



PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Employee Reviews

April 2005

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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 Human Resources Manage Employee Reviews 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 Human Resources Manage Employee Reviews.

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 application has its own version of this documentation.

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 application implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other products. • 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 Manage Employee Reviews

This chapter provides an overview of Manage Employee Reviews business process and discusses:

- Manage Employee Reviews business processes.
- Manage Employee Reviews business process integrations.
- Manage Employee Reviews business process implementation tasks.

Manage Employee Reviews Business Process Overview

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

The Manage Employee Reviews business process comprises the following main phases of operation:

- Setting up supporting tables.
- Creating employee review documents.
- Managing employee review documents.

Setting Up the Supporting Tables

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

1. Define rating models.
2. Define competencies.
3. (Optional) (JPN) Define Japan review IDs.
4. Clone the Basic Employee Review Template, and update the new employee review template.

Creating Employee Review Documents

Managers can use these methods to create employee reviews:

- Create employee review documents for direct reports.
- Create employee review documents by group.

Note. The employee self appraisal document is created when the employee selects the Start hyperlink next to the Review Self Evaluation step on the Document Details page.

See [Chapter 3, “Managing Employee Reviews,” Creating Employee Review Documents, page 16.](#)

Managing Employee Review Documents

Managers, employees, and administrators perform these tasks to manage the employee review process:

- Managers update competencies and goals in the employee review document.
- The employee can update the competencies and goals contained in their self-evaluation document, and rate their own performance.
- The manager records an evaluation of the employee against the goals and competencies contained in the review document.
- The manager or an administrator can transfer the employee review document to another manager.
- Administrators can print reports that list late or missing employee reviews.

See [Chapter 3, “Managing Employee Reviews,” Completing Employee Review Documents, page 20.](#)

Manage Employee Reviews Business Processes

Manage Employee Reviews business process in PeopleSoft Enterprise Human Resources enables you to:

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

We discuss these business processes in the business process chapters in this PeopleBook.

Manage Employee Reviews Integrations

Manage Employee Reviews business process integrates with these PeopleSoft applications:

- PeopleSoft Enterprise Human Resources: Manage Competencies.
- PeopleSoft Enterprise Human Resources: Plan Salaries.

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

Manage Employee Reviews Business Process Implementation

PeopleSoft 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 order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Enterprise Human Resources also provides component interfaces to help you load data from your existing system into Manage Employee Reviews business process tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	References
COMPETENCIES	CI_COMPETENCIES	See Chapter 2, “Creating Employee Review Templates,” Understanding Employee Review Templates, page 5.
EP_APPR_MAIN	CI_EP_APPR_MAIN	See Chapter 3, “Managing Employee Reviews,” Completing Employee Review Documents, page 20.

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

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

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

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

CHAPTER 2

Creating Employee Review Templates

This chapter provides an overview of the employee review templates and discusses how to create employee review templates.

Note. We discuss creating templates for United States federal employees in the USF-specific chapter in this PeopleBook

See Also

Chapter 4, “(USF) Managing Templates and Managing Reviews for Federal Employees,” page 29

Understanding Employee Review Templates

This section provides an overview of employee review templates and discusses the:

- General information.
- Competency section.
- Goals section.
- Overall summary section.
- Different calculation methods in the same template.

Employee Review Templates Overview

Employee review templates are the foundation for employee review documents. PeopleSoft provides a basic template which must be cloned before you can begin to create new templates:

- General Information
- Competency
- Goals
- Overall Summary

From this basic template, you create other templates that fit your organization’s structure and needs. PeopleSoft provides the basic template, which you cannot modify.

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

At least one template must be cloned from the basic template before you can begin the employee review process. The basic template cannot be modified and is used strictly for cloning purposes.

General Information

Use the general information section to identify the document type for the template. Document types help organize employee review documents. You can use them to narrow the focus when printing late or missing employee review reports or to limit the search criteria when looking up employee reviews. PeopleSoft provides five document types:

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

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

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

Competency Section

Use the Competency section to add competencies to the template and identify the section level rating model and calculation method to use to rate an employee. Although you can manually add competencies to any employee's review document, this section provides the ability to pre-populate the document with one or more competencies that appear automatically on each review that is created by using this template. The rating models and performance criteria originate from the Manage Competencies business process.

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

Calculation Method	Definition
Average	This calculation method uses the numeric ratings that corresponds to the qualitative ratings (defined on the rating model) to calculate a weighted average, if weightings exist; otherwise, it calculates a straight average. It then converts this average back to a qualitative rating, again using the rating model. To use this calculation method, rating models that are associated with the competencies section and its individual competencies must have defined numeric ratings. Note. Weights are used when the calculation method is <i>Average</i>. Weighting a competency enables you to place more or less significance on a particular competency relative to the other competencies in the review.
Summation	This calculation method converts qualitative ratings to review points (defined in the rating model), calculates the total review points, and refers to the point range that is defined on the competency section's rating model to convert this total into the corresponding review rating for the competency section. Weightings are ignored. To use this calculation method, rating models that are associated with the competencies and the competency section and must define review points. The rating model for the competency section must also define point ranges in the From Points and To Points fields.

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

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

Goals Section

Managers and employees use the Goals section in the employee review to add goals in the review document. Goals cannot be entered into the template—they must be entered directly into the review document after its been created from the template.

Overall Summary Section

The Overall Summary section identifies the employee's overall performance rating. The system converts the rating from the Competencies section into an overall summary rating by using the calculation method and rating model that are specified for the Overall Summary section.

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

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

Different Calculation Methods in the Same Template

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

Calculation Methods Allowed in Overall Summary Section	Calculation Methods Allowed in Competency Section
Average	Average
Summation	Average*, Summation (see note)
Review Band	Average*, Summation (see note)

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

Prerequisites

Before you create an employee review template:

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

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

Creating Employee Review Templates

To set up employee review templates, use the Clone Review Template (EP_CLONE_TMPL), Employee Review Template (EP_TMPL_BASIC), Competencies (COMPETENCIES), and Define Review JPN (REV_DEF_TBL_JPN) components. Use the CI_COMPETENCIES component interface to load data into the tables for the Competencies component

This section discusses how to:

- Clone employee review templates.
- Create or modify employee review templates.
- Update employee review templates.
- (JPN) Create review IDs.

Pages Used to Create Employee Review Templates

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

Cloning Employee Review Templates

Access the Clone Template Definition page.

Clone Template Definition

Document Type: BASIC

Template ID: BASIC Basic Employee Review Template

Effective Date: 01/01/1900

New Document Type: Annual Review

New Template ID:

Effective Date:

Clone Template Definition page

New Document Type

Select the document type that you want to copy into the new employee review template.

Creating or Modifying Employee Review Templates

Access the Define Empl Review Template - General page.

The screenshot shows the 'General' tab of the 'Define Empl Review Template' page. The fields are as follows:

- Document Type:** KOANNUAL Annual Review
- Template ID:** DEPART10
- Effective Date:** 01/01/2004
- *Description:** Basic Employee Review Template
- *Status:** Active (dropdown menu)
- Official Review:** ☒ Official Review
- Country:** Japan (dropdown menu with a flag icon)
- Review ID:** [Empty text box with a search icon]
- Include in Grade Advance:** ☐ Include in Grade Advance

Define Empl Review Template - General page

Official Review

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

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

(JPN) Review ID

Select an ID to enable the (JPN) Salary Planning business process by review ID. You define IDs on the JPN Review Definition Table page. The prompt table displays only those review documents that are defined for the selected document type.

(JPN) Include in Grade Advance

Select to indicate whether the selected review ID is eligible for the Grade Advance feature of the Plan Salaries business process. It is set up on the JPN Review Definition Table page.

Updating Employee Review Templates

Access the Define Empl Review Template - Structure/Content page.

General		Structure/Content	
Document Type:	KOANNUAL Annual Review		
Template ID:	DEPART10	Effective Date:	01/01/2003
Sections		Find View 1 First 1-3 of 3 Last	
Section Type:	Competency Section		
Rating Model:	PAS		
Calculation Method:	Average		
Section Items		Find View All First 1 of 1 Last	
Item ID:	0100	+ -	
Title:	Abstract thinking		
Rating Model:	PSCM		
Weight:	0		
Section Type:	Goals Section		
Rating Model:			
Calculation Method:			
Section Type:	Overall Summary Section		
Rating Model:	PAS		
Calculation Method:	Average		

Define Empl Review Template - Structure/Content page

Section Type: Competency Section

Rating Model

Select a value to use to rate an employee's performance or proficiency when calculating the rating for the competencies section across the employee's individual competencies.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, "Setting Up Competencies and Accomplishments," Setting Up Competencies.

Calculation Method

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

See [Chapter 2, "Creating Employee Review Templates," Understanding Employee Review Templates, page 5](#).

Item ID

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

Weight Enter the weight of this competency relative to all other competencies. Use only when *Average* is selected as the calculation method. Leave the field blank if all competencies are to be weighted equally.

Section Type: Goals Section

You do not enter goals on the template. You enter them directly into the review document.

Section Type: Overall Summary Section

Rating Model Determines which values are used to rate an employee's overall summary rating.

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

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

(JPN) Creating Review IDs

Access the Review Definition Table JPN page.

Review Definition Table JPN

SetID:	SHARE		
Review ID:	JPN01		
*Description:	First Quarter Review Period		
Short Description:	1st Qtr Review		
Period Begin Date:	01/01/2004		31
Period End Date:	03/31/2004		31
*Doc Type:	KOMERIT1		Performance Review
Include in Grade Advance	☒		

Review Definition Table JPN page

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

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

Doc Type (document type) Select the document type that is valid for the selected setID.

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

For example, you can have the system take an average or weighted average of the eligibility points for the employee's last three review documents. You select this check box if the results from this particular review (corresponding to the specified document type and review period) should be included in this process. If you select this check box, when you run the Grade Advance Eligibility SQR Report process (PER062JP), the system looks at the number of eligibility points that the employee earned on this and other designated or applicable review documents. If the eligibility points meet the required threshold, the employee may be eligible for a grade advancement.

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

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting*, "Setting Up Base Compensation and Budgeting," Setting Up Salary Plans, Grades, and Steps.

CHAPTER 3

Managing Employee Reviews

This chapter provides an overview of the employee review process and discusses how to:

- Create employee review documents.
- Complete employee review documents.
- Complete employee self-evaluation documents.
- Transfer employee review documents.
- View employee review documents.
- Processing Employee Review Reports.

Understanding the Employee Review Process

This section provides an overview of the employee review process and discusses employee performance ratings calculations.

The Manage Employee Review business process enables:

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

Employee Performance Ratings Calculation

Depending upon the settings configured in the employee review template, a review document can have several competency ratings and an overall rating. Rating calculations are based upon a rating model, which you associate with the Competency and Overall Summary sections when you create a template.

See *PeopleSoft Enterprise ePerformance 8.9 PeopleBook*, “Defining Document Templates,” Understanding Ratings Calculation Methods.

Creating Employee Review Documents

This section discusses how to:

- Select effective dates for determining direct report or employee groups.
- Select employees or employee groups to create performance documents for.
- Create employee review documents.
- Review performance document creation results.

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

Pages Used to Create Employee Review Documents

Page Name	Object Name	Navigation	Usage
Create Performance Documents (select date)	HR_DR_ADDL_INFO	Manager Self Service, Performance Management, My Performance Documents, Create Documents by Group Manager Self Service, Performance Management, My Performance Documents, Create Documents	Enter the date used to find the group or the employees that you manage.
Create Performance Documents (select group)	HR_DR_SELECT_GROUP	Manager Self Service, Performance Management, My Performance Documents, Create Documents by Group Click Continue on the Create Performance Documents (select date) page.	Select a group for which you want to create employee review documents.
Create Performance Documents (select employees)	HR_DR_SELECT_EMPS	Manager Self Service, Performance Management, My Performance Documents, Create Documents Click Continue on the Create Performance Documents (select date) page.	Select the employees for whom you want to create employee review documents.
Create Performance Documents (review list)	HR_DR_CART	Click View Selected Employees link on the Create Performance Documents (select employees) page.	View a list of selected employees. To remove an employee, click Remove next to the employees name. To add additional employees, click Return to Previous Page. If you are finished adding employees, click Continue to enter the document details.

Page Name	Object Name	Navigation	Usage
Create Performance Documents (details)	EP_CREATEAPPR_MGR	Click the Continue link on the Create Performance Documents (select employees) page.	Enter the parameters for creating the employee review document, then click the Create Documents button to generate documents for the employees.
Create Performance Documents - Results	EP_CREATE_RESULTS	Click the Create Documents button on the Create Performance Documents (details) page.	Displays a list of employees that you selected to create performance documents and the results of the process. The system creates documents for employees with a successful creation indicator of <i>Y</i>. Click the Maintain Performance Documents link to access the individual performance documents. The system does not create documents for employees with successful creation indicator of <i>N</i> and displays an error message in the Status column. You must correct the source of the error and rerun the process.

Selecting Effective Date for Determining Employees

Access the Create Performance Documents (select date) page.

Create Performance Documents

Create new performance documents for one or more of your employees.

Instructions

Follow this 3-step process to create performance documents for one or more of your employees:

1. Enter the date used to find the employees that report to you. You will be able to process only those employees that report to you as of this date.
2. Select the employees you are creating new performance documents for.
3. Enter the document details and select Create Documents.

Enter the Effective Date

Enter the effective date for determining your employees.



Create Performance Documents (select date) page

Enter the effective date to use to find the groups or the employees that you manage. Click Continue to access the Create Performance Documents (select group) or Create Performance Documents (select employees) page.

Selecting Employees or Employee Groups to Create Performance Documents

Access the Create Performance Documents (select employees) or the Create Performance Documents (select group) page.

Create Performance Documents

Select the employees to create new performance documents for.

▼ Instructions

Select the employees you are creating new performance documents for.

Once you have finished click *Continue* to enter the document details.

[View Selected Employees](#)
[Cancel](#)

Select Employees

Reports To:

Betty Locherty

▲

As Of:

01/01/1998

	Name	EmpID
☒	Salish Bir	KU0021
☐	Jennifer Brown	KC0025
☒	Adland Chu	KU0065
☐	Jean-Pierre Desmarais	KC0019
☐	David Duvall	KC0023
☒	Julie Dyer	KU0049

Create Performance Documents (select employees) page

Select the employees or the group that you want to use for creating new performance documents. When you are done, click Continue.

View Selected Employees Click to access the Create Performance Documents (review list) page where you can review or delete the employees that you selected.

Cancel Click to return to the Create Performance Document (select date) page.

Creating Employee Review Documents

Access the Create Performance Documents (details) page.

Create Performance Documents

Below is a list of employees that you selected for Performance Document Creation. Complete the information in the *Document Creation Details* section below, then click the **Create Documents** pushbutton to generate documents for these employees.

Document Creation Details

Document Type: Performance Review **Period:** 01/01/2004 - 06/30/2004
Template: Performance Review - Average

Create Documents

Selected Employees

Employee ID	Last Name	First Name
KC0006	Jubenville	Pierre
KC0023	Duvall	David
KU0038	Holsinger	Derek
KU0049	Dyer	Julie

Create Performance Documents (details) page

Document Type	Select the review type you want to associate with this group of employee review documents.
Period	Enter the dates that the review period begins and ends. The review period is the segment of time for which you are reviewing the employee.
Template	Select the template that should be used to generate the review documents. Note. For (USF) Federal employees, select the previously cloned copy of the Performance Plan template (PERF-USF) or the Performance Improvement Plan template (PIP-USF).
Create Documents	Click to create review documents for the selected employees and to access the Create Performance Documents - Results page.

Reviewing Performance Document Creation Results

Access the Create Performance Documents - Results page.

Create Performance Documents - Results

Below is a list of employees you selected for Performance Document Creation and the results of the process. Employees with errors will need to be re-run after correcting the source of the error.

The "Current Documents" hyperlink at the bottom of the page can be used to access individual performance documents.

Selected Employees				
Employee ID	Name	Template	Successful Creation?	Status
KC0023	David Duvall	Performance Review - Average	Y	Document created successfully
KU0021	Salish Bir	Performance Review - Average	Y	Document created successfully
KU0038	Derek Holsinger	Performance Review - Average	Y	Document created successfully
KU0049	Julie Dyer	Performance Review - Average	Y	Document created successfully
KU0065	Adland Chu	Performance Review - Average	Y	Document created successfully

Go To: [Create Documents](#)
[Current Documents](#)

Create Performance Documents-Results page

Successful Creation?	Displays a <i>Y</i> if the system successfully created a document for the employee. Displays a <i>N</i> if the system did not create a document for the employee and the Statuscolumn displays an error message. You must correct the source of the error and rerun the process.
Create Documents	Click to access the Create Performance Documents (select date) page.
Current Documents	Click to access the Current Performance Documents page to review or select current individual performance documents.

See Also

PeopleSoft Enterprise ePerformance 8.9 PeopleBook, "Generating Documents," Generating Documents for Direct Reports

Completing Employee Review Documents

To complete employee reviews, use the Performance Document (EP_APPR_MAIN) component. Use the CI_EP_APPR_MAIN component interface to load data into the tables for this component

This section discusses how to:

- Select performance documents.
- Review performance document details.
- Complete the employee review documents.

Pages Used to Complete Employee Reviews

Page Name	Object Name	Navigation	Usage
Current Performance Documents	EP_APPR_SELECT	Manager Self Service, Performance Management, My Performance Documents, Current Documents	Select the employee review document from which you want to update or view.
Current Performance Documents - Document Details	EP_APPR_DETAIL	Click the Document Type link on the Current Performance Documents page.	View the performance document details and progress, and select a performance document to start, edit or view.
Maintain Performance Documents	EP_APPR_MAIN1	Click the Start link on the Current Performance Documents - Document Details page.	You can add or delete goals and competencies, and finalize the employee review document

Selecting Performance Documents

Access the Current Performance Documents page.

Current Performance Documents

Listed below are the current performance documents for which you are the Manager.

Performance Documents					
Evaluatee	Document Type	Begin Date	End Date	Job Title	Status
Adland Chu	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr	In Progress
Angela McKay	Annual Review	01/01/2002	12/31/2002	Auditor-General	In Progress
Antonio Santos	Project Review	06/15/2002	12/31/2002	Assistant-Administrative	In Progress
Bailey MacDonald	Annual Review	01/01/2002	12/31/2002	Analyst-Financial Sr	In Progress
Carmichael Espinosa	Project Review	06/15/2002	12/31/2002	Consultant-Senior	Available for Review
Christelle Stevenson	Annual Review	01/01/2002	12/31/2002	Clerk-Payroll Sr	In Progress
Connie Chung	Annual Review	01/01/2002	12/31/2002	Auditor-General	Available for Review
Cynthia Adams	Performance Review	01/01/2004	06/30/2004	Officer-Loan	In Progress
Derek Holsinger	Performance Review	01/01/2004	03/31/2004	Accountant	In Progress
Salish Bir	Performance Review	01/01/2004	06/30/2004	Analyst-Financial	In Progress
Wendy Kwan	Annual Review	01/01/2002	12/31/2002	Analyst-Financial	In Progress

Current Performance Documents page

Document Type

Click the link in this column to access the Current Performance Documents - Details page.

Reviewing Performance Document Details

Access the Current Performance Documents - Document Details page.

Current Performance Documents

Document Details

Christelle Stevenson, Clerk-Payroll Sr
Annual Review: 01/01/2004 - 12/31/2004

Performance Document Details				
Employee:	Christelle Stevenson		Job Title:	Clerk-Payroll Sr
Document Type:	Annual Review		Period:	01/01/2004 - 12/31/2004
Manager:	Betty Locherty		Status:	In Progress

Document Progress				
Step		Status	Due Date	
Review Self Evaluation	☐	Not Started	12/31/2004	
Complete Manager Evaluation	☐	Not Started	12/31/2004	Start

[Return to Select Documents](#)

Current Performance Documents - Document Details page

Next Action links

Click these actions to access a step or launch the next available action in a manager or employee evaluation. The values are:

- **Start:**
Click to launch the performance document process. The status of the performance document changes from Not Started to In Progress.
- **Edit:**
Click to update or change performance document information.
- **Complete:**
Click to finalized and complete the performance document. The status of the performance document changes from In Progress to Complete.
- **View:**
Click to display performance document information. This link is available when the status of the document is Complete.

Completing the Employee Review Document

Access the Performance Document - Annual Review - Manager Evaluation page.

Performance Document - Annual Review

Manager Evaluation

Christelle Stevenson, Clerk-Payroll Sr
Annual Review: 01/01/2004 - 12/31/2004

Author: Betty Locherty

Role: Manager

Status: In Progress

Due Date: 12/31/2004

Approval: Not Required

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Save

Complete

Cancel

[Return to Document Detail](#)



[View Printable Evaluation](#)



[Notify](#)

Performance Document-Annual Review-Manager Evaluation page (1 of 5)

Section 1 - Competencies

Enter ratings and comments for each competency and behavior listed below, if applicable.

Competency 1: Abstract thinking

Weight: 51 %

Comments

Christelle has grown in her understanding of our payroll process and how it is impacted by our business cycle.

Rating: 3-Good



[Add Competency](#)



[Delete Competency](#)

Performance Document-Annual Review-Manager Evaluation page (2 of 5)

Competency 2: Analytical thinking**Weight:** 49 %

Comments
Christelle made a significant contribution to our payroll system upgrade.

Rating: 4-Very Good

[+ Add Competency](#) [- Delete Competency](#)

Competencies Summary
 **Rating:** Outstanding

Performance Document-Annual Review-Manager Evaluation page (3 of 5)

Section 2 - Employee Goals

Goal 1: Manage two new direct reports.

Details

- Status: In Progress

[Edit Details](#)

Comments
Christelle has just started this new goal. She is making steady progress.

[+ Add Goal](#) [- Delete Goal](#)

Performance Document-Annual Review-Manager Evaluation page (4 of 5)

Section 3 - Overall Summary


Rating: Superior
 [Override](#) 4.00

Comments

Christelle is a valued employee that has delivered consistant performance during her time here.

Calculate All Ratings

Cancel Evaluation

Save

Complete

Cancel

[Return to Document Detail](#)

 [View Printable Evaluation](#)
 [Notify](#)

Performance Document-Annual Review-Manager Evaluation page (5 of 5)

Section 1–Competencies

Rating	Select a qualitative rating for this competency from the list of available options. The values appearing in the list come from the rating model associated with this competency on the Competency table.
Weight	Enter a weight here to assign different relative weights to competencies. Enter the weight as a percentage, for example enter 40 to indicate that this competency accounts for 40% of the summary rating across all competencies. If used, all weights must add up to 100.
Comments	Enter comments regarding the employee's proficiency level, in support of the rating you've assigned.
Add Competency	Click to add a new competency to the evaluation.
Delete Competency	Click to remove an exiting competency.
	Click the Calculate Rating button to have the system calculate the ratings for each section, using the calculation method and rating model defined on the template that generated this review document.
Competencies Summary	Click the Calculate Rating button to have the system calculate the rating for the Competencies section, or select an override rating.

Section 2–Employee Goals

Add Goal	Click to add a new goal to the evaluation.
-----------------	--

Delete Goal	Click to remove an existing goal.
Edit Details	Click to edit specific details of the employee goal.

Section 3—Overall Summary

Calculate All Ratings	Click to calculate the Competencies and Overall Summary section ratings. Ratings are not calculated for sections or summaries that have been overridden.
Cancel Evaluation	Click to terminate and discard the entire employee evaluation.
Save	Click to save work already in progress for later editing. The system calculates all ratings contained in the review prior to saving the review.
Complete	Click this button to change the status of the employee document from In Progress to Complete.
Cancel	Click to return to the Document Details page without saving.

Completing Employee Self-Evaluation Documents

This section discusses how to:

- Select employee self-evaluation documents.
- Review employee self-evaluation document details
- Complete an employee self-evaluation .

Pages Used to Complete Employee Self-Evaluation Documents

Page Name	Object Name	Navigation	Usage
Current Performance Documents	EPP_APPR_SELECT	Self Service, Performance Management, My Performance Documents, Current Documents	Select the employee performance document that you want to work on.
Current Performance Documents - Document Details	EP_APPR_DETAIL	Click the link in the Document Type column on the Current Performance Documents page.	View the performance document details and progress, and select the employee self-evaluation to start, edit, complete or view.
Performance Document - [name] - Employee Evaluation	EP_APPR_MAIN1	Click the Edit link on the Current Performance Documents - Document Details page.	Add or update competencies and goals to the employee self-evaluation.

Selecting Employee Self-Evaluation Documents

See [Chapter 3, “Managing Employee Reviews,” Selecting Performance Documents, page 21.](#)

Reviewing Employee Self-Evaluation Document Details

Access the Current Performance Documents - Document Details page.

Note. The Current Performance Documents - Document Details page that employees access through the Self-Service navigation is the same page that managers access through the Manager Self-Service navigation. Page elements are defined in the Completing Employee Review Documents section of this chapter.

See [Chapter 3, “Managing Employee Reviews,” Completing the Employee Review Document, page 22](#).

Completing the Employee Self-Evaluation

Access the Performance Document - [name] - Employee Evaluation page.

Note. The Performance Document - [name] - Employee Evaluation page that employees access through the Self-Service navigation is the same as the Performance Document - [name] - Manager Evaluation page that managers access through the Manager Self-Service navigation. Page elements are defined in the Completing Employee Review Documents section of this chapter.

See [Chapter 3, “Managing Employee Reviews,” Completing the Employee Review Document, page 22](#).

Transferring Employee Review Documents

See *PeopleSoft Enterprise ePerformance 8.9 PeopleBook*, “Performing Administrative Tasks,” Transferring Documents.

Viewing Employee Review Documents

See *PeopleSoft Enterprise ePerformance 8.9 PeopleBook*, “Performing Administrative Tasks,” Managing Administrative Tasks.

Processing Employee Review Reports

This section discusses how to:

- Run the late employee review report.
- Run the missing employee review report.

Pages Used to Process Employee Review Reports

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

Running the Late Employee Review Report

See *PeopleSoft Enterprise ePerformance 8.9 PeopleBook*, “Generating Reports in ePerformance,” Report Late Evaluations.

Running the Missing Employee Review Report

See *PeopleSoft Enterprise ePerformance 8.9 PeopleBook*, “Generating Reports in ePerformance,” Report Missing Evaluations.

CHAPTER 4

(USF) Managing Templates and Managing Reviews for Federal Employees

This chapter provides an overview of United States Federal (USF) functionality and discusses how to:

- Assign roles and permissions lists for USF functionality.
- Set up supporting tables.
- Create employee review templates.
- Create job profiles.
- Associate job profiles with employees.
- Manage reviews for federal employees.

Understanding USF Functionality

The following functionality exists specifically to manage employee reviews for federal employees:

- USF templates.

Two templates are available: one to create employee performance review documents (PERF-USF), and another to create performance improvement plan documents (PIP-USF). You must clone these templates, and in the case of employee performance reviews, add free-form elements for evaluating employee performance.

- Ability to link employee performance review templates that are based on the PERF-USF document type to job codes, positions, job families, or salary grades.

This feature enables you to link templates to job profiles to eliminate the need for managers to select template when they create employee reviews. You accomplish this through the use of job profile the PERF-USF document type.

- A warning message that alerts users when the score for all numeric element ratings differs by more than .06 from a review's overall numeric rating.
- Ability to enter comments from other reviewers.

Administrators can use the Maintain Reviewer Comments - USF page to enter review comments from an employee's peers, subordinates, customers, and other reviewers.

- Ability to use self-service pages for employee reviews.

Managers can use the self-service pages to generate review documents for federal employees and perform reviews and employees can use self-service pages to complete their self-evaluation documents.

Assigning Roles and Permission Lists for USF Functionality

This section lists roles and permission lists that are available to federal customers.

Permission Lists

The following tables list the roles and associated permission lists that you can assign to users that allow them to use the federal functionality. Employee Review Setup (USF) and Employee Review Administrator (USF) are roles that are specific to federal functionality. The Employee Review Manager and Employee Review Employee roles enable the use of the self-service features of the Manage Employee Reviews business process.

Roles

Role	Permissions
Employee Review Setup (USF)	HCCPHR2070, HCCPHR2080
Employee Review Administrator (USF)	HCCPHR2060, HCCPHR2090, HCCPHR3250
Employee Review Manager	HCCPSS2145
Employee Review Employee	HCCPSS1340

Permission Lists

Permission List	Description
HCCPHR2060	Employee Review - Admin
HCCPHR2070	Employee Review - Setup
HCCPHR2080	Employee Review - Setup USF
HCCPHR2090	Employee Review - Admin USF
HCCPHR3250	Employee Review - Reporting
HCCPSS2145	Employee Review - MGR
HCCPSS1340	Employee Review - EE

Setting Up Supporting Tables

This section provides an overview of the setup steps for the supporting tables and discusses how to:

- Set up rating models.
- Update the PERF-USF document type.

Understanding Supporting Table Setup

Before you can clone and modify templates for employee performance reviews and performance improvement plans, you must:

1. Create rating models that specify the values that can be used to rate or score employee performance.
2. (Optional) Update the document type for employee reviews.

The system delivers a federal document type call PERF-USF that tells the system where to look for the template when it generates performance documents for federal employees. By default, the system prompts managers to select the template when they create the review documents. If you prefer to have the system determine which template to use by checking the job profile that is assigned to the employee's job, position, job family, or salary grade, specify this on the Document Type page by adding a new effective-dated row to the table.

Note. A second document type, PIP-USF, is provided for performance improvement plans. This document type is associated with the delivered PIP-USF template. You cannot modify or view the PIP-USF document type.

Pages Used to Set Up Supporting Tables

Page Name	Object Name	Navigation	Usage
Rating Table	RATING_MDL_TBL	Set Up HRMS, Common Definitions, Competencies, Rating Model	Define the values used to rate an employee's performance.
Document Types	EP_REVIEW_TYPE_USF	Set Up HRMS, Product Related, Workforce Development, Employee Review, Update Document Type (USF)	Update the template source for the PERF-USF document type and specify which template to use as the default.

Defining Rating Models

Access the Rating Model page.

Rating Model

Rating Model: GUSF

Rating Model Description Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 Status: Active

*Description: Goal Status for USF

Short Description: GoalStatus ☐ Review Band

Ratings Customize | Find First 1-3 of 3 Last

General | Review Points

*Rating	*Description	Short Description	Numeric Rating	Career Strength/ Development		
1	Not Meet	Not Meet	1.00			
2	Met	Met	2.00			
3	Exceeded	Exceeded	3.00			

Rating Model page

This page is documented in *PeopleSoft 8.9 Human Resources PeopleBook: Manage Competencies*.

Note. Enter a value in the Numeric Rating field for each rating. When the system performs calculations, it refers to the values in the Numeric Rating field, not to values in the Rating field.

Note. The system delivers two rating models that have specific uses: FUSF (Goal Status for USF) and PIP (performance improvement plans). These rating models define statuses, rather than ratings, that you can assign to goals and performance improvement plans. GUSF values are *Not Met*, *Met*, and *Exceeded*. PIP values are *In Progress*, *Satisfactory*, and *Unsatisfactory*. You can modify the values on both of these rating models.

See Also

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

Updating the PERF-USF Document Type

Access the Document Types page.

Document Types

Document Type: PERF-USF

Document Type Detail		Find View 1	First	1-2 of 2	Last
Effective Date:	01/01/2000	+ -			
*Description:	Performance Plan				
*Template Source:	Position (Job Profile)				
Default Template:	DEFAULT				
Effective Date:	01/01/1900	+ -			
Description:	Performance Plan				
Template Source:	User Specified				

Document Types page

The system-delivered definition for the PERF-USF document type is dates 01/01/1900. According to this definition, the template sources is user-specified, meaning that managers must select the template to use when they create the performance review documents.

You can modify the definition for the PERF-USF document type by inserting a new effective-dated row. You can then instruct the system to look at the job profile that is associated with the employee's job code, position, job family, or salary grade to determine which template to use.

Document Type PERF-USF is the delivered document type for federal employee reviews. You cannot create or modify other document types.

Template Source Identify where the system should look for the template when it generates employee review documents for federal employees.

To have the system check the employee's job profile for the template, indicate where to find the job profile. Options are: *Job Code (Job Profile)*, *Job Family (Job Profile)*, *Position (Job Profile)*, or *Salary Grade (Job Profile)*.

To have the system make all templates available for selection when a performance document is generated, select *User Specified*.

Example 1: You select *Job Code (Job Profile)* in this field. When the system generates the performance documents, it retrieves the employee's job code and looks at the associated job profile. The job profile tells the system the template definition to use for the document type.

Example 2: You select *User Specified* in this field. When the system generates performance documents for the document type or PERF-USF, it prompts the user to select the template.

Default Template This field is available if you select one of the job profile options in the Template Source field. Select the template to use to generate performance documents for this document type when no template is associated with the job profile.

Creating Employee Review Templates

This section provides overviews of the two templates that are available to federal customers and the steps for cloning and modifying templates and discusses how to:

- Clone templates.
- Define general information for templates.
- Define a template's content and structure.

Understanding Templates for Federal Employees

Templates provide the foundation for your employee performance documents. The system provides two templates that are designed specifically for federal customers:

- Performance Plan (PERF-USF)

This template is designed for employee performance reviews.

- Performance Improvement Plan (PIP-USF)

Performance improvement plans offer employees an opportunity to positively address issues that have adversely impacted their performance reviews.

From these basic templates, you can create other templates that fit your organization's structure and needs. You can copy, but not alter, the basic templates provided by PeopleSoft.

Performance Plan Template (PERF-USF)

This template contains five sections:

- General Information

Here you enter the name of the template and specify whether the review documents generated with this template are official.

- Performance Elements

In this section, you enter the free-form performance criteria against which you evaluate employees.

- Goals

Managers and employees use this section to add goals to the review document. You cannot enter goals into the template; you must enter them directly into the review document after you create it from the template.

- Overall Summary

This section identifies the employee's overall performance rating. The system converts the rating from the performance elements section into an overall summary rating, using the calculation method and rating model that you specify.

- Signature Section

Performance Improvement Plan Template (PIP-USF)

This template consists of three sections:

- General Information

Here you enter the name of the template and specify whether the review documents generated with this template are official.

- Performance Improvement Plan
Manager use this section to assess performance improvement and assign a status.
- Signature Section

Steps for Cloning and Modifying Cloned Templates

To create templates that managers can use to generate performance reviews and performance improvement plans:

1. Clone the delivered PERF-USF or PIP-USF template.
2. Enter general information for the cloned template on the Define Empl Review Template - General page.
Enter a description, set the status to *Active*, and specify whether the documents that are generated from the template are official.
3. Modify the structure and content of the cloned template using the Define Empl Review Template - Structure/Content page.
For employee performance reviews (performance plans), select the rating models to use, define the elements (items) and standards (sub-items), and weight elements, and indicate if they are critical.

Pages Used to Clone and Modify Cloned Templates

Page Name	Object Name	Navigation	Usage
Clone Template Definition	EP_CLONE_TMPL	Set Up HRMS, Product Related, Workforce Development, Employee Review, Clone Employee Review Template	Create a new employee review template or performance improvement plan template.
Define Empl Review Template - General	EP_TMPL_BASIC1	Set Up HRMS, Product Related, Workforce Development, Employee Review, Define Empl Review Template, General	Enter general information for the cloned template, including a description and status.
Define Empl Review Template - Structure/Content	EP_TMPL_BASIC2	Set Up HRMS, Product Related, Workforce Development, Employee Review, Define Empl Review Template, Structure/Content	Select the rating models and define and weight, elements, and standards, if applicable.

Cloning a Template

Access the Clone Template Definition page for the PERF-USF or PIP-USF document type.

Clone Template Definition

Document Type:	PERF-USF	Performance Plan
Template ID:	FPND0009	POS#- FPND0009
Effective Date:	01/01/2000	

New Document Type:	PERF-USF	Performance Plan
New Template ID:		
Effective Date:		

Clone Template Definition page

Defining General Information for a Template

Access the Define Empl Review Template - General page.

General

Structure/Content

Document Type:	PERF-USF	Performance Plan
Template ID:	DEPT20	Effective Date: 01/01/2004

***Description:**

***Status:** 

☒ **Official Review**

 **Japan**

Define Empl Review Template - General page

Official Review

Select to designate that review documents generated for this document type are official. You can designate any number of templates as official. On the PERF-USF template, this check box is selected by default. On the PIP-USF template, this check box is cleared, by default.

Selecting this check box enables salary increases to be tied to employee performance reviews. It also enables the Within-Grade Increase (WGI) process to pick up completed performance reviews.

If an employee has more than one official review document, these processes use the results of the review document with the latest period end date.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “(USF) Processing Automatic Actions for Probation, Tenure, and WGIs”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, “Setting Up Base Compensation and Budgeting”

Defining a Template's Content and Structure

Access the Define Empl Review Template - Structure/Content page.

General

Structure/Content

Document Type:

PERF-USF

Performance Plan

Template ID:

FPND0008

Effective Date:

01/01/2000

Sections

Find | View 1

First

1-4 of 4

Last

Section Type:

Performance Elements

Rating Model:

FEDA

Calculation Method:

Average

Section Items

Find | View 1

First

1-3 of 3

Last

Title:

Element# 1 - Maintain Applicant Supply File

Rating Model:

FEDA

Weight:

40

☒ Critical

Sub-Items

Find | View All

First

1 of 1

Last

Title:

Standard# 1 - Administrer Job Announcements

Description:

Assist with the distribution of recurring materials and preparation and posting of job announcements for position openings. The

Define Empl Review Template - Structure/Content page (1 of 3)

+ - Title: Element # 2 - PProcess Personnel Actions	
Rating Model:	FEDA
Weight:	40
	☒ Critical
Sub-Items Find View All First 1 of 2 Last	
+ - Title: Standard # 1 - Manage incoming personal action forms	
Description:	Log and schedule meetings with managers for incoming personal actions.
+ - Title: Element# 3 - Add new hires into system	
Rating Model:	FEDA
Weight:	20
	☐ Critical
Sub-Items Find View All First 1 of 1 Last	
+ - Title:	
Description:	

Define Empl Review Template - Structure/Content page (2 of 3)

Section Type:	Goals
Rating Model:	GUSF
Calculation Method:	Average
Section Type:	Overall Summary Section
Rating Model:	FEDA 
Calculation Method:	Average
Section Type:	Signature Section
Rating Model:	
Calculation Method:	

Define Empl Review Template - Structure/Content page (3 of 3)

Note. The fields that are shown in the screen sample pertain to templates that are cloned from the PERF-USF template. Templates that are cloned from the PIP-USF template contain a Rating Model and Description field only. The default value for the Rating Model field is PIP. You can change the rating model selection, should you need to; however, the system does not use the rating model for any performance improvement plan calculations.

Rating Model	Select the rating model to use for the performance elements section.
Calculation Method	The system displays Average. This is the only calculation method that is available for templates that are based on the delivered PERF-USF template.

Section Items

Title	Enter the name of the item or criterion against which employees are to be evaluated. Items are also known as elements.
Rating Model	Displays the rating model that you selected for the section. Section items (elements) inherit the rating model from the section.
Weight	Enter the weight of this item relative to the other items. Leave the field blank if all items are to be weighted equally.
Critical	Select if this is a critical job requirement for employee performance. This field is informational only.

Sub-Items

Define any performance standards or sub-items for the element.

Creating Job Profiles

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

Understanding Job Profiles

Job profiles define the template that is applicable to employees in the same job, job family, position, or salary grade.

To set up a job profile:

1. Create a job profile ID and enter a description of the job profile.
2. Associate a performance template with the job profile.
3. Select the document type (PERF-USF) and the template to associate with the job profile.
4. Associate the job profile with employees.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Jobs,” Selecting Document Types and Performance Templates for a Job Profile

Pages Used to Create Job Profiles

Page Name	Object Name	Navigation	Usage
Job Profile - General	JOB_PROFILE_TBL1	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, General	Create a job profile ID and description. IDs can be up to eight alphanumeric characters.
Job Profile - Performance Templates	JOB_PROFILE_TBL4	Set Up HRMS, Foundation Tables, Job Attributes, Job Profile, Performance Templates	Select the document type (PERF-USF) and the template to associate with the job profile.

Associating Job Profiles with Employees

This section provides an overview of associating job profiles with employees and discusses pages used to associate job profiles with employees.

Understanding Associating Job Profiles with Employees

You can associate a job profile with a group of employees by assigning the profile to a job code, job family, position, or salary grade. To do this, complete the Job Profile ID field on one of the following pages:

- Job Code Profile
- Job Family
- Position Data
- Salary Grade Table

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Jobs,” Selecting Document Types and Performance Templates for a Job Profile

Pages Used to Associate Job Profiles with Employees

Page Name	Object Name	Navigation	Usage
Job Code Profile	JOB_CODE_TBL1_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile	Add new job codes to the system and define job family, compensation, and regulatory information for each job code.
Job Family	JOB_FAMILY_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Family Table	Create job families and assign them job profiles.
Position Data	POSITION_DATA1	Organizational Development, Succession Planning USF, Identify Key Positions	Enter a description of the position; enter information that is specific to the position you're creating, such as the work phone number and the mail drop ID; review the position's current budget and incumbents.
Salary Grade Table	SALARY_GRADE_TBL1	Compensation, Base Compensation, Maintain Plans, Define Salary Grades USF	Specify the minimum, maximum, and midpoint rates for salary grades. Set up several salary grades, in ascending or descending order, within the same salary administration plan. To create different ranges for the same salary grade, use separate salary administration plans for each.

Managing Reviews for Federal Employees

This section provides an overview of managing federal employee reviews and discusses how to:

- Create employee review documents.
- Complete employee review evaluations.
- Record comments from other reviewers.

Understanding Employee Review Documents

Procedures for managing reviews for federal employees are similar to those documented in the “Managing Employee Reviews” chapter in this PeopleBook, with the exception of completing employee review evaluations and recording comments from other reviewers. This section provides examples of the employee performance plan and the employee performance improvement plan that are based on modified versions of the PERF-USF and PIP-USF templates.

Pages Used to Manage Reviews for Federal Employees

Page Name	Object Name	Navigation	Usage
Current Performance Documents	EP_APPR_SELECT	Manager Self-Service, Performance Management, My Performance Documents, Current Documents	View the performance document details and progress, select a document to edit.
Maintain Reviewer Comments - USF	EP_APPR_SELECT	Workforce Development, Performance Management, Performance Documents, Administrative Tasks, Maintain Reviewer Comments USF	Select the employee review document to which you want to add comments.
Reviewer Comments USF	GVT_EP_COMMENTS	Click the employee name link on the Maintain Reviewer Comments - USF page.	Enter comments about an employee's performance from multiple reviewers.

See Also

Chapter 3, "Managing Employee Reviews," Pages Used to Create Employee Review Documents, page 16

Creating Employee Review Documents

Managers can use the self-service pages to create employee review documents for individual employees and groups of employees. If you modified the PERF-USF document type to specify a template source other than User Defined, the system will not prompt you to select the template. It will instead look for the job profile that is assigned to the employee's job code, position, job family, or salary grade to determine which template to use.

See Chapter 3, "Managing Employee Reviews," Creating Employee Review Documents, page 16.

Completing Employee Review Evaluations

Access the Performance Document-Performance Plan-Manager Evaluation page.

Performance Document - Performance Plan

Manager Evaluation

George Garfield, Manager-Accounts Payable

Performance Plan: 01/01/2004 - 06/30/2004

Author: Betty Locherty

Role: Manager

Status: In Progress

Due Date: 06/30/2004

Approval: Not Required

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Save

Complete

Cancel

[Return to Document Detail](#)



[View Printable Evaluation](#)



[Notify](#)

Performance Document-Performance Plan-Manager Evaluation page (1 of 4)

Section 1 - Performance Elements

Manage direct reports

Weight: 100 %

Details

- Critical: Yes

Rating: Outstanding

5.00

Performance Elements Summary

Summary Weight: 100 %



Rating: Outstanding

5.00

Performance Document-Performance Plan-Manager Evaluation page (2 of 4)

Section 2 - Goals

Hire new Employee

▼ Details

Description: Hire new member of staff by 6/30/04.

- Date Met 06/08/2004

[Edit Details](#)

Goal Status:

[+ Add Goals](#)

[- Delete](#)

Performance Document-Performance Plan-Manager Evaluation page (3 of 4)

Section 3 - Overall Summary



Rating: Outstanding

[Override](#) 5.00

Comments

George sets high standards for his team, and leads by example. He has reduced the average-days-outstanding of accounts payable by 24%.

[Calculate All Ratings](#)

[Cancel Evaluation](#)

[Save](#)

[Complete](#)

[Cancel](#)

[Return to Document Detail](#)



[View Printable Evaluation](#)



[Notify](#)

Performance Document-Performance Plan-Manager Evaluation page (4 of 4)

Note. When you click Calculate All Ratings, Save, or Complete, the system displays a warning if the numeric rating in the Overall Summary section is 0.6 higher or lower than the numeric element ratings.

Access the Performance Document-Performance Improvement Plan-Manager Evaluation page.

Performance Document - Performance Improvement Plan

Manager Evaluation

Cynthia Adams, Officer-Loan

Performance Improvement Plan: 04/01/2004 - 06/30/2004

Author: Betty Locherty

Role: Manager

Status: In Progress

Due Date: 06/30/2004

Approval: Not Required

Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.

Save

Complete

Cancel

[Return to Document Detail](#)



[View Printable Evaluation](#)



[Notify](#)

Performance Document-Performance Improvement Plan-Manager Evaluation page (1 of 2)

Section 1 - Performance Improvement Plan

Performance Improvement Plan Summary

PIP Status:

Comments

Cynthia has completed all requirements assigned to her relating to her improvement plan.

Cancel Evaluation

Save

Complete

Cancel

[Return to Document Detail](#)



[View Printable Evaluation](#)



[Notify](#)

Performance Document-Performance Improvement Plan-Manager Evaluation page (2 of 2)

See Also

[Chapter 3, "Managing Employee Reviews," Completing the Employee Review Document, page 22](#)

Recording Review Comments

Managers can add comments about an employee's performance that are received from the employee's peers, subordinates, customers, or other reviewers.

Access the Reviewer Comments USF page.

Maintain Reviewer Comments - USF
Reviewer Comments USF
Add comments from other reviewers on this employees performance.
Employee: Nancy Reed **Job Title:** Manager-HR Systems
Document Type: Annual Review **Period:** 01/01/2002 - 12/31/2002
Manager: Marc Kessler **Status:** Available for Review

Reviewer Comments Find | View All First 1 of 1 Last

***Reviewer ID:** 0014  Akihiro LAURENT  

Reviewer Role: Mentor 

Comments: Nancy has always set and communicated high standards of group performance for all her staff. Her leadership is exemplary and she keeps the welfare of her group in mind, standing up for them in relation to the larger organization.  

Save

[Return](#)

Reviewer Comments USF page

Reviewer Comments

Reviewer ID

Select or enter the identification number of the other reviewer.

Reviewer Role

Select the role that best describes the relationship between the reviewer and the employee being reviewed.

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 terms 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.

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