



PeopleSoft Enterprise eDevelopment 8.9 PeopleBook

April 2005

PeopleSoft Enterprise eDevelopment 8.9 PeopleBook
SKU HRCS89MP1EDV-B 0405
Copyright © 1988-2005 PeopleSoft, Inc. All rights reserved.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. (“PeopleSoft”), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

Open Source Disclosure

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright © 1999-2000 The Apache Software Foundation. All rights reserved.

THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

OpenSSL

Copyright © 1998-2003 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

SSLeay

Copyright © 1995-1998 Eric Young. All rights reserved.

This product includes cryptographic software written by Eric Young (eay@cryptsoft.com). This product includes software written by Tim Hudson (tjh@cryptsoft.com). Copyright © 1995-1998 Eric Young. All rights reserved. THIS SOFTWARE IS PROVIDED BY ERIC YOUNG “AS IS” AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE AUTHOR OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright © 2001 by Andrei Alexandrescu. This code accompanies the book:

Alexandrescu, Andrei. “Modern C++ Design: Generic Programming and Design Patterns Applied.” Copyright © 2001 Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

Helma Project

Copyright © 1999-2004 Helma Project. All rights reserved.

THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

Contents

General Preface

About This PeopleBook Preface	ix
PeopleSoft Application Prerequisites.....	ix
PeopleSoft Application Fundamentals.....	ix
Documentation Updates and Printed Documentation.....	x
Obtaining Documentation Updates.....	x
Ordering Printed Documentation.....	x
Additional Resources.....	xi
Typographical Conventions and Visual Cues.....	xii
Typographical Conventions.....	xii
Visual Cues.....	xiii
Country, Region, and Industry Identifiers.....	xiv
Currency Codes.....	xiv
Comments and Suggestions.....	xiv
Common Elements Used in PeopleBooks.....	xv

Preface

PeopleSoft Enterprise eDevelopment Preface.....	xvii
PeopleSoft Products.....	xvii
PeopleSoft Enterprise HRMS Application Fundamentals.....	xvii
PeopleBook Structure.....	xvii

Chapter 1

Getting Started with eDevelopment.....	1
eDevelopment Business Processes.....	1
eDevelopment Integrations.....	1
eDevelopment Implementation.....	2

Chapter 2

Entering Personal Development Information.....	3
Navigating in eDevelopment.....	3
Roles.....	4
Security.....	4

Entering Training Information.....	5
Pages Used to Enter Training Information.....	5
Reviewing, Updating, and Adding Education Information.....	5
Pages Used to Review, Update, and Add Education Information.....	6
Reviewing, Updating, and Adding Honors and Awards Information.....	6
Understanding the Honors and Awards Transaction.....	6
Pages Used to Review, Update, and Add Honors and Awards Information.....	7
Entering Language Information.....	7
Understanding the Languages Transaction.....	7
Pages Used to Enter Languages.....	8
Entering License and Certificate Information.....	8
Understanding the Licenses and Certificates Transaction.....	8
Pages Used to Enter License and Certificate Information.....	9
Managing Membership Information.....	9
Understanding the Memberships Self-Service Transaction.....	9
Pages Used to Manage Professional Membership Information.....	10
Managing Activity Information.....	10
Understanding the Activities Transaction.....	10
Pages Used to Manage Activity Information.....	11
Setting Up Administrative Post Information.....	11
Understanding the Administrative Posts Self-Service Transaction.....	11
Pages Used to Set Up Administrative Post Information.....	11
Manage Committee Information.....	12
Understanding the Committee Self-Service Transaction.....	12
Pages Used to Manage Committee Information.....	12
Managing Presentation Information.....	12
Understanding the Presentations Transaction.....	12
Pages Used to Manage Presentation Information.....	13
Entering Special Project Information.....	13
Understanding the Special Projects Self-Service Transaction.....	13
Pages Used to Enter Special Project Information.....	13
Reviewing, Updating, and Adding Student Advising Information.....	14
Understanding the Student Advising Self-Service Transaction.....	14
Pages Used to Review, Update, and Add Student Advising Information.....	14
Entering Teaching Responsibility Information.....	14
Understanding the Teaching Responsibilities Self-Service Transaction.....	14
Pages Used to Enter Teaching Responsibility Information.....	15

Chapter 3

Completing Competency Self-Evaluations.....	17
Understanding the Competency Self-Evaluation Process.....	17
Prerequisites.....	17
The Self-Evaluation Process.....	17
Creating New Evaluations.....	18
Pages Used to Create an Evaluation.....	19

Chapter 4

Requesting Employee Training.....	21
Understanding the Self-Service Training Development Process.....	21
Prerequisites.....	21
The Self-Service Training Development Process.....	21
Submitting Training Requests.....	22
Pages Used to Submit Training Requests.....	23
Approving Training Requests.....	23
Pages Used to Approve Training Requests.....	24
Viewing the Status of Training Requests.....	24
Pages Used To View the Status of Training Requests.....	24
Reviewing Training History Information.....	24
Page Used to Review Training History.....	25
Handling Errors and Warnings.....	25
Understanding Errors and Warnings.....	25
Page Used to Handle Errors and Warnings.....	25

Chapter 5

Managing Professional Compliance.....	27
Understanding Professional Compliance.....	27
Completing Regulated Individual Development Reviews.....	28
Understanding RI Development Reviews.....	28
Pages Used to Complete Regulated Individual Development Reviews.....	29
Completing RI Observations.....	29
Understanding RI Observations.....	29
Pages Used to Complete RI Observations.....	30
Completing RI Key Performance Indicator Reviews.....	30
Understanding RI Key Performance Indicator Reviews.....	30
Pages Used to Complete RI Key Performance Indicator Reviews.....	31
Viewing RI Development Records.....	31

Understanding How to View RI Development Records.....31

Pages Used to View RI Development Records.....32

Viewing RI Development Reviews.....32

Understanding How to View RI Development Reviews.....32

Pages Used to View RI Development Reviews.....33

Viewing RI Observation History.....33

Understanding How to View RI Observation History.....33

Pages Used to View RI Observation History.....34

Viewing Regulated Individual KPI Review History.....34

Understanding How to View RI KPI Review History.....34

Pages Used to View Regulated Individual KPI Review History.....35

Appendix A

Delivered Workflow for eDevelopment.....37

Delivered Workflow for eDevelopment.....37

Competencies.....37

Education.....38

Honors and Awards.....38

Languages.....39

Licenses and Certificates.....39

Memberships.....40

Professional Training.....41

Glossary of PeopleSoft Terms.....43

Index 65

About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, <https://www.peoplesoft.com/corp/en/login.jsp>

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	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 letter <i>O</i> .
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 the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (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.

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.

If the note is preceded by *Important!*, the note 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.

Cross-References

PeopleBooks provide cross-references either under 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.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise eDevelopment Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS application fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise eDevelopment.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft Enterprise eDevelopment operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface”

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

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 used in the PeopleBook, if necessary.
Getting Started with...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other applications. • A high-level documentation 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.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) 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 a application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
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 eDevelopment

This chapter discusses:

- eDevelopment business processes.
- eDevelopment integrations.
- eDevelopment implementation.

eDevelopment Business Processes

PeopleSoft Enterprise eDevelopment is comprised of self-service transactions that interface with the PeopleSoft Human Resources system.

Employees use eDevelopment to:

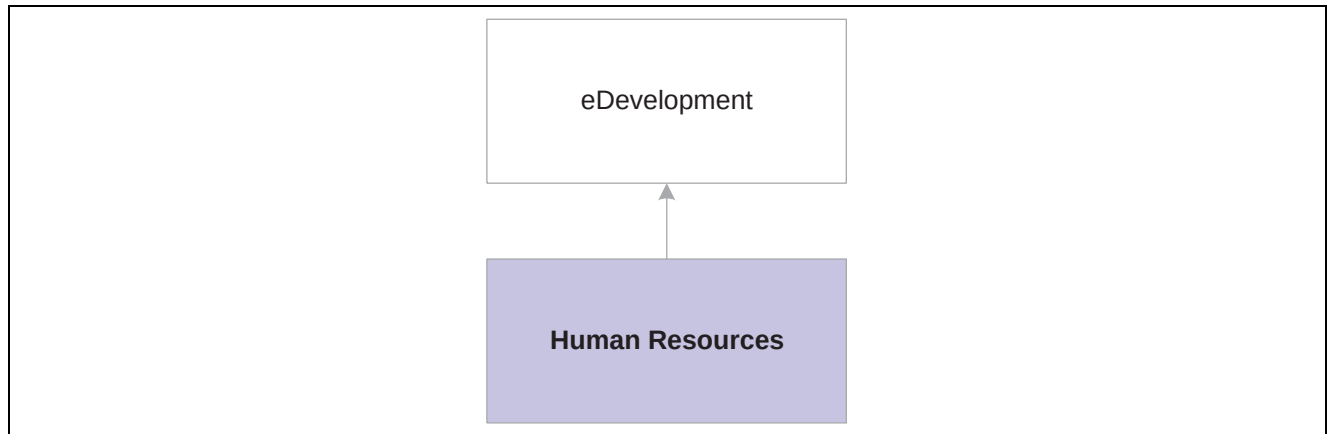
- Request training.
- Review their training information.
- Enter personal development information.
- Complete their self-evaluation form.

Managers use eDevelopment to:

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

eDevelopment Integrations

eDevelopment integrates with the following PeopleSoft application:



PeopleSoft Enterprise eDevelopment integrations with this PeopleSoft application

We discuss integration considerations in the eDevelopment Implementation section, later in this chapter.

eDevelopment Implementation

PeopleSoft Enterprise Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook* with information about where to find the most current version of each.

See Also

[“PeopleSoft Enterprise eDevelopment Preface,” page xvii](#)

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

CHAPTER 2

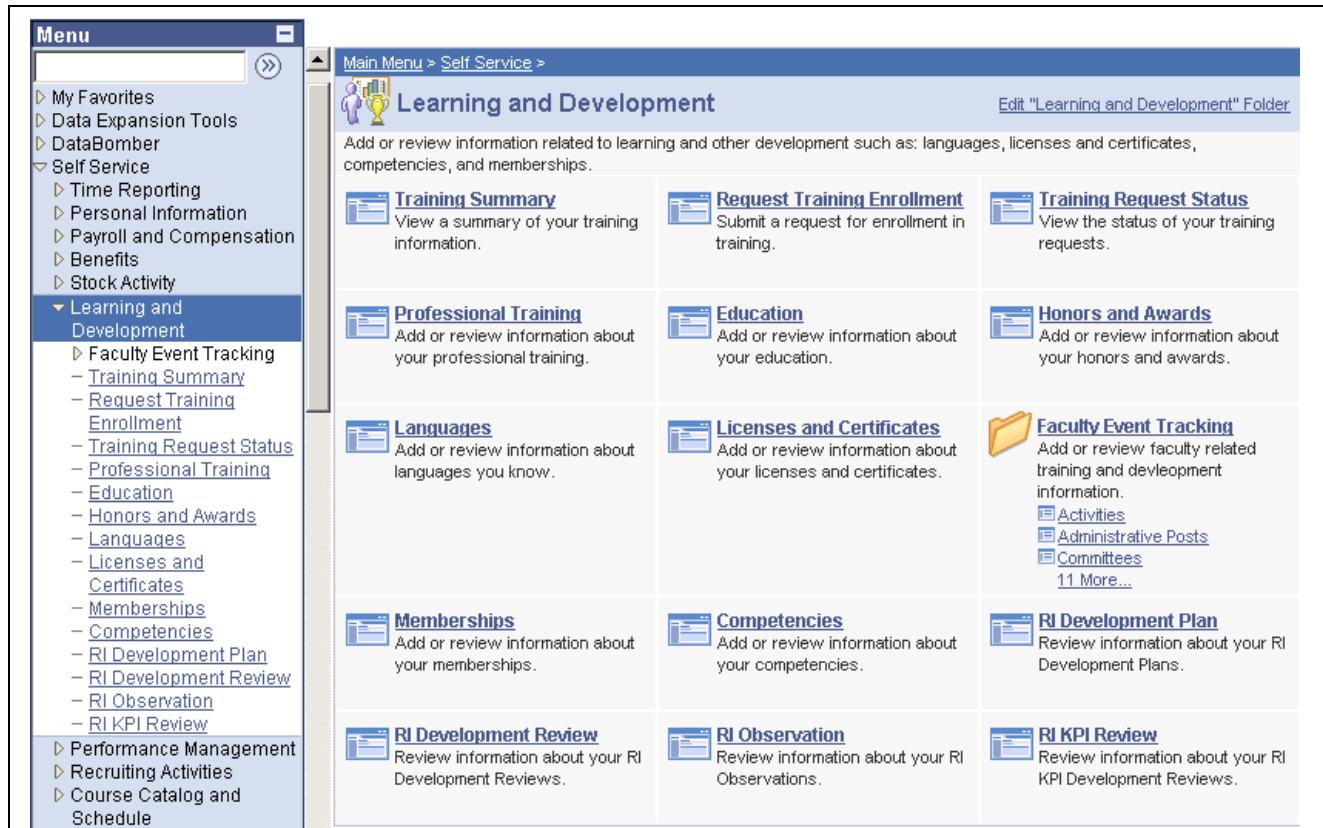
Entering Personal Development Information

This chapter describes how to:

- Navigate in eDevelopment.
- Enter training information.
- Review, update, and add education information.
- Review, update, and add honors and awards information.
- Enter language information.
- Enter license and certificate information.
- Manage membership information.
- Manage activity information.
- Set up administrative post information.
- Manage committee information.
- Manage presentation information.
- Enter special project information.
- Review, update, and add student advising information.
- Enter teaching responsibility information.

Navigating in eDevelopment

The standard menu-driven navigation path is the standard access method for the PeopleSoft Enterprise eDevelopment application.



eDevelopment navigation path

Roles

The self-service components can be used by both the employee and the manager; therefore, PeopleSoft delivers definitions for these roles and define a menu for each role.

Note. In this PeopleBook, the term *employee* refers to all people who work for and report time in the organization. This can include regular employees as well as contractors and other temporary assignment workers.

Security

The user profile that you create for each individual who accesses the self-service components determines the internet pages that the user can access by default. Create user profiles by using the User Profiles component (USERMAINT). Assign a role to each user profile, which is linked to access control lists. Each access control list identifies pages that individuals can access. To modify the access for specific internet pages for each role, modify the access control list for the user's role. Define which data the user can access in the user profile.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Entering Training Information

This section lists the pages used to enter training information.

Pages Used to Enter Training Information

Page Name	Object Name	Navigation	Usage
Professional Training	HR_PROF_TRAINING	Self-Service, Learning and Development, Professional Training	Review information about professional training courses employees have completed.
Professional Training Detail	HR_PROF_TRN_DETAIL	Click Edit or Add a Professional Training Course on the Professional Training page.	Employees add detailed information about the training course.
Professional Training	EG_SSTRAINING_L	Self-Service, Learning and Development, Faculty Event Tracking, Professional Training	Faculty members add detailed information about the training course.
Professional Training - Change a Course, Professional Training - Add a Course	EG_SSTRAINING_D	Click Edit or Add a Course on the Professional Training page.	Faculty members add detailed information about the training course.

Reviewing, Updating, and Adding Education Information

This section lists the pages used to review, update, and add education information.

Pages Used to Review, Update, and Add Education Information

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

Reviewing, Updating, and Adding Honors and Awards Information

This section provides an overview of the Honors and Awards transaction and lists the pages used to review, update, and add honors and awards information.

Understanding the Honors and Awards Transaction

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

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies, “Setting Up Competencies and Accomplishments”

Pages Used to Review, Update, and Add Honors and Awards Information

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

Entering Language Information

This section provides an overview of the Languages transaction and lists the pages used to review and update language information.

Understanding the Languages Transaction

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

Pages Used to Enter Languages

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

Entering License and Certificate Information

This section provides an overview of the Licenses and Certificates transaction and lists the pages used to enter license and certificate information.

Understanding the Licenses and Certificates Transaction

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

Pages Used to Enter License and Certificate Information

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

Managing Membership Information

This section provides an overview of the Memberships self-service transaction and lists the pages used to manage professional membership information.

Understanding the Memberships Self-Service Transaction

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

Pages Used to Manage Professional Membership Information

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

Managing Activity Information

This section provides an overview of the Activities transaction and lists the pages used to manage activity information.

Understanding the Activities Transaction

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

Pages Used to Manage Activity Information

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

Setting Up Administrative Post Information

This section provides an overview of the Administrative Posts self-service transaction and lists the pages used to review and update administrative post information.

Understanding the Administrative Posts Self-Service Transaction

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

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

Pages Used to Set Up Administrative Post Information

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

Manage Committee Information

This section provides an overview of the Committee self-service transaction and lists the pages used to manage committee information.

Understanding the Committee Self-Service Transaction

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

For faculty members to view their committee memberships, you need to set up these tables:

- Use the Committee Type Table page to maintain different committee types and committee roles within each type.

The committee types that you set up on this page are used in the Committee page.

- Use the Committee page to establish a committee and attach a committee type to it.

For example, you can establish the research Committee Type and attach it to the research and development committee.

- Use the Committee Members page to assign faculty members to a committee type within the committee.

Pages Used to Manage Committee Information

Page Name	Object Name	Navigation	Usage
Committees	EG_SSCOMMIT_MBR_L	Self Service, Learning and Development, Faculty Event Tracking, Committees	Faculty members review their committee membership information.
Committee Details	EG_SSCOMMIT_MBR_D	Click a committee start date on the Committees page.	Faculty members review details about administrative post records already assigned to them.

Managing Presentation Information

This section provides an overview of the Presentations transaction and lists the pages used to manage presentation information.

Understanding the Presentations Transaction

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

Pages Used to Manage Presentation Information

Page Name	Object Name	Navigation	Usage
Presentations	EG_SSPPRESENTATN_L	Self Service, Learning and Development, Faculty Event Tracking, Presentations	Faculty members review, add, update, or delete information about the presentations they have given.
Change Presentation, Add Presentation	EG_SSPPRESENTATN_D	Click Edit or Add Presentation on the Presentations page.	Faculty members create new presentation records, and review and edit details about presentation records already assigned to them. This includes the presentation type, date, title, and the audience or function at which they gave the presentation.

Entering Special Project Information

This section provides an overview of the Special Projects self-service transaction and lists the pages used to enter significant special project information.

Understanding the Special Projects Self-Service Transaction

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

Pages Used to Enter Special Project Information

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

Reviewing, Updating, and Adding Student Advising Information

This section provides an overview of the Student Advising self-service transaction and lists the pages used to review, update, and add student advising information.

Understanding the Student Advising Self-Service Transaction

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

Pages Used to Review, Update, and Add Student Advising Information

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

Entering Teaching Responsibility Information

This section provides an overview of the Teaching Responsibilities self-service transaction and lists the pages used to enter teaching responsibility information.

Understanding the Teaching Responsibilities Self-Service Transaction

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

Pages Used to Enter Teaching Responsibility Information

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

CHAPTER 3

Completing Competency Self-Evaluations

This chapter provides an overview of the competency self-evaluation process and describes how to create new evaluations.

Understanding the Competency Self-Evaluation Process

This section lists prerequisites and discusses the self-evaluation process.

Prerequisites

Before employees can enter their self evaluations, you must:

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up and Working with Self-Service Transactions”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies

The Self-Evaluation Process

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

- Competencies.

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

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

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

Evaluation data is stored in the CM_EVALUATIONS and COMPETENCIES tables.

- Approve Competencies.

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

Approval information is stored in the HR_CM_EVAL_STA table.

Creating New Evaluations

This section lists the pages used to create an evaluation.

Pages Used to Create an Evaluation

Page Name	Object Name	Navigation	Usage
Competency Evaluation	HR_CM_EVALUATN_NEW HR_CM_EVALUATN_CUR	Self Service, Learning and Development, Competencies	Employees access competency self-evaluation information.
Competency Details	HR_COMP_DETAIL	Click the Edit button on the Competency Evaluation page.	Employees add or modify details about a specific competency.
Add Competencies	HR_COMP_ASSIGN	Click the Add Competencies button on the Competency Evaluation page.	Employees use this page to view competencies and select a competency on which to update their self-evaluation.
Competency Evaluation	HR_CM_EVALUATN_UPD	Click the Continue button on the Add Competencies page after selecting search criteria and defining competencies.	Enter new or update self-evaluation information. The Proficiency field is required. You can also update your interest level, dates, and years of experience.
, Your Previous Competency Evaluations	HR_CM_EVALUATN_HST	Click the View Previous Evaluations link on the Competency Evaluation page.	Review the list of previous evaluations. Evaluations can originate from the Your Competency Evaluation self-service transaction, PeopleSoft Enterprise Human Resources: Manage Competencies, or PeopleSoft ePerformance.
Your Previous Competency Self-Evaluation	HR_CM_EVALUATN_PRV	Select a review date for a self evaluation on the Your Previous Competency Evaluations page.	Employees view the details of previous competency evaluations.
Select Competency Evaluation	HR_COMP_SEL_MGR	Manager Self Service, Learning and Development, Approve Competencies, Select Competency Evaluation	Select an employee whose competency evaluation you want to review.
Approve Competencies	HR_COMP_EVAL_MGR	Click a competency evaluation on the Approve Competency Evaluation page.	Managers approve or deny self-evaluations for their direct report.

CHAPTER 4

Requesting Employee Training

This chapter provides an overview of the self-service training development process and discusses how to:

- Submit training requests.
- Approve training requests.
- View the status of training requests.
- Review training history information.
- Handle errors and warnings.

Understanding the Self-Service Training Development Process

This section lists prerequisites and discusses the self-service training development process.

Prerequisites

Before you submit a training request, complete the following:

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up and Working with Self-Service Transactions”

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up and Working with Groups”

The Self-Service Training Development Process

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

- Request Training Enrollment.

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

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

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

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

- Approve Training Request.

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

- View Training Request Status.

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

- Training Summary.

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

Note. If a manager requests training for a group of direct reports and the class exceeds the number allotted during the enrollment process, the system enrolls the entire group into the class and updates their statuses to enrolled. The system then notifies an administrator to handle this situation.

Submitting Training Requests

This section lists the pages used to submit training requests.

Pages Used to Submit Training Requests

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

Approving Training Requests

This section lists the pages used to approve training requests.

Pages Used to Approve Training Requests

Page Name	Object Name	Navigation	Usage
Approve Training Request	SS_LIST	Manager Self-Service, Learning and Development, Approve Training Request	Managers view a list of employees that require training approval.
Approve Training Request	TRN_REQUEST_MGR	Manager Self-Service, Learning and Development, Approve Training Request Click the Training Enrollment by Manager link.	Managers approve or deny each employee's training request and enter comments.
Save Confirmation	EO_SAVE_CONFIRM	Select Approve or Deny on the Approve Transaction page.	Managers approve or deny the request.

Viewing the Status of Training Requests

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

Pages Used To View the Status of Training Requests

Page Name	Object Name	Navigation	Usage
Training Request Status, Training Request Status List	SS_LIST	- Self-Service, Learning and Development, Training Request Status, Training Request Status - Manager Self-Service, Learning and Development, View Training Request Status, Training Request Status List	Displays current status summary information for each training request.
Training Request Status	TRN_REQUEST_MGR	Click the Training Enrollment link on the Training Request Status or Training Request Status List page.	Displays details of the current status for the selected training request.

Reviewing Training History Information

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

Page Used to Review Training History

Page Name	Object Name	Navigation	Usage
Select Employee	OPRROWS	Manager Self-Service, Learning and Development, Training Summary, Select Employee	Select an employee whose training summary you want to review.
Training Summary	HR_TRN_SUMMARY	- Click an employee's name link in the Name column on the Select Employee page. - Self-Service, Learning and Development, Training Summary, Training Summary	Displays a summary of completed, currently confirmed, or waitlisted training courses. You can also initiate enrollment into another course using the Training Summary page.
Training Summary - Course Detail	HR_TRN_CRSDISC	Click a link in the Course Name column on the Training Summary page.	Displays detailed information about the training course.

Handling Errors and Warnings

This section provides an overview of errors or warnings and lists the page used to handle errors and warnings.

Understanding Errors and Warnings

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

- Successfully updated the database.
- Require further processing.

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up and Working with Self-Service Transactions”

Page Used to Handle Errors and Warnings

Page Name	Object Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry	Administrators review activity for self-service transactions.

CHAPTER 5

Managing Professional Compliance

This chapter provides an overview of professional compliance and discusses how to:

- Complete regulated individual (RI) development reviews.
- Complete RI observations.
- Complete RI key performance indicator (KPI) reviews.
- View RI development records.
- View RI development reviews.
- View RI observation history.
- View regulated individual KPI review history.

Understanding Professional Compliance

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

With Professional Compliance, you can:

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

Using Self-Service Transactions with Professional Compliance

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

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

Note. All RI direct reports display on the RI pages regardless of their assignment statuses. The assignment status also displays in the Direct Reports grids on the RI pages.

For Professional Compliance transactions, individuals that a manager/supervisor can view in the Direct Reports grid are their regulated individuals. It is possible for a manager/supervisor to have direct reports who are not RIs in which case the direct report would not display in the grid.

It is also possible for a manager/supervisor to be responsible for an RI, who is not one of their direct reports. In this case, the RI would still display in the grid since it is an RI transaction. Regulated individuals who are not also a direct report of a manager/supervisor will not display in the Direct Reports grid for any self-service transactions other than those for Professional Compliance.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Professional Compliance, “Monitoring Regulated Individuals”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Professional Compliance, “Entering and Maintaining Regulated Individual Data”

Completing Regulated Individual Development Reviews

This section provides an overview of RI development reviews and lists the pages used to complete development reviews.

Understanding RI Development Reviews

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

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

Pages Used to Complete Regulated Individual Development Reviews

Page Name	Object Name	Navigation	Usage
Complete a Regulated Individual Development Review - Select Regulated Individual	PCMP_OPRROWS, PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI Development Review  Click to access an employee ID list.	Select a regulated individual for whom you want to complete a development review.
RI Development Review (regulated individual development review)	HR_PCMP_T_DEVREV, HR_PCMP_T_DEVREV2, HR_PCMP_T_DEVREV3	Select a regulated individual on the Complete a Regulated Individual Development Review - Select Regulated Individual page.	Managers complete development reviews. Using the pages, managers select statuses for development plan areas, and add optional comments about a particular area. They can also update review dates and the review status.

Completing RI Observations

This section provides an overview of RI observations and lists the pages used to complete observations.

Understanding RI Observations

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

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

Pages Used to Complete RI Observations

Page Name	Object Name	Navigation	Usage
Complete a Regulated Individual Observation - Select Regulated Individual	PCMP_OPRROWS, PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI Observation  Click to access an employee ID list.	Select a regulated individual for whom you want to complete an observation.
RI Observation (regulated individual observation)	HR_PCMP_T_RIOBS, HR_PCMP_T_RIOBS2, HR_PCMP_T_RIOBS3	Select a regulated individual on the Complete a Regulated Individual Observation - Select Regulated Individual page.	Enter an observation, including selecting observation models, defining the observation date, setting the statuses of observation model elements, and entering optional comments.

Completing RI Key Performance Indicator Reviews

This section provides an overview of RI key performance indicator reviews and lists the pages used to complete KPI reviews.

Understanding RI Key Performance Indicator Reviews

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

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

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

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

Pages Used to Complete RI Key Performance Indicator Reviews

Page Name	Object Name	Navigation	Usage
Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual	PCMP_OPRROWS, PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI KPI Review  Click to access an employee ID list.	Select a regulated individual for whom you want to complete a KPI review.
RI KPI Review (regulated individual key performance indicators review)	HR_PCMP_T_RIKPI, HR_PCMP_T_RIKPI2, HR_PCMP_T_RIKPI3	Select a regulated individual on the Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page.	Perform a key performance indicator review by completing details for each indicator, entering the date of the review, the frequency, and optional comments about the review.

Viewing RI Development Records

This section provides an overview of the viewing RI development records and lists the pages used to view RI development records.

Understanding How to View RI Development Records

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

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

Pages Used to View RI Development Records

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Development Record - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI Development Record  Click to access an employee ID list.	Select a regulated individual whose development plan you want to view.
RI Development Record (regulated individual development record), Development Record	HR_PCMP_DEVREC2	- Select a regulated individual on the View a Regulated Individual Development Record - Select Regulated Individual page. - Self-Service, Learning and Development, RI Development Plan, Development Record	Compliance managers/supervisors view details of development plans for regulated individual . Employees can view details of their own development plans.

Viewing RI Development Reviews

This section provides an overview of viewing RI development reviews and lists the pages used to view development reviews.

Understanding How to View RI Development Reviews

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

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

Pages Used to View RI Development Reviews

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Development Review - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI Development Review  Click to access an employee ID list.	Select a regulated individual whose development review you want to view.
Development Review	HR_PCMP_DEVREV2	- Select a regulated individual on the View a Regulated Individual Development Review - Select Regulated Individual page. - Self-Service, Learning and Development, RI Development Review, Development Review	Compliance managers/supervisors view development review histories of regulated individual. Employees can view details of their own development reviews.

Viewing RI Observation History

This section provides an overview of viewing RI observation history and lists the pages used to view RI observation history.

Understanding How to View RI Observation History

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

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

Pages Used to View RI Observation History

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Observation - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI Observation  Click to access an employee ID list.	Select a regulated individual whose observation history you want to view.
RI Observation (regulated individual observation), Regulated Individual Observation	HR_PCMP_RIOBS	- Select a regulated individual on the View a Regulated Individual Observation - Select Regulated Individual page. - Self-Service, Learning and Development, RI Observation, Regulated Individual Observation	Compliance managers/supervisors view observation history. Employees can also view details of their own observation history.

Viewing Regulated Individual KPI Review History

This section provides an overview of viewing RI KPI review history and lists the pages used to view KPI review history.

Understanding How to View RI KPI Review History

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

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

Pages Used to View Regulated Individual KPI Review History

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI KPI Review  Click to access an employee ID list.	Select a regulated individual whose KPI review you want to view.
RI KPI Review (regulated individual key performance indicators review), Key Performance Indicators Review	HR_PCMP_RIKPI	- Select a regulated individual on the View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page. - Self-Service, Learning and Development, RI KPI Review, Key Performance Indicators Review	Compliance managers/supervisors view regulated individual KPI reviews. Employees can also view details of their own KPI reviews.

APPENDIX A

Delivered Workflow for eDevelopment

This appendix discusses workflows for PeopleSoft Enterprise eDevelopment.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflow for eDevelopment

This section discusses eDevelopment workflow. The workflows are listed alphabetically by workflow name.

Competencies

This section discusses the Competencies workflow.

Description

Event Description	An employee completes and submits a self-evaluation and generates a worklist entry.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to a page where he can approve the self-evaluation.
Notification Method	Email, worklist, or both

Workflow Objects

Event	HR_COMPETENCIES
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Competencies
Business Activity	HR_COMPETENCIES
Business Event	Submit evaluation

Education

This section discusses the Education workflow.

Description

Event Description	An employee uses self-service to update his personal development information for education. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to a page where she can view the changed personal development information for education.
Notification Method	Email, worklist, or both

Workflow Objects

Event	HR_EDUCATION
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Education
Business Activity	HR_EDUCATION
Business Event	Education

Honors and Awards

This section discusses the Honors and Awards workflow.

Description

Event Description	An employee uses self-service to update her personal development information for honors and awards. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to a page where he can view the changed personal development information for honors and awards.
Notification Method	Email, worklist, or both

Workflow Objects

Event	HR_HONORS_AWARDS
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Honors
Business Activity	HR_HONOR_AWARD
Business Event	Honor

Languages

This section discusses the Languages workflow.

Description

Event Description	An employee uses self-service to update his personal development information for languages. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to a page where she can view the changed personal development information for languages.
Notification Method	Email, worklist, or both

Workflow Objects

Event	HR_LANGUAGES
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Languages
Business Activity	HR_LANGUAGES
Business Event	Languages

Licenses and Certificates

This section discusses the Licenses and Certificates workflow.

Description

Event Description	An employee uses self-service to review, add, update, or delete license and certification information. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to a page where he can view the license and certificate information.
Notification Method	Email, worklist, or both

Workflow Objects

Event	HR_LIC_CERT
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Licenses & Certificates
Business Activity	HR_LIC_CERT_CHANGE
Business Event	LicCert

Memberships

This section discusses the Memberships workflow.

Description

Event Description	An employee uses self-service to review, add, update, or delete membership information. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to a page where he can view membership information.
Notification Method	Email, worklist, or both

Workflow Objects

Event	HR_MEMBERSHIPS
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Memberships
Business Activity	HR_MEMBERSHIPS
Business Event	Memberships

Professional Training

This section discusses the Professional Training workflow.

Description

Event Description	An employee uses self-service to update their personal development information for professional training. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to a page where she can view changed personal development information for professional training.
Notification Method	Email, worklist, or both

Workflow Objects

Event	HR_PROF_TRAINING
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Professional Training
Business Activity	HR_PROF_TRAINING
Business Event	Training

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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

	PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
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 <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i>.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollout structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.

document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.
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.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.
product line	The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
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 <i>record input value-added tax flag</i> . 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 <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
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.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

- activities 10
- Activities page 11
- Activities transaction 10
- Add a License or Certificate page 9
- Add a Membership page 10
- Add Activity 11
- Add Administrative Post page 11
- Add an Education page 6
- Add Competencies page 19
- Add Honor or Award page 7
- Add Presentation page 13
- Add Special Project page 13
- Add Student Advising page 14
- Add Teaching Responsibility page 15
- additional documentation x
- administrative posts 11
- Administrative Posts page 11
- Administrative Posts transaction 11
- application fundamentals ix
- application overview 1
- application tables, implementing 2
- Approve Competencies page 19
- Approve Competencies transaction
 - understanding 17
 - using 19
- Approve Training Request page 24
- Approve Training Request transaction
 - understanding 22
 - using 23
- Approve Transaction page 24
- awards 6

C

- certificates 8
- Change Activity page 11
- Change Administrative Post page 11
- Change Education page 6
- Change Honor or Award page 7
- Change License or Certificate page 9
- Change Membership page 10
- Change Presentation page 13
- Change Special Project page 13
- Change Student Advising page 14
- Change Teaching Responsibility page 15

- comments, submitting xiv
- Committee Details page 12
- Committee transaction 12
- committees 12
- Committees page 12
- common elements xv
- competencies
 - creating evaluations 18
 - understanding 17
 - workflow 37
- Competencies transaction
 - understanding 17
 - using 19
- Competency Details page 19
- Competency Evaluation page 19
- Complete RI Development Review transaction 28
- Complete RI KPI Review transaction 30
- Complete RI Observation transaction 29
- compliance, professional
 - and self-service transactions 27
 - overview 27
- contact information xiv
- Course Detail page 23
- Course Search page 23
- cross-references xiii
- Customer Connection website x

D

- development plans 31
- Development Record page 32
- development records 31
- Development Review page 33
- development reviews
 - completing 28
 - viewing history 32
- documentation
 - printed x
 - related x
 - updates x

E

- education 5
- Education Detail page 6
- Education page 6

- Education transaction 5
- education workflow 38
- errors 25
- evaluations
 - creating 18
 - understanding 17

F

- features 1

G

- getting started 1
- glossary 43

H

- Honor/Award Detail page 7
- honors 6
- Honors and Awards page 7
- Honors and Awards transaction 6
- honors and awards workflow 38

I

- implementation 2
- indicators, *See* key performance indicators (KPIs)
- individuals, *See* regulated individuals (RI)
- integration 1

K

- key performance indicators (KPIs)
 - completing a review 30
 - viewing review history 34
- Key Performance Indicators Review page 35
- KPIs, *See* key performance indicators (KPIs)

L

- Language Detail page 8
- languages 7
- Languages page 8
- Languages transaction 7
- languages workflow 39
- License/Certificate Detail page 9
- licenses 8
- Licenses and Certificates page 9
- Licenses and Certificates transaction 8
- licenses and certificates workflow 39

M

- Membership Detail page 10
- memberships 9
- Memberships page 10
- Memberships transaction 9
- memberships workflow 40
- MMA Partners x

N

- navigation 3
- notes xiii

O

- observations
 - completing 29
 - viewing history 33

P

- PeopleBooks
 - ordering x
- PeopleCode, typographical conventions xii
- PeopleSoft application fundamentals ix
- PeopleSoft eDevelopment
 - using workflow 37
- performance indicators, *See* key performance indicators (KPIs)
- personal development, entering information 3
- personal information
 - activities 10
 - administrative posts 11
 - committees 12
 - education 5
 - honors and awards 6
 - languages 7
 - licenses and certificates 8
 - memberships 9
 - presentations 12
 - special projects 13
 - student advising 14
 - teaching responsibilities 14
 - training 5
- plans, development 31
- posts, administrative 11
- prerequisites ix
- presentations 12
- Presentations page 13
- Presentations transaction 12

- printed documentation x
- professional compliance
 - and self-service transactions 27
 - overview 27
- Professional Education page 6
- Professional Training - Add a Course
 - page 5
- Professional Training - Change a Course
 - page 5
- Professional Training Detail page 5
- Professional Training page 5
- Professional Training transaction 5
- professional training workflow 41
- projects, special 13

R

- records, development 31
- regulated individual (RI)
 - viewing KPI review history 34
 - viewing observation history 33
- Regulated Individual Observation
 - page 34
- regulated individuals (RI)
 - completing development reviews 28
 - completing observations 29
 - viewing development records 31
 - viewing development review history 32
- related documentation x
- Request Training Enrollment page 23
- Request Training Enrollment transaction
 - understanding 21
 - using 22
- requests, training
 - approving 23
 - handling errors and warnings 25
 - reviewing history 24
 - submitting 22
 - understanding 21
 - viewing status 24
- responsibilities, teaching 14
- reviews
 - development 28, 32
 - key performance indicators (KPIs) 30, 34
- RI, *See* regulated individual (RI)
- RI Development Record page 32
- RI Development Review page 29
- RI KPI Review page 31, 35
- RI Observation page 30, 34

- RI Observation transaction 34

S

- Save Confirmation page 24
- School Education page 6
- security
 - Self Service, understanding 4
- Select Competency Evaluation page 19
- Select Employee page 25
- Select Employees page 23
- Select Regulated Individual page -
 - Complete a Regulated Individual Development Review 29
- Select Regulated Individual page -
 - Complete a Regulated Individual Key Performance Indicators Review 31
- Select Regulated Individual page -
 - Complete a Regulated Individual Observation 30
- Select Regulated Individual page - View
 - a Regulated Individual Development Record 32
- Select Regulated Individual page - View
 - a Regulated Individual Development Review 33
- Select Regulated Individual page - View a
 - Regulated Individual Key Performance Indicators Review 35
- Select Regulated Individual page - View a
 - Regulated Individual Observation 34
- Self Service
 - roles, understanding 4
 - security, understanding 4
- self-evaluations
 - creating 18
 - understanding 17
- self-service transactions
 - business processes 1
 - navigation to 3
 - professional compliance 27
- Session Detail page 23
- setup 2
- Significant Special Projects page 13
- special projects 13
- Special Projects transaction 13
- student advising 14
- Student Advising page 14
- Student Advising transaction 14
- Submit Request page 23

suggestions, submitting xiv

T

tables, implementing 2
teaching responsibilities 14
Teaching Responsibilities page 15
Teaching Responsibilities transaction 14
terms 43
training information 5
Training Request Status List page 24
Training Request Status page 24
training requests
 approving 23
 handling errors and warnings 25
 reviewing history 24
 reviewing status 24
 submitting 22
 understanding 21
Training Summary - Course Detail
 page 25
Training Summary page 25
Training Summary transaction
 understanding 22
 using 24
transactions
 business processes 1
 navigation to 3
 professional compliance 27
typographical conventions xii

V

View Available Sessions page 23
View RI Development Records
 transaction 31
View RI Development Review
 transaction 32
View RI KPI Review transaction 34
View RI Observation transaction 33
View Training Request Status transaction
 understanding 22
 using 24
visual cues xiii

W

warnings xiii, 25
workflow
 competencies 37
 delivered with PeopleSoft
 eDevelopment 37

honors and awards 38
languages 39
licenses and certificates 39
memberships 40
professional training 41
Workflow Inquiry page 25

Y

Your Previous Competency Self-Evaluation
 page 19