



PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Plan Careers and Successions

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 Plan Careers and Successions 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 Plan Careers and Successions.

PeopleSoft Enterprise HRMS Application Fundamentals

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

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

See Also

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

PeopleBook Structure

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

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

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

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

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product 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 product and the functionality within the product.

Chapters	Description
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
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 product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with Plan Careers and Successions

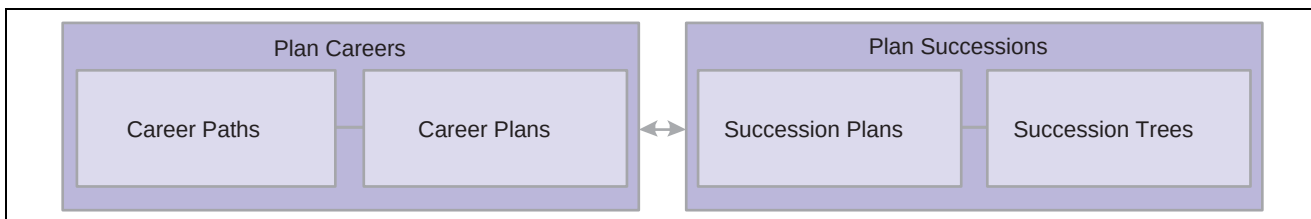
This chapter discusses:

- Plan Careers and Successions overview.
- Plan Careers and Successions business processes.
- Plan Careers and Successions integrations.
- Plan Careers and Successions implementation.

Plan Careers and Successions Overview

Plan Careers and Successions is two separate, but integrated, business processes in Human Resources. The Plan Careers business process enables you to create default career paths and to design individual career plans for workers in an organization. The Plan Successions business process enables you to build graphical succession trees by using PeopleSoft Tree Manager and to create successions plans that identify key positions and target key candidates.

This diagram illustrates the Plan Careers and Plan Successions business processes in Human Resources:



Plan Careers and Plan Successions business processes

Note. The Plan Careers and the Plan Successions business processes can be implemented separately.

Plan Careers and Plan Successions Business Processes

Plan Careers and Successions provides these business processes:

- Manage career plans.
- Manage succession plans.

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

Plan Careers and Successions Integrations

Plan Careers and Successions integrates with these PeopleSoft applications:

- HRMS applications.
- Other PeopleSoft applications.
- Third-party applications.

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

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Working with Enterprise Integration Points in PeopleSoft HRMS”

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

Other Sources of Information

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook

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

CHAPTER 2

Planning Careers

This chapter provides an overview of Plan Careers, lists prerequisites, and discusses how to:

- Create career paths.
- Create career plans.
- Review employee career data.
- Run career reports.
- (FRA) Rate employees.

Understanding Plan Careers

This section discusses:

- Plan careers
- (USF) Plan careers

Plan Careers

Retaining and motivating employees are important aspects of an organization's success. Use the Plan Careers business process in Human Resources to ensure the organization uses employee talents to their fullest. Career planning enables you to assess and rank workers, record job preferences, create career paths, develop long-term goals, assign mentors, identify competencies, devise training plans, and create development plans.

To implement the Plan Careers business process:

1. Perform the prerequisite tasks.
2. Create the career paths.
3. Create the career plans.

Once everything is set up, review employee data and run the career reports on a regular basis to manage organizational growth and to adjust career paths and career plans as requirements change over time.

Integrations

The Plan Careers business process integrates with:

- The Manage Competencies business process in Human Resources.

See [Chapter 2, "Planning Careers," Setting Up Competencies, page 6.](#)

- The Administer Training business process in Human Resources.

See [Chapter 2, “Planning Careers,” Setting Up Training Programs, page 6.](#)

(USF) Plan Careers

The Plan Careers business process for U.S. Federal Government users enables you to set up career plans and produce Individual Development Plans (IDPs) for employees' career development paths. You can track IDP progress, job move costs, training, employee appraisals, mentoring, and self-implemented career development activities. An employee or supervisor can request to work on a career plan at any time.

Once you create a career plan, the system:

1. Routes the plan along the agency's path of review and approval.
2. Tracks costs and activities associated with the plan.
3. Generates the IDP output form.

Use career plans to complement performance reviews and training programs or to prepare employees to become key managers. Career plans help you develop backup personnel for open positions.

Note. Using the Plan Careers business process is optional, and is intended to work with merit staffing practices as established by law, regulation, or internal policy.

Career Plan Tracking

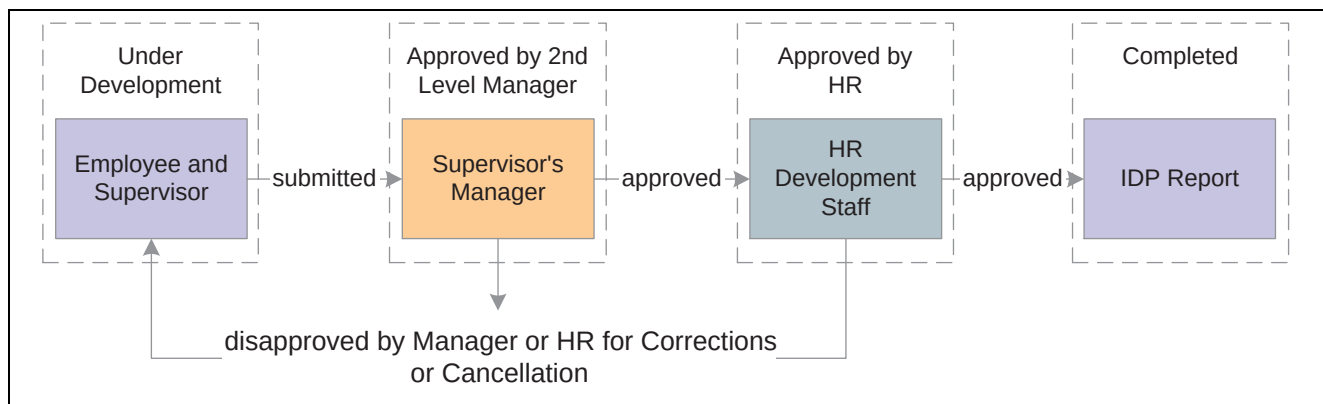
The Plan Careers business process includes a sequence of steps that enable you to track the request, approval, and completion of career plans. For example, a path might include:

- Creating a career plan.
- Submitting it as a request.
- Giving reviews and approvals.
- Completing an authorized career plan.
- Producing an IDP.

PeopleSoft workflow manages routing and tracking. You assign a status, and workflow tracks and routes the career plan through the approval cycle. Reviewers change the status to either continue the review process or disapprove the plan. The system then shows the career plan status on the Career Plan page.

Career Plan Approval Process

This graphic presents an overview of the career plan approval process:



Career plan approval process

The following definitions describe the process of submitting and reviewing career plans. You can use these or adapt them to meet specific requirements.

Status	Career Plan Status Code	Definition
Under Development	1	Employee and supervisor create a career plan, assign this status, and work on the plan until submitting it to the second-level supervisor or manager.
Submitted to Supervisor	2	Supervisor assigns this status to send the career plan to the second-level supervisor or manager.
Approved by Manager	3	Manager or second-level supervisor assigns this status to send the plan to the human resources department.
Disapproved by Manager	4	Manager or second-level supervisor assigns this status to send career plan back to originators for cancellation.
Approved by HR	5	Human resources official approves request by assigning this status.
Disapproved by HR	6	Human resources official disapproves request by assigning this status.

Prerequisites

Perform the following tasks before setting up the Plan Careers business process in Human Resources:

1. Set up HRMS basic data, such as department codes.
2. Set up Human Resources job data.
3. (optional) Set up competencies.
4. (optional) Set up training programs.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up and Installing PeopleSoft HRMS”

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Jobs”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce”

Setting Up Human Resources Job Data

Employee job data must exist in the Workforce Administration tables before you work with the Plan Careers pages. If you’ve implemented multiple business units and setIDs, the information that you use and create is determined by how business unit and setID functionality is set up for your user ID. You must create the job codes that you use in default career paths to populate identifying information in the Career Path table from the Job Code table.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*.

Setting Up Competencies

Use the Manage Competencies business process to assign competencies to employees and to job codes. A significant part of planning careers is identifying worker strengths and developmental areas and establishing goals to help workers improve in their developmental areas. Competencies are discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*.

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

After the competency data is entered, you can automatically link employee competency data to an employee career plans.

See Chapter 2, “Planning Careers,” Evaluating Employee Strengths and Developmental Areas, page 19.

Tracking Competencies and Accomplishments

To enable you to easily track competencies and accomplishments, certain pages from the Manage Competencies business process are duplicated in the Plan Careers business process: Competencies (COMPETENCIES), Education (EDUCATION), Honors and Awards (HONORS_AWARDS), Languages (LANGUAGES), Licenses and Certifications (LICENSES_CERTIFS), Memberships (MEMBERSHIPS), Prior Work Experience (PRIOR_WORK_EXPER), and Significant Special Projects (SPECIAL_PROJECTS).

Note. You can only view the competencies and accomplishments of those employees for whom you have created a career plan. If you have not created a career plan, you must view these in the Manage Competencies business process

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

Setting Up Training Programs

Use the Administer Training business process to help workers develop the skills they need for their current position, to acquire the knowledge they need for their next position, and to develop alternate career paths. Training programs are discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training*.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training*, “Defining Training Courses and Programs”.

You can link one or more training programs to a job code to establish default training programs for employees who have this job code. Courses can also be defaulted into employee career plans, enabling you to tailor training to the individual needs of each worker.

See Chapter 2, “Planning Careers,” Entering and Updating Training Programs, page 21.

Creating Career Paths

To create career paths, use the Geographic Preference (GEOG_PREF_TBL) and Career Path Table (CAREER_PATH_TBL) components.

This section provides an overview of career paths and discusses how to define career paths for job codes.

Understanding Career Paths

Set up default career paths for key job codes or for all job codes. Default career paths enable you to:

- Create a hierarchy or network of jobs.
- See a logical career progressions and the relationship between jobs.
- Save time when developing employee career plans.
- Save time when planning employee successions.

For example, you might want to coordinate career paths only for job codes above a certain management level, to make sure that employees in them get the necessary work experience to prepare for higher-level management positions.

Career Move Levels

Career move levels usually show a hierarchical job progression in a career path and build on the job code in the previous career-move level.

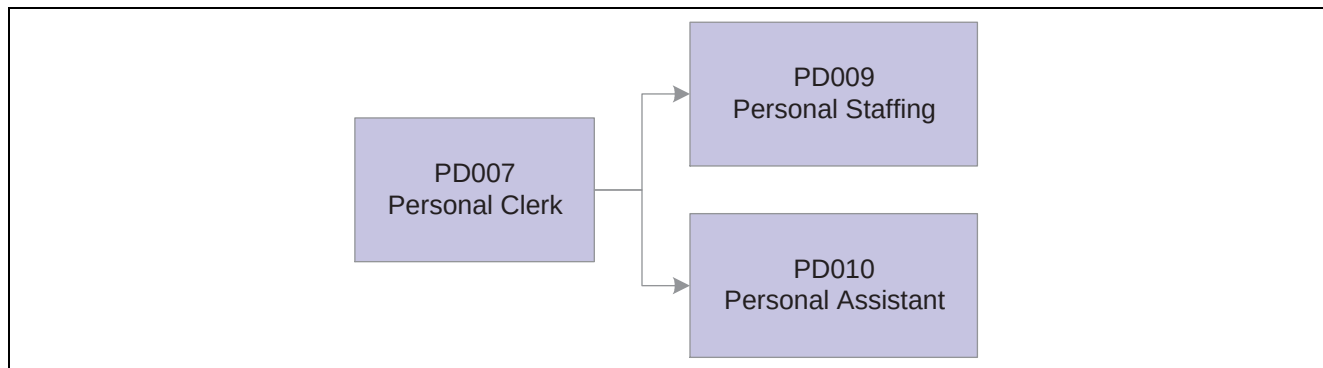
Let's look at an example of a default career path for Job Code, PD007, Personnel Clerk. The first move from the current job is to Personnel Assistant, which leads to Personnel Staffing Specialist as a second level move from the current job. As a third level move, the job leads to Personnel Officer, and so on. You can define up to nine career moves on a career plan.

This table lists three career moves:

Career-Move Level		Job Code	Position
	Current	PD007	Personnel Clerk GS-0203
1	First move from current job	PD010	Personnel Assistant GS-0203-06
2	Second move from current job	PD101	Personnel Staffing Specialist GS-0212-09
3	Third move from current job	PD107	Personnel Officer GS-0201-13

Some job codes have more than one possible job move in a particular career-move level. For example, Job Code PD007, Personnel Clerk, could have two job options as the first move from the current job: Job Code PD010, Personnel Assistant; and an additional option (not shown in the table) could be Job Code PD009, Personnel Staffing Assistant.

This diagram illustrates that a job code can have more than one job move:



Career path options

If you have more than one job option in a career-move level, use option numbers to sort the job codes in the proper order.

Page Used to Create Career Paths

Page Name	Object Name	Navigation	Usage
Geog Pref Tbl (geographic preference table)	GEOG_PREF_TBL	Set Up HRMS, Product Related, Workforce Development, Define Career Plans, Geographic Preference, Geog Pref Tbl	Define geographic areas for job relocation in career planning components.
Career Path Table	CAREER_PATH_TBL	Set Up HRMS, Product Related, Workforce Development, Define Career Plans, Career Path Table, Career Path Table	Define default career paths for job codes.

Defining Career Paths for Job Codes

Access the Career Path Table page.

Career Path Table

Business Unit: FEDBT **Job Code:** 170070 Assistant-Personnel

Description:

Default Salary Details

SetID: GS **Sal Plan:** 0000 **Grade:** 05 **Manager Level:** Other

Career Move Find | View All First 1 of 3 Last

*Career Move: 1st Move First Move from Current Job + -

Job Details Salary Details

Job Options for Career Move Find | View All First 1 of 1 Last

Opt #	Business Unit	Job Code	Job Title	Mgr Level	Job Function	SetID	Plan	Grade
1	FEDBT	L0024						

+ -

Career Path Table page

Default Salary Details

The setID, salary plan, grade, and manager level that are associated with the selected job code appear in the Default Salary Details group box. These fields are for information only.

Career Move

Career Move Select a career move level. *First Move from Current Job* defines the first move from the selected job code, and *Ninth Move from Current Job* is the last move. You can include multiple job codes for any career move to reflect moves at the same management level and moves up the management hierarchy.

Opt # (option number) Enter a number if there is more than one job code option for the selected career-move level. Use the option number to sort the job codes.

Job Code Select the job code for the career move level.

When you exit the Job Code field, the system completes the job details [Job Title, Mgr Level (manager level), and Function fields] and salary details (SetID, Plan, and Grade fields). The system makes these fields unavailable.

Creating Career Plans

To create career plans, use the Create Career Plan (CAREER_PLAN) component.

This section provides an overview of career plans and discusses how to:

- Enter employee job, location, and availability preferences.
- Define an employee career path.
- (USF) Submit and print the career plan.
- (USF) Add career path information.
- Rank employee potential.
- Enter career goals.
- Enter career mentoring data.
- (USF) Add career goal information.
- Evaluate employee strengths and developmental areas.
- Synchronize competency data.
- Enter and update training programs.
- (USF) Add information about a career developmental goal.
- (USF) Approve the career plan.

Understanding Career Plans

Use the Create Career Plan component to enter information about an employee's current position, abilities, strengths, and career desires for the future. You can use this information to help plan employee careers and maintain an available pool of candidates for key positions.

Create a new career plan whenever an employee changes jobs to ensure that the career plan is based on current job information. Use the old career plans for reference to see how elements like training, goals, and ratings change over time.

Recording Input From Multiple Sources

If you gather feedback on an employee from many people or groups and each evaluator has different recommendations, don't create a new career plan every time someone contributes information. Instead, identify the contributor by specifying an input evaluation type. After weighing the evaluations, assign a composite rating for inclusion in an approved career plan.

Pages Used to Create Career Plans

Page Name	Object Name	Navigation	Usage
Career Plan	CAREER_PLAN1	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Plan	Enter employee preferences for jobs and geographic locations; indicate availability to move into new positions.
Career Path	CAREER_PLAN2	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path	Define an employee's career path; modify a default career path; configure a job progression.
Current Career Position Descr (current career position description)	CAREER_POSN_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path Click the Position Long Description link.	View a description of the position selected on the Create Career Plan - Career Path page.
Current Career Job Descr (current career job description)	CAREER_JOBCD_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path Click Jobcode Long Description link.	View a description of the job code selected on the Create Career Plan - Career Path page.
(USF) Federal Potential Future Positions	GVT_CAR_PLN2_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path Click the Federal Data link.	Add further information about the career path specified on the Career Plan - Career Path page.

Page Name	Object Name	Navigation	Usage
(USF) Federal Data / Print IDP Actions	GVT_CAR_PLN2_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Path, Federal Data link Click Federal Data/Print IDP link.	Submit the career plan for approval; print the completed plan.
Career Ranking and Potential	CAREER_PLAN3	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Ranking and Potential	Show how employees compare to their peers and indicate their potential.
Career Goals	CAREER_PLAN4	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Goals	Enter short and long-term goals for employees.
Career Mentoring	CAREER_PLAN5	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Mentoring	Assign career mentors.
Federal Coaching/Mentor Information	GVT_CAR_PLN5_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Mentoring Click the Federal Data button.	Add further information about the career goal specified on the employee's Career Mentoring page.
Career Strength/Develop Areas	CAREER_PLAN6	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Strength/Development Areas	Record and evaluate an employee's career strengths and developmental areas.
Plan Careers/Manage Competencies Link	CAREER_STRDVLP_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Strength/Develop Areas Click the Link to Competencies link.	Synchronize competency data between the Plan Careers and Manage Competencies business processes.
Career Training Plan	CAREER_PLAN7	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Training Plan	Enter or update a training program for the selected employee; use or modify the default training program for the employee job code.

Page Name	Object Name	Navigation	Usage
Career Development Plan	CAREER_PLAN8	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Development Plan	Help employees improve in developmental areas before their next performance review or career planning session.
(USF) Federal Career Plan Information	GVT_CAR_PLN8_SEC	Workforce Development, Career Planning, Prepare Evaluation/Career Plan, Create Career Plan, Career Development Plan Click the Federal button.	Add further information about the career developmental goal specified on the Career Development Plan page.

Entering Employee Job, Location, and Availability Preferences

Access the Career Plan page.

The screenshot displays the 'Career Plan' page for employee Jones, Jane (EmpID: B-BU101). The page includes several sections for setting preferences:

- Career Plan Section:** Contains fields for *Effective Date (11/01/2002), Career Plan Review Date, Date Available, and Projected Retirement Date (10/01/2044). Navigation links like 'Find', 'View All', 'First', '1 of 1', and 'Last' are present.
- Employee Willing To Section:** Includes checkboxes for 'Relocate', 'Take International Assignment', and 'Travel'.
- Desired Work Sites Section:** Divided into 'First Choice' and 'Second Choice', each with fields for Business (GBIBU), Unit, and Location.
- Obstacles to Mobility Section:** Includes a field for *Obstacles to Mobility.
- Geographic Preferences Section:** Includes a field for *Geographic Preferences.
- International Preferences Section:** Includes a field for *Country.

Career Plan page

Projected Retirement Date This field automatically populates with the date on which the employee turns 65. If that is not the employee's actual retirement date, enter the correct date.

Federal Data/Print IDP This link appears for U.S. Federal users only.

Click to display the Federal Data/Print IDP Actions page, where you submit the career plan for approval and print the completed plan.

If there are reasons that the employee can't travel, define them in the Obstacles to Mobility scroll area.

Defining an Employee Career Path

Access the Career Path page.

Career Path page

Career Path

Click to create a career path based on the default career path for the employee's job code. If a career path is defined for that job code, the system completes most of the information in the Potential Future Positions scroll area. If the employee's path differs from the default path, modify the fields as required.

Once you save the plan, the Career Path button is unavailable. However, each time you create a new career plan for an employee, the system makes the button available, and you can use the default path for the new plan. See Setting Up Default Career Paths for information about creating default career paths.

Note. The system uses the date (career plan date) to determine the employee's job code. If the employee has changed jobs since the career plan date, the default career path is based on the previous job code. To ensure that the career plan is based on an employee's current job, create a new career plan whenever an employee changes job, and set the effective date to match the effective date on the Job Data page.

Evaluation Type

Within each career plan, there can be multiple evaluation types. Several people, such as the employee's supervisor or mentor, might have ideas about the next job to which an employee should plan. Because their input affects the same time frame, create new evaluation type records, not a new career plan.

Evaluation Type	Select an evaluation type to indicate who is evaluating the information on the employee. This is populated with <i>Approved/Official</i> if you clicked the Career Plan button. To use the evaluation in Plan Successions, you must select <i>Approved/Official</i> .
Potential Future Positions	
Career Move	Select the career move to define. <i>1st Move</i> is the first step in the career path. It defines the job that the employee will move to from the current job and when the employee will be ready for that job. You can define up to nine moves. <i>9th Move</i> is the final step in the employee's career path. It defines the ninth job move from the current job.
Opt # (option number)	If you decide to include more than one job code in a career-move level, insert an option number to sort the job codes in the preferred order.
Position	If you're driving part or all of Human Resources by position, select a position number from the available options. When you move out of this field, the system completes the Business Unit, Department and Job Code fields. It also displays the job title, salary plan, grade, manager level, and function associated with this position. If you use partial position management and decide not to use a position in this career move, delete the position number.
Position Long Description	Click to access the Current Career Position Descr page where you can see a description of the selected position. This link is active only after you select a position.
Readiness	Select an estimate of the employee's readiness for such a move from these options: <i>1–2 yrs:</i> (1–2 years) The employee will be ready for the move within the next two years. <i>3–5 yrs:</i> (3–5 years) The employee will be ready for the move in three to five years. <i>Emergency:</i> The employee is overdue for a job move and needs to move as soon as possible. <i>Ready Now:</i> The employee is ready for the move now. <i>Retirement:</i> The employee will not move to another position after this; for example, those who are nearing retirement age. The system uses this information in Plan Successions to show blockages: succession candidates who are blocked from advancement.
Federal Data	This link only appears if you are a U.S. Federal user. Click to display the Federal Potential Positions page, where you enter further information about the potential career move.
Department	If you know it, select a department for the job. This field is optional. You create departments in the Department table. The setID determines the departments that you see.

- Job Code** Select the job code for the career move from the available options. When you select a job code and move out of the field, the system displays the associated job title, salary plan, grade, manager level, and function. You use the Job Code table to create job codes.
- Jobcode Long Description** Click to access the Current Career Job Descr (current career job description) page, where you can see a description of the selected job. This link is active only after you select a job code.

(USF) Submitting and Printing the Career Plan

Access the Federal Data/Print IDP Actions page.

Federal Data/Print IDP Actions page

- Reason Career Plan Initiated** Select a reason for the career plan. Valid values are *BU Agree* (bargaining unit agreement), *Car Ladder* (career ladder), *Car Prgm* (career program), *Dec Prgm* (developmental program), *Employee* (employee requested), *Period Rvw* (periodic review), and *Supv* (supervisor requested).
- Currently Participating** Select if the employee is participating in a developmental program and select the program from the list of available options.

(USF) Adding Career Path Information

Access the Federal Potential Future Positions page.

Federal Potential Future Positions

Potential Future Positions

Date Need Identified: 

Reason:  ☐ **Self-Development**

Status:  ☐ **Required**

Estimated Cost: **Actual Cost:**

Federal Potential Future Positions page

Date Need Identified Enter the date that the career move was agreed to.

Self-Development Select if this is part of the employee's self-development activities.

Required Select if the move is required.

Ranking Employee Potential

Access the Career Ranking and Potential page.

[Career Plan](#) | [Career Path](#) | **[Career Ranking and Potential](#)** | [Career Goals](#) | [Career Mentoring](#) | [Career Strength/Develop Areas](#) 

Santos, Emma ID: B-BU140 Empl Rcd#: 0

Career Ranking and Potential

[Find](#) | [View All](#) | First  1 of 1  Last

Effective Date: 11/01/2002 **Career Plan Review Date:** 

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Force Ranking [Customize](#) | [Find](#) | [View All](#) |  First  1 of 1  Last

*Review Date	Rank	Out of	Rank Type	Description		
10/01/2002 			Function			

Career Potential [Customize](#) | [Find](#) | [View All](#) |  First  1 of 1  Last

*Review Date	*Rating	Reviewer Comments		
12/30/2002 	Promote			

Career Ranking and Potential page

To get a better cross-section of employee skills and promotability, enter rankings of different types.

Out of Enter the total number of people against whom the employee has been ranked.

To illustrate how force ranking and career potential might work together, consider John Smith, an engineer. John ranks second out of 200 engineers who have the same job code. On the basis of force ranking alone, an executive committee might think he's a candidate to move to a critical Kuwaiti project. However, John is about to retire, loves his current position in Bahrain, and does not want to move anywhere. You can indicate this by giving him a rating of currently well-placed, *placed*, in his career potential evaluation.

Entering Career Goals

Access the Career Goals page.

Santos, Emma ID: B-BU140 Empl Rcd#: 0

Career Goals Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 **Career Plan Review Date:**

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Short-Term Career Goals Customize | Find | View All First 1 of 1 Last

Estimated Completion Date	Actual Completion Date	Goal (Next 1 - 3 Years)
11/22/2002	10/28/2002	

Import Long-Term Goals

Long-Term Career Goals Customize | Find | View All First 1 of 1 Last

Estimated Completion Date	Actual Completion Date	Goals (3 - 5 Years)
12/30/2002		

Career Goals page

Actual Completion Date Enter the actual completion date when the employee achieves the goal.

Goal (Next 1 - 3 Years) If you're tracking employee reviews in Human Resources, you can use the short-term goals that you enter here as the basis for short-term goals and objectives in employee reviews.

Import Long-Term Goals This button is for U.S. Federal users only.
Click this button to import goals from the employee's most recent appraisal.

Goals (3 - 5 Years) If you're tracking employee reviews in Human Resources, you can use the long-term goals that you enter here as the basis for long-term goals and objectives in employee reviews.

Enter Career Mentoring Data

Access the Career Mentoring page.

[Career Plan](#) | [Career Path](#) | [Career Ranking and Potential](#) | [Career Goals](#) | **[Career Mentoring](#)**

Santos, Emma ID: B-BU140 Empl Rcd#: 0

Career Mentoring Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 **Career Plan Review Date:**

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Career Strength/Development Areas Customize | Find | View All First 1 of 1 Last

Name	*Mentor Type	*Estimated Date	Completion Date	Career Goal
Jane Jones	Supervisor	11/29/200		Financial Planning

Career Mentoring page

An employee can have multiple mentors of different types working towards different career goals.

Name	Enter the name of the employee's mentor.
Mentor Type	Select the type of mentor from the list.
Estimated Date	Enter the expected date of completion for this mentoring activity.
Completion Date	When complete, enter the completion date.
Career Goal	Enter the career goal for the employee to achieve through this mentor.

(USF) Adding Career Goal Information

Access the Federal Coaching/Mentor Information page.

Federal Coaching/Mentor Information

Federal Coaching/Mentoring Information	
Date Need Identified:	11/29/2002
☐ Self-Development	☒ Activity Required
Reason:	LC License Renewal Status: 5 In Progress
Estimated Cost:	300.00 Actual Cost:

Federal Coaching/Mentor Information page

Date Need Identified Enter the date that the goal was agreed to.

Self-Development Select if this is part of the employee's self-development. This indicates that the employee is paying the costs for this activity.

Activity Required Select if the activity is mandatory.

Evaluating Employee Strengths and Developmental Areas

Access the Career Strength/Develop Areas page.

Santos, Emma ID: B-BU140 Empl Rcd#: 0 10/01/1965

Career Strength/Development Areas Find | View All First 1 of 1 Last

Effective Date: 11/01/2002 Career Plan Review Date: [Link to Competencies](#) + -

Business Unit: BN1BU Cobra Business Unit

Job Code: B1007 Financial Analyst

Department: B009 Regression Testing

Supervisor Lvl:

Strengths Find | View All First 1 of 1 Last

*Evaluation Type: Supervisor *Strength: 0110 Time Mgmt + -

Rating Model: PSCM Rating: 4-Very Good

Comment:

Developmental Areas Find | View All First 1 of 1 Last

*Evaluation Type: Self *Dev Area: 0101 Analytical + -

Rating Model: PSCM Rating: 2-Fair

Comment:

Career Strength/Development Areas page

Link to Competencies

Click to transfer the employee's competency data between the Plan Careers and Manage Competencies business processes.

If you already have employee competencies, use this link to display that information and copy it into the employee's career plan. You can also use the link to transfer the competency information from the Career Strength/Develop Areas page to Manage Competencies.

Strengths**Strength**

Select the strength to evaluate from the list of competencies.

Rating Model

When you move out of the Strength field, the system displays the rating model used to measure that competency. You set up rating models on the Rating Model Table Setup page in Manage Competencies.

Rating

Select the rating that best matches the employee's level of proficiency for the selected competency.

Developmental Areas**Dev Area** (developmental area)

Select a competency that is a developmental area for the employee.

Rating Model

When you move out of the Dev Area field, the system displays the rating model used to measure that competency. You set up rating models on the Rating Model Setup page in Manage Competencies.

Rating

Select the rating that best matches the employee's level of proficiency for the selected competency.

Synchronizing Competency Data

Access the Plan Careers/Manage Competencies Link page.

Plan Careers / Manage Competencies Link
 Jones,Rebekah ID: K0G001 Empl Rcd#: 0

The selected competencies will be transferred to Plan Careers.

Manage Competencies			
Customize Find First 1- 3 of 3 Last			
	Eval Type	Competency	Rating
☐	Approved	Ability to prioritize tasks	Strength
☐	Approved	Organize people and goal tasks	Strength
☒	Approved	Resource Planning	Strength

Select All

OK Cancel

The selected competencies will be transferred to Manage Competencies.

Career Planning		
Customize Find First 1 of 1 Last		
Eval Type	Competency	Type

Select All

Plan Careers/Manage Competencies Link page

Manage Competencies

In this scroll area, the system displays the competencies assigned to the employee in Manage Competencies. For each competency, the system displays the evaluation type, competency, and the employee's rating (*Strength* or *Development*). Select the check box next to the competency to transfer to the employee's career plan.

Career Planning

In this scroll area, the system displays the competencies listed on the employee's career plan. For each competency, the system displays the evaluation type, competency, and the employee's rating. Select the check box next to the competency to transfer to the employee's competency profile in Manage Competencies.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies, "Tracking Employee Competencies and Accomplishments," Entering Employee Competencies

Entering and Updating Training Programs

Access the Career Training Plan page.

Career Training Plan page

Training Plan

You create default training programs in the Training Program table and tie them to job codes in the Job Code table. If a training plan has been established for the job code displayed on this page, when you click the Training Plan button, the system populates the fields in the Training Plan scroll area with the information from the training program. If the employee's training plan differs from the default plan, modify the fields as required.

After you save the plan, this button is unavailable. However, each time you create a new career plan for an employee, this button is available, and you can choose to use the default for the new plan.

Note. The system uses the effective date (career plan date) to determine the employee's job code. If the employee has changed jobs since the career plan date, the default training plan is based on the previous job code. To ensure that the training plan is based on an employee's current job, create a new career plan whenever an employee changes job and set the effective date to match the effective date on the Job Data page.

Training Program

Training Program

If the employee's training plan is based on a predefined training program, the system displays the training program name.

Training Plan

Sequence

To set the course order, enter a sequence number. If this field is left cleared, courses appear in ascending chronological order by estimated completion date. To rearrange the courses on the list, enter sequence numbers for the courses in

the order that they should appear. Save this information, close, and reopen the page. The courses will appear in the new order.

Completion Date

If the training course has been scheduled in Administer Training, the system will display the end date of the course in this field when the status changes to *Completed*.

If you are tracking a training course that is not handled in Administer Training, enter the actual completion date when the employee completes the course or training.

Course

Select a course code from the list of available options. When you exit this field, the system enters the course title, the internal and external value, the school code, and the school name for the course. The system makes the fields unavailable; you can't change this information.

If you've entered a course code and decide that you don't want to use it after all, delete the selection. When you exit this field, the system makes the other fields available.

Course Title

If you selected a course code, the system supplies the course title and makes this field unavailable. If the course is not in the course table, enter the course title.

Required

Select this check box if the course is mandatory.

Internal/External

If you selected a course code, the system completes this field and makes it unavailable. If you left the Course field cleared, select one of these options:

Internal: If the course is held in-house.

External: If an external vendor administers the course.

Dt Need Identified (date need identified)

The system automatically populates this field with the career plan date, which you can change if necessary.

School

If the course is *External*, select a school code, which you define in the school table. If the school isn't in the school table, leave this field cleared and complete the school Name field. When you select a course that is *Internal*, the system makes the School field unavailable.

Name

If you selected a school code, the system enters the school name and makes this field unavailable. If the school isn't in the school table, enter the school name.

USF fields

The following elements are for U.S. Federal users only.

Self-Development

If this is part of the employee's self-development activities, select this check box. This indicates that the employee is paying the costs for this activity.

(USF) Adding Information About a Career Developmental Goal

Access the Federal Career Plan Information page.

Federal Career Plan Information			
☐ Self-Development		☒ Activity Required	
Date Need Identified:	11/29/2002	Reason Activity Pursued:	RQ
Estimated Cost:	300.00	Actual Cost:	
OK		Cancel	

Federal Career Plan Information page

Self-Development

If this is part of the employee's self-development activities, select this check box. This indicates that the employee is paying the costs for this activity.

Date Need Identified

Enter the date that the goal was agreed to.

(USF) Approving the Career Plan

Access the Career Plan, Career Path, Career Mentoring, and Career Training Plan pages.

Depending on how the approval process is set up, PeopleSoft workflow routes requested career plans to the appropriate person for approval. The reviewer can approve or change the request and send it to other reviewers and, ultimately, to a human resources person. To view the request, the reviewers open their worklist and the career plan appears. The reviewer then brings it up as a correction to approve or reject it. All of the pages routed through workflow for approval contain a Status field to indicate approval or disapproval.

To begin the approval process:

1. Access the worklist and open the appropriate page (Career Plan, Career Path, etc.).
2. View the plans that are ready for approval.
3. Review them, then change the status to indicate the review decision.

To open the worklist:

1. Select View, Navigator Display, Worklist.
2. Open the career plan ready for approval.

To approve a career plan request:

1. Access the page by accessing the worklist.
2. At the bottom of the page, click either Approve or Disapprove.

To approve a career path request:

1. Open the worklist.
The system prompts for an employee ID.
2. Open the page and change the status to *Approved* or *Disapproved*.

To approve a career mentoring request:

1. Open the worklist.
The system prompts you for an employee ID.
2. Open the page and change the status to *Approved* or *Disapproved*.

To approve a career training plan request:

1. Open the worklist.

The system prompts for an employee ID.

2. Open the page and change the activity status to such as *Approved* or *Disapproved*.

Reviewing Employee Career Data

To review career-related employee data, use the Employment (EMPLOYEE_SUMMARY), Career Assignments (CAREER_SUMMARY), Immediate Family Summary (CAREER_DEPEND_SUMM), Compensation Summary (COMP_SUMMARY), and Training (TRN_STUDENT_CRD_SU1) components.

This section provides an overview of employee career data and discusses how to:

- View employee job paths.
- View summary information.

Understanding Employee Career Data

When you prepare employees for career advancements, look at the candidates' personal and job histories and review their career plans. All the information is on the Plan Careers menu. You can access prior work experience, education, career assignments, and several summary pages. The information on the summary pages is display-only.

Note. In the Plan Careers component, you can access career-related employee data only for employees who have career plans.

Pages Used to Review Employee Career Data

Page Name	Object Name	Navigation	Usage
Employment	EMPLOYEE_SUMMARY1	Workforce Development, Career Planning, Review Career Summaries, Employment, Employment	View employee current job, employment, and personal data.
Career Assignment Summary	CAREER_SUMMARY	Workforce Development, Career Planning, Review Career Summaries, Career Assignments, Career Assignment Summary	View employee job paths through an organization.
Immediate Family Summary	IMMEDIATE_FAMILY	Workforce Development, Career Planning, Review Career Summaries, Immediate Family, Immediate Family Summary	View employee dependent and beneficiary information.
Compensation Summary	COMP_SUMMARY	Workforce Development, Career Planning, Review Career Summaries, Compensation, Compensation Summary	View summary compensation information.
Training Summary	TRN_STUDNT_CRS_SUM	Workforce Development, Career Planning, Review Career Summaries, Training, Training Summary	View summary training information.

Viewing Employee Job Paths

Access the Career Assignment Summary page.

Career Assignment Summary			
Name:	Davies,Craig R		EmplID: KC0021 Empl Rcd Nbr: 0
Company:	GBI GBI		Hire Date: 03/16/1980
Current Location:	Calgary		Country: CAN
Annual Rate:	55,000.00  CAD		Province: AB Alberta
Career Summary Find View All First 1-2 of 2 Last			
Effective Date:	06/01/1996	Business Unit: GBIBU	Position Number:
Department:	10000 Human Resources	Manager Level: Non-Mgr	Grade: 004
Job Code:	140080 Analyst-Systems	Job Function Code: MIS	
Supervisor Level:			
Effective Date:	03/16/1980	Business Unit: CAN01	Position Number:
Department:	11000 Information Systems	Manager Level: Non-Mgr	Grade: 004
Job Code:	140080 Analyst-Systems	Job Function Code: MIS	
Supervisor Level:			

Career Assignment Summary page

The Career Assignment Summary page shows a history of previous jobs that an employee has held in the company. It does not list every personnel action; it shows only job movements. Each position, job code, salary grade, department or business unit change appears.

Viewing Summary Information

If additional employee information exists in Human Resources, such as compensation history, training history, and information about the employee's immediate family, you can review it on the summary pages.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Compensation and Budgeting, “Viewing and Reporting Summary Salary Data,” Understanding Compensation History

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Viewing Summary Workforce Information,” Viewing Worker Job History

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Increasing the Workforce”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training, “Tracking Student Training,” Reviewing Training-Related Employee Data

Running Career Reports

This section lists the pages used to run career reports.

Pages Used to Run Career Reports

Page Name	Object Name	Navigation	Usage
Careerpath Run Control	RUNCTL_CAR001	Workforce Development, Career Planning, Career Reports, Career Plan, Careerpath Run Control	Run the Career Planning Report (CARPLAN) Crystal report.
Runctl Career Training	RUNCTL_CAR002	Workforce Development, Career Planning, Career Reports, Career Training, Runctl Career Training	Run the Career Plan Training Path (CARTRAIN) Crystal report.
IDP (individual development plan)	RUN_FGHR022	Workforce Development, Career Planning, Career Reports, Individual Development Plan, IDP	Run the IDP (FGHR022) SQR report.

(FRA) Rating Employees

Within the French Public Sector, ratings are used as criteria for determining job eligibility.

Rating employees is discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector*.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage French Public Sector, “Rating Employees”

CHAPTER 3

Planning Successions

This chapter provides an overview of Plan Successions, lists prerequisites, and discusses how to:

- Create succession plans.
- Build succession trees.
- Manage succession plans.
- Review career summaries.

Understanding Plan Successions

This section discusses:

- Plan successions
- (USF) Plan successions

Plan Successions

To ensure an organization's continued success, you need to determine who will eventually replace employees currently in key positions. The Plan Successions business process in Human Resources enables you to identify candidates for key positions, anticipate organizational bottlenecks, and develop multiple career paths for individuals who are ready for promotion.

To implement the Plan Successions business process:

1. Perform the prerequisite tasks.
2. Create the succession plans.
3. Build the succession trees.

Once the succession trees are in place, you can review career summaries, monitor the progress of key employees, track changes to key positions, and make adjustments to successions plans as the requirements of the organization change over time.

Integrations

The Plan Successions business process integrates with:

- The Manage Competencies business process in Human Resources.

See [Chapter 3, "Planning Successions," Setting Up Competencies, page 31](#); [Chapter 3, "Planning Successions," Defining Key Positions, page 32](#) and [Chapter 3, "Planning Successions," Identifying Potential Candidates, page 32](#).

- The Plan Careers business process in Human Resources.

See [Chapter 3, “Planning Successions,” Setting Up Career Plans, page 31](#).

- The Manage Positions business process in Human Resources.

See [Chapter 3, “Planning Successions,” Defining Key Positions, page 32](#) and [Chapter 3, “Planning Successions,” Identifying Potential Candidates, page 32](#).

- PeopleSoft Enterprise Talent Acquisition Manager.

See [Chapter 3, “Planning Successions,” Identifying Potential Candidates, page 32](#).

(USF) Plan Successions

The Plan Successions business process for U.S. Federal Government users enables you to set up and manage succession plans and succession trees for government workers.

The Succession Planning USF menu contains the same pages as the Succession Planning menu *minus* the Position Competencies (ROLE_COMPETENCY), Position Accomplishments (ROLE_ACCOMPLISHMNT) and Position Cluster (ROLE_CLUSTER) components under the Succession Planning, Define Key Positions menu. The Key Positions (POSITION_DATA) component under the Succession Planning, Define Key Positions menu is the same as the Identify Key Positions component (POSITION_DATA) under the Succession Planning (USF) menu.

The Succession Planning USF components are discussed in this chapter as well as *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies* and *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions*.

Prerequisites

Perform the following tasks before setting up the Plan Successions business process in Human Resources:

1. Set up HRMS core data.
2. Set up Human Resources job data.
3. (optional) Set up competencies.
4. (optional) Set up career plans.
5. Define key positions.
6. Identify potential candidates.

Setting Up HRMS Core Data

The HRMS core data required for the Plan Successions business process is discussed in *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*.

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, “Setting Up and Installing PeopleSoft HRMS”.

Setting Up Job Data

The Human Resources job data required for the Plan Successions business process is discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*.

Note. Employee job data must exist in the Workforce Administration tables before you work with the Plan Successions pages. If you've implemented multiple business units and SetIDs, the information that you use and create will be determined by how business unit and SetID functionality is set up for your user ID.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Increasing the Workforce".

Setting Up Competencies

Use the Manage Competencies business process to assign competencies to employees and to job codes that are tied to key positions. The succession planning process matches the employee competencies with position competencies to identify and rank potential candidates for key positions. Competencies are discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*.

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

Reviewing Competencies and Accomplishments

Certain pages from the Manage Competencies business process are duplicated in the Plan Successions business process: Competencies (COMPETENCIES), Education (EDUCATION), Honors and Awards (HONORS_AWARDS), Languages (LANGUAGES), Licenses and Certifications (LICENSES_CERTIFS), Memberships (MEMBERSHIPS), Prior Work Experience (PRIOR_WORK_EXPER), and Test Results (TEST_RESULTS_PANEL).

Note. You can only view this information from the Manage Competencies business process if the employee is part of a succession plan. If you have not created a succession plan, you must view these in the Manage Competencies business process

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

Setting Up Career Plans

Use the Plan Careers business process to prepare potential candidates for key positions. The career plans you develop for high-potential employees will prepare them to move into key positions. Career plans are not a prerequisite for creating succession plans. Using succession plans in conjunction with career plans enables you to plan employee training and development in readiness for planned moves. Career planning is discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Plan Careers and Successions*.

See [Chapter 2, "Planning Careers," Creating Career Plans, page 9](#).

You can automate the process of identifying candidates for key positions. From the Create Succession Plan (SUCCESSION_PLAN) component, Candidates page, click the Initialize button to generate a list of people who have the selected key position in their career path

See [Chapter 3, "Planning Successions," Indicating Candidate Readiness, page 35](#).

Reviewing Career Summaries

To review career summaries, use the Career Assignments (CAREER_SUMMARY), Compensation (COMP_SUMMARY2), and Training (TRN_STUDENT_CRS_SU2) components.

To enable you to easily review candidate career information, certain pages from the Plan Careers, Administer Workforce, and Administer Training business process are duplicated in the Plan Successions business process.

Note. These pages are view-only. If you want to update career, compensation, or training data, use the appropriate pages from the Plan Careers, Administer Workforce, or Administer Training business processes.

See [Chapter 2, “Planning Careers,” Creating Career Paths, page 7](#) and *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, “Updating Person and Job Information”.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Training*.

Defining Key Positions

To define key positions, use the Key Positions (POSITION_DATA), Position Competencies (ROLE_COMPETENCY), Position Accomplishments (ROLE_ACCOMPLISHMNT), and Position Clusters) components.

To define key positions, first use the Manage Positions business process to identify key positions in the organization and to create position hierarchies (which are required for successions plans). Once the position hierarchy exists, identify the incumbent in each key position. Key positions are discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions*.

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

Then, use the Manage Competencies business process to define specific job-related competencies and accomplishments which can then be ranked and attributed to the key positions. Position competencies, accomplishments, and clusters are discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, “Assigning Competencies and Accomplishments to Roles”.

Note. USF users should access the Key Positions pages using the Organizational Development, Successions Planning USF, Identify Key Positions navigation path.

Identifying Potential Candidates

To identify potential candidates, use the Competency Match-Applicants (CM_SRCH_APPL), Competency Match-Contractors (CM_SRCH_CNTR), Competency Match-Employees (CM_SRCH_EE), and Competency Match-All (CM_SRCH_ALL) components.

After you have identified the key positions and defined job-related competencies and accomplishments for these positions, review employee competencies and accomplishments to help you identify potential candidates. The succession planning process matches the position competencies with employee competencies to perform succession searches and rankings. Competency matches are discussed in *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Competencies*, “Performing Gap and Match Analyses on a Workforce”.

Recruiting External Candidates

When creating candidate lists for key positions, consider candidates outside the organization. Before you can include external candidates in a succession plan, you must add them to the Human Resources system as persons of interest.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, “Increasing the Workforce”.

The Plan Successions business process integrates with Talent Acquisition Manager. You can increase the chances of identifying and recruiting candidates for key positions if the competencies listed in the job requisitions match the competencies required for the position.

Creating Succession Plans

To create succession plans, use the Create Succession Plan (SUCCESSION_PLAN) component.

This section discusses how to:

- Enter plan dates and select succession candidates.
- Use career path information to plan successions and indicate candidate readiness.
- View candidates for specific positions.

Pages Used to Create Succession Plans

Page Name	Object Name	Navigation	Usage
Succession Plan	SUCCESSION_PLAN1	- Organizational Development, Succession Planning, Create Succession Plan, Succession Plan - Organizational Development, Succession Planning USF, Create Succession Plan, Succession Plan	Enter plan dates and select succession candidates.
Candidates	SUCCESSION_PLAN2	- Organizational Development, Succession Planning, Create Succession Plan, Candidates - Organizational Development, Succession Planning USF, Create Succession Plan, Candidates	Use career path information to plan successions and indicate candidate readiness to move into a new position.
Slate	SUCCESSION_SLATE	- Organizational Development, Succession Planning, Create Succession Plan, Slate - Organizational Development, Succession Planning USF, Create Succession Plan, Slate	View the candidates that are slated to replace successors in their current positions.

Entering Succession Plan Data and Selecting Candidates

Access the Succession Plan page.

Succession Plan			Candidates	Slate
Position Number:	PUN7021	Director - Human Resources		
Company:	NCY	City of Nelson		
Supervisor Level:				
Business Unit:	EGNBU	City of Nelson Business Unit		
Department:	10000	Human Resources		
Job Code:	420060	Director-Human Resources		
Sal Plan/Grade/Step:	SAL	4		
Succession Data Find View All First 1 of 1 Last				
*Effective Date:	10/20/2004			
Next Succession Plan Date:				
*Plan Status:	Proposed			
Projected Vacancy Date:				
Plan Incumbent				
EmplID:	PN014	Rosalie Weider		
Date Available:				
Retire Date:				
Potential:				

Succession Plan - Succession Plan page

Position Number You can create succession plans for each key position.

Projected Vacancy Date If the incumbent has a career plan in Human Resources, the projected vacancy date is the retirement date indicated in their career plan. Otherwise, enter a date in this field.

To return to the Key Position Data component, open the Node menu and select Define Key Position, Key Positions, Description, Specific Information, or Budgets and Incumbents.

Indicating Candidate Readiness

Access the Succession Plan - Candidates page.

Succession Plan		Candidates		Slate	
Position Number	19000210	Director-Human Resources	Company	GBI	
Supervisor Level					
Business Unit	GBIBU	Global Business Institute BU	Sal Plan/Grade/Step		
Department	10000	Human Resources	KU01	009	
Job Code	420060	Director-Human Resources			
Succession Data Find View All First 1 of 1 Last					
Effective Date	01/01/2000	Next Succession Plan Date	Initialize + -		
Plan Status	Proposed	Projected Vacancy Date			
Succession Candidates Find First 1-3 of 3 Last					
Rank	1	*EmplID	KC0026	Carol Johnson	
Target Date	31	*Readiness	1 - 2 Yrs		
Position	19000600	Business Unit	CAN01		
Department	14000	Job Code	600240	TrnDev Mgr	
Sal Plan/Grade/Step	KC02	Potential			

Succession Plan - Candidates page

Succession Data

Initialize

To automatically identify succession candidates, click the Initialize button. The system checks employees' career plans and lists all employees with the job code or position in their career paths.

Note. If an employee's career plan contains multiple positions that have the same job code, the succession plan searches for all career plans for the position and the the job code when it initializes. This results in the same employee appearing multiple times in duplicate rows on this page. You can remove the rows that are not required.

If you haven't created any career plans or you want to add additional candidates, enter new data rows and select the candidate's employee ID.

Succession Candidates

The Succession Candidates scroll area lists potential successors for the selected position. The succession planning process maintains static data and must be updated by creating new succession plans for each position as needed. Creating new succession plans prevents data from becoming outdated.

Rank

Enter a ranking number for each candidate. Assign the number 1 to indicate that a candidate is the first choice in the list. Proceed in descending order. When you save the succession plan, the candidates appear in order of rank.

Note. You rank the candidates and save the information before viewing candidates on the Succession Plan - Slate page, where you view the hierarchy of successors to a position.

- Target Date** Enter the date when you expect the candidate to move into the selected position.
- Readiness** The system autopopulates the candidate's readiness status from their career plans, which you can override.
- If you change the readiness status, update it in the employee career plan also.

The system displays the candidates' current position, salary details, and potential from the Career Ranking and Potential page. These fields are information-only.

Viewing Candidates for Specific Positions

Access the Succession Plan - Slate page.

[Succession Plan](#)
[Candidates](#)
[Slate](#)

Position Number: 19000210 Director-Human Resources

Supervisor Level:

Business Unit: GBIBU Global Business Institute BU

Department: 10000 Human Resources

Job Code: 420060 Director-Human Resources

Succession Data
[Find](#) | [View All](#)
First ◀ 1 of 1 ▶ Last

Effective Date: 01/01/2000

Plan Incumbent: Aliverdi,Reza K

Readiness:

Project Vacancy Date:

Projected Retirement Date:

Potential:

1st Ranked Candidates Slate
[Find](#) | [View 1](#)
First ◀ 1-3 of 3 ▶ Last

EmplID	Name	Readiness:	Title	Position	Block
KC0026	Johnson,Carol L	1 - 2 Yrs	TrnDev Mgr	19000600	Y
KC0015	Campbell,Barry Robert	Ready Now	Train Spec	19000601	N
KU0114	Dell,Emmylou K	1 - 2 Yrs	Emplmnt Mgr	19000004	Y
KU0072	Mosley,Wayne	3 - 5 Yrs	Emplmnt Mgr	19000004	N

Succession Plan - Slate page

Succession Data

Use the options in the Succession Data dialog box to view plan incumbent for this position.

1st Ranked Candidates Slate

Use the options in the 1st Ranked Candidates Slates dialog box to view the selected candidates from the Candidates page, in the ranking order. The second and third levels show the people who are ranked first to succeed the candidates in their current positions. The system sorts the succession plan rows in ascending Position Number, descending Effective Date, ascending Rank, ascending Readiness, ascending Target Date and ascending Employee ID. In the example, Carol L Johnson (employee ID KC0026) is the first candidate for the position 19000210 (Director Human Resources). The first candidate to replace Carol Johnson in her current position 19000600 (Manager Training) is Barry Robert Campbell (employee ID KC0015).

The adjustments to the readiness status for incumbents and successors is probably the last step toward finalizing succession plans.

This page is particularly useful after you've created succession plans for several key positions, because you can see successors for positions three layers down. This helps to ensure that no gaps exist in replacements and to identify and prevent any organizational bottlenecks. See which candidates are blocked in their current position so that you can prepare them for other positions or change their rotations, thereby preventing the loss of high-potential employees.

The system checks the employee's readiness. If this is set at "2" (ready in three to five years), "E" (ready in an emergency) or "R" (retire in current position), then Blocked is set to "N" designating that this employee is not ready. If readiness is "0" (ready now) or "1" (ready in one to two years), the system checks the incumbent's readiness. If there is an incumbent but the incumbent has no row on the succession plan table for this or any other position, Blocked is set to "Y." If the incumbent has one or more rows on the succession plan table (any position) then the system checks the lowest readiness in all positions. If the incumbent's minimum readiness is set to "0" or "1," Blocked is set to "N"; otherwise, ("2", "E" or "R"), Blocked is set to "Y."

Building Succession Trees

To build succession trees, use the Tree Manager (PSTREEMGR), Tree Structure (PSTREESTRUCT), Tree Auditor (RUN_TREE_AUDITS), and Tree Viewer (PSTREEVIEWER) components.

Succession trees provide a graphical view of an organization's succession plan. Succession trees show which workers currently hold key positions and which candidates are slated to move into this position.

Note. You must create successions plans and identify succession candidates before creating the succession tree.

Use the PeopleSoft Tree Manager to build, view, modify, and control access to succession trees. To represent positions as a hierarchy, identify the reporting relationships among the key positions and then build the succession tree. Succession trees are effective-dated; you can build multiple trees to maintain a history of the organization's succession planning and to track planned and actual changes. You can also build alternative scenarios using the Save As feature to clone a tree and then changing hierarchy properties to create different scenarios.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

See *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*, "Setting Up and Building Organization Charts".

Determining Security Access

You can determine the type of access that users have to succession trees. Many levels of access exist: to the tree itself, to key position and succession plans, and to career plans. For example, you might enable many users to update key position, succession plan, and career plan data from within succession trees yet permit only a few users to make changes to the succession trees themselves. You might want other users to view key position, succession plan, and career plan data as display-only. You can delegate the maintenance of different levels in trees by specifying the level of access or update authority that a user or a set of users has.

Use object security to specify which users can access trees and to control whether the trees that users access are display-only. User security determines whether users can access pages from nodes and details and controls whether they are display-only pages. Use employee data security to specify whether users can access the data in pages tied to specific nodes and details.

See *Enterprise PeopleTools PeopleBook: Security Administration*

Managing Succession Plans

Once you've created succession plans with candidate lists, you can view career plans and related employee data for succession candidates. Use this information to make decisions about particular candidates, to re-rank candidates in succession plans, or to remove candidates from the candidate list.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

Viewing Details in Succession Trees

Use the Detail feature of Tree Manager to view and update career plans for succession candidates and to view and update several other pages containing pertinent employee data, such as compensation history, skills, languages, and prior work experience.

This diagram illustrates a succession tree:

SetID:	Tree Name:	SUCCESSION_PLAN	Succession Tree
Effective Date:	Status:	Active	Last Audit: Valid Tree

[Save As](#)
[Tree Definition](#)
[Display Options](#)
[Print Format](#)
[Close](#)

19000001 > 19000500

[Collapse All](#) | [Expand All](#)

[Find](#)
[First Page](#)
[10 of 24](#)
[Last Page](#)

- 19000001 - President & CEO
 - 19000500 - VP-International Operations
 - 19000210 - Director-Human Resources
 - 19000029 - Manager-HR Systems
 - 19000400 - VP-Sales & Services
 - 19000300 - VP-Operations
 - 19000024 - General Auditor
 - 19000220 - Director-IT

Succession tree

Adding Details in Succession Trees

To add details to the succession tree, click the Insert Detail button. When you double-click the button, a list of candidates in the succession plan for that position appears. Select the candidate for whom to view career plans or related employee data.

Note. Before you can view career plans and other employee data, create succession plans for key positions and include succession candidates in them. These pages are available in Tree Manager only for succession candidates.

To add a detail to succession tree:

1. In Tree Manager, open the succession tree and highlight the key position for which you want to add a detail.
2. Click Insert Detail.
3. Select the Dynamic Flag check box on the Detail Value Range page and click Add.

The detail is placed on the tree in what appears to be a lower level in the plan. For example, a detail for Position 1 in the CEO level appears under the EVP level.

To hide the details in a succession tree:

1. Click Display Options.
2. Clear the Display Node Description check box on the Configure User Options page.

When you highlight a detail and click Edit Data, the system displays a list of candidates in the succession plan for the key position. The candidates are sorted first by succession plan date, then by ranking, and then by readiness. If a candidate is in more than one succession plan, they appear in this list only for the most current succession plan. Click the Update button on the line for the candidate for which you want to view additional information. The first page in the group, Career Plan, appears. If you prefer to access other pages from within Tree Manager, you can change the link between Tree Manager and the pages.

Note. You can specify which page you'll see when you select to see details on a tree object, by selecting a page on the Details menu.

Reviewing Career Summaries

This section lists the pages used to review career summaries.

Pages Used to Review Career Summaries

Page Name	Object Name	Navigation	Usage
Career Assignment Summary	CAREER_SUMMARY	- Organizational Development, Succession Planning, Review Career Summaries, Career Assignments, Career Assignment Summary - Organizational Development, Succession Planning USF, Review Career Summary Info, Career Assignments, Career Assignment Summary	Review employee job status and job history.
Compensation Summary	COMP_SUMMARY	- Organizational Development, Succession Planning, Review Career Summaries, Compensation, Compensation Summary - Organizational Development, Succession Planning USF, Review Career Summary Info, Compensation, Compensation Summary	Review employee compensation history.
Training Summary	TRN_STUDNT_CRS_SUM	- Organizational Development, Succession Planning, Review Career Summaries, Training, Training Summary - Organizational Development, Succession Planning USF, Review Career Summary Info, Training, Training Summary	Review employee training history.

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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