PeopleSoft®

PeopleSoft 8.8 Mobile Time Management PeopleBook

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PeopleSoft 8.8
Mobile Time Management PeopleBook
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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.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

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.

Typographical Convention or Visual Cue	Description
`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.
. . . (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 Mobile Time Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

See Also

About These HRMS PeopleBooks

PeopleSoft Application Fundamentals

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

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS applications you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

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

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With…	This chapter discusses application implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other applications. • A high-level guide to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Understanding…	This is an introductory chapter that broadly explains the application and the functionality within the application.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of an application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** The PeopleSoft Mobile Time Management PeopleBook is intended for system administrators and end users alike. **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.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explaining 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.

Chapters	Description
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft Mobile Time Management

This chapter provides an overview of PeopleSoft Mobile Time Management business processes and discusses PeopleSoft Mobile Time Management implementation tasks.

PeopleSoft Mobile Time Management Business Processes

The following list shows the PeopleSoft Mobile Time Management business processes:

- Report elapsed time.
- Submit elapsed time.
- View elapsed time.
- View schedule.

We cover these business processes in this PeopleBook.

PeopleSoft Mobile Time Management Implementation

The Mobile Time Management table-loading implementation includes the following:

- Setting up PeopleSoft HRMS fundamental tables.
- Setting up PeopleSoft Time and Labor application tables.
- Installing PeopleTools Mobile Agent.
- Initializing Mobile Time Management.

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

Important! The order in which you set up tables required to implement PeopleSoft Mobile Time Management may vary; each individual application isn't necessarily set up in sequence. The order in which you complete setup may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

PeopleTools Installation Guide

Setting Up PeopleSoft HRMS Fundamental Tables

PeopleSoft Mobile Time Management requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define in these tables lays the foundation for the PeopleSoft Mobile Time Management setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Getting Started With PeopleSoft HRMS"
2. Select Mobile Time Management on the Installation Table – Products page.	*PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook*, "Getting Started With PeopleSoft HRMS"

Setting Up PeopleSoft Time and Labor Tables

PeopleSoft Mobile Time Management requires the setup of core PeopleSoft Time and Labor application tables. The information that you define in these tables lays the foundation for the PeopleSoft Mobile Time Management setup.

Step	Reference
1. Set up PeopleSoft Time and Labor application tables.	*PeopleSoft 8.8 Time and Labor PeopleBook*, "Getting Started With PeopleSoft Time and Labor"

Installing PeopleSoft Mobile Agent

The steps discussed in this section provide an overview of the Mobile Agent installation process. The reference documentation listed for each step provides further detail.

Step	Reference
1. Access the PeopleSoft Mobile Agent setup files and follow the steps in the PeopleSoft Mobile Agent InstallShield Wizard.	*PeopleTools Installation Guide,* Appendix: Installing PeopleTools Mobile Agent http://www.peoplesoft.com
2. Log onto the Mobile Portal and set the synchronization IDs.	*PeopleTools PeopleBook: PeopleTools Mobile Agent ,* Using Synchronizable Component Interfaces, "Using the Synchronization ID and DateTime Stamp"
3. Define mobile user roles and associate with user IDs.	*PeopleTools PeopleBook: PeopleTools Mobile Agent,* Mobile Pages, "Creating Roles for Mobile Users and Associating Permission Lists to the Roles"

Initializing PeopleSoft Mobile Time Management

The steps discussed in this section provide an overview of the Mobile Time Management initialization process. The information that you defined in your fundamental tables lays the foundation for this setup.

Completing these steps prepares your system to support these business processes:

- Report elapsed time.
- Submit elapsed time.
- View elapsed time summaries.
- View schedules.

Note. The steps listed below as optional are required only when using a Pocket PC.

Step	Reference
1. Start the PeopleSoft Mobile Agent application.	Chapter 3, "Reporting Time," page 7
2. Log on to the Mobile Portal Bootstrap synchronization page that automatically loads upon initial logon.	Chapter 3, "Reporting Time," page 7
3. Synchronize the mobile device.	Chapter 3, "Reporting Time," page 7
4. (Optional) If initializing a Pocket PC, make certain the device has a network connection to the host computer. Then repeat step one if the Mobile Agent has been stopped.	Chapter 3, "Reporting Time," page 7
5. (Optional) Select PS Sync PDA from the Mobile Agent menu.	Chapter 3, "Reporting Time," page 7
6. (Optional) Log on to the Update PDA Applications page that automatically loads upon initial logon.	Chapter 3, "Reporting Time," page 7
7. (Optional) Synchronize the mobile device.	Chapter 3, "Reporting Time," page 7

CHAPTER 2

Understanding PeopleSoft Mobile Time Management

This chapter provides an overview of PeopleSoft Mobile Time Management and discusses:

- PeopleSoft Mobile Time Management business processes.
- PeopleSoft Mobile Time Management integrations.
- PeopleSoft Mobile Agent.

PeopleSoft Mobile Time Management

PeopleSoft Mobile Time Management provides time reporting and viewing capabilities for Pocket PC and laptop computer users while disconnected from the organization's network. This enables users to manage time reporting while working remotely and to submit reported time periodically through synchronization with the server.

Prerequisites

Before using PeopleSoft Mobile Time Management, PeopleSoft Time and Labor application tables must be set up and Mobile Time Management must be selected on the Installation Table – Products page. PeopleSoft Mobile Agent must be installed and running on the host machine and the mobile device. The bootstrap synchronization does not need to be performed if the host machine is not also the mobile device.

Before using PeopleSoft Mobile Time Management, PeopleSoft Mobile Agent must be installed on the mobile device and, if PeopleSoft Mobile Time Management is used on a Pocket PC, PeopleSoft Mobile Agent must also be installed on the host computer. For installation instructions on PeopleSoft Mobile Agent refer to the *PeopleTools Installation Guide* posted on the PeopleSoft Customer Connection Website.

See http://www.peoplesoft.com

Note. The billable time functionality requires implementation of PeopleSoft Projects.

See Also

PeopleSoft 8.8 Time and Labor PeopleBook, "Understanding PeopleSoft Time and Labor"

PeopleTools PeopleBook: PeopleTools Mobile Agent

PeopleSoft Mobile Time Management Business Processes

PeopleSoft Mobile Time Management supports the following business processes:

- Report elapsed time.

  Report time on the mobile device using the Report Time page. The reported time is submitted when any synchronization is performed.

- View elapsed time summaries.

  View reported time for the current time period on the Elapsed Time Summary page. This page also links to the Report Time page to report time or modify previously reported time in the current time period.

- View schedules.

  View the schedule for the current time period using the View Schedule page.

PeopleSoft Mobile Time Management Integrations

PeopleSoft Mobile Time Management integrates with PeopleSoft Time and Labor.

The PeopleSoft Mobile Time Management time reporting feature enables the tracking of billable payable time. PeopleSoft Mobile Time Management integrates with PeopleSoft Time and Labor which integrates with PeopleSoft Projects to record and track billable time.

Note. We cover integration considerations in this PeopleBook.

Understanding PeopleSoft Mobile Agent

PeopleSoft Mobile Agent technology enables users to work with PeopleSoft mobile applications on a laptop computer or Pocket PC while disconnected from the Internet or local network. PeopleSoft Mobile Agent uses standard Internet tools and protocols—Web browser, HTTP, XML—to access a mobile database containing application definitions and data. Changes made while disconnected can be distributed across the network when later connected.

See Also

PeopleTools Installation Guide

http://www.peoplesoft.com

PeopleTools PeopleBook: PeopleTools Mobile Agent

CHAPTER 3

Reporting Time

This chapter provides an overview of mobile time reporting and discusses how to:

- Access PeopleSoft Mobile Time Management.
- View, report, and update elapsed time entries.
- View schedules.
- Synchronize data.

Note. This chapter assumes familiarity with PeopleSoft Time and Labor and time reporting transactions.

See Also

PeopleSoft 8.8 Time and Labor PeopleBook, “Reporting Time”

Understanding Mobile Time Reporting

PeopleSoft Mobile Time Management enables users to report elapsed time-related data on mobile devices. PeopleSoft Mobile Time Management runs on either a laptop computer or Pocket PC. When disconnected from the network, users can still maintain time reporting data on the mobile device. Time reporter data is uploaded to the network server upon synchronization and then the data passes to the application server, updating the time reporter data in the application.

You can report time through the mobile device and still use the PeopleSoft Time and Labor online self-service transactions as well. If duplicate entries are made on the mobile device and through an online transaction, the entry performed on the device will be processed as the default and the system produces an error message upon the next synchronization. Corrections to previous period time reporting data must be performed online.

PeopleSoft Mobile Time Management enables users to designate billable time for each time reporting transaction. This data passes to reported payable time in PeopleSoft Time and Labor and then is passed onto PeopleSoft Projects, if installed, or another third–party application. This allows for accurate time reporting for organizations and clients.

See Also

PeopleSoft 8.8 Time and Labor PeopleBook, “Setting Up Basic Tables”

PeopleSoft 8.8 Time and Labor PeopleBook, “Establishing Time Reporting Codes”

Accessing the Mobile Time Management Application

This section discusses how to:

- Access Mobile Time Management from a laptop.
- Access Mobile Time Management from a Pocket PC.

Accessing Mobile Time Management From a Laptop

To access PeopleSoft Mobile Time Management from a laptop: from the Start menu, select Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent, PS Mobile Application.

Upon the first initialization, the bootstrap synchronization page appears. After initialization, the main menu page appears when accessing the application.

Accessing Mobile Time Management From a Pocket PC

To access the Mobile Time Management application on a Pocket PC:

1. From the Start menu, select Programs.
2. Select the PeopleSoft folder.

   This folder contains the files to start and stop the Mobile Agent application and the PeopleSoft Mobile Time application file.
3. Select Start PS Mobile Agent.

   This starts the Mobile Agent application.
4. Select PS Mobile Application.

   This opens PeopleSoft Mobile Time Management.

Note. To improve viewing on the Pocket PC screen, reduce the text size by selecting View, Text Size, Smaller (or Smallest).

Understanding Mobile Time Management Navigation

PeopleSoft Mobile Time Management uses familiar PeopleSoft and Web navigation methods, including a menu, links and buttons.

The Menu link displays the main page including the Mobile Time, Alerts and Synchronization links. The menu link appears only on the Pocket PC, not on the laptop. Each of these menus contain links to Mobile Time Management pages.

The Mobile Time Management menu contains links to the basic functions of the application, the Elapsed Time page and the View Schedule page. Click the Elapsed Time link to go to the Elapsed Time Summary page. This page displays the elapsed time entries for the current period. From this page you can add new elapsed time entries by clicking the Add button or modify time entries by clicking the date link for that entry. Either link displays the Report Time page.

Viewing, Reporting, and Updating Elapsed Time Entries

This section discusses how to:

- View elapsed time summaries.
- Report and update elapsed time.
- Search for reported time information.

Common Elements Used in This Section

Time Reporting Code Enter a code for a TRC (time reporting code), an element of compensation or a bucket of several elements in which the system collects labor data, hours, amounts, or units worked. Define these codes on the Time Reporting Codes components in PeopleSoft Time and Labor. Click the column heading to sort by TRC.

Quantity Enter the number of hours being reported for the designated date and TRC. Click the column heading to sort by quantity.

Currency Select a currency code for this time report entry.

If you know the correct currency code, enter it here. If not, click the look-up prompt to see the list of valid currency codes or enter the first two letters, if known, and click the look-up prompt and the system displays all currency codes beginning with the letters you entered. For example, enter “US” in the currency code field on the Report Time page and tap or click the look-up prompt to see a list of currency codes beginning with “US.”

Billable Select to charge the time expense to a project and trigger client billing. PeopleSoft Projects must be implemented to use the billable feature.

Sync Status Use the Sync Status column to view the synchronization information on each entry. Click the heading to sort by Sync Status.

See Also

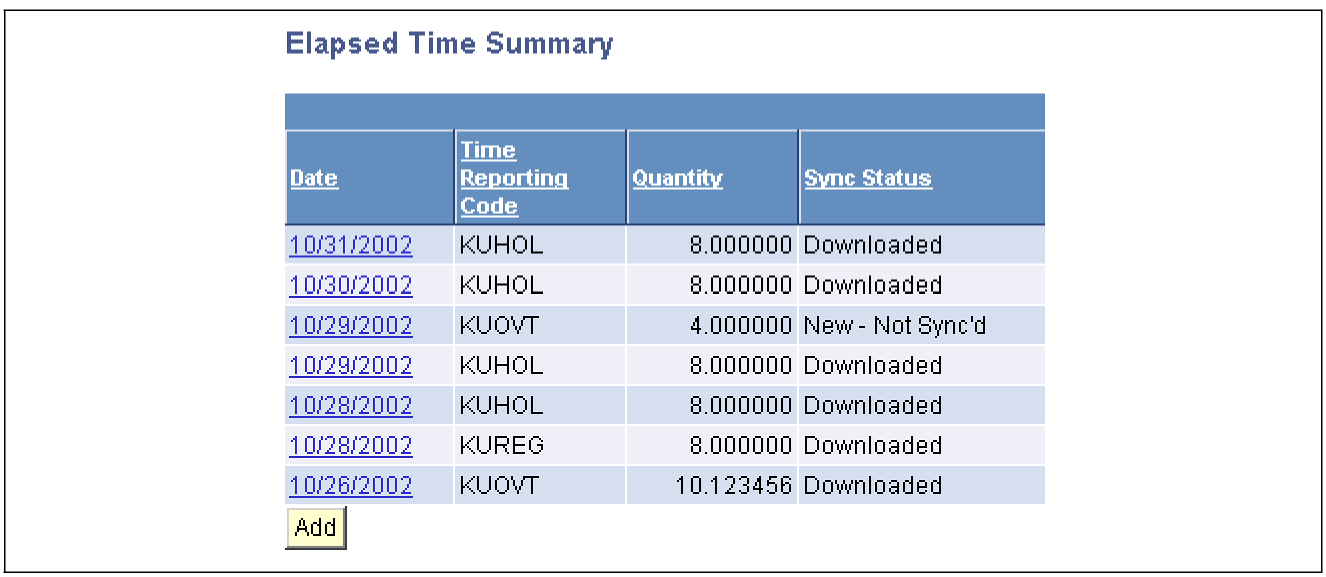
PeopleSoft 8.8 Time and Labor PeopleBook, “Establishing Time Reporting Codes”

Pages Used to View and Report Elapsed Time

Page Name	Object Name	Navigation	Usage
Elapsed Time Summary	TL_MBLE_ELPTIME_MP	Mobile Time, Elapsed Time	View the reported elapsed time entries for the current period and any time reported on the mobile device that has not been submitted. This page links to the Report Time page to add new time or modify existing time entries. The Elapsed Time Summary page displays up to seven current period time entries. Use the online pages to review and adjust prior period entries.
Report Time	TL_MBLE_ELPTIME_MP	Mobile Time, Elapsed Time, Click the link for the date of the reported time to be viewed or modified, or use the Add button.	Use the Report Time page to enter reported time using the Add button found on the Elapsed Time Summary page or clicking the date link on the Elapsed Time Summary page to modify previously reported time.

Viewing Elapsed Time Summary

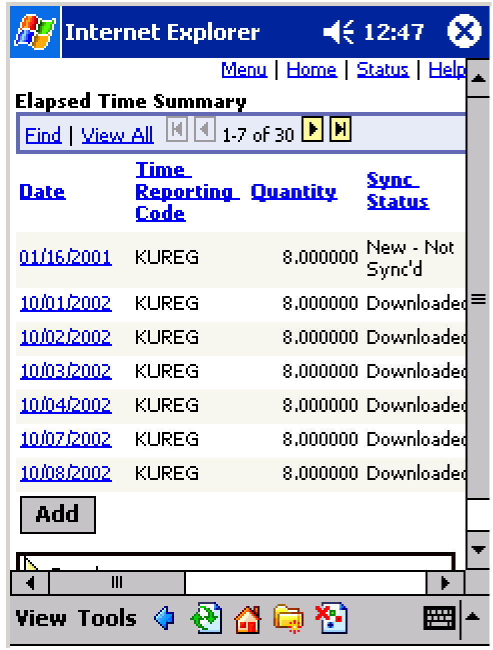
Access the Elapsed Time Summary page.


Elapsed Time Summary

Date	Time Reporting Code	Quantity	Sync Status
10/31/2002	KUHOL	8.000000	Downloaded
10/30/2002	KUHOL	8.000000	Downloaded
10/29/2002	KUOVT	4.000000	New - Not Sync'd
10/29/2002	KUHOL	8.000000	Downloaded
10/28/2002	KUHOL	8.000000	Downloaded
10/28/2002	KUREG	8.000000	Downloaded
10/26/2002	KUOVT	10.123456	Downloaded

Add

Elapsed Time Summary page – laptop computer



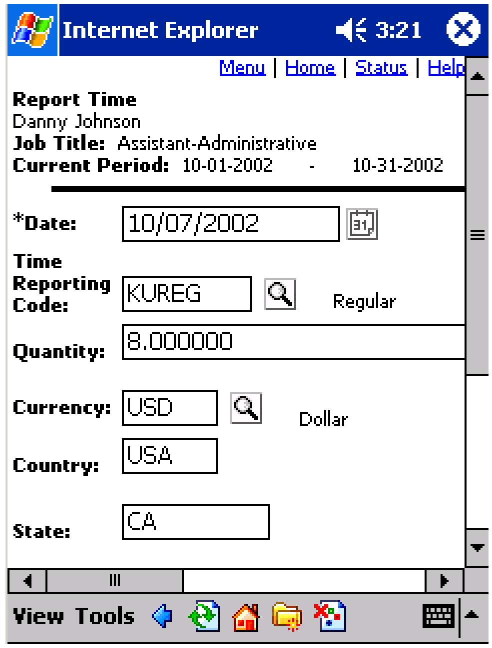
Elapsed Time Summary page – Pocket PC

Click the Add button to access the Report Time page for new time reports or click the date link to modify an existing report.

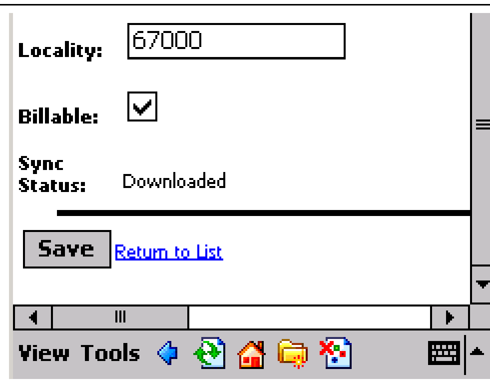
Reporting and Updating Elapsed Time

Access the Report Time page.

Report Time page – laptop computer



Report Time page – Pocket PC 1 of 2



Report Time page – Pocket PC 2 of 2

Entering Reported Time

To report time:

1. Enter the date for the reported time.
2. Select the time reporting code for the reported time. This is a required field and the page will not save without entering a value here.
3. Enter the number of hours being reported for this date and TRC.
4. Select a currency code for this reported time.
5. Enter the Country, State and Locality from where the time is being reported. You cannot report a Locality without reporting a State; you cannot report a State without reporting a Country.
6. If this time is billable, select the Billable check box. Implement PeopleSoft Projects to process billable time.
7. Click Save. Click Return to List to return to the Elapsed Time Summary page.

If time for one date is split between different TRCs or billable and non-billable time, enter a separate time report for each TRC or billable and non-billable hours. For example, if on July 15, 2002, you worked four regular, non-billable hours; four regular, billable hours; and, three overtime hours you would enter three separate time reports with the same date.

Reported time entries remain stored on the mobile device until the next server synchronization process uploads the entries to the server.

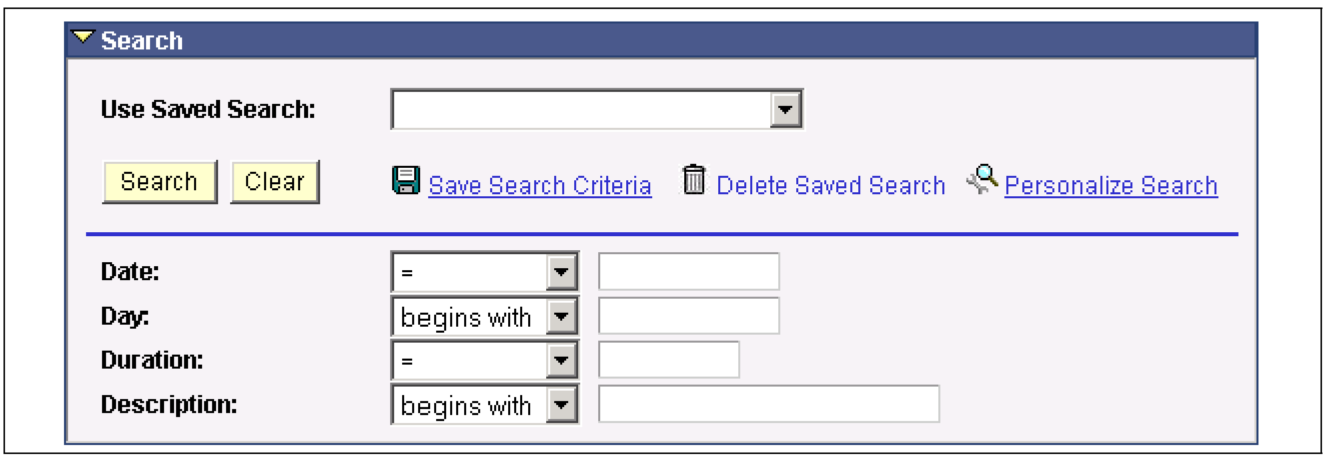
Updating Reported Time

To update entries on the mobile device prior to synchronization:

1. Access the Elapsed Time Summary page.
2. Click the date link on the Elapsed Time Summary page for the entry to be updated to access the Report Time page.
3. Modify any fields on the Report Time page.
4. Click Save.

Searching for Reported Time Information

Access the Search group box on the Elapsed Time Summary or View Schedule pages.



Elapsed Time Summary – Search group box

Use Saved Search

Enter a name for this search and then enter search criteria in the fields Date, Time Reporting Code, Quantity, or Sync Status fields. Click the Save Search Criteria link to name this search and save the criteria to use again.

Click the Personalize Search link to define the search page layout.

Note. Saved searches on the Elapsed Time Summary page will not appear on the View Schedule page. Separate criteria for saved searches must defined on each page.

Note. The search feature on the Pocket PC is identical to that on the laptop.

Viewing Schedules

This section discusses how to view the current schedule period.

PeopleSoft Mobile Time Management enables you to view the current schedule period. Scheduling data updates with either the Full Synchronization or Update Application synchronization modes.

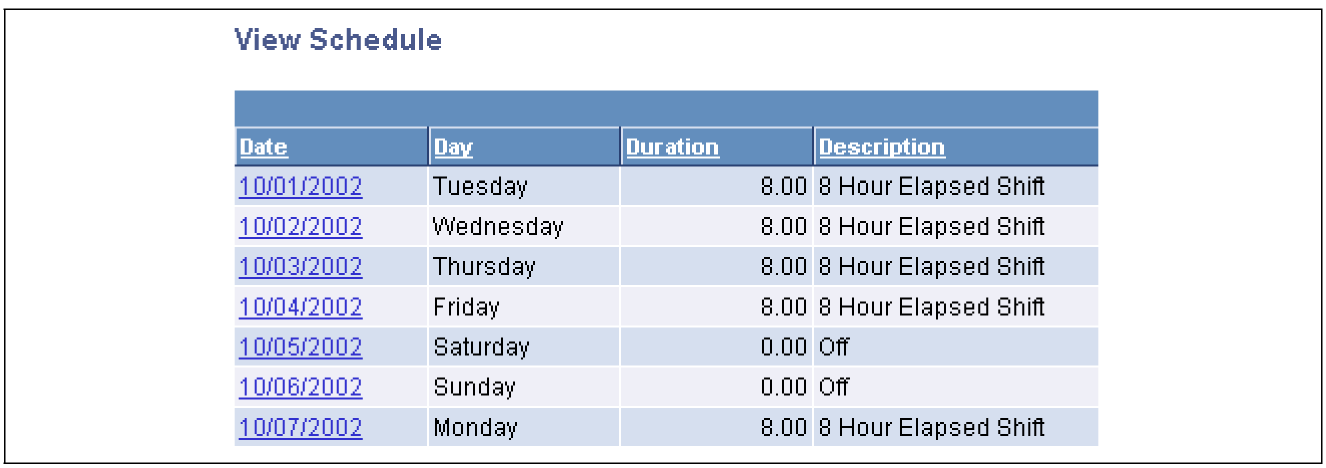
The schedule displays the current period as defined by the payroll definitions in PeopleSoft Time and Labor. If a period is one week, the week containing the current date displays. If a period is one month, the month period containing the current date displays, with a maximum of 31 days.

Page Used to View Schedules

Page Name	Object Name	Navigation	Usage
View Schedule	TL_MBLE_SCHEDULE_MP	Mobile Time, View Schedule	Use the View Schedule page to view the current period schedule.

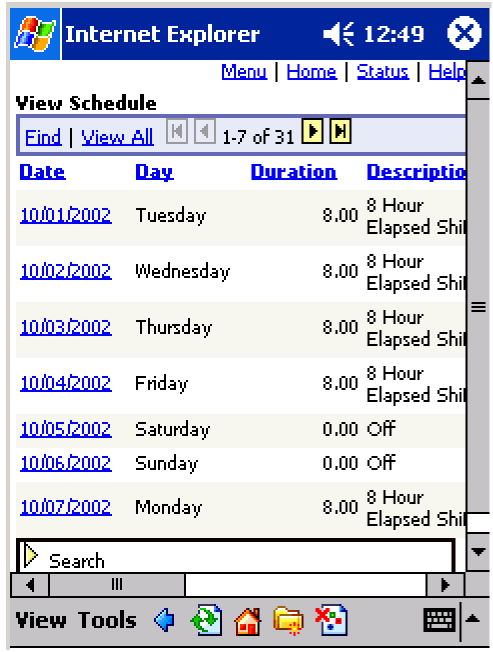
Viewing Schedules by Reporting Period

Access the View Schedule page.


View Schedule

Date	Day	Duration	Description
10/01/2002	Tuesday	8.00	8 Hour Elapsed Shift
10/02/2002	Wednesday	8.00	8 Hour Elapsed Shift
10/03/2002	Thursday	8.00	8 Hour Elapsed Shift
10/04/2002	Friday	8.00	8 Hour Elapsed Shift
10/05/2002	Saturday	0.00	Off
10/06/2002	Sunday	0.00	Off
10/07/2002	Monday	8.00	8 Hour Elapsed Shift

View Schedule page – laptop computer



View Schedule page – Pocket PC

The View Schedule page displays the current schedule period.

Synchronizing Data

This section provides an overview of mobile synchronization and discusses how to:

- Synchronize mobile application data.
- View synchronization results.

Mobile applications store data updates on the device until the mobile user initiates a data synchronization. The mobile user must gain a network connection to the synchronization server gateway machine prior to executing the synchronization process. During the synchronization process, data from the device is uploaded to the server and any data conflicts between the device and server are resolved. In some cases, new and modified business data, application definitions, and error messages are downloaded from the server to the device.

In addition to the three synchronization modes available from the Synchronization menu and described in the table below, the device automatically initiates the Bootstrap Synchronization mode upon initial logon to the application. The Bootstrap Synchronization loads your business applications if your device has never been initialized or if you have reinstalled PeopleSoft Mobile Agent and PeopleSoft Mobile Time Management. If your applications successfully load, a Full Synchronization is performed to load your business data on to your device.

To perform the Bootstrap Synchronization on the laptop or host workstation:

1. Start the PeopleSoft Mobile Agent application. From the Start menu, select Programs, PeopleSoft Mobile Agent, Start PS Mobile Agent, PS Mobile Application.
2. Log on to the Mobile Portal Bootstrap synchronization page that automatically loads upon initial logon.

3. Synchronize the mobile device.
4. (Optional) If initializing a Pocket PC, make certain the device has a network connection to the host computer, then repeat step one if the Mobile Agent has been stopped.
    a. Select PS Sync PDA from the Mobile Agent menu.
    b. Log on to the Update PDA Applications page that automatically loads upon initial logon.
    c. Synchronize the Pocket PC.

Note. When using a Pocket PC, the host machine used for data synchronization must be running PeopleSoft Mobile Agent.

From the Synchronization menu, there are three synchronization modes from which to choose. The following table provides a brief description of each mode.

Synchronization Mode	Description
Upload Changes	Upload Changes sends new and modified reported time from the mobile device to the server. This is the fastest synchronization process. Only error messages download from the server.
Full Synchronization	Full Synchronization uploads changes and provides a complete reconciliation of the business data on the device with the data on the server. After uploading the changed data, the mobile device retrieves new and modified business data from the server.
Update Applications	Update Applications first uploads new and modified reported time from the device to the server. If errors occur during the upload process, Update Applications terminates and the errors generated must be corrected before proceeding. If there are no errors with the reported time, Update Applications removes all data from the device and downloads the current version of the application from the server. After successfully reloading the application, a Full Synchronization executes to restore business data to the device.

Synchronizing Mobile Application Data

To synchronize PeopleSoft Mobile Time Management data:

1. Select Synchronization from the PeopleSoft Mobile Time Management main menu page.
2. Select the synchronization mode.

    Note. To expedite synchronization on the Pocket PC, use the initialized host PC. To do so, from the Start menu, select Programs, PeopleSoft Mobile Agent, PS Sync PDA. This synchronization method uses the host PC's processing power to perform the application synchronization and then synchronizes the results to the connected Pocket PC. A synchronization performed directly from the Pocket PC will take longer to process.

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3. Enter your User ID and Password.
4. Click the Synchronize button.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent, Using PeopleSoft Mobile Agent, “Selecting a Synchronization Mode”

Viewing Synchronization Results

After each synchronization, you can view the results as well as error messages and notifications produced by the synchronization process.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent, Using PeopleSoft Mobile Agent, “Viewing and Responding to Alerts”

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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