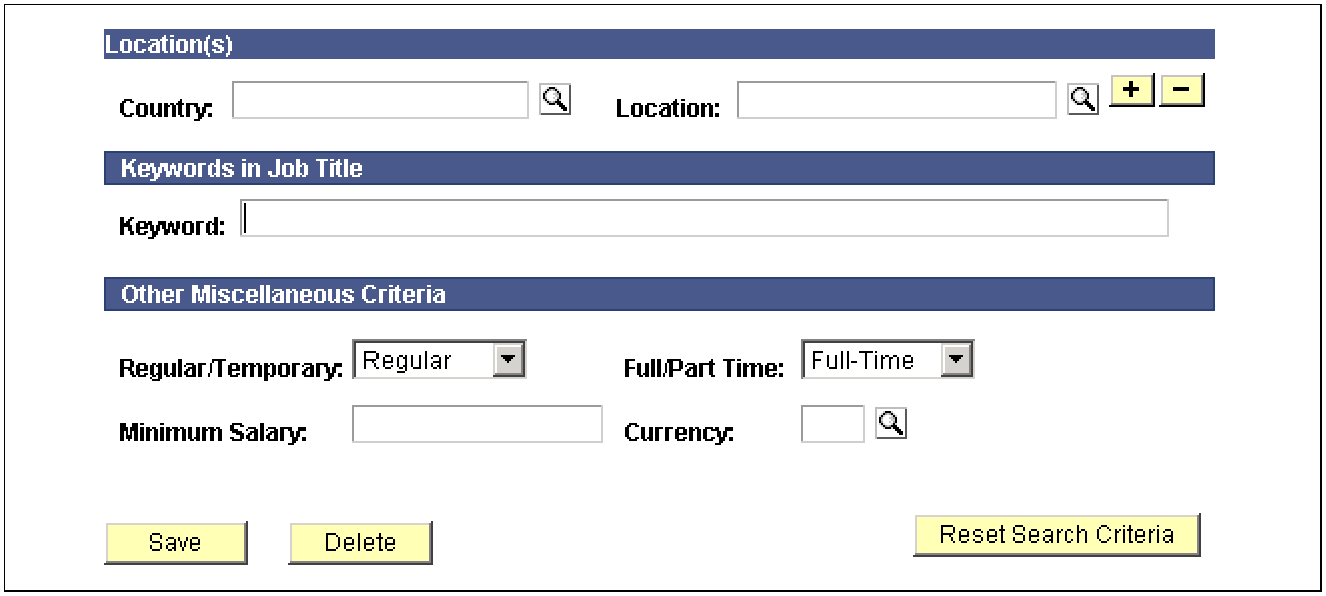
Page Used to Enter Job Profiles

Page Name	Object Name	Navigation	Usage
Signon	HR_IDENTIFY_1_APP	Employee Self-Service, Recruiting Activities, Job Search Agent	Signon page for applicant.
Job Search Agent	HR_JOB_POST_L	Click Signon	Defines the search criteria for jobs that an applicant or employee might be interested in applying for.

Creating Job Agent Profiles

Access the Job Search Agent page.

Job Search Agent Profile page (1 of 2)



Job Search Agent Profile page (2 of 2)

Job Categories This group box enables you to select your areas of interest. If you select one or more areas, the system will compare your profile only with job requisitions with job codes that have this category entered in the Job Function Code field on the Job Code Profile page. If you leave the group box blank, the system will compare your profile with all open job requisitions.

Locations This group box enables you to select the country or location in which you are interested in working. The Job Agent Process will compare this field to the Location Code field on the Job Requisition Information page.

Keyword or Phrase This group box enables you to enter specific keywords that can further narrow the job requisitions with which your profile will be compared. The Job Agent process will match these keywords to the job posting title and description.

Save Click Save to save the job agent profile record.

Delete Click Delete to delete the job agent profile record.

Reset Criteria Deletes any criteria that have been entered.

Matching Profiles to Job Requisitions

This section discusses how the system matches profiles to job requisitions and describes how to run the Job Agent process.

Understanding How Profiles Are Matched to Job Requisitions

To match an applicant or employee's job agent profile to open job requisitions, an administrator runs the Job Agent process. This process will:

- Search for old profiles in ER_AP_PROFILE. If the profile is out of date, the profile is deleted. The system decides whether the profile is old, by taking the Last Modified Date in the ER_APP_PROFILE table adding the number of days entered in the Days Job Agent Profile Active field on the eRecruit Installation Options page and comparing that date to the system date. If the new date is less than the system date, the profile is out of date and will be deleted.
- Profiles are then compared to job requisitions. The job requisition must be approved, open, and the posting medium is internet. If the profile is for an external applicant, the job requisition must have a posting type of external. If the profile is for an employee or anonymous user, the job requisition must have a posting type of internal.
- If all the entered criteria matches the data in the job requisition data, the results are written to a file called ER_AGENT_RESULTS and a workflow process called ER_EMAIL_AGENT is initiated. This workflow process sends an email to the applicant notifying them of the job requisition. Users are notified only once about job requisitions that match their profiles.

Page Used to Match Profiles to Job Requisitions

Page Name	Object Name	Navigation	Usage
Job Search Agent	RUNCNTL_ER_AGENT	Recruiting, Identify/Process Applicants, Run Job Agent Process	Initiates the process that compares an applicant or employee's job agent profile with open job requisitions.

Reviewing Results From Job Agent

This section lists the page used to review jobs that match the

Page Used to Review Results

Page Name	Object Name	Navigation	Usage
Job Search Agent Results	HR_JOB_POST_L	Employee Self Service, Recruiting Activities, Job Search Agents Results	Applicants review jobs that match their profiles.

CHAPTER 6

Interviewing Applicants

This chapter describes how employees can:

- View their personal interview schedule and the entire interview team schedule.
- Enter their recommendations about the applicant.

Prerequisites

You must set up the interview evaluation template which defines the form interviewers use to evaluate applicants for the requisition.

See Also

PeopleSoft Human Resources: Recruit Workforce PeopleBook, "Creating Templates"

Viewing the Interview Schedule

This section describes the two ways employees can view interview schedules.

Pages Used View Interview Schedules

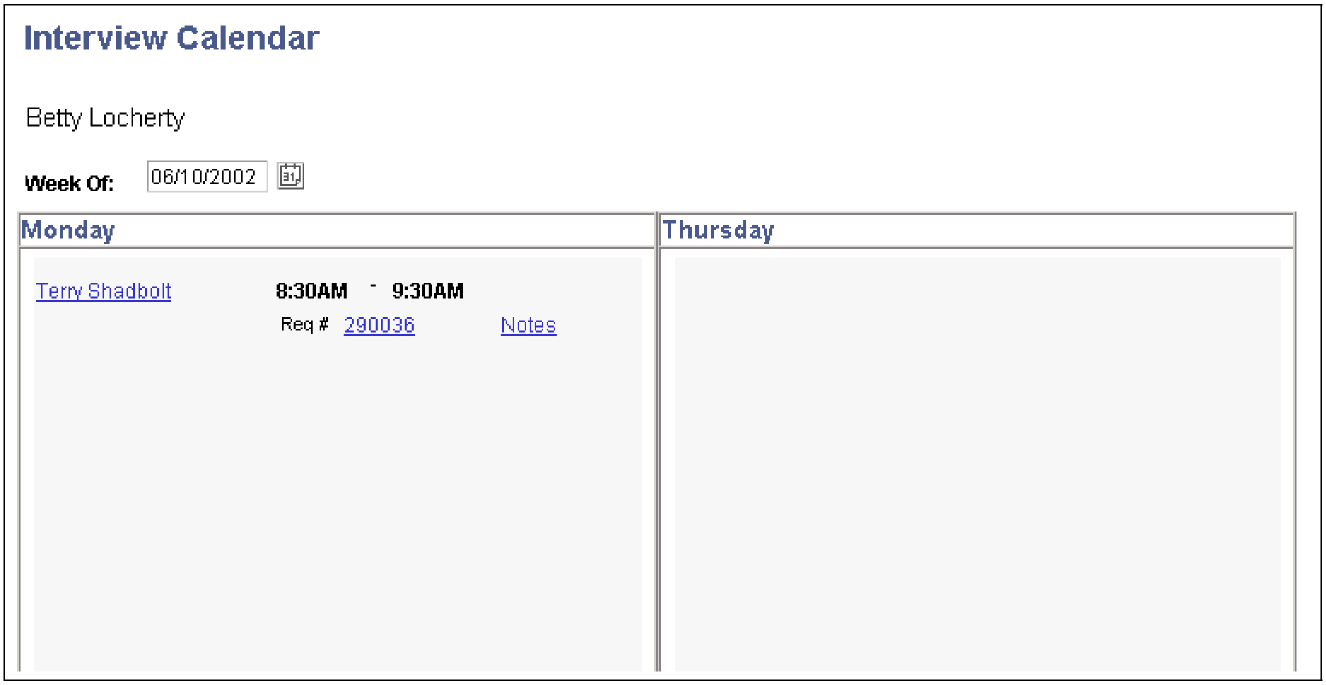
Page Name	Object Name	Navigation	Usage
Interview Calendar	ER_INTVW_SCHED_MGR	Employee Self Service, Recruiting Activities, Interviewer's Calendar	View the current week's interview schedule. Employee's can only view interview schedules where their name was entered by an administrator on the Interview Schedule page, or by a manager or recruiter on the Schedule Interview page.
Schedule Notes	ER_INTCMNT_MON_SEC	Click the Notes link on the schedule page.	Interviewers view comments entered by the person scheduling the interviews using the Interview Schedule or the Schedule Interview pages.
View Interview Team Calendar	ER_JOB_REQ_LST	Employee Self Service, Recruiting Activities, Interviewer Team Schedule	View the entire interview teams schedule. Employee's can only view interview schedules where their name was entered by an administrator on the Interview Schedule page, by a manager or recruiter on the Schedule Interview page, or where the employee is the originator, the authorizer, or recruiter of the requisition.

See Also

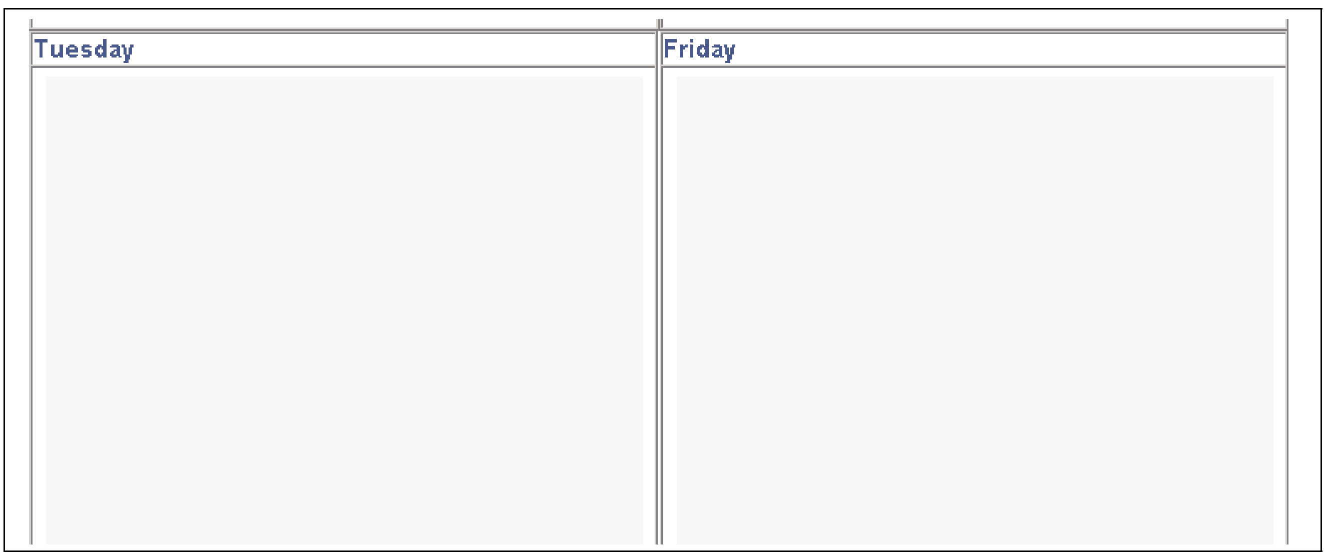
PeopleSoft 8.8 Human Resources PeopleBook: Recruit Workforce, "Setting Up Recruit Workforce"

Reviewing Personal Interview Schedules

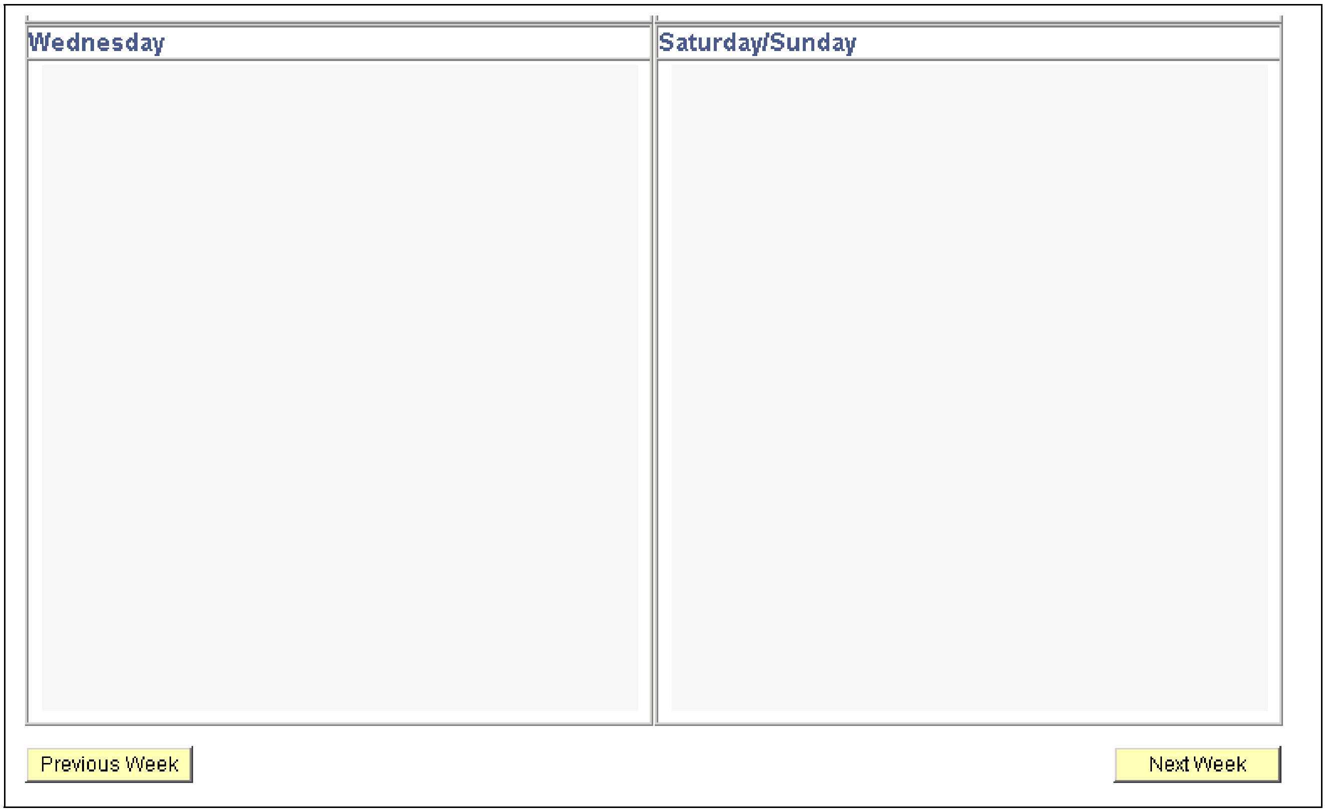
Access the Interview Calendar page.



Interview Calendar page (1 of 3)



Interview Calendar page (2 of 3)

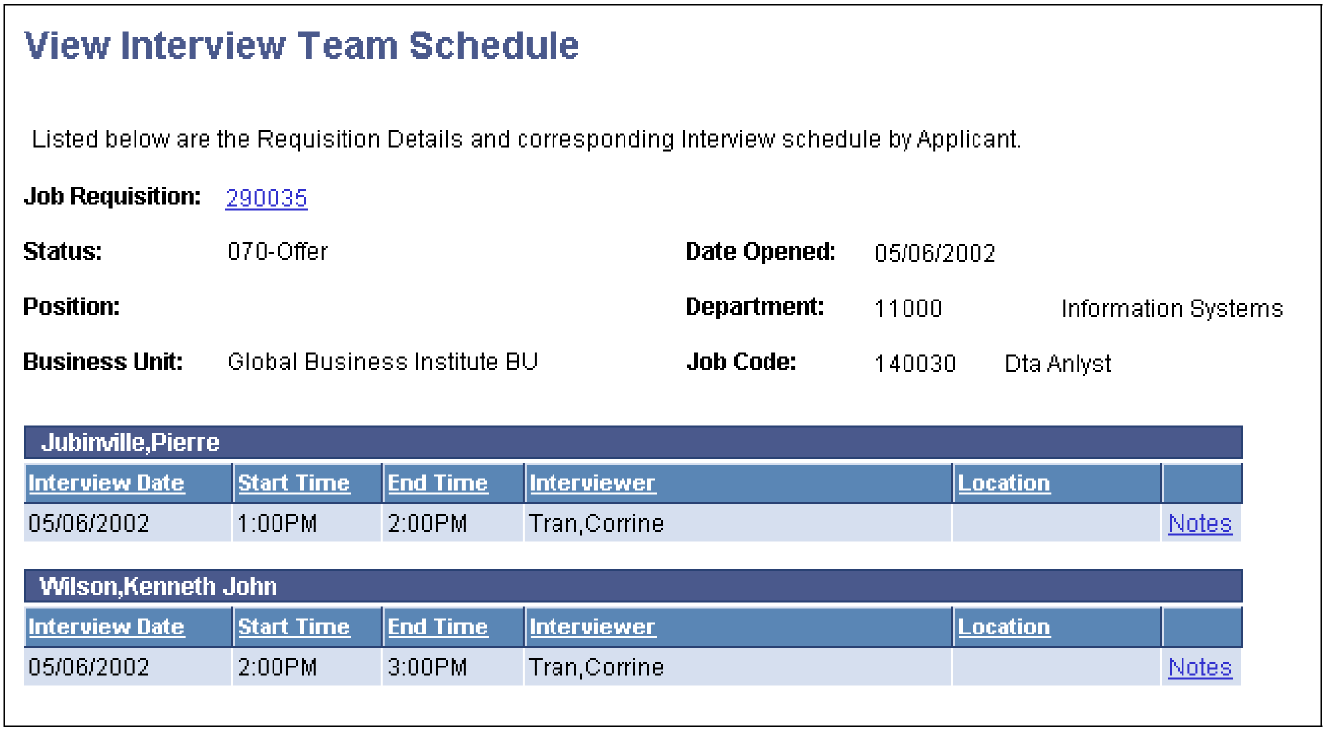


Interview Calendar page (3 of 3)

Week of	Select the week to review.
Applicant Name link	Click the applicant name to display the Applicant Information page.
Requisition Number link	Click the requisition number link to display the Requisition Summary page.
Notes	Click the Notes link to display the Recruiter Comments page.

Review the Team's Interview Schedule

Access the View Interview Team Calendar page.



View Interview Team Schedule

Listed below are the Requisition Details and corresponding Interview schedule by Applicant.

Job Requisition: 290035

Status: 070-Offer **Date Opened:** 05/06/2002

Position: **Department:** 11000 Information Systems

Business Unit: Global Business Institute BU **Job Code:** 140030 Dta Anlyst

Jubinville,Pierre

Interview Date	Start Time	End Time	Interviewer	Location	
05/06/2002	1:00PM	2:00PM	Tran,Corrine		Notes

Wilson,Kenneth John

Interview Date	Start Time	End Time	Interviewer	Location	
05/06/2002	2:00PM	3:00PM	Tran,Corrine		Notes

View Interview Team Schedule

Requisition Number link	Click the requisition number link to display the Requisition Summary page.
Notes link	Click the Notes link to display the Recruiter Comments page.

Entering Interview Results

Interviewers use the Interview Evaluations self-service transaction to enter results of completed interviews. The system lists applicants where the employee is named as an interviewer and the interview date is the current date or earlier.

Interviewers assign a rating, enter their recommendations, and enter additional comments. When the interviewer submits the evaluation, this triggers workflow to notify the hiring manager and recruiter of the job requisition.

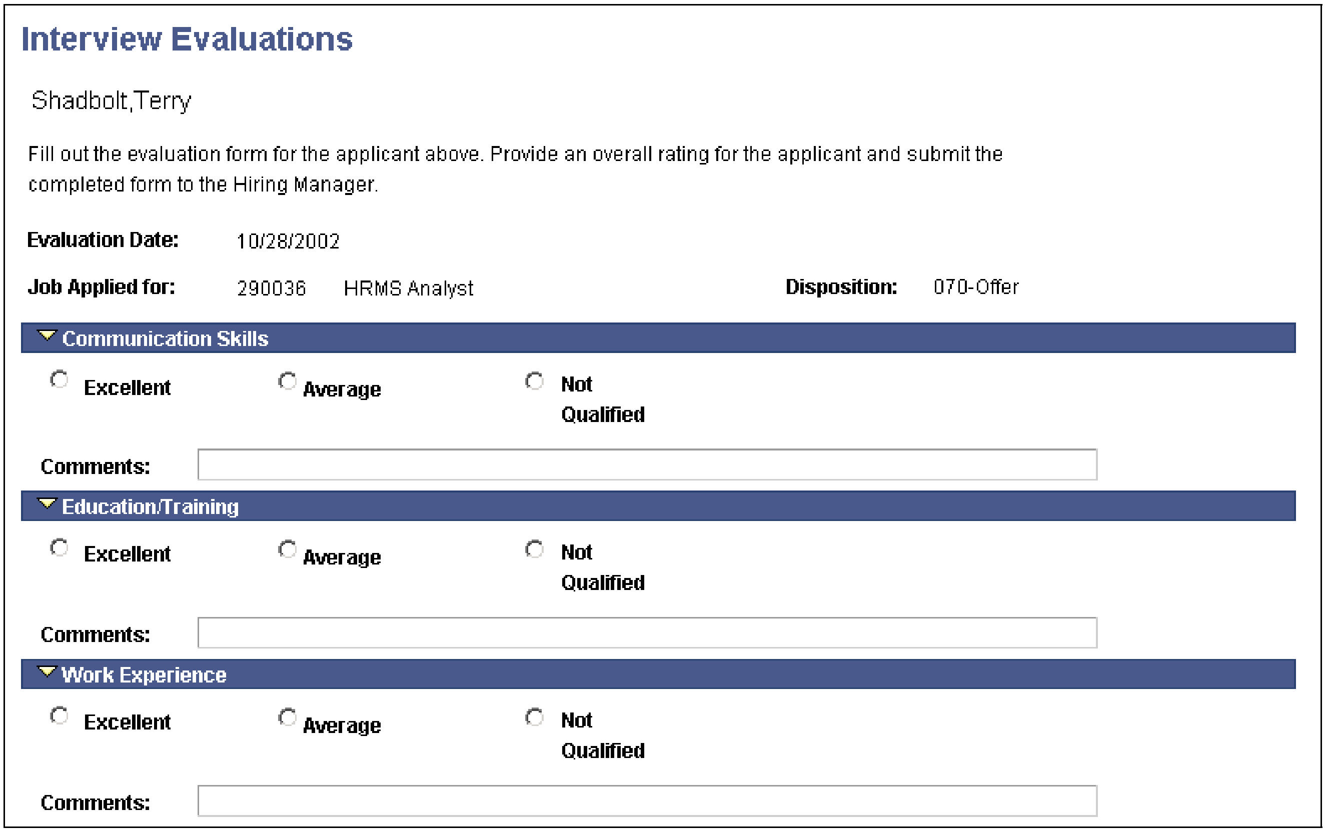
At this point, either an administrator, the hiring manager, or recruiter reviews the evaluations and makes a final decision. If eRecruit Manager is used, managers and recruiters can use View Interview Evaluation Summary to make a final decision. If eRecruit Manager is not available, an administrator can use Track Applicant Activities to enter the evaluations and to make a final decision.

Pages Used to Enter Interview Evaluations

Page Name	Object Name	Navigation	Usage
Interview Evaluations	ER_INT_EVL_LST	Employee Self Service, Recruiting Activities, Interview Evaluations	Interviewers select an interviewed applicant.
Interview Evaluation	ER_INTVW_EVL_FORM	Click applicant name on the Interview Evaluations page.	Interviewers rate the applicant in predefined areas and give an overall rating and recommendation. If interviewers click Save without selecting Submit Form, they can modify the evaluation form later. However, once they submit the form, this page is display only.
Recommendation Reasons	ER_INTVW_EVL_RSNS	Click the Recommendation Reasons link on the Interview Evaluation Form page.	Interviewers choose a reason for their recommendation.

Entering an Interview Evaluation

Access the Interview Evaluations page. The evaluation categories that display are determined by the Interview template.



Interview Evaluations

Shadbolt,Terry

Fill out the evaluation form for the applicant above. Provide an overall rating for the applicant and submit the completed form to the Hiring Manager.

Evaluation Date: 10/28/2002

Job Applied for: 290036 HRMS Analyst **Disposition:** 070-Offer

Communication Skills

Excellent Average Not Qualified

Comments:

Education/Training

Excellent Average Not Qualified

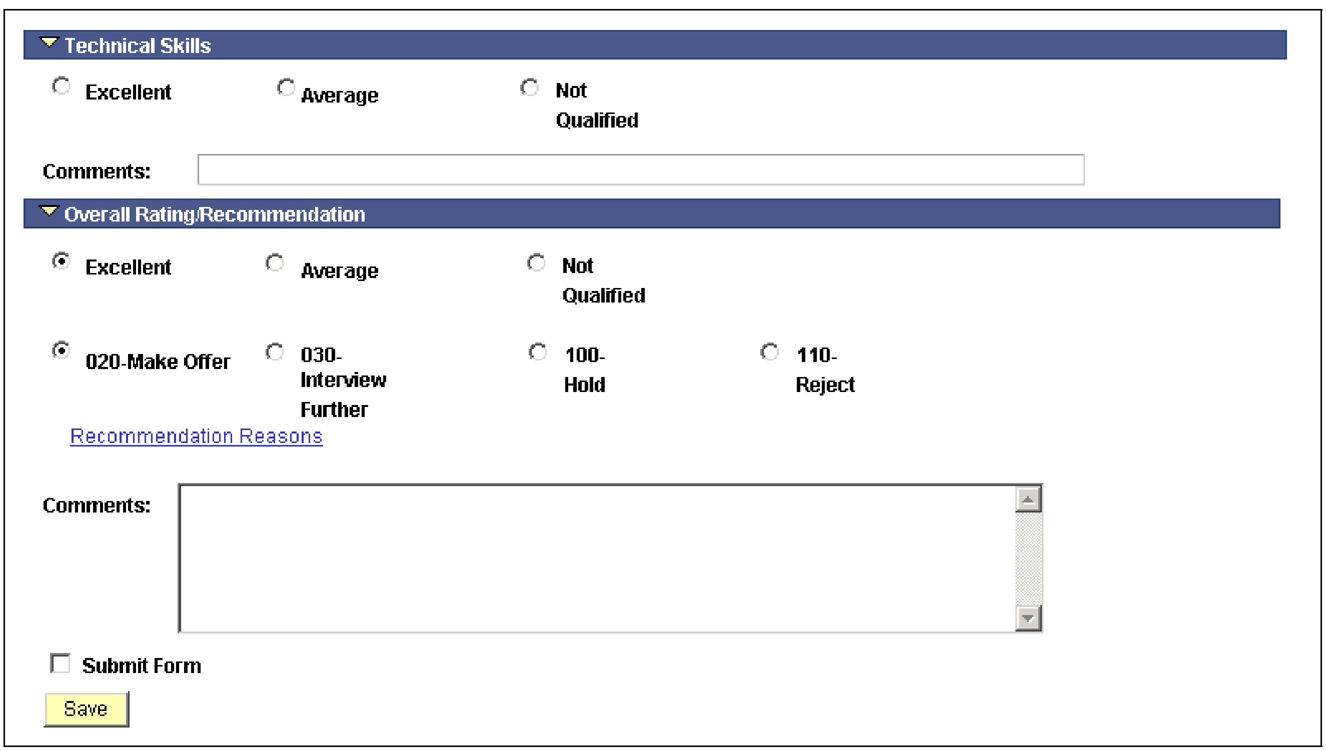
Comments:

Work Experience

Excellent Average Not Qualified

Comments:

Interview Evaluations page (1 of 2)



Technical Skills

Excellent Average Not Qualified

Comments:

Overall Rating/Recommendation

Excellent Average Not Qualified

020-Make Offer 030-Interview Further 100-Hold 110-Reject

Recommendation Reasons

Comments:

Submit Form

Save

Interview Evaluations page (2 of 2)

Select a rating within each category and enter any relevant comment about the applicant.

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.

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