PeopleSoft®

PeopleSoft 8.8
Human Resources PeopleBook:
Manage Employee Reviews

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Human Resources PeopleBook:
Manage Employee Reviews
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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 Human Resources Manage Employee Reviews 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 Human Resources: Employee Review PeopleBook* provides you with implementation and processing information for your PeopleSoft Human Resources Manage Employee Reviews 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 Human Resources Manage Employee Reviews

This chapter lists PeopleSoft Human Resources Manage Employee Reviews business processes and discusses PeopleSoft Human Resources Manage Employee Reviews implementation tasks.

PeopleSoft Human Resources Manage Employee Reviews Business Processes

The following business processes are available in PeopleSoft Human Resources Manage Employee Reviews:

- Create employee review documents.
- Manage employee reviews.

We cover these activities in this PeopleBook.

PeopleSoft Human Resources Manage Employee Reviews Implementation

The PeopleSoft Human Resources Manage Employee Reviews table-loading implementation includes setting up the following:

- Setting up HRMS fundamental tables.
- Setting up HRMS core tables.
- Setting up HRMS Employee Review tables.

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

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

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Human Resources Manage Employee Reviews requires the setup of fundamental HRMS tables that are common to multiple HRMS applications. The information defined in these tables is the basis for the PeopleSoft Human Resources Manage Employee Reviews setup.

Step	Reference
1. Set up the HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*

Setting Up HRMS Core Tables

In addition to the fundamental HRMS tables, several HRMS tables are relevant to PeopleSoft Human Resources Manage Employee Reviews.

Step	Reference
1. Create rating models. These rating models are also used by Competency Management and eDevelopment.	
2. Define competencies. Competency information is setup only if you include competencies in your review documents. Competency information is also used by Competency Management, eDevelopment, and eRecruit.	*PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*, “Setting Up Competencies and Accomplishments”

Setting Up Core PeopleSoft Human Resources Manage Employee Reviews Tables

PeopleSoft Human Resources Manage Employee Reviews requires the setup of several product specific tables. The information defined in these tables is the basis for the PeopleSoft Human Resources Manage Employee Reviews setup.

Step	Reference
1. Define employee review templates.	Chapter 3, “Creating Employee Review Templates,” page 7
2. Clone employee review template.	Chapter 3, “Creating Employee Review Templates,” Cloning Employee Review Templates, page 10
3. (Optional) (JPN) Create review definitions.	Chapter 3, “Creating Employee Review Templates,” (JPN) Creating Review IDs, page 13

CHAPTER 2

Understanding PeopleSoft Human Resources Manage Employee Reviews

This chapter discusses the PeopleSoft Human Resources Manage Employee Reviews:

- Features
- Integrations
- System

PeopleSoft Human Resources Manage Employee Reviews

PeopleSoft Human Resources Manage Employee Reviews business process is a competency-based assessment tool with the ability to track individuals' goals and assess goals attainment. The primary purpose of the Human Resources Employee Review business process is to drive competency-based training, but it can be used to drive competency-based rewards and compensation.

PeopleSoft's Human Resources Employee Review business process includes the following transactions:

- Generate employee review documents.
- Update and review goals and competencies associated with an employee review.
- Complete the employee review.
- Transfer employee review documents to another manager.
- Monitor late and missing employee review documents.

We cover these activities in this PeopleBook.

PeopleSoft Human Resources Manage Employee Reviews Integrations

PeopleSoft Human Resources Manage Employee Reviews business process integrates with the following PeopleSoft applications:

- PeopleSoft Human Resources Manage Competencies (sends and receives).
- PeopleSoft Human Resources Plan Salaries (sends and receives).

We cover integration considerations in the implementation chapters in this PeopleBook.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Enterprise Integration Points in HRMS”

Using Your Employee Review System

PeopleSoft Human Resources Manage Employee Reviews business process comprises the following main phases of operation:

1. Set up supporting tables.
2. Generate review documents.
3. Maintain review documents.
4. Monitor review documents.

Setting Up the Supporting Tables

The following is a list of the basic setup tasks administrators complete before managers can create employee review documents.

1. Define rating models.
2. Define competencies.
3. (Optional) Define Japan review IDs.
4. If necessary, create new employee review templates.

Creating Employee Review Documents

The following is a list identifying the two method managers can use to create employee reviews.

1. Create employee review documents for direct reports.
2. Create employee review documents by group.

Note. Managers have the option of creating employee self-appraisal documents from within the employee review document that is created from either of the two methods.

See Chapter 4, “Managing Employee Reviews,” Creating Employee Review Documents, page 15.

Manage Employee Review Documents

The following is a list of the tasks managers, employees, and administrators can perform to manage the employee review process.

1. Managers update competencies and goals in the employee review document. Once these are defined on the employee review document, the manager can create an employee self-appraisal document that is an exact duplicate of the employee review document.
2. If the manager has created a employee self-appraisal document, the employee can update the competencies and goals contained in their self-appraisal document, and rate their own performance.
3. The manager records an evaluation of the employee against the goals and competencies contained in the review document.
4. The manager or an administrator can transfer the employee review document to another manager.
5. Administrators can print reports that list late or missing employee reviews.

See Chapter 4, "Managing Employee Reviews," page 15.

CHAPTER 3

Creating Employee Review Templates

This chapter discusses employee review templates and describes how to create them.

Understanding Employee Review Templates

Employee review templates are the foundation for your employee review documents. PeopleSoft provides a basic template that contains the following sections:

- General Information
- Competencies
- Goals
- Overall Rating

From this basic template, you will create other templates that fit your organization's structure and needs. The basic template is provided by PeopleSoft and cannot be altered.

General Information

For General information, you identify the *document type* for this template. Document types help organize your employee review documents. You can use them to narrow the focus when printing late or missing employee review reports or to limit the search criteria when looking up employee reviews. PeopleSoft provides five document types for your use:

- Annual Review
- Project Review
- Performance/Salary Evaluation
- Performance Review
- Salary Planning

You can also identify whether the documents generated from this template are official. Results of official documents can be used by the Salary Planning by Group process and the Salary Increase Matrix function in PeopleSoft Human Resources. If an employee has more than one official document, these processes use the results of the document with the latest period end date.

For Japan, the *Review ID* is identified and is used by the JPN salary increase processes in Plan Salaries. In some organizations, the types of reviews that are given and the review periods in one business unit may differ from the types of reviews given and review in another business unit. Review IDs are used to identify which document types are valid for a particular SetID. You also define whether the performance results are to be considered by the Grade Advance Eligibility feature of the Plan Salaries business process. The plan salaries process recognizes employee review results by the review ID linked to the template which is used to create the employee review document.

Competencies Section

In this section, you identify the rating model and calculation method that will be used to rate an employee. Although competencies can be manually added to any employee's review document, you can also enter one or more competencies that will automatically appear on each review created using this template. The rating models and performance criteria originate from Human Resources Manage Competencies business process.

PeopleSoft provides two calculation methods for calculating a summary rating for all competencies:

- *Average*. To use this calculation method, rating models associated with the competencies section and its individual competencies must define numeric ratings. The system uses the numeric ratings that corresponds to the qualitative ratings (defined on the rating model) to calculate a weighted average, if weightings exist; otherwise it calculates a straight average. It then converts this average back to a qualitative rating, again using the rating model.

  Note. Weights are used when the calculation method is *Average*. Weighting a competency enables you to place more or less significance on a particular competency relative to the other competencies in the review.

- *Summation*. To use this calculation method, rating models that are associated with the competencies and the competency section and must define review points. The rating model for the competency section must also define point ranges (From Points and To Points). The system converts qualitative ratings to review points (defined in the rating model), calculates the total review points, and refers to the point range defined on the competency section's rating model to convert this total into the corresponding review rating for the competency section. Weightings are ignored.

Note. PeopleSoft recommends using the *Average* method over the *Summation* method. It's easier to understand, set up, and maintain, and you can achieve the same results by using weighted averages.

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments".

Goals Section

This section is used in the Employee Review for managers and employees to add goals in the review document. Goals cannot be entered into the template—they must be directly entered into the review document after it's been created from the template.

Overall Summary Section

This section identifies the employee's overall performance rating. The system converts the rating from the competencies section into an overall summary rating, using the calculation method and rating model specified for the overall summary section.

PeopleSoft provides three calculation methods for calculating an overall summary rating:

- *Average*. To use this calculation method, rating models associated with both the competencies section and overall summary section must define numeric ratings. The system uses the numeric ratings, that correspond to the qualitative rating of the competencies section defined on the rating model, and converts it back to a qualitative rating using the rating model associated with the overall summary.
- *Summation*. To use this calculation method, rating models associated with both the competencies section and the overall summary section and must define review points. The rating model for the overall summary section must also define point ranges (From Points and To Points). The system converts the qualitative rating of the competencies section to review points defined in the rating model, and refers to the point range defined on the overall summary section's rating model to convert this total into the corresponding review rating for the competency section.
- *Review Band*. This calculation method is similar to *Summation*, and is unique to the Overall Summary section of a review document. To use this method, the rating model that's associated with the overall summary section must have Review Band turned on and define review points as well as point ranges (From Points and To Points). During the calculation process, the system computes the total review points for the overall summary section and converts this total into the equivalent review band on the employee review.

Using Different Calculation Methods in the Same Template

The Competency and Overall Summary sections can have different calculation methods; however, the calculation method that you select for the overall rating (the Overall Summary section) determines which calculation methods the competency section of the document can use. This is illustrated in the following table.

Calculation Methods Allowed in Overall Summary Section	Calculation Methods Allowed in Competency Section
Average	Average
Summation	Average*, Summation
Review Band	Average*, Summation

* You must define review points for these sections in addition to numeric ratings. The system converts section ratings to review points to determine the overall rating.

Guidelines for Creating Employee Review Templates

PeopleSoft recommends that you limit the number of templates you create for each document type. This makes it easier for users to select the correct template when they generate review documents and simplifies template maintenance.

At least one template must be cloned from the Basic Template, before you can begin the employee review process.

Note. The basic template cannot be updated and is used strictly for cloning purposes.

Prerequisites for Creating Employee Review Templates

Before you create an employee review template:

1. Create rating models.
2. Define competencies.
3. (JPN) Create review IDs.

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments".

Defining Templates

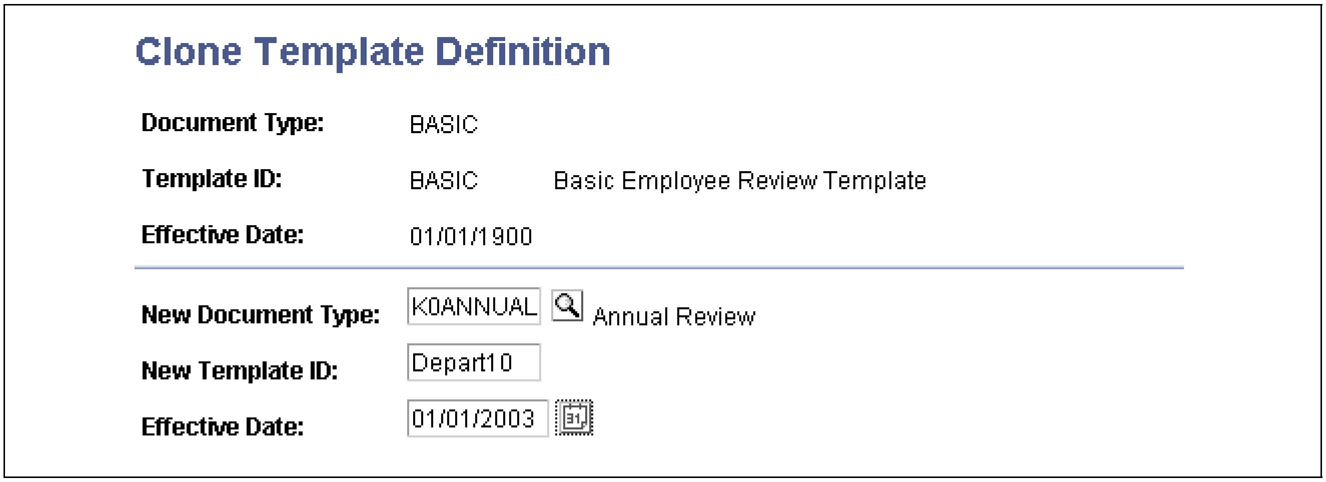
This section discusses:

Pages Used to Create Employee Review Templates

Page Name	Object Name	Navigation	Usage
Clone Template Definition	EP_CLONE_TMPL	Set Up HRMS, Workforce Development, Clone Employee Review Template	Create a new employee review template.
Define Empl Review Template – General	EP_TMPL_BASIC1	Set Up HRMS, Workforce Development, Define Empl Review Template	Describe and activate an employee review template.
Define Empl Review Template – Structure/Content	EP_TMPL_BASIC2	Set Up HRMS, Workforce Development, Define Empl Review Template Click the Structure/Content tab.	Define the rating model, calculation method, competencies and goals, and the weight of the competencies for the employee review template.
Review Definition Table JPN	REV_DEF_TBL_JPN	Set Up HRMS, Workforce Development, Define Review JPN	Define the Review ID that is used to identify the specific document types used per Set ID for an organization and define the begin and end dates for review periods.

Cloning Employee Review Templates

Access the Clone Template Definition page.

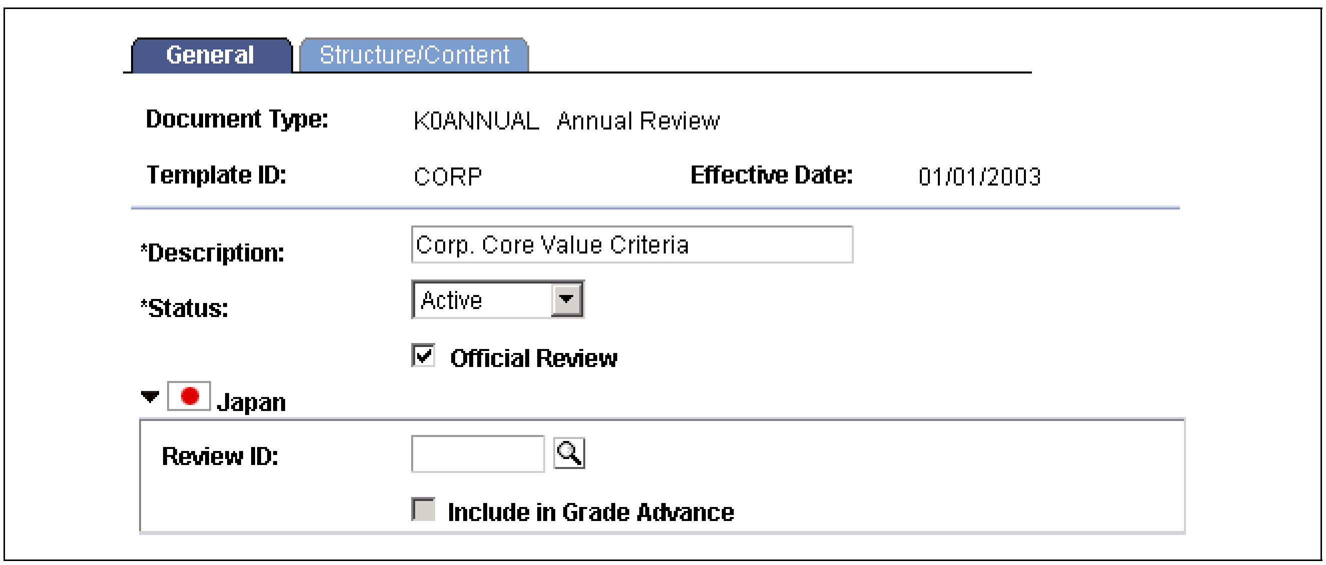


Clone Template Definition page

New Document Type Select the document type you want to copy into the new employee review template.

Creating or Modifying Employee Review Templates

Access the Define Empl Review Template – General page.



Define Empl Review Template – General page

Official Document Select this check box to designate that review documents generated for this document type are official. You can designate any number of templates as official.

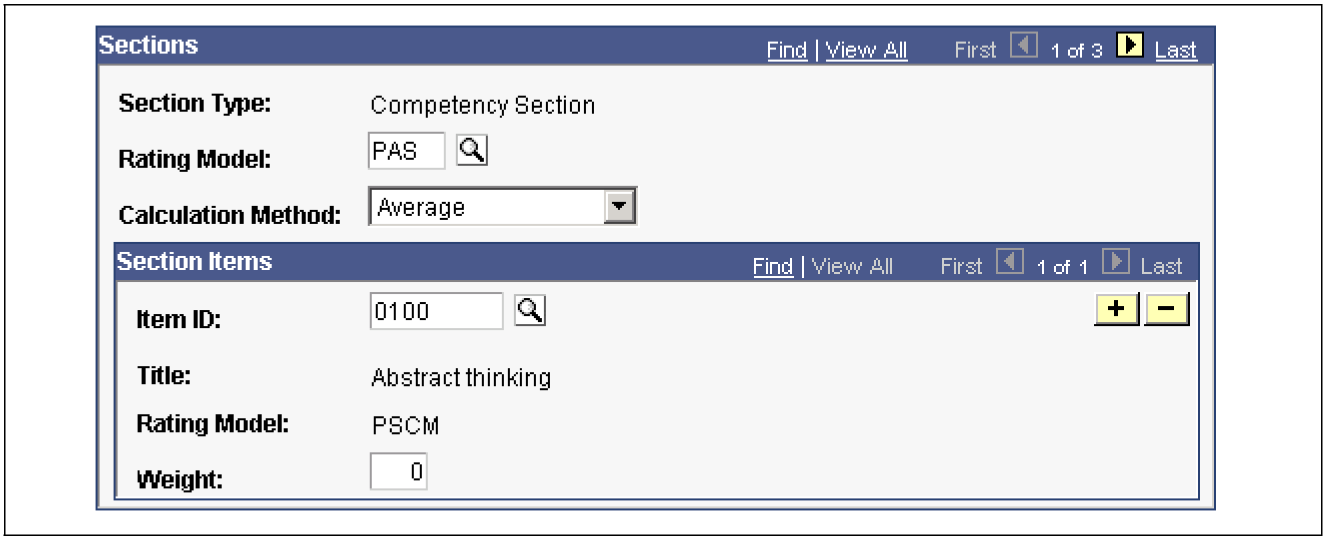
By selecting this field, you enable the Salary Planning by Group process to retrieve rating and review points for review documents created from this template. You also enable the Salary Increase Matrix to retrieve the rating. If an employee has more than one official review document, these processes use the results of the review document with the latest period end date.

Review ID To enable the (JPN) Salary Planning process by review ID, select the ID here. You define IDs on the JPN Review Definition Table page. The prompt table displays only those review documents defined for the selected document type.

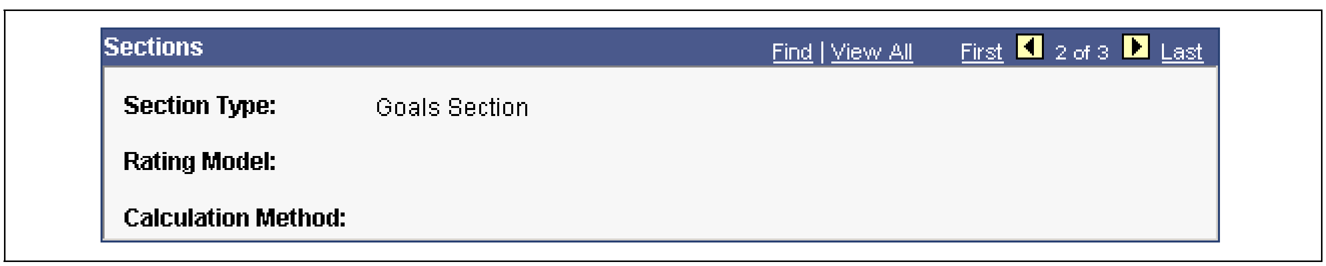
Include in Grade Advance This field indicates whether the selected Review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is set up on the JPN Review Definition Table page.

Updating Employee Review Templates

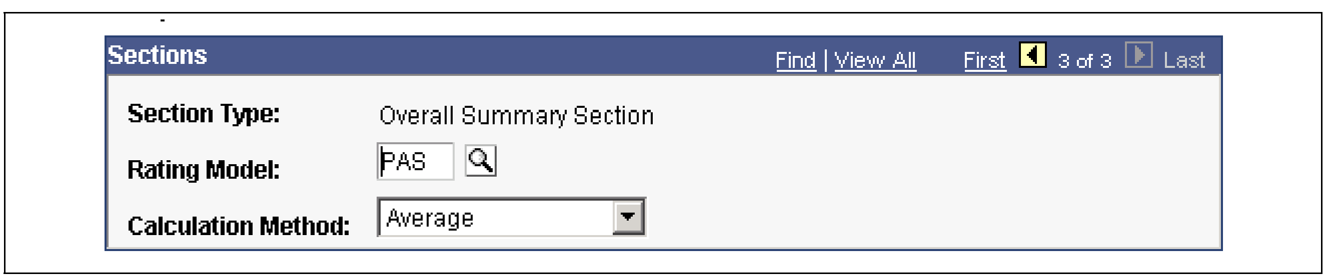
Access the Define Empl Review Template – Structure/Template page.



Define Empl Review Template – Structure/Template: Competency Section page (1 of 3)



Define Empl Review Template – Structure/Template: Goals Section page (2 of 3)



Define Empl Review Template – Structure/Template: Overall Summary Section page (3 of 3)

Competency Section

Rating Model

Determines which values will be used to rate an employee's performance or proficiency when calculating the rating for the competencies section across the employee's individual competencies.

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Competencies.

Calculation Method

Select the method for calculating the section rating. Options are *Summation* and *Average*.

See the *Using Different Calculation Method in the Same Template* section in this chapter.

Item ID

Select an item or competency by which you want evaluated in every review document created from this template.

Weight

Used only when *Average* is selected as the Calculation Method. Enter the weight of this competency relative to all other competencies. Leave the field blank if all competencies are to be weighted equally.

Goals Section

Goals are not entered on the template, you enter them directly into the review document.

Overall Summary Section

Rating Model

Determines which values will be used to rate an employee's overall summary rating.

See *PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Competencies.

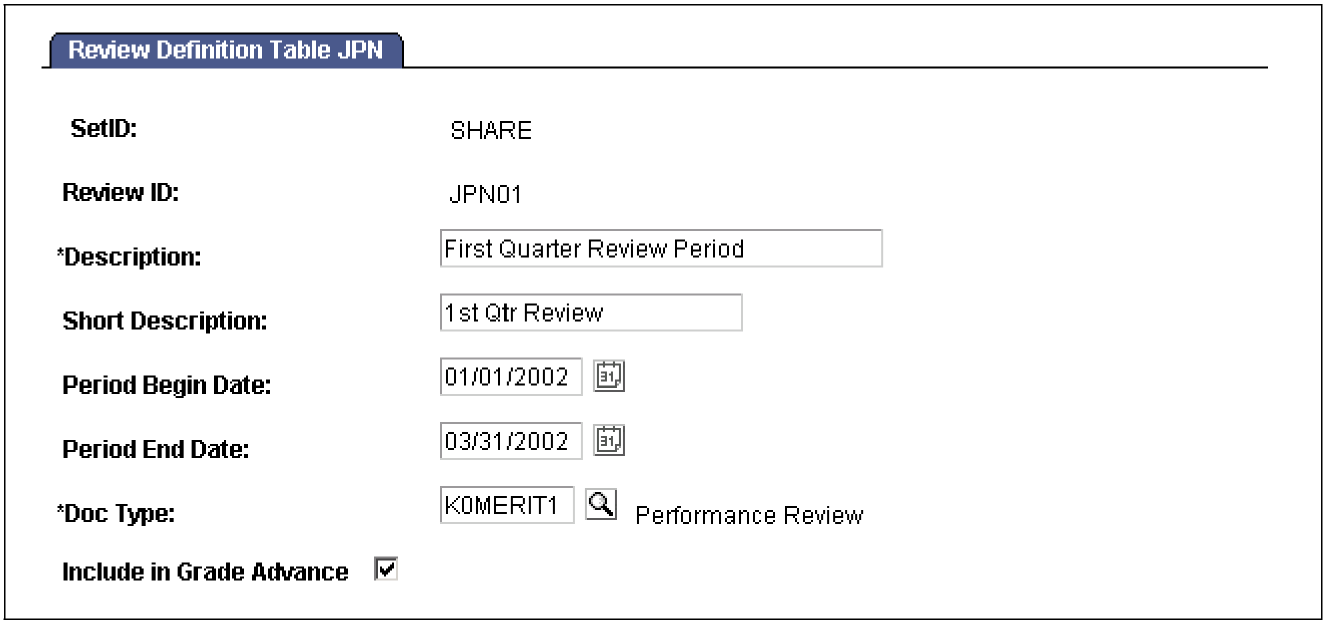
Calculation Method

Select the method for calculating the Overall Summary section rating from the Competencies section rating. Options are *Summation*, *Average*, and *Review Band*.

The calculation method that you select for the Overall Summary section of the document determines which calculation methods are valid for the other sections.

(JPN) Creating Review IDs

Access the Review Definition Table JPN page.



Review Definition Table JPN page

Period Begin Date Enter the first date of the review period.

Period End Date Enter the last date of the review period.

Doc Type Select the document type that is valid for the selected SetID.

Include in Grade Advance Select if this review is to be considered by the Grade Advance Eligibility process (in the Plan Salaries business process). With the Grade Advance Eligibility process, you can define the criteria employees must meet to be eligible for a grade advancement, including the number of eligibility points they must earn on review documents.

For example, you can have the system take an average or weighted average of the eligibility points for the employee's last three review documents. You use this check box to if the results from this particular review (corresponding to the specified document type and review period) should be included in this process. If this check box is selected, when you run the Grade Advance Eligibility process, the system looks at the number of eligibility points the employee earned on this and other designated or applicable review documents. If the eligibility points meet the required threshold, the employee may be eligible for a grade advancement.

This field works with the Eligibility Points, that are defined for the rating model, the system references when calculating the performance results in the Overall Summary section of the document.

See *PeopleSoft 8.8 Human Resources PeopleBook: Plan Salaries*, "Setting Up Plan Salaries".

CHAPTER 4

Managing Employee Reviews

This chapter discusses the employee review process and describes how to:

- Create employee review documents.
- Complete employee review documents.
- Complete employee self-appraisal documents.
- Transfer employee review documents.
- View employee review documents.
- Print employee review reports.

Understanding the Employee Review Process

The Employee Review process enables:

1. Managers to create employee reviews using two methods:
   - For their direct reports.
   - For groups of employees using Group IDs created in Group Build.
2. Managers to add or delete competencies and/or goals for an employee.
3. Managers to create employee self-appraisal documents.
4. Employees to evaluate their own performance.
5. Managers to evaluate employee performance and finalize employee reviews.
6. Managers or administrators to transfer ownership of an employee review document to another manager.
7. Administrators to print reports listing late or missing employee review documents.

Creating Employee Review Documents

This section discusses how to create employee review documents.

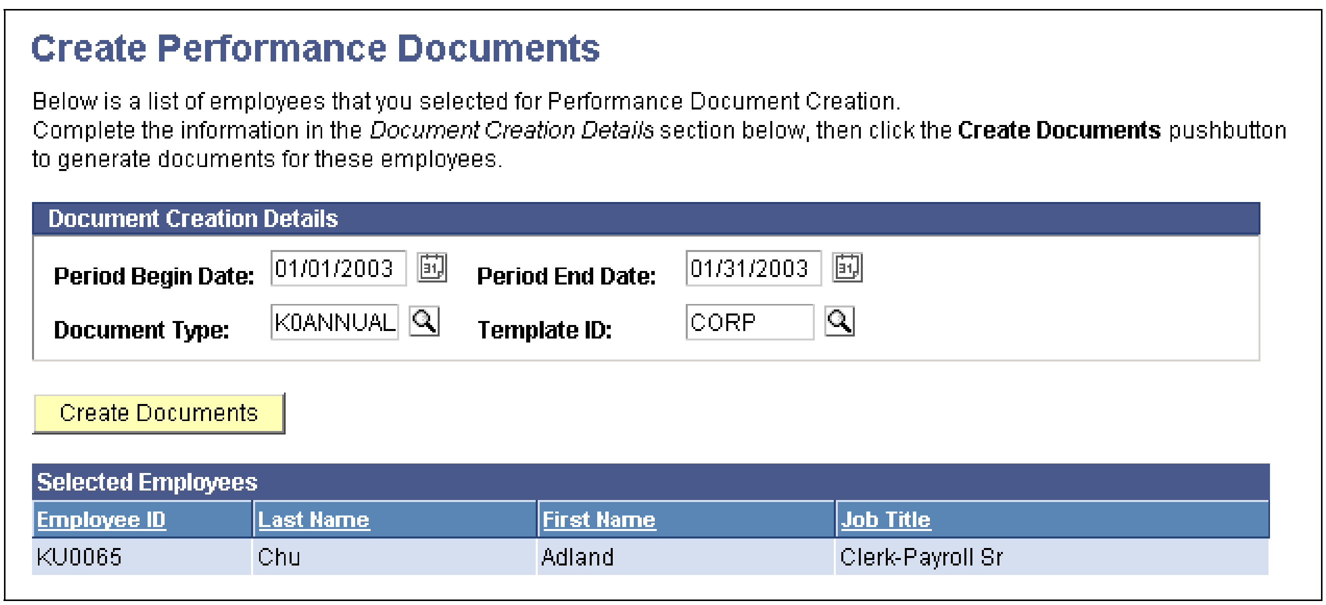
Note. The process for creating employee reviews, whether it is by direct reports or group IDs, is similar. Creating employee reviews by group has one extra step at the beginning. The manager or HR administrator first selects the group ID for which employee reviews are to be created and then continues with the process.

Pages Used to Create Employee Review Documents

Page Name	Object Name	Navigation	Usage
Performance Document Creation – Select Group	SS_GROUP_SELECT	Manager Self Service, Training and Development, Employee Reviews, Create Group Employee Reviews	This is for Create Group Employee Review only. Select the group for which you want to create employee review documents. After you select a group, the process is the same as the Creating Employee Review Documents.
Performance Document Creation – Select Employees	OPRROWS_MULTI	Manager Self Service, Training and Development, Employee Reviews, Create Employee Reviews	Select the employees for whom you want to create an employee review documents. This page is also used by the Create Group Employee Reviews transaction.
Create Performance Documents	EP_CREATEAPPR_MGR	Click the Continue link on the Performance Document Creation – Select Employees page.	Enter the parameters for creating the employee review document. This page is also used by the Create Group Employee Reviews transaction.

Creating Employee Review Documents

Access the Create Performance Documents page.



Create Performance Documents page

Period Begin and End Date Enter the dates that the review period begins and ends. The review period is the segment of time for which you are reviewing the employee.

Document Type	Select the review type you want to associate with this group of employee review documents.
Template ID	Select the template ID that identifies the template that should be used to generate the review document(s).
Create Documents	Click to create review documents for the employees listed at the top of the page.

Completing Employee Review Documents

This section discusses how the system calculates performance ratings and how to complete an employee review document.

Calculating Employee Performance Ratings

This section discusses the three calculation methods and how they work to calculate an employee's review rating.

How the Average Calculation Method Works

To calculate ratings, the rating models that are associated with a section and its items must define an equivalent numeric rating for each qualitative rating. The numeric ratings are used in the calculations.

- Competency ratings: The user directly enters the qualitative rating for each competency.
- Competencies section rating: The system calculates the Competency section rating as follows.
  - If any competencies are weighted, it calculates the rating as a weighted average of all of the competencies in the section, taking individual weights into account. Unrated competencies and competencies that are not weighted are ignored.
  - If no competencies are weighted (or if the weighting feature is not activated), it calculates the simple average of all rated competencies. Unrated competencies are ignored.
- Overall rating: The system assigns the qualitative Competencies section rating to the Overall Summary rating.

How the Summation Calculation Method Works

To use the summation method, the rating model that's associated with each section must define the points that are equivalent to each qualitative rating. The system uses the points in its calculations.

- Competencies section rating: The system calculates the Competency section rating by determining the corresponding review points for each rated competency, using the rating model associated with each competency. It then sums the points across all competencies to determine the total points for the Competencies section. These summed points are then converted to a qualitative Competencies section rating using the rating model associated with the Competencies section.
- The system determines the corresponding review points for each rated competency, using the rating model associated with each competency. It then sums the points across all competencies to determine the total points for the Competencies section. These summed points are then converted to a qualitative Competencies section rating using the rating model associated with the Competencies section.
- Overall rating:

- If the competency section was calculated using the average method, the system converts the section rating to the appropriate number of review points using the rating model associated with the Competencies section.
- If the competency section was calculated using the summation method, the total review points for the competencies in the section are used as the section points.
- The points from the competency section are converted to a review rating using the From/To point range on the rating model that is associated with the Overall Summary section.

How the Review Band Calculation Method Works

This method can be used for the Overall Summary section only. To use this method, review points must be associated with the competency section rating. The system uses the points in its calculations.

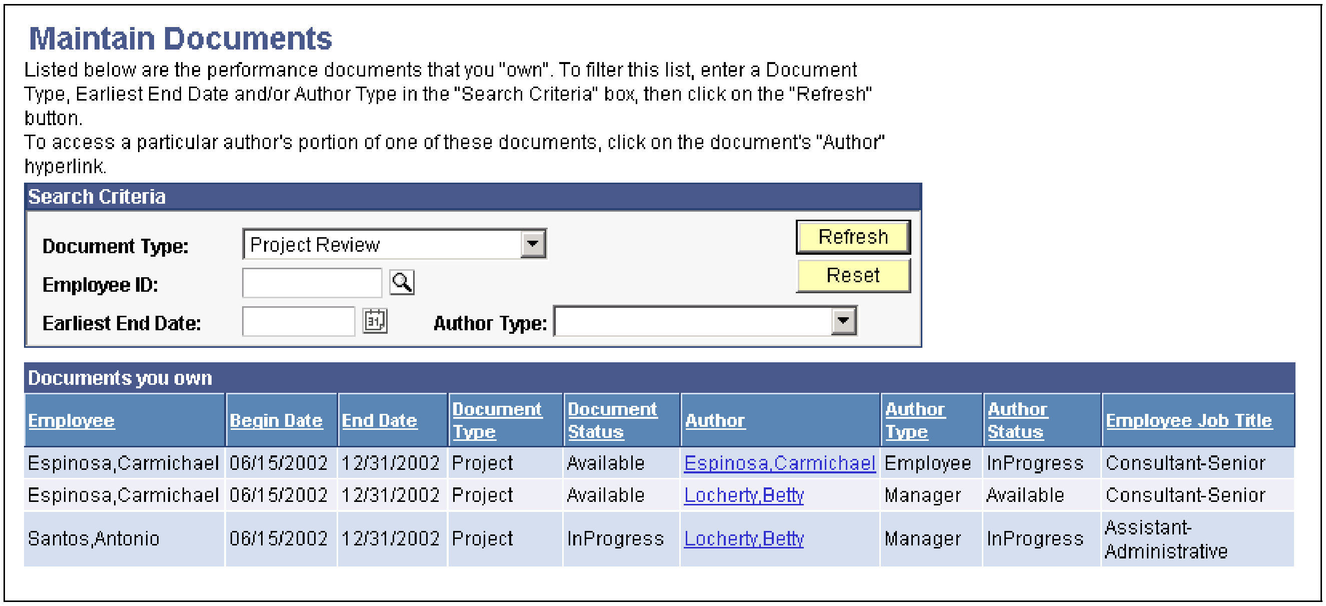
1. Calculate the overall points by following the same steps as the summation method.
2. Convert the overall points into the appropriate review band, according to the rules you define on the Rating Model Table page.

Pages Used to Complete Employee Reviews

Page Name	Object Name	Navigation	Usage
Maintain Documents	EP_APPR_SELECT	Manager Self Service, Training and Development, Employee Reviews, Maintain Employee Reviews	Select the employee review document from which you want to add or delete goals and/or competencies .
Maintain Performance Documents	EP_APPR_MAIN1	Click the employee name link on the Maintain Documents page.	You can add or delete goals and competencies, create employee self-appraisal documents, and finalize the employee review document.

Selecting Reviews

Access the document selection page.



Maintain Documents

Listed below are the performance documents that you "own". To filter this list, enter a Document Type, Earliest End Date and/or Author Type in the "Search Criteria" box, then click on the "Refresh" button.
To access a particular author's portion of one of these documents, click on the document's "Author" hyperlink.

Search Criteria

Document Type: Project Review

Employee ID:

Earliest End Date:

Author Type:

Refresh

Reset

Documents you own

Employee	Begin Date	End Date	Document Type	Document Status	Author	Author Type	Author Status	Employee Job Title
Espinosa,Carmichael	06/15/2002	12/31/2002	Project	Available	Espinosa,Carmichael	Employee	InProgress	Consultant-Senior
Espinosa,Carmichael	06/15/2002	12/31/2002	Project	Available	Locherty,Betty	Manager	Available	Consultant-Senior
Santos,Antonio	06/15/2002	12/31/2002	Project	InProgress	Locherty,Betty	Manager	InProgress	Assistant-Administrative

Document Selection page

Search Criteria

Enter your search criteria to limit the display of documents you can access. The selection criteria fields are as follows:

Document Type

Enter a document type. For example, annual review, quarterly review, or project review.

EmplID

Enter an EmplID. Only documents for which the employee selected is the subject will be displayed in the grid.

Note. This field only appears on manager or HR administrator versions of the Performance Document Selection page. It is not available when the user role is employee, because employees can only view documents for which they are the subject.

Earliest End Date

Enter the earliest review period end date of the documents you want to access. The system only selects documents with review period end dates that are equal to or greater than the date you specify here.

Author Type

Specify the author type. Valid values are:

- Manager

  Select *Manager* to display only manager sub-documents.

- Employee

  Select *Employee* to display only employee self-appraisals.

- Blank

  Leave the field blank to display both manager documents and employee self-appraisals.

This will display only those sub-documents owned by the indicated author type.

Refresh Click on the Refresh button to bring up a list of documents based on the selection criteria you defined.

Documents

The Documents grid displays a list of documents meeting the selection criteria you have defined. To open a document, click on the link in the Author column.

Name Displays the name of the employee that is the subject of the performance document. This field is hidden when the user role is employee, since employees can view only their own information.

Note. This field does not appear when you specify an employee ID in the search criteria.

Begin Date Displays the review period begin date for each document meeting the selection criteria. Documents are listed based upon the most recent review period begin date in alphanumeric order.

End Date Displays the review period end date for each document meeting the selection criteria.

Document Type Displays the Document Type for each document meeting the selection criteria. For example, annual review, quarterly review, or project review.

Document Status Displays the current status of the overall review document. For example, *In Progress, Complete,*

Author Displays the name of the individual who owns the listed sub-document. If this sub-document is accessible to the user, then this field will be an active link. Clicking on this link will transfer the user into this sub-document..

Note. The manager is considered to be the “owner” of the manager’s sub-document, and the employee is defined as the “owner” of the employee’s self-appraisal.

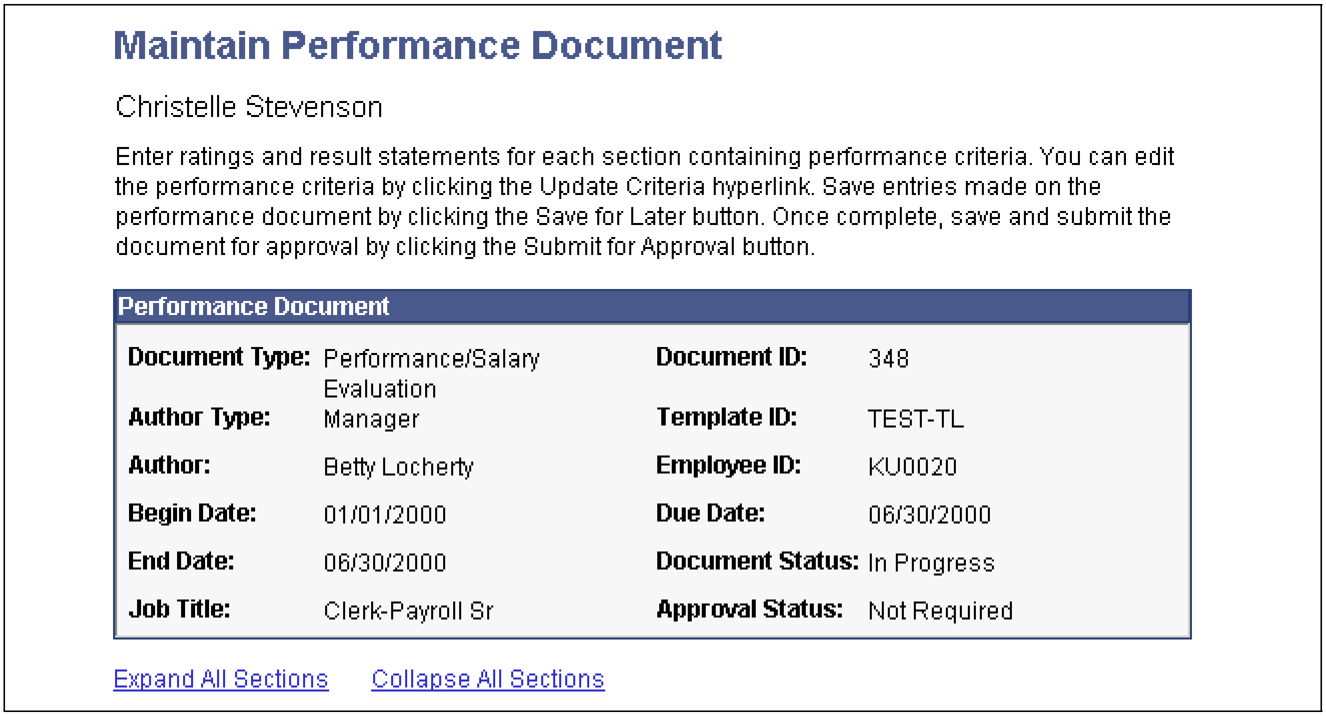
Author Type Displays either *Manager* or *Employee,* depending on who owns the listed sub-document.

Author Status This is the status of the listed sub-document. For example, the employee’s self-appraisal may be "Complete", while the manager’s sub-document "In Progress". The "Document Status" field is the status of the overall logical performance document, taking the status of both the manager’s sub-document and the employee’s self-appraisal into account.

Job Title Displays the job title of the employee that is the subject of the performance document. For employees with multiple concurrent jobs, a performance document relates to only one of the employee’s jobs. There would typically be a separate performance document for each of the employee’s jobs.

Completing the Employee Review Document

Access the Maintain Documents page.



Maintain Performance Document

Christelle Stevenson

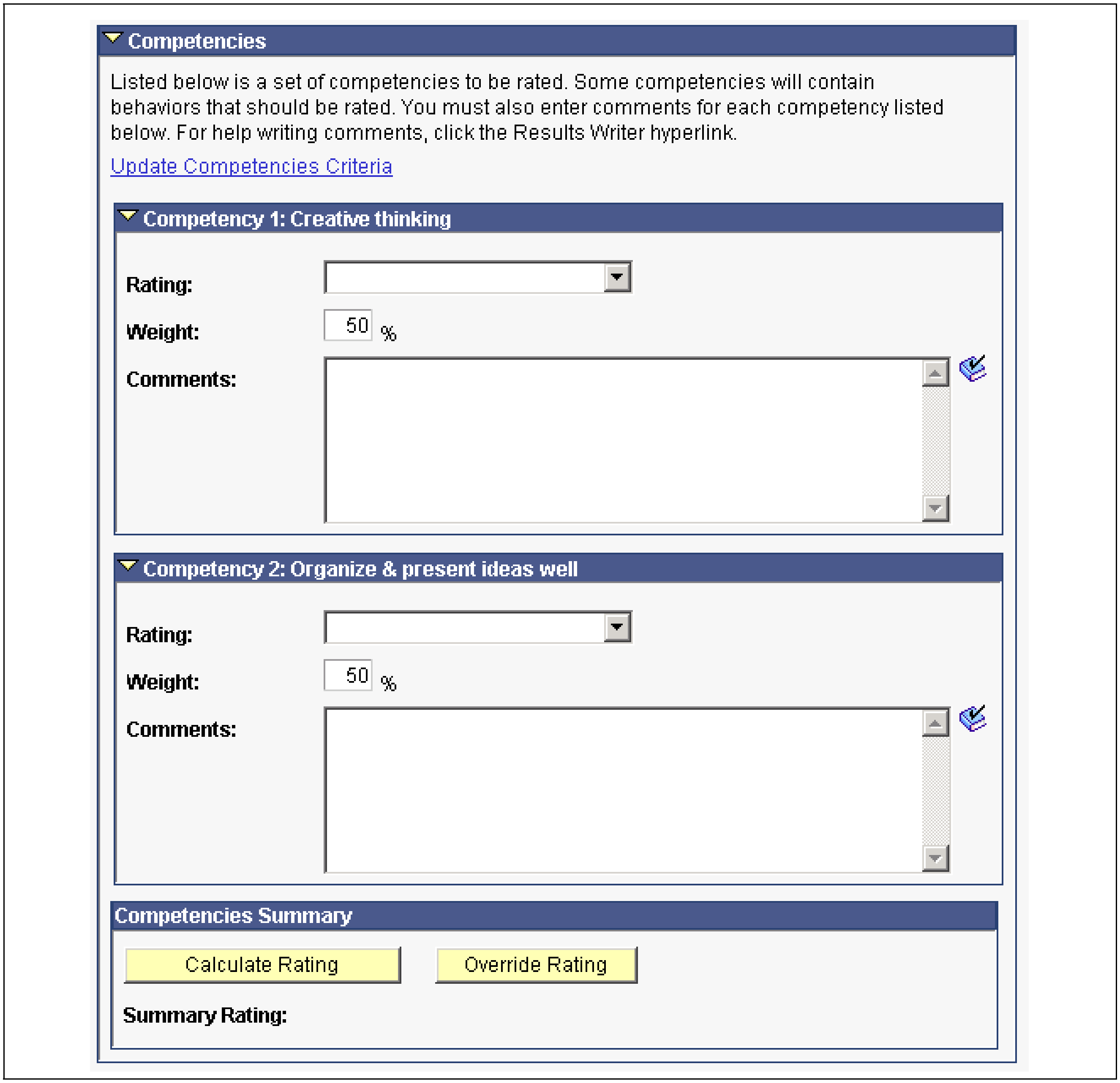
Enter ratings and result statements for each section containing performance criteria. You can edit the performance criteria by clicking the Update Criteria hyperlink. Save entries made on the performance document by clicking the Save for Later button. Once complete, save and submit the document for approval by clicking the Submit for Approval button.

Performance Document

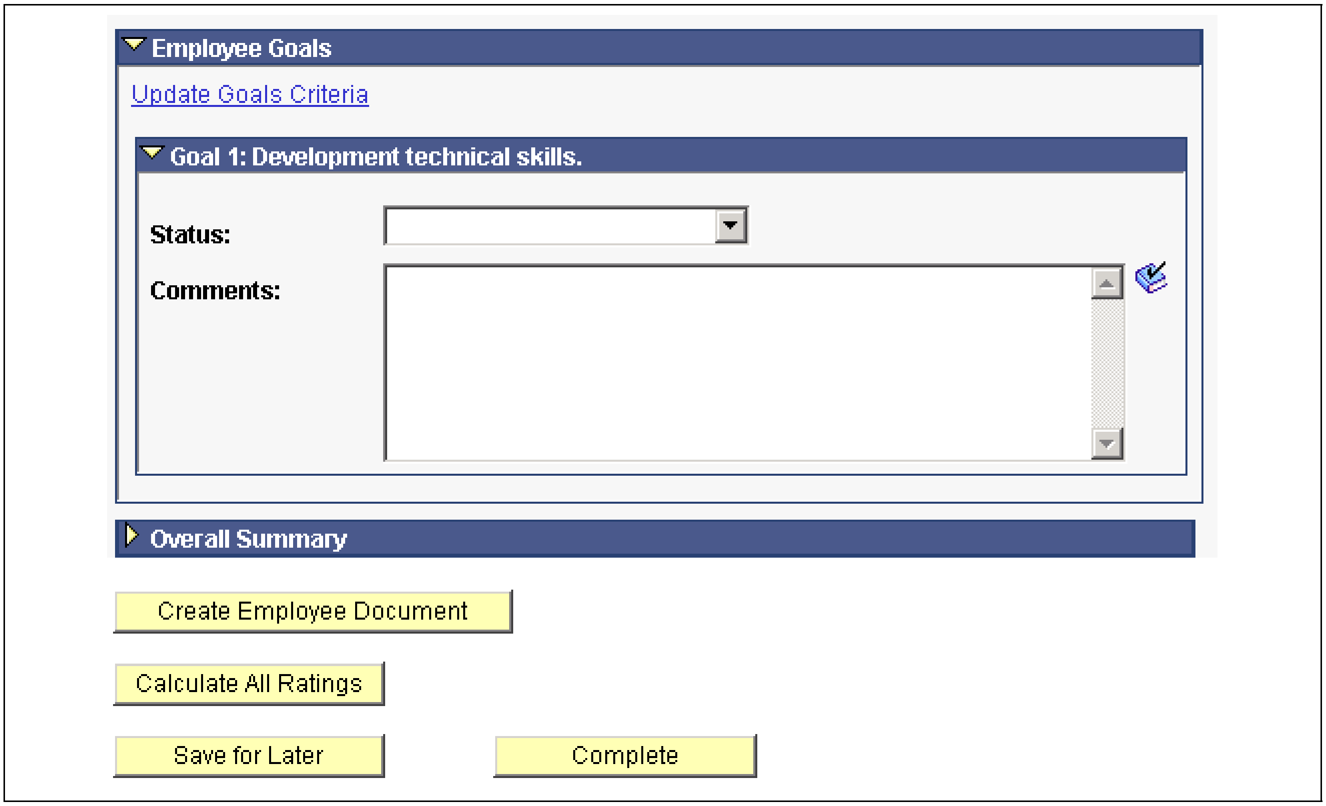
Document Type:	Performance/Salary Evaluation	**Document ID:**	348
Author Type:	Manager	**Template ID:**	TEST-TL
Author:	Betty Locherty	**Employee ID:**	KU0020
Begin Date:	01/01/2000	**Due Date:**	06/30/2000
End Date:	06/30/2000	**Document Status:**	In Progress
Job Title:	Clerk-Payroll Sr	**Approval Status:**	Not Required

Expand All Sections Collapse All Sections

Maintain Performance Document page (1 of 3)



Maintain Performance Document page (2 of 3)



Maintain Performance Document page (3 of 3)

Competencies Section

Update Competencies Criteria Click to navigate to a page that allows you to either delete, or add a competency.

Rating Select a qualitative rating for this competency from the list of available options. The values appearing in the list come from the rating model associated with this competency on the Competency table.

Weight If you would like to assign different relative weights to competencies, enter a weight here (as a percentage—for example, enter 40 to indicate that this competency accounts for 40% of the summary rating across all competencies). If used, all weights must add up to 100.

Comments Enter comments regarding the employee's proficiency level, in support of the rating you've assigned.

Calculate Rating Click to have the system calculate the summary rating for the Competencies section, using the calculation method and rating model defined on the template that generated this review document.

Override Rating Click to open up the Summary Rating field so that the calculated Summary Rating can be overridden by directly entering a rating.

Summary Rating This is the summary rating for the Competencies section that has been calculated by the system, or overridden.

Goals Section

Update Goals Criteria	Click to navigate to a page that allows you to either delete, or add a goal.
Status	Select the current status of the employee's progress against this goal.
Comments	Enter any comments you wish to record relative to this goal.

Overall Summary Section

Calculate Rating	Click to have the system calculate the summary rating for the Overall Summary section, using the calculation method and rating model defined on the template that generated this review document.
Override Rating	Click to open up the Summary Rating field so that the calculated Summary Rating can be overridden by directly entering a rating.
Summary Rating	This is the summary rating for the Overall Summary section that has been calculated by the system, or overridden. This is the *Official Rating* for the employee review.

Links

Complete	Click this button to change the status of the employee document from *In Progress* to *Complete.*
Create Employee Document	Click to create an employee's self-appraisal document that is an exact duplicate of this employee review document. Once the employee's self-appraisal document has been created, this button will not be available.
Calculate All Ratings	Click to calculate the Competencies section, and Overall Summary ratings displayed on the review document. (Ratings are not calculated for ratings that have been overridden.)
Save for Later	Click to save your work and return to it later. The system calculates all ratings contained in the review (according to template rules) prior to saving the review to the database.

Completing Employee Self-Appraisal Documents

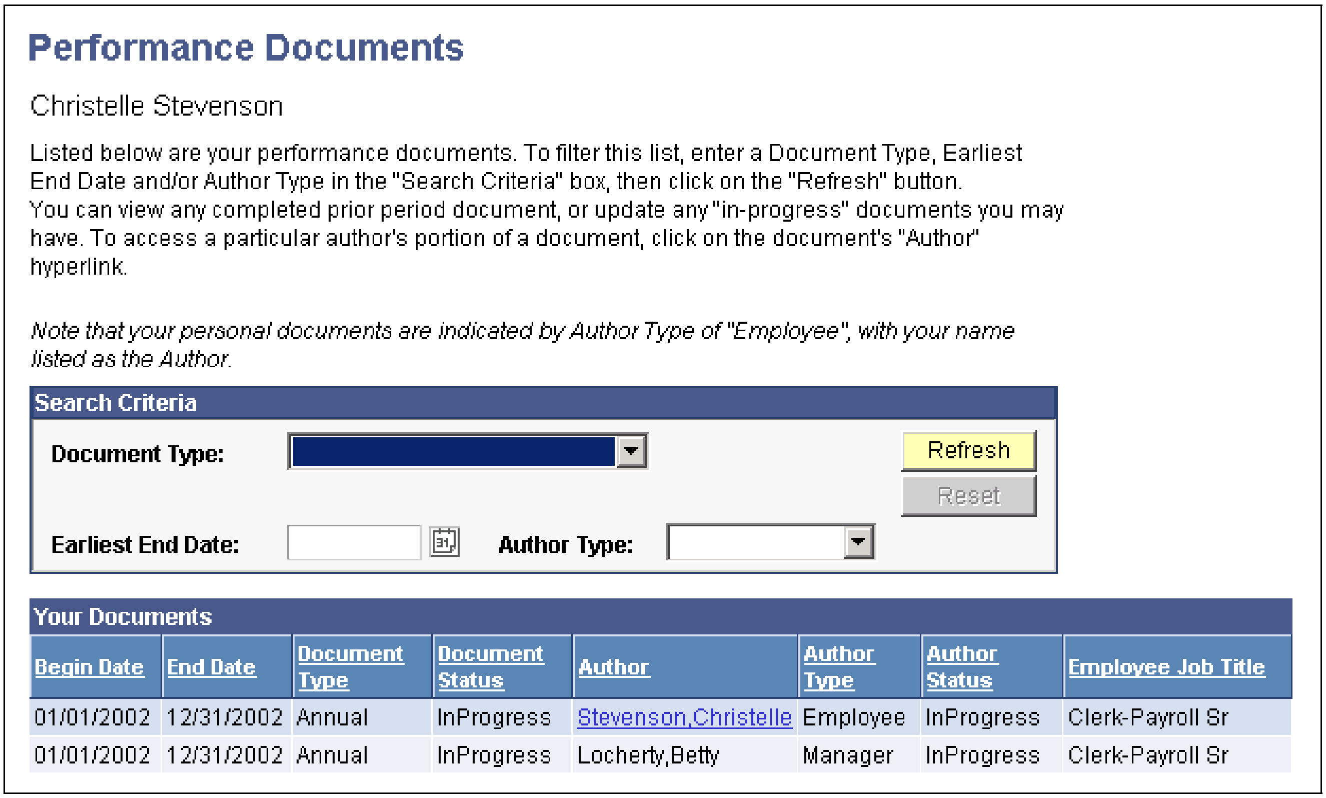
This section discusses:

Pages Used to Complete Employee Self-Appraisal Documents

Page Name	Object Name	Navigation	Usage
Maintain Performance Documents	EPP_APPR_SELECT	Employee Self Service, Training and Development, Employee Reviews	Select the employee self-appraisal document you want to work on.
Maintain Performance Documents	EP_APPR_MAIN1	Click the employee name link.	Add or update competencies and goals to the employee self-appraisal document.

Selecting Employee Self-Appraisal Documents

Access the Performance Documents search page.



Performance Documents

Christelle Stevenson

Listed below are your performance documents. To filter this list, enter a Document Type, Earliest End Date and/or Author Type in the "Search Criteria" box, then click on the "Refresh" button. You can view any completed prior period document, or update any "in-progress" documents you may have. To access a particular author's portion of a document, click on the document's "Author" hyperlink.

Note that your personal documents are indicated by Author Type of "Employee", with your name listed as the Author.

Search Criteria

Document Type:

Refresh

Reset

Earliest End Date:

Author Type:

Your Documents

Begin Date	End Date	Document Type	Document Status	Author	Author Type	Author Status	Employee Job Title
01/01/2002	12/31/2002	Annual	InProgress	Stevenson,Christelle	Employee	InProgress	Clerk-Payroll Sr
01/01/2002	12/31/2002	Annual	InProgress	Locherty,Betty	Manager	InProgress	Clerk-Payroll Sr

Performance Documents search page

Search Criteria

Enter your search criteria to limit the display of documents you can access. The selection criteria fields are as follows:

Document Type Enter a document type. For example, annual review, quarterly review, or project review.

Earliest End Date Enter the earliest review period end date of the documents you want to access. The system only selects documents with review period end dates that are equal to or greater than the date you specify here.

Author Type Specify the author type. Valid values are:

- Manager

  Select *Manager* to display only manager sub-documents.
- Employee

  Select *Employee* to display only employee self-appraisals.
- Blank

  Leave the field blank to display both manager documents and employee self-appraisals.

This will display only those sub-documents owned by the indicated author type.

Refresh Click on the Refresh button to bring up a list of review documents based on the selection criteria you defined.

Your Documents

This grid displays a list of review documents meeting the selection criteria you have defined. To open a document, click on the link in the Author column.

Name Displays the name of the employee that is the subject of the review document. This field is hidden when the user role is employee, since employee's can access only their own information.

Note. This field does not appear when you specify an employee ID in the search criteria.

Begin Date Displays the review period begin date for each document meeting the selection criteria. Documents are listed based upon the most recent begin date in alphanumeric order.

End Date Displays the review period end date for each document meeting the selection criteria.

Document Type Displays the Document Type for each document meeting the selection criteria. For example, annual review, quarterly review, or project review.

Document Status Displays the current status of the overall review document. For example, *In Progress* or *Cancelled.*

Author Displays the name of the individual who owns the listed sub-document. If this sub-document is accessible to the user, then this field will be an active link. Clicking on this link will transfer the user into this sub-document..

Note. The manager is considered to be the "owner" of the manager's sub-document, and the employee is defined as the "owner" of the employee's sub-document (self-appraisal).

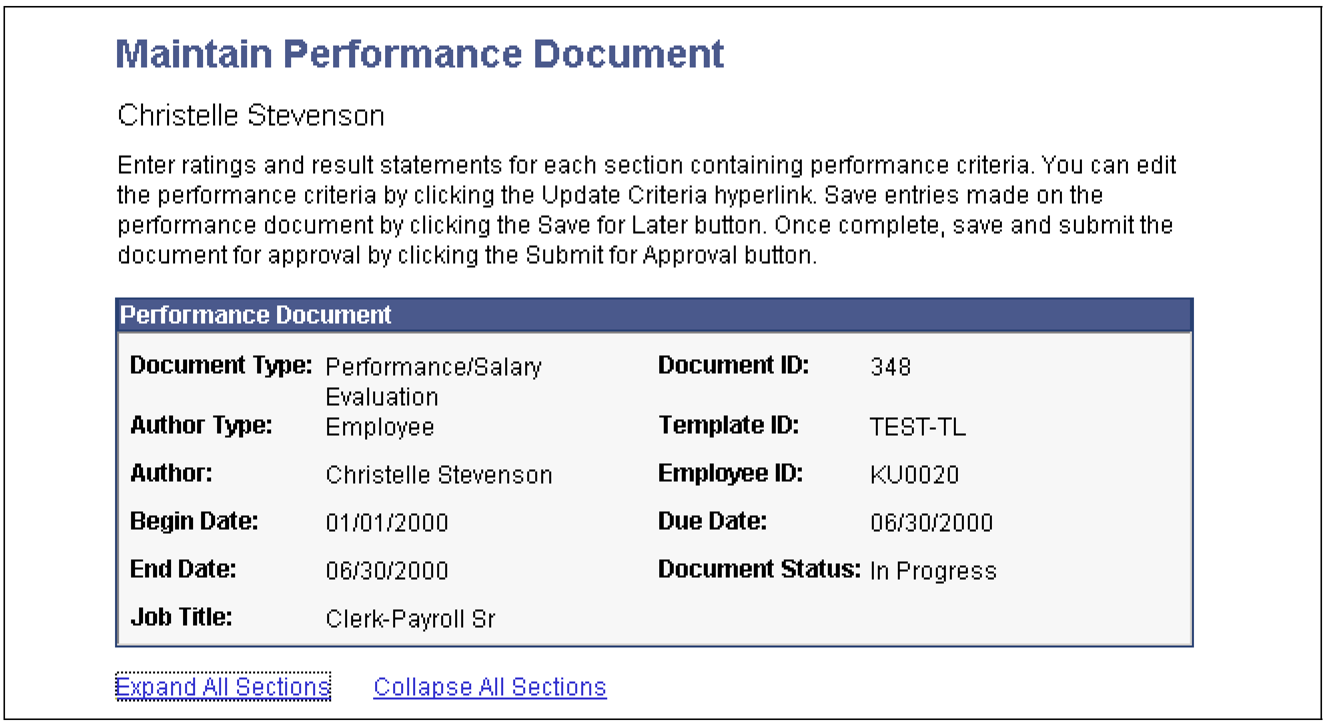
Author Type Displays either *Manager* or *Employee,* depending on who owns the listed sub-document.

Author Status This is the status of the listed sub-document. For example, the employee’s self-appraisal may be "Complete", while the manager’s sub-document is *In Progress*. The *Document Status* field is the status of the overall logical review document, taking the status of both the manager’s sub-document and the employee’s self-appraisal into account.

Job Title Displays the job title of the employee that is the subject of the review document. For employees with multiple concurrent jobs, a review document relates to only one of the employee’s jobs. There would typically be a separate review document for each of the employee’s jobs.

Completing an Employee Self-Appraisal Document

Access the Maintain Documents page.


Maintain Performance Document

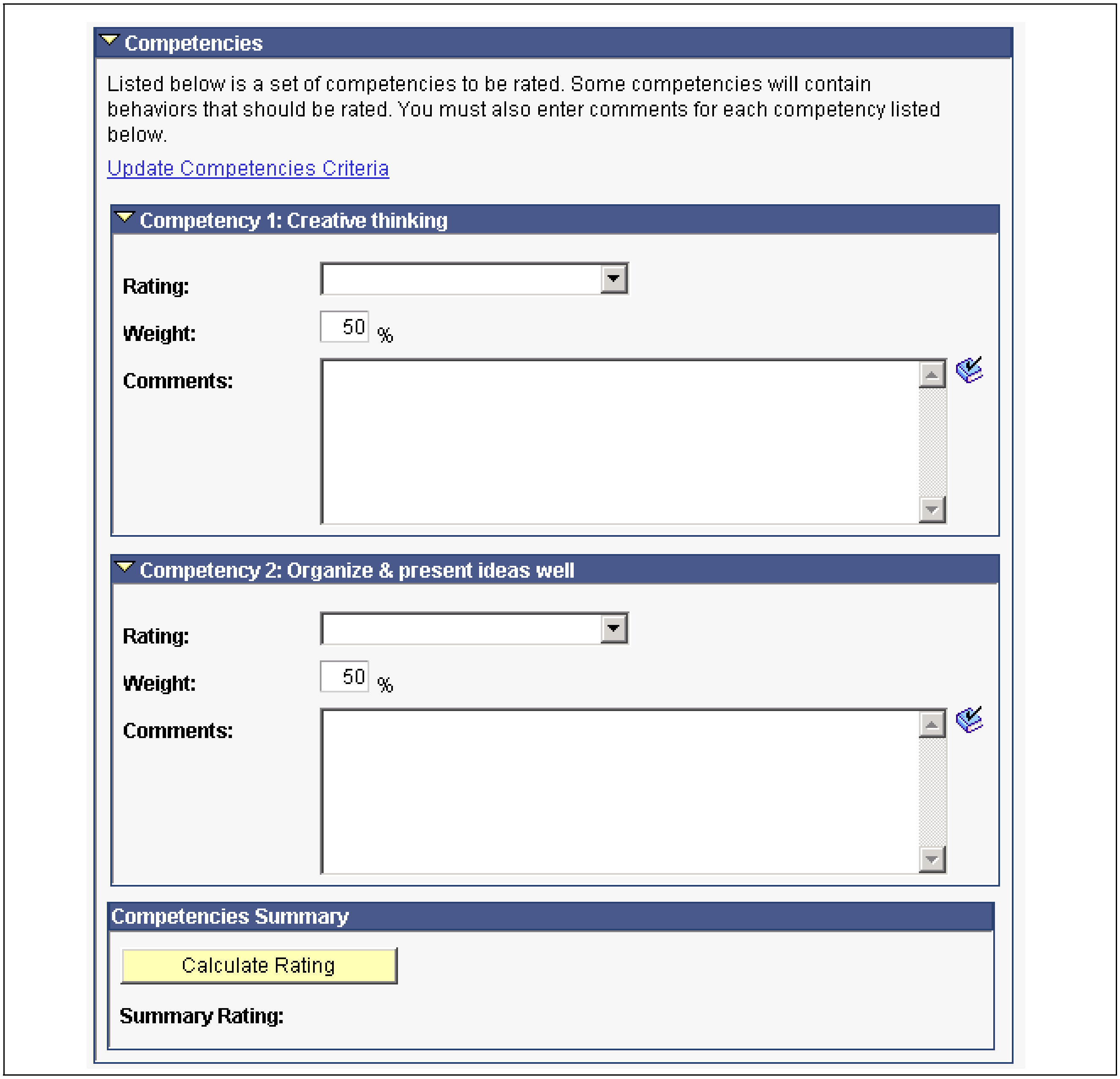
Christelle Stevenson

Enter ratings and result statements for each section containing performance criteria. You can edit the performance criteria by clicking the Update Criteria hyperlink. Save entries made on the performance document by clicking the Save for Later button. Once complete, save and submit the document for approval by clicking the Submit for Approval button.

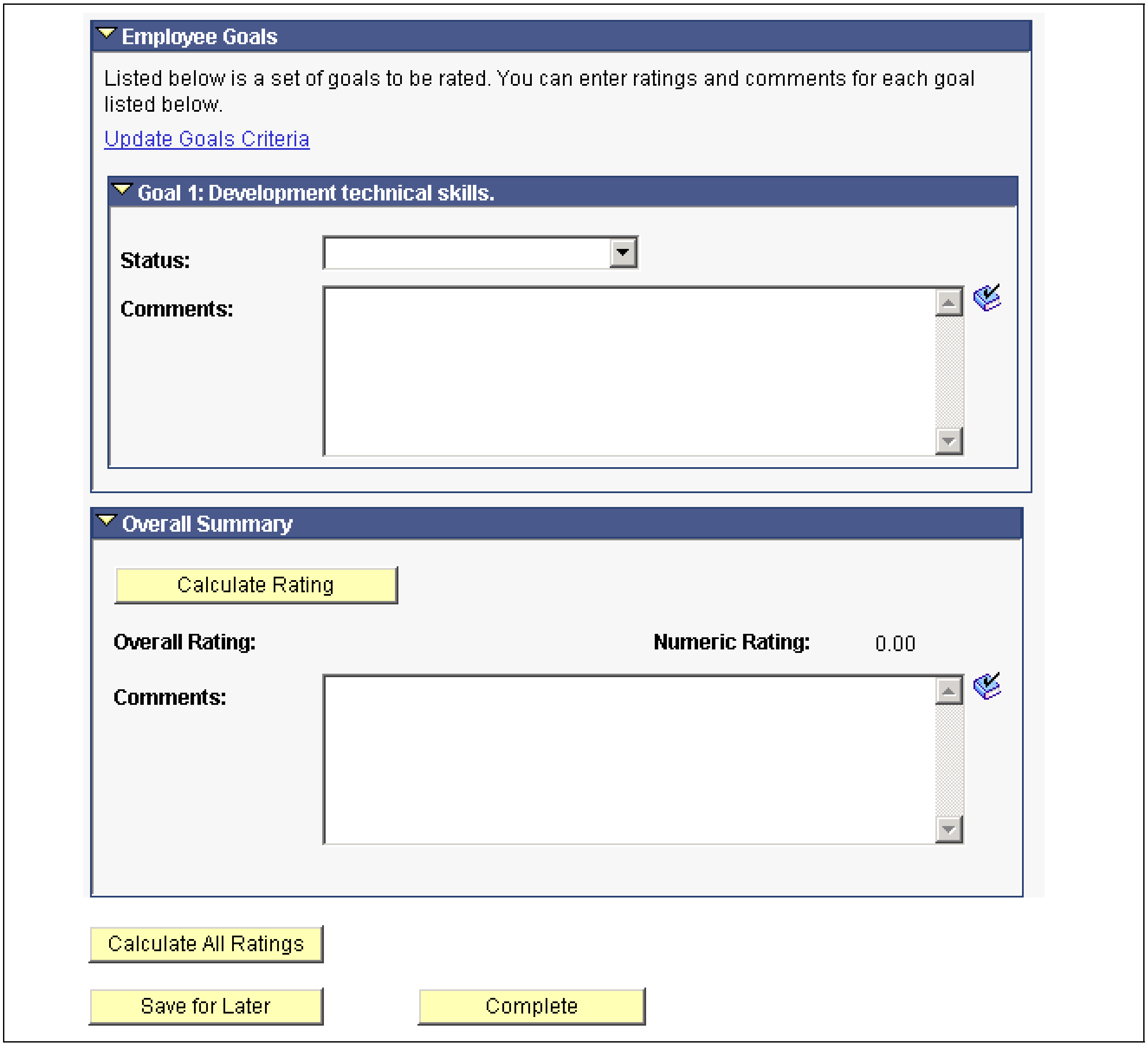
Performance Document			
Document Type:	Performance/Salary Evaluation	**Document ID:**	348
Author Type:	Employee	**Template ID:**	TEST-TL
Author:	Christelle Stevenson	**Employee ID:**	KU0020
Begin Date:	01/01/2000	**Due Date:**	06/30/2000
End Date:	06/30/2000	**Document Status:**	In Progress
Job Title:	Clerk-Payroll Sr		

Expand All Sections Collapse All Sections

Maintain Performance Document page (1 of 3)



Maintain Performance Document page (2 of 3)



Maintain Performance Document page (3 of 3)

Note. This page is same as the Employee Review Document.

See Chapter 4, "Managing Employee Reviews," Completing Employee Review Documents, page 17.

Transferring Employee Review Documents

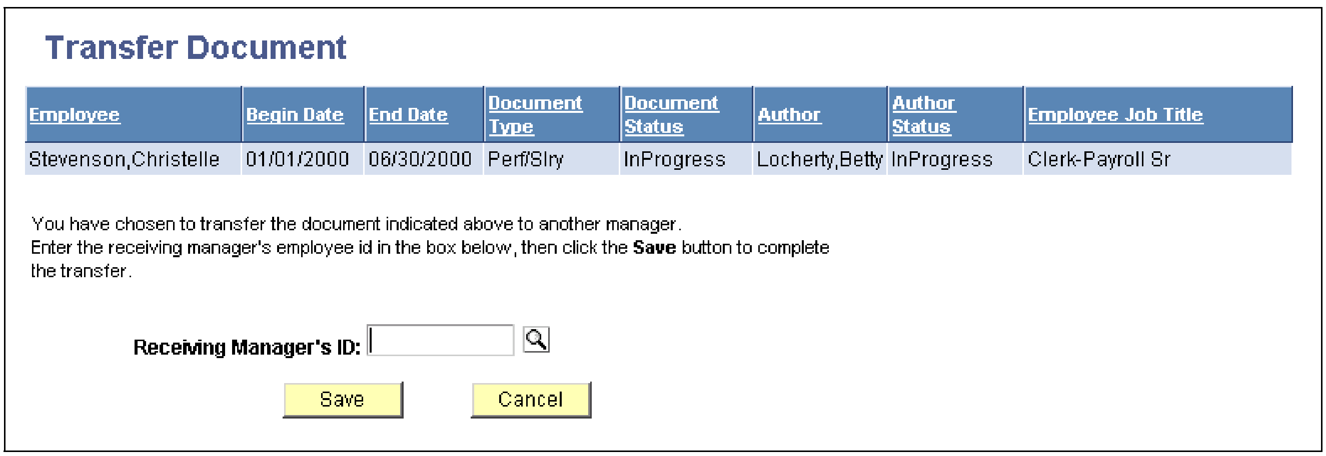
This section discusses how managers or administrators can transfer an employee review document to another manager.

Pages Used to Transfer Employee Review Document

Page Name	Object Name	Navigation	Usage
Transfer Document	EP_APPR_SELECT	• Manager Self Service, Training and Development, Employee Reviews, Transfer Employee Review • Workforce Development, Performance Management, Administer Documents, Transfer Document	Select the review document for which you'd like to transfer review responsibility.
Transfer Document	EP_APPR_XFER	Click the employee name link on the employee selection page.	Enter the manager's ID to whom you are transferring the employee review document.

Transferring Employee Reviews

Access the Transfer Document page.



Transfer Document page

Receiving Manager's ID Enter the ID of the manager or any other employee to whom you are transferring responsibility for the review document.

Viewing Employee Review Documents

This section discusses how administrators can view employee review documents.

Page Used to VIew Employee Review Documents

Page Name	Object Name	Navigation	Usage
Maintain Documents	EP_APPR_SELECT	Workforce Development, Performance Management, Administer Documents, View Performance Documents	HR administrators can select employees for whom they want to view employee review documents. See Chapter 4, "Managing Employee Reviews," Selecting Reviews, page 18.

Printing Employee Review Reports

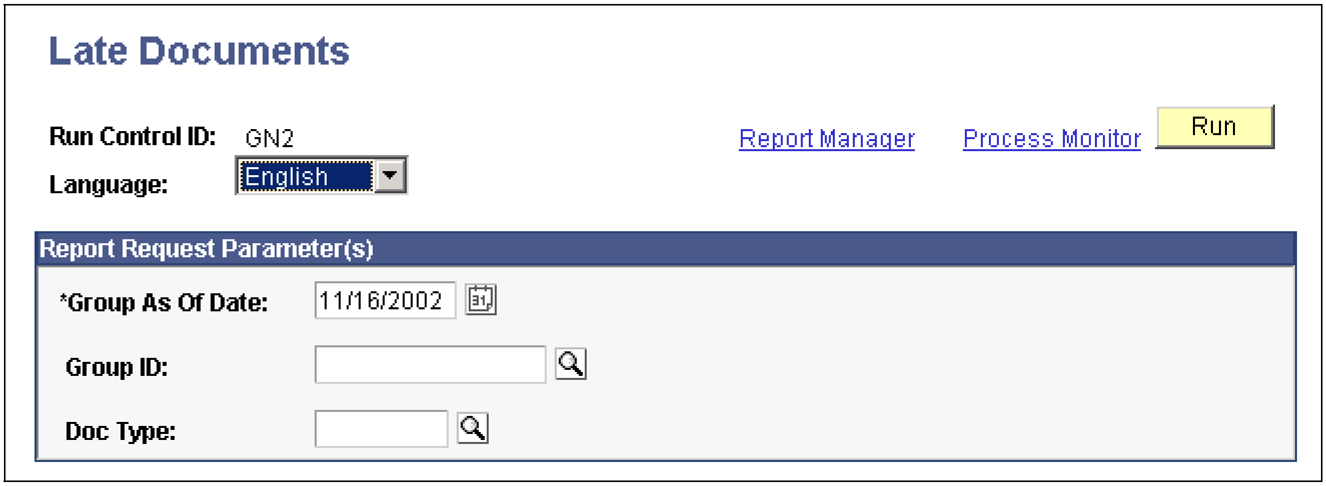
This section discusses how to print a late or missing employee review document report.

Pages Used to Manage Employee Review documents

Page Name	Object Name	Navigation	Usage
Maintain Documents	EP_APPR_SELECT	Workforce Development, Performance Management, Administer Documents, View Performance Documents	HR administrators can select employees for whom they want to view employee review documents.
Late Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Late Documents	Generate a list of late review documents, by document type, for a group of employees. The system considers a review document to be "late" if the review's due date (review period end date) is less than, or equal to the current date.
Missing Documents	RUNCTL_EP_RPT	Workforce Development, Performance Management, Reports, Missing Documents	Generate a list of missing employee review documents for a group of employees (group ID) and a given document type and date range. If an active employee has no review document with review period begin/end dates that would cause any part of the review period to fall within the date parameters specified for the report.

Printing the Late Employee Review Report

Access the Late Documents page.



Late Documents page

Language

Select the language in which you want to generate the report.

Group ID

Enter the Group ID of the employees for whom you want to generate the report.

Group IDs are defined as part of the Group Build process in PeopleSoft Human Resources.

Group As Of Date

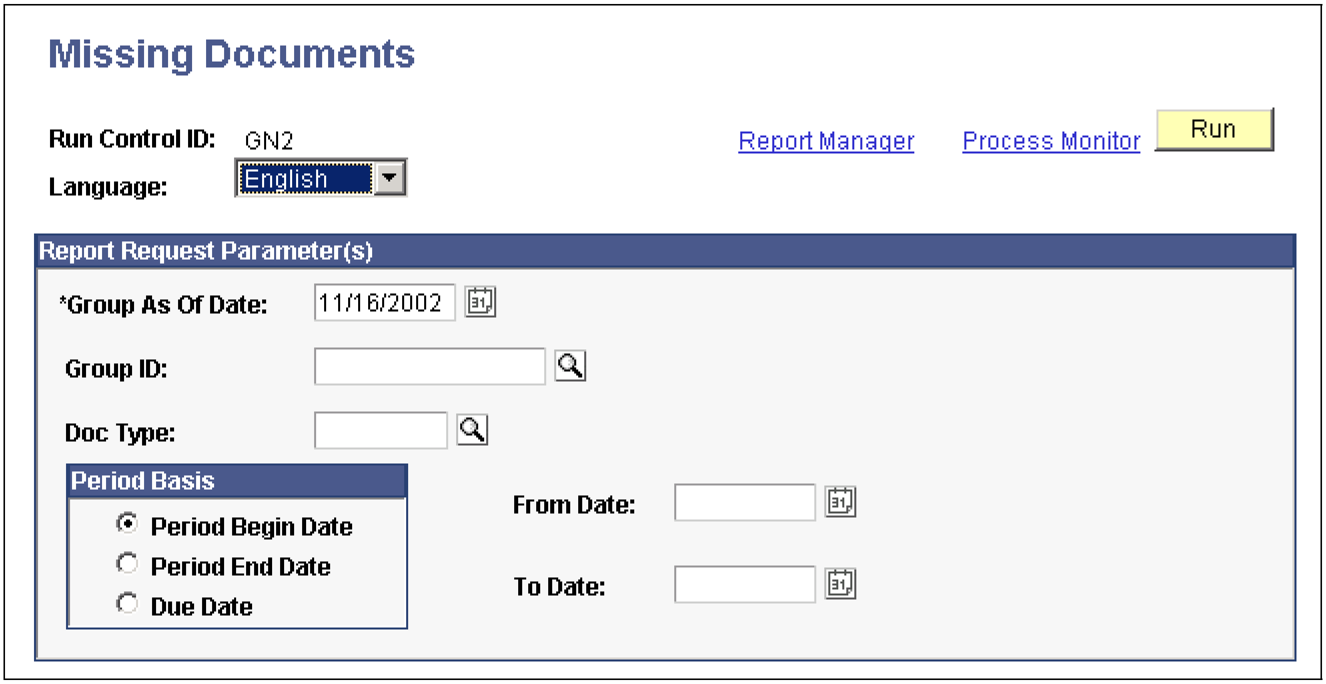
Select the as of date. The report generates a list of late review documents for employees belonging to the group defined in the Group ID field as of the date specified.

Document Type

Select a Document Type such as quarterly, annual, or project review.

Printing the Missing Employee Review Report

Access the Missing Documents page.



Missing Documents page

Group ID

Enter the Group ID associated with the employees for whom you want to generate the report.

Group IDs are defined as part of the Group Build process in PeopleSoft Human Resources.

Group As Of Date

Enter a group as of date.

The report generates a list of missing review documents for employees belonging to the group defined in the Group ID field as of the date specified.

Document Type

Select a Document Type such as quarterly, annual, or yearly.

Period Basis

The period basis determines which date on the review document the system uses when selecting missing review documents to publish in the report. Valid values are:

- Period Begin Date

  Selecting this option causes the system to look for employees who do not have a document, for the specified type, with a Period Begin Date falling within the range entered in the From Date and To Date fields.

- Period End Date

  Selecting this option causes the system to look for employees who do not have a document, for the specified type, with a Period End Date falling within the range entered in the From Date and To Date fields.

- Due Date

Selecting this option causes the system to look for employees who do not have a document, for the specified type, with a Due Date falling within the range entered in the From Date and To Date fields. The due date for an employee review is the same as the review period end date.

From and To Date The From and To dates establish a date range that is used in conjunction with the Period Basis to select review documents to include in the report. For example, if you define a From and To date range of 1 January 01 to 31 December 01 and the Period Basis is *Period End Date,* the report only selects review documents whose review period end date falls between 1 January 01 and 31 December 01.

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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