PeopleSoft®

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Absence

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Contents

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.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press 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 Monitor Absence Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise Human Resources application fundamentals.
- PeopleBook structure.

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Monitor Absence.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise Human Resource Monitor Absence PeopleBook* provides you with implementation and processing information for your PeopleSoft Human Resources system.

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.

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

See Also

Interactive Services Repository on Customer Connection

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 Monitor Absence

This chapter discusses:

- Human Resources Monitor Absence overview.
- Human Resources Monitor Absence business processes.
- Human Resources Monitor Absence integrations.
- Human Resources Monitor Absence implementation.

Human Resources Monitor Absence Overview

Monitor Absence enables you to set up and track absences, such as vacations, holidays, sick leave, maternity leave, and parental leave. This section provides an overview of how to:

- Define absence parameters.
- Assign work and holiday schedules.

  You can identify work and holiday schedule times when individuals are expected to be either at work or absent. By tracking work times, you can set a work schedule for your personnel depending on your needs.
- Track absences.

  You can enter and track all general absences, including vacation time.

  You can maintain and track absence data to monitor absences for both performance evaluation and project planning.
- Report absences.

  You can run various reports on absences.
- (NLD) Register Dutch illness.

  You can report daily illness absences for people employed under Dutch regulations if your organization is registered under a Dutch Industrial Insurance Board *(Bedrijfsvereniging)*.
- (GBR) Track maternity and parental leave.

  You can track maternity and parental leave for the United Kingdom.

Human Resources Monitor Absence Business Processes

Monitor Absence provides these business processes:

- Define absence parameters.
- Assign work and holiday schedules.
- Track absences.
- Report absences.
- (NLD) Register Dutch illness.
- (GBR) Track maternity and parental leave.

Human Resources Monitor Absence Integrations

Monitor Absence integrates with these applications:

- All PeopleSoft Enterprise HRMS applications.
- Other PeopleSoft applications.
- Other 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

Interactive Services Repository on Customer Connection

Human Resources Monitor Absence 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 8.9 Application Fundamentals for HRMS PeopleBook,* with information about where to find the most current version of each.

See Also

"PeopleSoft Enterprise Human Resources Monitor Absence Preface," page xvii

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

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Setting Up Absence Data

This chapter provides an overview of absence data and discusses how to:

- Set up absence classes, types, codes, and parameters.
- Set up and assign work and holiday schedules.
- Set up vacation benefit plans.

Understanding Absence Data

This section discusses:

- Absence tracking.
- SetIDs and regulatory regions.

Absence Tracking

With the Monitor Absence business process, you can maintain and track both historical and current absence data. This process enables you to better monitor absences for both performance evaluation and project planning. Use the Monitor Absence business process to track typical absences such as sickness, maternity leave, trade union duties, public duties, and annual holidays.

Note. The absence tables and modules that are described in this section are for use with PeopleSoft Human Resources and certain other HRMS applications. If you're using PeopleSoft Global Payroll, use separate absence tracking functions.

SetIDs and Regulatory Regions

During absence data setup, you must consider the regional (that is, national or provincial) regulatory and legislative practices that are applicable to people, and you need to understand how these translate into company policies.

The Absence Class and Absence Type tables are keyed by setID so that you can maintain separate sets of absence types and codes for different regions, as required by the regulatory and legislative practices of the regions.

Because each country monitors different types of absences, use regulatory regions to process all absences within the PeopleSoft Human Resources system. A *regulatory region* is a set-sharing entity similar to a *business unit,* and you associate regulatory regions with setIDs by using the TableSet Control page. The Monitor Absence business process uses the association between setID and regulatory region to ensure that operators have access to the applicable codes for the countries in which absences occur.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Working with Regulatory Regions”

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Working with System Data Regulation in HRMS,” Understanding PeopleSoft HRMS System Data Regulation

Setting Up Absence Classes, Types, Codes, and Parameters

To set up the absence classes, types, codes, and parameters tables, use the Absence Class Table (ABS_CLASS_TABLE) Absence Type Table (ABS_TYPE_TABLE), Absence Codes (ABS_CODE_TABLE), and Absence Parameters (ABS_PARAMETERS) components.

This section discusses how to define:

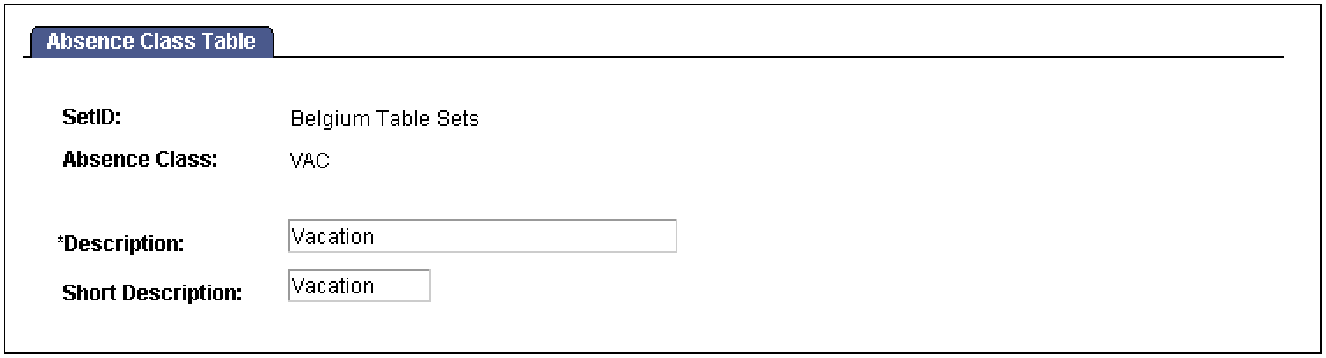
- Absence Classes.
- Absence types.
- Absence codes.
- Absence parameters.

Pages Used to Set Up Absence Classes, Types, Codes, and Parameters

Page Name	Object Name	Navigation	Usage
Absence Class Table	ABS_CLASS_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Class Table	Define absence classes for regulatory regions.
Absence Type Table	ABS_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Type Table	Define the types of absences that a person takes.
Absence Codes	ABS_CODE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Type Table, Absence Codes	Define absence codes for absence types.
Absence Parameters	ABS_PARAMETERS	Set Up HRMS, Product Related, Workforce Administration, Absence, Absence Parameters	Define the parameters for tracking a person’s absence. Use these parameters on the absence calendar.

Defining Absence Classes

Access the Absence Class Table page.

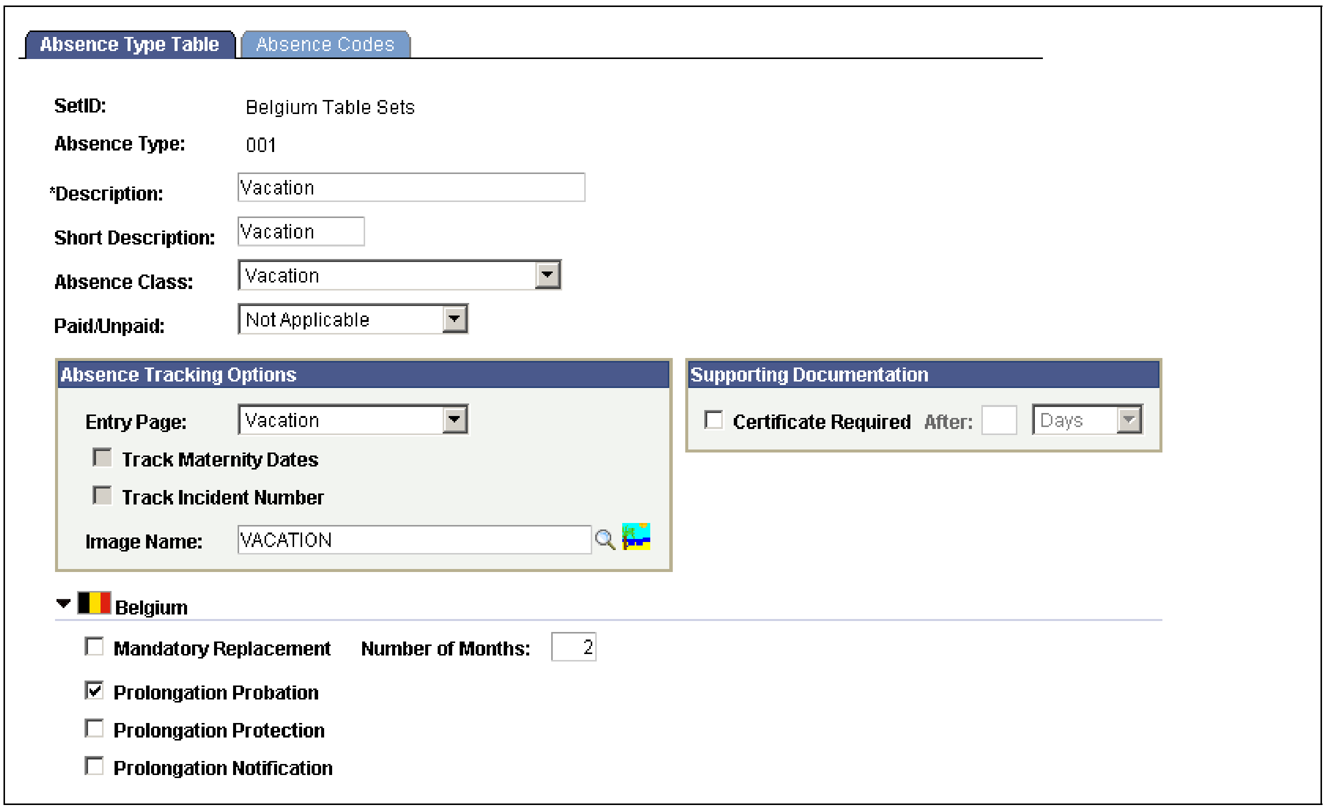


Absence Class Table page

Absence Class Displays the Absence Class you selected from the Search Dialogue.

Defining Absence Types

Access the Absence Type Table page.



Absence Type Table page

Absence Type Displays the type of absence that you entered to access this page.

Absence Class Select types of absences that you want to group for reporting purposes. Generally, the absence class is a category to which the absence type belongs. For example, if you track three different types of sicknesses, you could categorize them all under the absence class *Sickness* for reporting purposes.

Paid/Unpaid Select a value to indicate whether people using this absence type are paid while absent.

Note. Indicating that an absence type is paid does not mean that the system automatically generates a payment for this type of absence. You must set up the payments through the payroll system.

Absence Tracking Options

The options in the Absence Tracking Options group box control how and where absence data is processed on the Absence Data, Vacation, UK Maternity Leave, or UK Paternal Leave pages.

Entry Page

Select a value to indicate the default for this absence type. Options are:

General Absence: Track information on all absences of this type.

UK Maternity Leave: Track UK maternity leave only.

UK Paternal Leave: Track UK paternal leave only.

Vacation: Use for other types of leave that are not categorized by the preceding two options.

Track Maternity Dates

Select this option to track maternity absence on the Absence Data page. The page includes a Maternity link that enables you to enter additional maternity data, such as expected and actual birth dates.

Track Incident Number

Select this option to track incidents on the Absence Data page. This option enables you to associate incidents that you create in PeopleSoft Health and Safety with absences that you enter as part of absence monitoring.

Image Name

Displays a graphical representation of the symbol to be used to denote the selected absence type on the absence calendar. PeopleSoft provides images for *Sickness, Vacation,* and *Maternity* for certain setIDs.

Supporting Documentation

Certificate Required After

Select this check box and enter the duration for which you require a certificate (if certification is required). In companies in many countries, people must produce a medical certificate or some other form of supporting documentation if the absence exceeds a specific number of days.

(BEL) Belgium

Enter data that is required to define absence types for Belgian companies.

Mandatory Replacement

Select this option to indicate that a replacement is required for this absence type.

Number of Months

If a replacement is required, indicate the length of time that the replacement can hold the position.

Prolongation Probation

Select this option if the absence affects a probation period. This option indicates that you may need to take the absence into account and extend the probation period.

Prolongation Protection

Select this option if the absence affects a protection period. This option indicates that you may need to take the absence into account and extend a protection period.

Prolongation Notification Select this option if the absence affects a notification period.

See Also

Chapter 4, “Tracking Vacations,” page 33

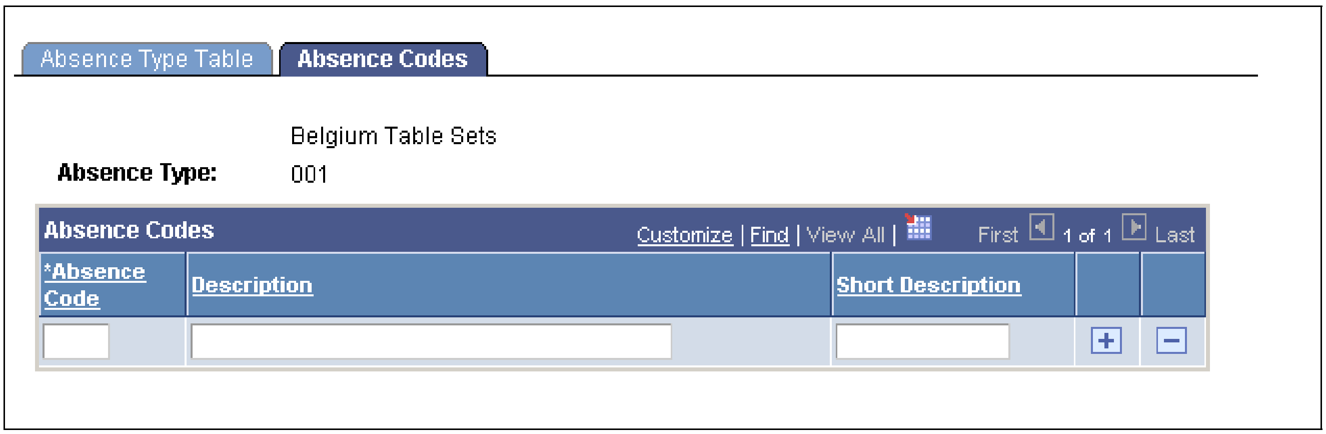
Chapter 3, “Tracking General Absences,” Viewing Absences on the Calendar, page 30

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Working with System Data Regulation in HRMS”

Chapter 6, “(GBR) Tracking Maternity and Parental Leave,” page 47

Defining Absence Codes

Access the Absence Codes page.



Absence Codes page

Absence Codes Enter a three-letter code indicating a type of absence.

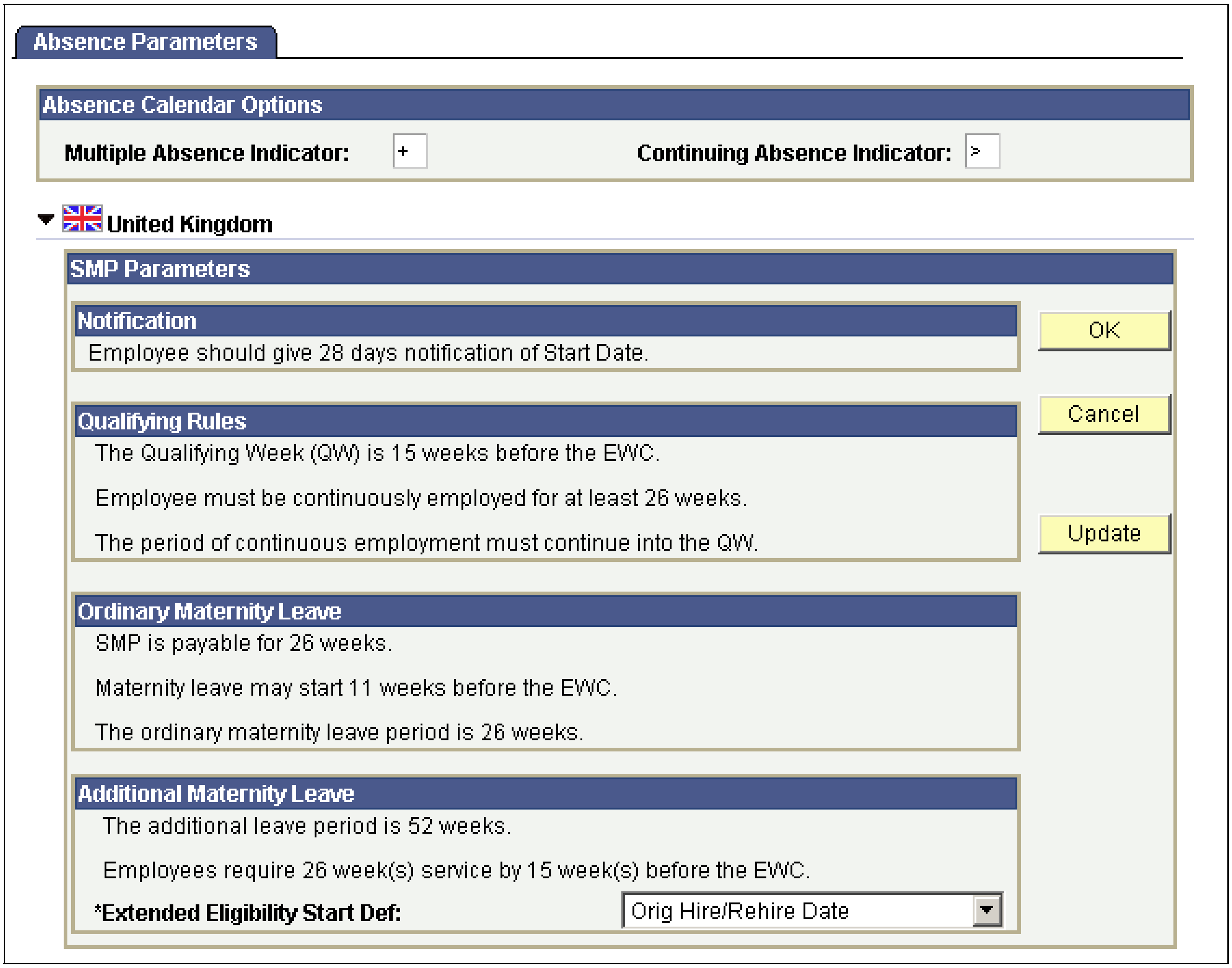
Define as many codes as necessary to cover every aspect of the absence type. To enter additional codes, insert new rows.

Each absence type consists of a group of absence codes that you use to provide detailed descriptions for specific types of absences. For example, you can track various types of illness within the absence type *Sickness*.

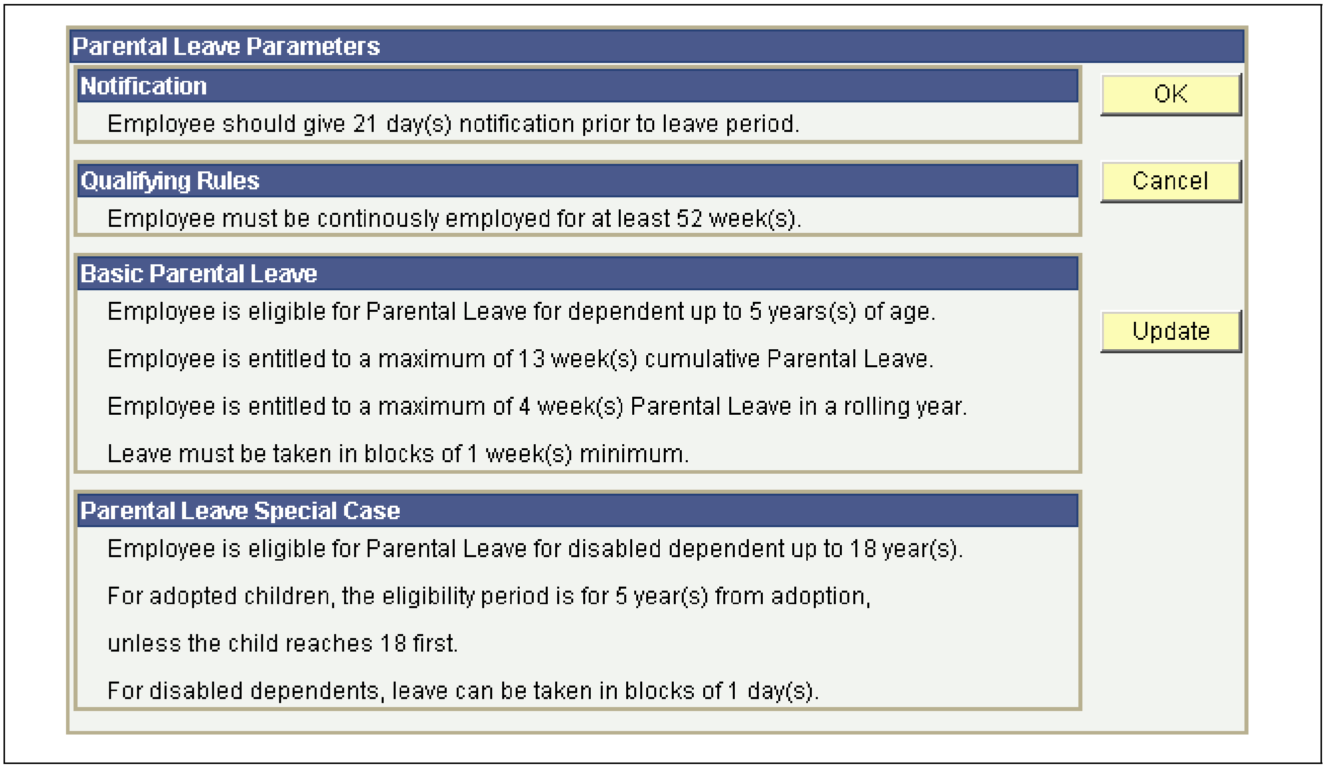
The way that you define absence codes for your organization is discretionary. You can modify the list of codes as necessary for your business requirements, or you can disregard this feature altogether.

Defining Absence Parameters

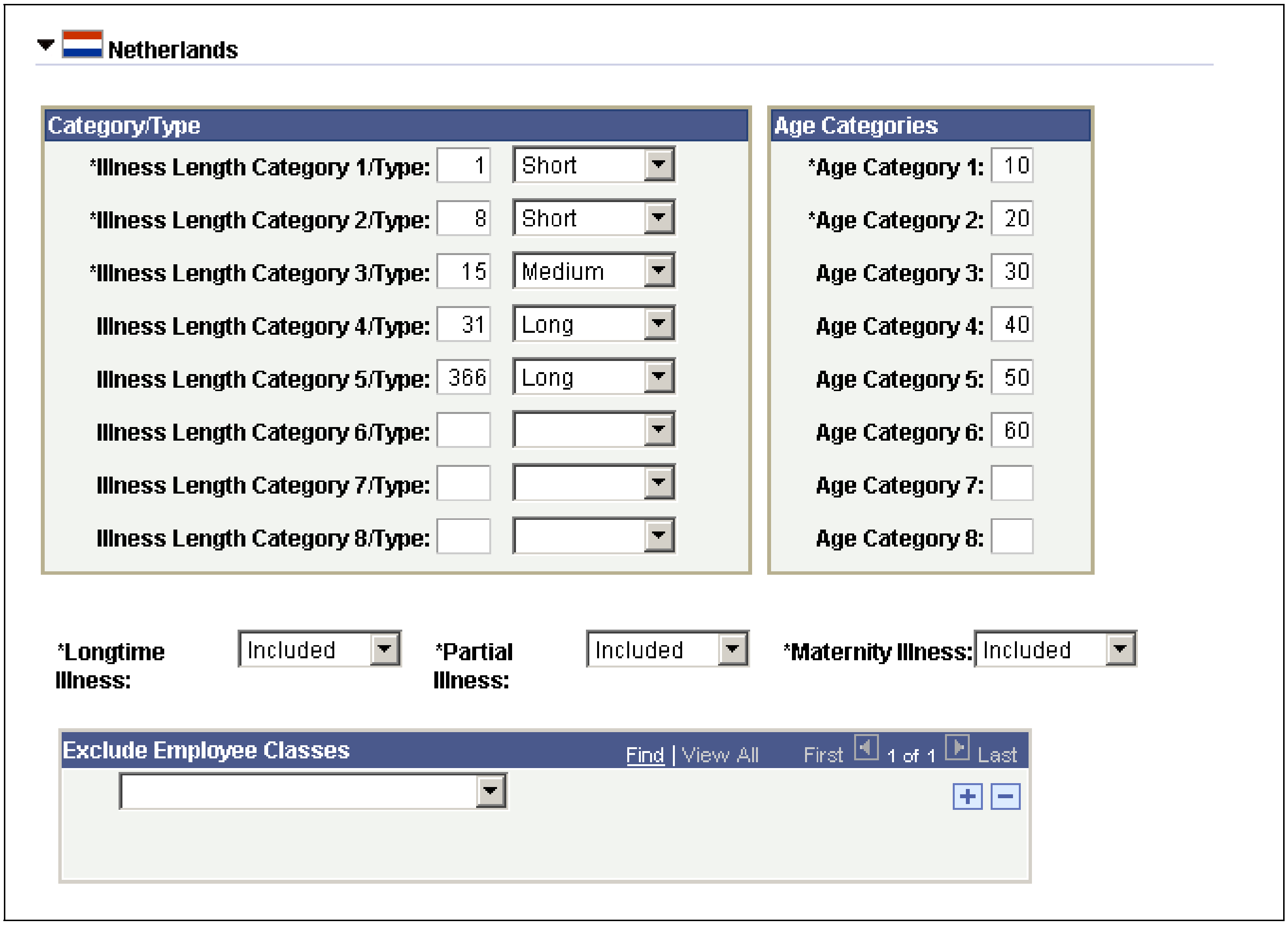
Access the Absence Parameters page.



Absence Parameters page (1 of 3)



Absence Parameters page (2 of 3)



Absence Parameters page (3 of 3)

Absence Calendar Options

Multiple Absence Indicator Displays the symbol that indicates multiple absences. You can change this symbol for different regulatory regions.

Continuing Absence Indicator Displays the symbol that indicates an ongoing absence. You can change this symbol for different regulatory regions.

(GBR) United Kingdom

Use the standard maternity pay (SMP) parameters and parental leave parameters to define statutory maternity pay and parental leave pay parameters for UK companies.

Update Click to edit the fields in the United Kingdom collapsible section. By default, the fields (which are prescribed by UK regulations) are display-only, except for the Extended Eligibility Start Definition field.

Extended Eligibility Start Def. (Extended Eligibility Start Definition) Select *Orig Hire/Rehire Date* to begin eligibility from the hiring date, or the rehire date, whichever is later.

Select *Service Date* to begin eligibility from the worker's service date.

In either case, the system uses the value stored in the worker's Employment Data page.

Note. These values are for tracking purposes only. The PeopleSoft Human Resources system does not calculate SMP or payments of parental leave. You must calculate SMP and parental leave, if paid, in your payroll or other external system.

(NLD) Netherlands

Specify the types of illnesses to include or exclude from the report. This information is necessary to comply with Dutch illness registration reporting requirements. You can also exclude certain classes of individuals.

Category/Type	Enter the appropriate category and select the Category Type from the available options.
Age Categories	Enter the appropriate age categories.
Longtime Illness	Select to include or exclude a longtime illness.
Partial Illness	Select to include or exclude a partial illness. An illness is considered to be partial if the illness percentage is less than 100 percent.
Maternity Illness	Select to include or exclude maternity leave.
Exclude Employee Classes	If excluding classes, select which classes of individuals to exclude from the illness registration report. Insert as many rows as necessary to list all excluded classes.

Setting Up and Assigning Work and Holiday Schedules

To set up the work and holiday tables, use the Work Template Table (ABSW_TMPL_TABLE) Work Schedule Table (ABSW_SCHD_TABLE), and Holiday Schedule Table (ABS_HOL_SCHD_TABLE) components.

Work and holiday schedules specify when a person is expected to be either at work or absent. By tracking work times, you can set work schedules that meet your needs. Some organizations need several work schedules because they have many kinds of workers that are working a variety of hours. Other organizations may need only one schedule because everyone in the organization works the same hours.

This section provides an overview of work templates and discusses how to:

- Define work templates.
- Create work schedules.
- Set up holiday schedules.
- Assign and update work and holiday schedules.

Understanding Work Templates

A work template consists of a series of days, or work periods, and the time worked on those days. The template does not indicate specific dates but merely a pattern of work over a day or series of days.

For example, a template for an office worker who has regular Monday to Friday hours might show five days of working eight hours per day, then two days with no work. By contrast, for a person who works irregular hours, you might set up a different template with four days of working seven hours per day, one day off, one day at ten hours per day, and one day off.

Use work templates to create work schedules. A work schedule may consist of one template, or you can combine templates to describe more complex work patterns. Create as many templates as needed to build all components of your organization's work schedules.

Example Template

If a person works from 22:00 to 6:00 three days per week, the work template would look like this:

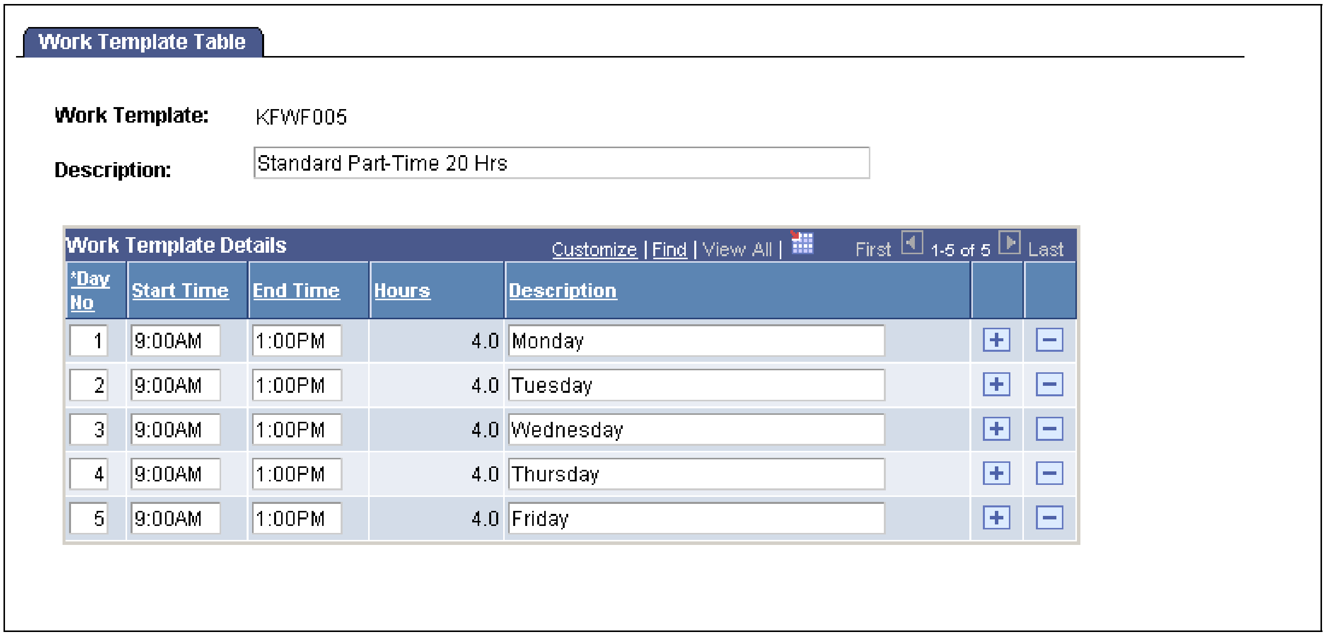
Day Number	Start Time	End Time
1	22:00	24:00
2	00:00	06:00
2	22:00	24:00
3	00:00	06:00
3	22:00	24:00
4	00:00	06:00

Pages Used to Set Up and Assign Work and Holiday Schedules

Page Name	Object Name	Navigation	Usage
Work Template Table	ABSW_TMPL_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Work Template Table	Define work templates. The templates describe unique work patterns for your workforce.
Work Schedule Table	ABSW_SCHD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Work Schedule Table	Create schedules that match the requirements of your personnel and their respective functions. Schedules represent a cyclical work or nonwork pattern made up of templates.
Holiday Schedule Table	ABS_HOL_SCHD_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Holiday Schedule Table	Set up all holiday dates for the regulatory regions.
Work Schedule	ABSW_SCHEDULE	Workforce Administration, Absence and Vacation, Track Absence History, Assign Work/Holiday Schedules, Work Schedule	Assign work and holiday schedules to individuals. Update schedule assignments.

Defining Work Templates

Access the Work Template Table page.

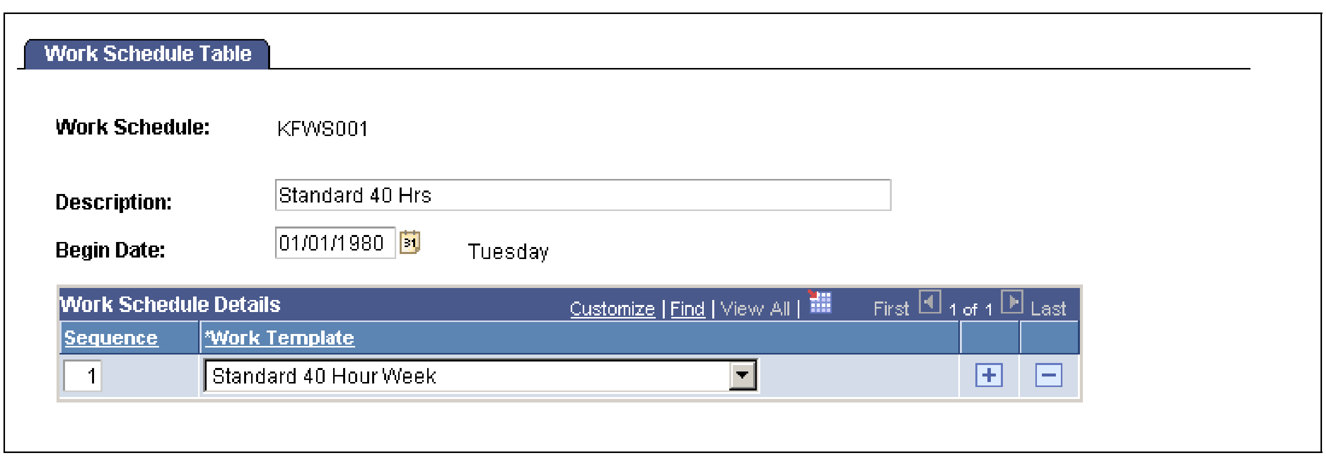


Work Template Table page

Work Template	Displays the work template ID that you assign when you define a new template.
Day No (day number)	Enter the day number for each entry. Use the same day number more than once to indicate separate work times on the same day.
Start Time	Enter the start time for the indicated day.
End Time	Enter the end time for the indicated day.
Hours	Displays the number of work hours based on the values in the Start Time and End Time fields.

Creating Work Schedules

Access the Work Schedule Table page.



Work Schedule Table page

Every person in the system can have a schedule allocated that matches his or her employment contract or functional requirement. These personal schedules enable you to map present and future work patterns for each person.

Work Schedule Displays the work schedule ID that you entered to access this page.

Begin Date Enter the date on which the work schedule takes effect. This date is important when you associate schedules with people.

Sequence Enter a number to specify the order in which the work templates take effect.

Work Template Select a work template that represents a cyclical work or nonwork pattern.

Example Schedule

Use the same template as many times as necessary to achieve the schedule that you want. For example, if a person works seven days, has two days off, works five days, then has two off, use the following setup:

Sequence	Work Template	Description
1	All Days	The person works according to template definition (seven days straight).
2	Two Days Off	The person takes the next two days off.
3	Five Days	The person returns to work for another five days.
4	Two Days Off	The person takes another two days off.

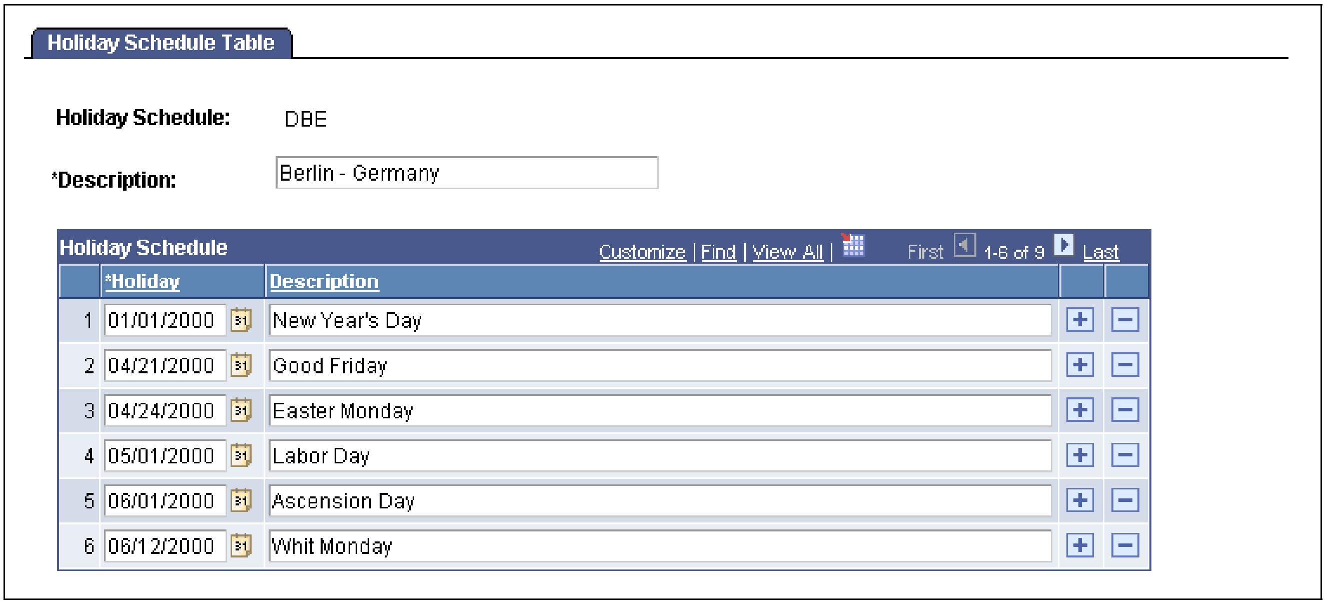
Note. The example above uses a *five days off* work template that is not a delivered value. Use the Work Template Table page to define or modify existing work templates.

See Also

Chapter 2, "Setting Up Absence Data," Defining Work Templates, page 13

Setting Up Holiday Schedules

Access the Holiday Schedule Table page.



Holiday Schedule Table

Holiday Schedule: DBE

*Description: Berlin - Germany

Holiday Schedule — Customize | Find | View All | First 1-6 of 9 Last

	*Holiday	Description
1	01/01/2000	New Year's Day
2	04/21/2000	Good Friday
3	04/24/2000	Easter Monday
4	05/01/2000	Labor Day
5	06/01/2000	Ascension Day
6	06/12/2000	Whit Monday

Holiday Schedule Table page

When a person is absent, the system uses the holiday calendar for that person when calculating the duration that the person is actually absent from work.

Holiday Schedule Displays the ID of the holiday schedule.

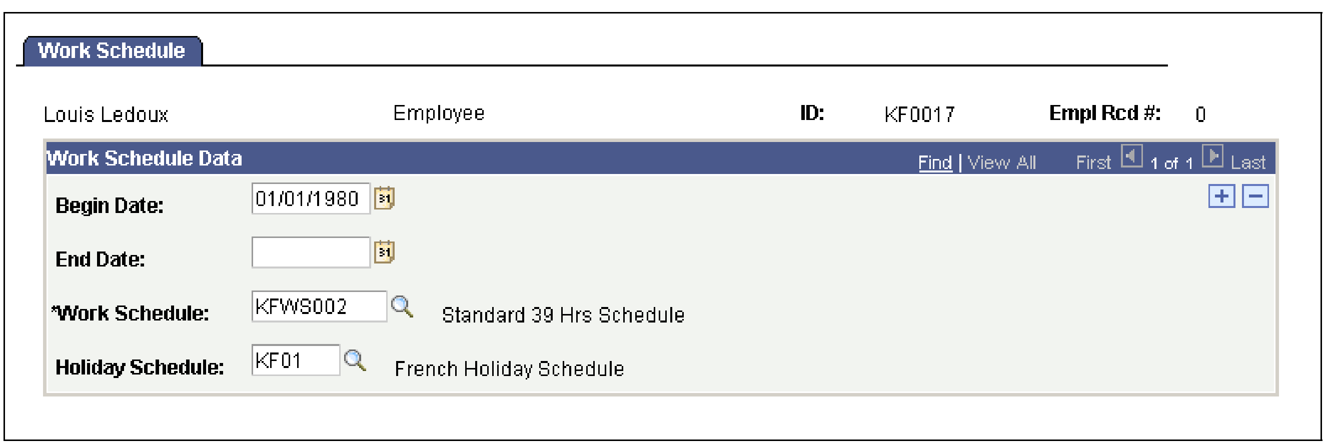
Holiday Enter all the holiday dates that your organization observes within this schedule. These dates are reflected on the absence calendar as nonwork days.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Organization Foundation Tables," Setting Up Holiday Schedules

Assigning and Updating Work and Holiday Schedules

Access the Work Schedule page.



Work Schedule

Louis Ledoux Employee ID: KF0017 Empl Rcd #: 0

Work Schedule Data — Find | View All First 1 of 1 Last

Begin Date: 01/01/1980

End Date:

*Work Schedule: KFWS002 Standard 39 Hrs Schedule

Holiday Schedule: KF01 French Holiday Schedule

Work Schedule page

Begin Date Enter the date that the work schedule takes effect for this person. Work schedules are keyed by this date. A new begin date in the overall work schedule diary is interpreted as the start of a new work schedule. Work schedules are cyclical.

End Date Enter the date that the work schedule ceases to be effective. This date must be later than the begin date.

Work Schedule Select the person's work schedule for the defined period.

Holiday Schedule Select the person's holiday schedule for the defined period. Even if people have different work schedules, they typically share the same holiday schedule.

Important! For absence processing to work, you must enter a holiday schedule.

Change or add work schedules for people as necessary. If a person's job changes during the year, enter a new row of data with the new effective date and schedule. When the new schedule becomes effective, all of the person's data is mapped to the new work schedule. Benefits processing, absence processing, and the calendar reflect the new schedule.

Note. Verify existing begin and end dates for the current work schedules before entering new ones. Each new begin date in the calendar is interpreted as the beginning of a new work schedule.

Setting Up Vacation Benefit Plans

To set up the vacation benefit plan tables, use the Benefit Plan Table (BENEFIT_PLAN_TABLE) and Vacation Plan Table (ABSV_PLAN_TABLE) components.

This section discusses how to:

- Set up vacation providers.
- Add vacation benefit plans.
- Define entitlement rules.
- Add vacation plans to benefit programs.

Pages Used to Set Up Vacation Benefit Plans

Page Name	Object Name	Navigation	Usage
Benefit Plan Table	BENEFIT_PLAN_TABLE	Workforce Administration, Absence and Vacation, Define Absence/Work Schedules, Benefit Plan, Benefit Plan Table Set Up HRMS, Product Related, Base Benefits, Plans and Providers, Benefit Plan Table	Define the basic criteria for vacation benefits. **Note.** Define all benefit plans.
Vacation Plan Table	ABSV_PLAN_TABLE	Set Up HRMS, Product Related, Workforce Administration, Absence, Vacation Plan Table	Define the entitlement rules for accruing vacation leave time for each vacation benefit plan.

See Also

Chapter 4, "Tracking Vacations," Assigning Vacation Plans to Individuals, page 33

Chapter 4, "Tracking Vacations," Updating Vacation Accruals, page 34

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up Vendors"

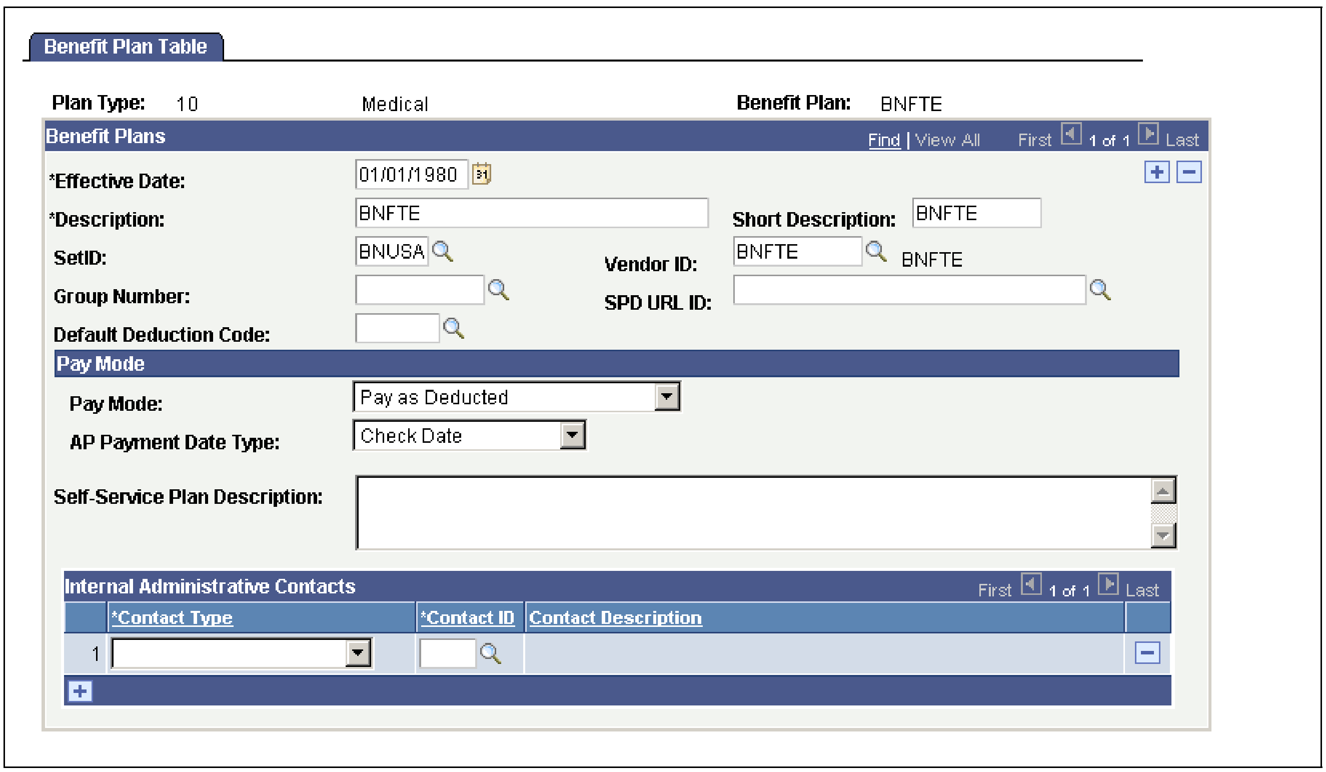
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Base Benefits, "Setting Up Benefit Plans," Defining Benefit Plans

Setting Up Vacation Providers

For vacation plans, you can set up your organization as the provider.

Adding Vacation Benefit Plans

Access the Benefit Plan Table page.



Benefit Plan Table page

Set up distinct vacation plans for different accrual schedules.

Note. The following fields are required for the Monitor Absence business process vacation plans; the remaining fields apply to other benefit plans. The Benefit Plan Table page is documented in the *PeopleSoft Enterprise 8.9 Human Resources PeopleBook: Manage Base Benefits*. It is included in the Absence and Vacation menu for your convenience.

Plan Type For vacation plans, select the plan type *Vacation* to access the page.

Note. The recommended plan type is Vacation; this plan type is delivered with PeopleSoft Enterprise Human Resources for vacation processing. Adding or changing plan types often involves complex updates to associated processing logic.

Benefit Plan

Displays the benefit plan ID that you entered to access this page.

Vendor ID

Select an ID from the list of providers. If the provider does not appear on the list, access the Provider table (PROVIDER_TABLE) and add it.

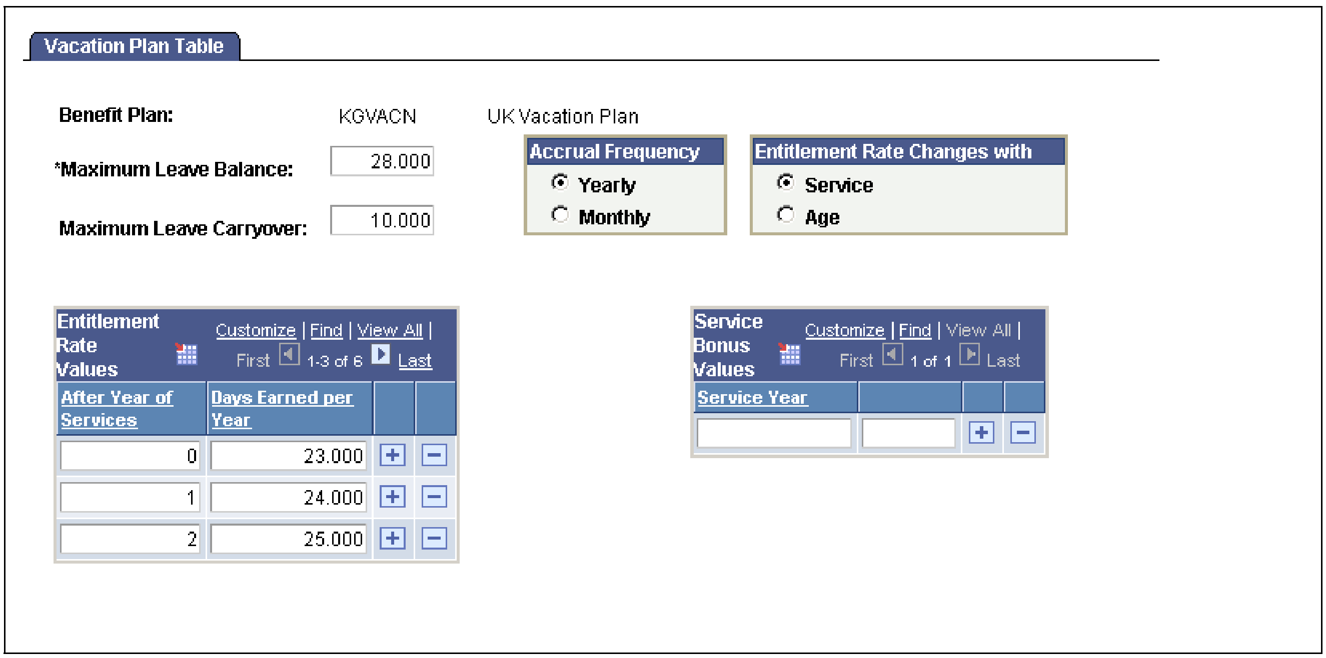
Important! For a provider to be valid for a particular benefit plan, that provider must be on the Provider table with an effective date that is the same as or prior to the effective date of the benefit plan in question.

See Also

PeopleSoft Enterprise Benefits Administration 8.9 PeopleBook, “Building Automated Benefit Programs”

Defining Entitlement Rules

Access the Vacation Plan Table page.



Vacation Plan Table page

Benefit Plan

Displays the name of the vacation plan.

Maximum Leave Balance

Enter the maximum number of days that a person can hold in any one period.

Maximum Leave Carryover

Enter the maximum number of days that a person can carry into the next period.

Accrual Frequency

Select the length of the accrual period and how often the process should be run. The default is *Yearly,* but you can change it to *Monthly* if necessary.

Changing the accrual frequency changes the period prompt in the Entitlement Rate Values and Service Bonus Values group boxes.

Entitlement Rate Changes with Select either *Service* or *Age.* When you do, the prompt under the Entitlement Rate Values group box changes.

Entitlement Rate Values

Enter the vacation entitlement schedule under this plan in the Entitlement Rate Values group box according to the person's length of service or age, depending on your selection in the Entitlement Rate Changes with group box.

Service Bonus Values

Enter bonus accruals based only on completion of years of service. Enter figures to three decimal places. The amounts are either per year or per month, depending on your selection in the Accrual Frequency group box.

Adding Vacation Plans to Benefit Programs

Access the Benefit/Deduction Program Table page.

Note. Many of the fields on this page do not apply to vacation plans.

After defining vacation plans, you must include them in a benefit program. Benefit programs combine various benefit plans into a single program. For example, a benefit program for salaried workers might include a vacation plan, company car plan, and maternity leave plan. When you set up people, you assign them a benefit program. Later, when you enroll individuals in a benefit plan, your plan choices include only those that are available in the benefit program that is assigned to the person.

See Also

PeopleSoft Enterprise Benefits Administration 8.9 PeopleBook, "Building Automated Benefit Programs"

CHAPTER 3

Tracking General Absences

This chapter lists common elements and discusses how to:

- Track general absence data.
- Review absence summaries.
- Run absence reports.

Common Elements Used in This Chapter

Begin Date	Enter the date that the absence began.
End Date/Time	Enter the date and time that the absence ended.
Absence Type	Select a type of absence. The available absence types depend on how you set up the system.
Absence Code	Select a code that provides more detailed information about the type of absence.

Tracking General Absence Data

This section discusses how to:

- Enter absence data.
- (BEL) (NLD) Track absence recurrence.
- Enter follow-up actions.
- Record comments about an absence.

Use the Absence Data component (ABSENCE_HISTORY) to enter and track all general absences—the actual absent time, any follow-up activities related to the absence, and any comments about the absence.

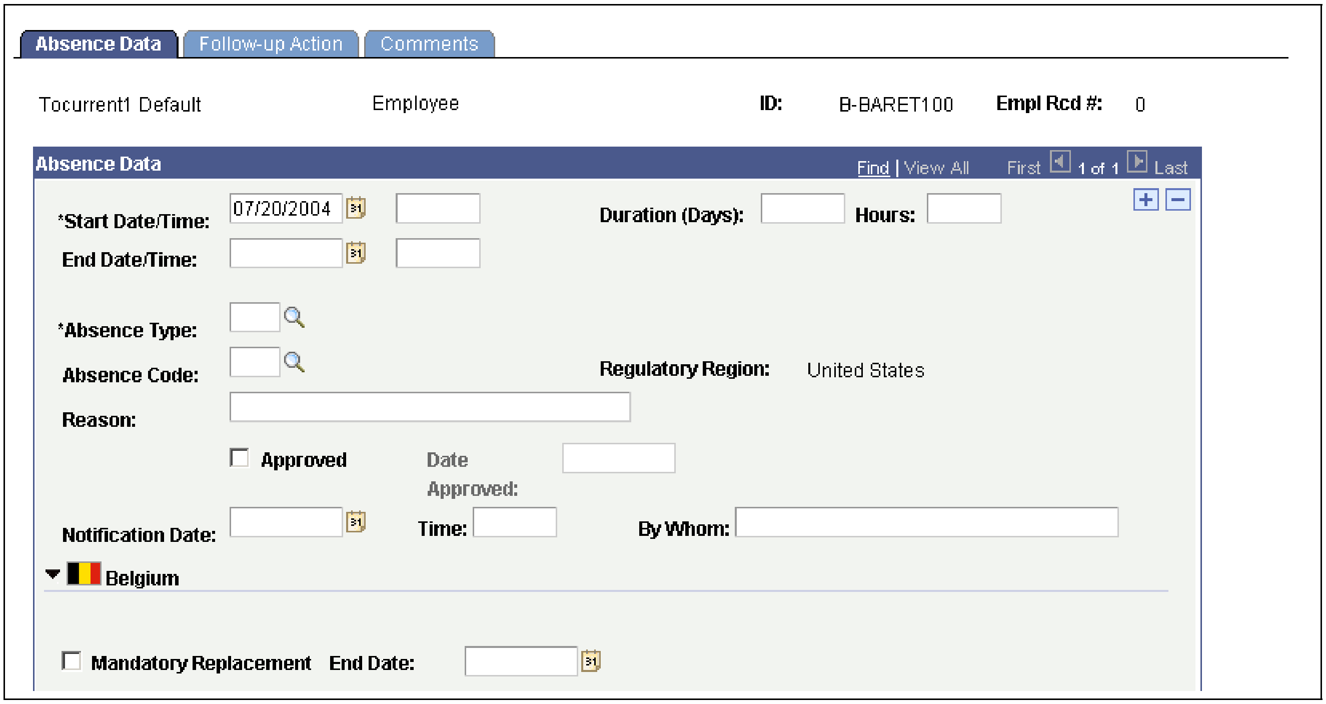
Note. Though you can track all general absences using this component, we've provided dedicated pages for those instances where your regulatory or legislative practices require you to track certain absences in detail. For example, for UK employees, you can track UK maternity leave by using the UK Maternity Leave page.

Pages Used to Track General Absence Data

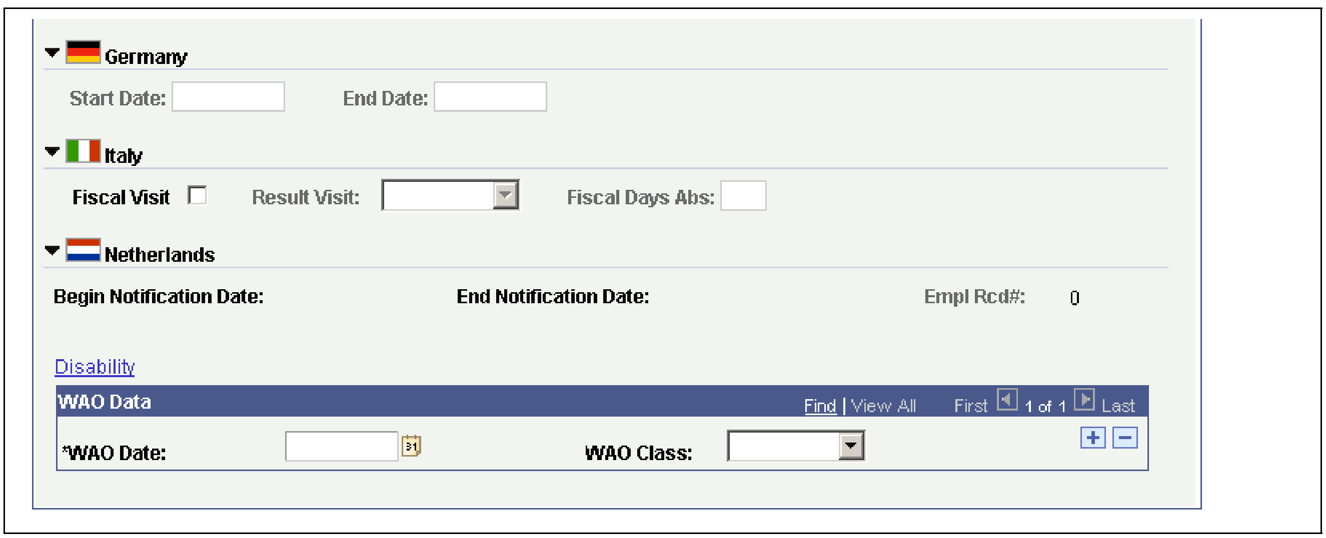
Page Name	Object Name	Navigation	Usage
Absence Data	ABSENCE_HISTORY	Workforce Administration, Absence and Vacation, Track Absence History, Create/Update Absence, Absence Data	Enter absence data details. For a vacation absence, use the Vacation Request page instead.
Maternity Dates	ABS_HIST_MAT_SEC	Click the Maternity link on the Absence Data page. This option appears when you select *Maternity* as the absence type.	Enter the expected and actual dates that the baby is born for a person with a *Maternity* absence type.
Absence Recurrence	ABS_RECUR_SEC	Click the Absence Recurrence link on the Absence Data page under the appropriate country flag.	Track absence recurrence (for regulations in Belgium and The Netherlands).
Follow-up Action	ABSENCE_HISTORY2	Workforce Administration, Absence and Vacation, Track Absence History, Create/Update Absence, Follow-up Action	Enter any follow-up details and subsequent actions that are required for the absence, such as whether the illness is work-related or due to an ongoing illness.
Create/Update Absence - Comments	ABSENCE_HISTORY3	Workforce Administration, Absence and Vacation, Track Absence History, Create/Update Absence, Comments	Record comments about the person's absence.

Entering Absence Data

Access the Absence Data page.



Absence Data page (1 of 2)



Absence Data page (2 of 2)

Start Date/Time Enter the beginning date and time of the absence.

Duration (Days) Displays the total duration of the absence in days and hours. You can override this system calculation.

Note. The duration that the system calculates takes into consideration the person's work and holiday schedule. Therefore, it isn't the elapsed time between the start and end dates for the absence, but actual work days and hours lost from work due to sickness.

Absence Type Enter the type of absence. If you enter *Maternity,* a link to the Maternity Dates page appears.

Regulatory Region Displays the person’s regulatory region.

Reason Enter a detailed reason for the absence.

Approved Select this check box to indicate the status of the absence.

Date Approved If applicable, enter the date that the absence was approved.

Notification Date, Time, and **By Whom** Enter the date and time that the absence was first reported and the person who reported it.

(BEL) Belgium

Mandatory Replacement Select this check box to indicate that a replacement is required for this absence. This option applies to structural absences only.

End Date Enter an end date for the period during which a replacement is required for the absent person.

(DEU) Germany

Start Date Enter the beginning of the person’s maternity leave.

End Date Enter the end of the person’s maternity leave.

(ITA) Italy

Fiscal Visit Select this check box if a doctor’s visit is required to verify the person’s illness.

Result Visit Select a value to indicate the result of the doctor’s visit.

Fiscal Days Abs (fiscal days absent) Enter the number of fiscal days that the person will be absent, as determined by the doctor.

(NLD) Netherlands

Begin Notification Date Enter the date that the illness absence was reported to the *Arbeidsomstandigheden (ARBO)* service provider.

End Notification Date Enter the date that the end of the illness absence was reported to the ARBO service provider.

Disability Click this link to access the Disability page if the absence is related to a disability.

WAO Date (*Wet Arbeids Ongeschiktheid* date) Enter the date that the percentage of physical disability was measured.

WAO Class (*Wet Arbeids Ongeschiktheid* class) Select the percentage of physical disability for the person in performing job duties. This percentage value is measured on the date specified, according to Dutch disability law requirements.

See Also

Chapter 4, "Tracking Vacations," Entering Vacation Requests, page 36

Chapter 2, "Setting Up Absence Data," Understanding Absence Data, page 3

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Tracking Disabilities

(BEL and NLD) Tracking Absence Recurrence

Access the Absence Recurrence page.

Absence Recurrence

Previous Absences — Customize | Find | View All | First 1-4 of 4 Last

	Return Date	Empl Rcd#	Absence Type	Description	Start Date	Recurrence	Start Date
☐	12/01/1999	0	501	Sickness	10/14/1999	☐	
☐	09/14/1999	0	506	Extended Maternity	08/10/1999	☐	
☐	08/05/1999	0	502	Maternity	05/04/1999	☐	
☐	05/12/1998	0	501	Sickness	04/27/1998	☐	

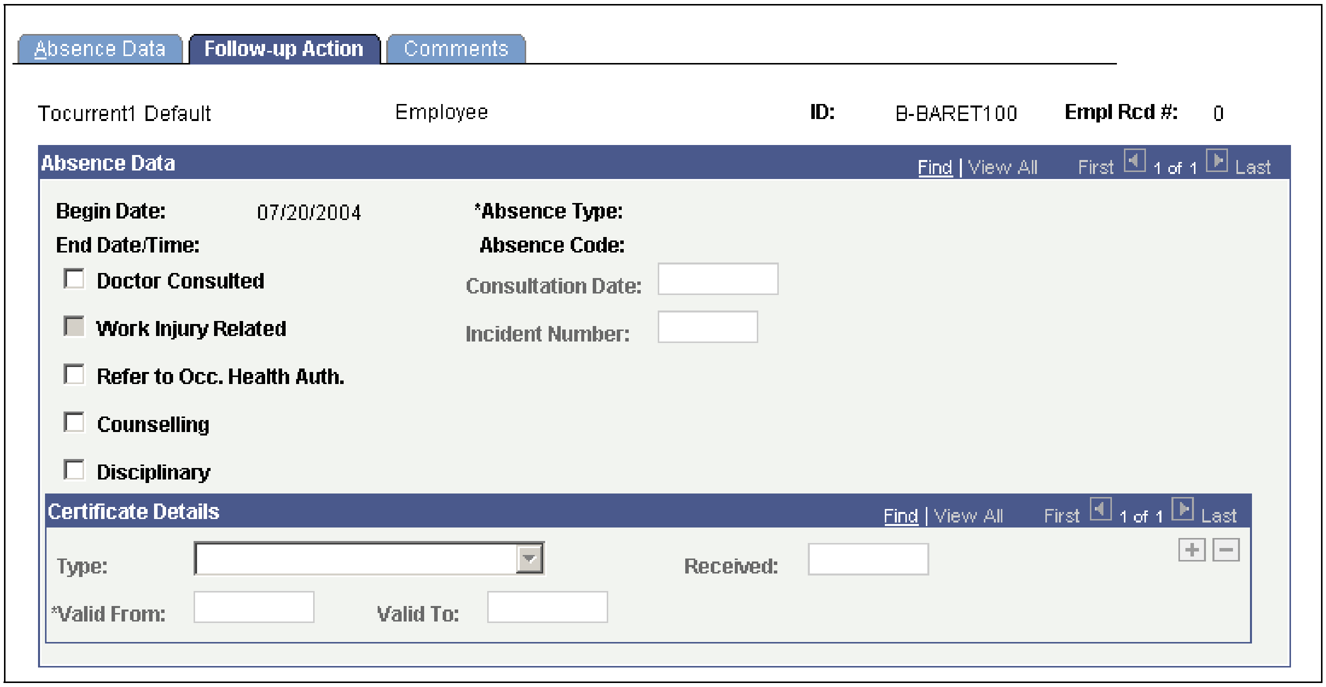
Absence Recurrence page

Regulations in Belgium and the Netherlands require noting if the absence for an illness is a recurrence of a previous absence. For example, a person might be absent for a month, return to work for three days, and then be absent for another week with the same illness. The second absence must be recorded as a recurrence of the prior absence.

When you access the Absence Recurrence page, the system displays all previous absences. If the absence being recorded relates to a previous absence, select the check box next to the previous related absence's return date.

Entering Follow-Up Actions

Access the Follow-up Action page.



Follow-up Action page

Doctor Consulted Select this check box if you contacted the person's doctor about the absence.

Consultation Date Enter the date that you contacted the doctor.

Work Injury Related Select this check box if the absence is related to a work injury.

Incident Number Enter the incident number that was assigned if you selected the Work Injury Related check box. Complete this field if you use the PeopleSoft Enterprise Human Resources: Health and Safety business process. Options include all incidents entered into the Health and Safety module.

Note. To track absence data about work-related injuries, set up the system to monitor such information.

Refer to Occ. Health Auth. (refer to occupational health authority) Select this check box if follow-up action with the Occupational Health Authority is appropriate.

Counseling Select this check box if follow-up counseling is appropriate.

Disciplinary Select this check box if disciplinary action is appropriate.

Certificate Details

Type Enter the type of certification if you receive certification for a follow-up action. Values are:

Medical Certificate: A certificate received from the absent person's physician.

Self Certificate: A certificate received from the person.

Received Enter the date that you received the certificate.

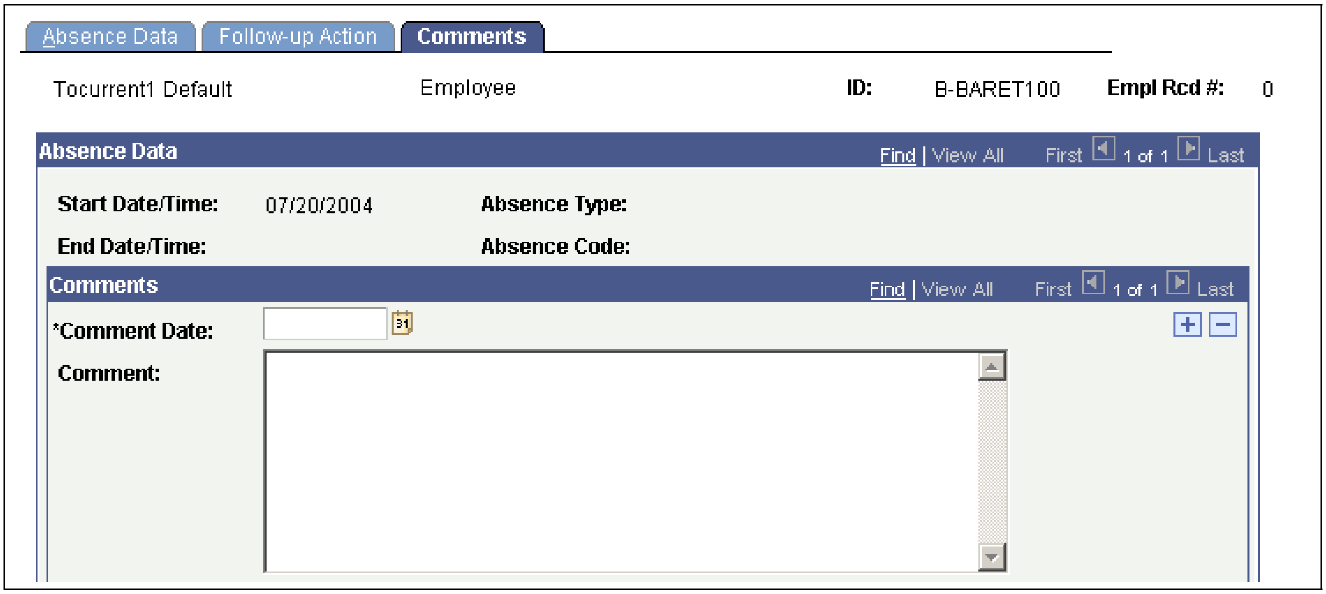
Valid From and **Valid To**	Enter from and to dates for the certification so that you can track the need to obtain additional certification for ongoing illnesses.

See Also

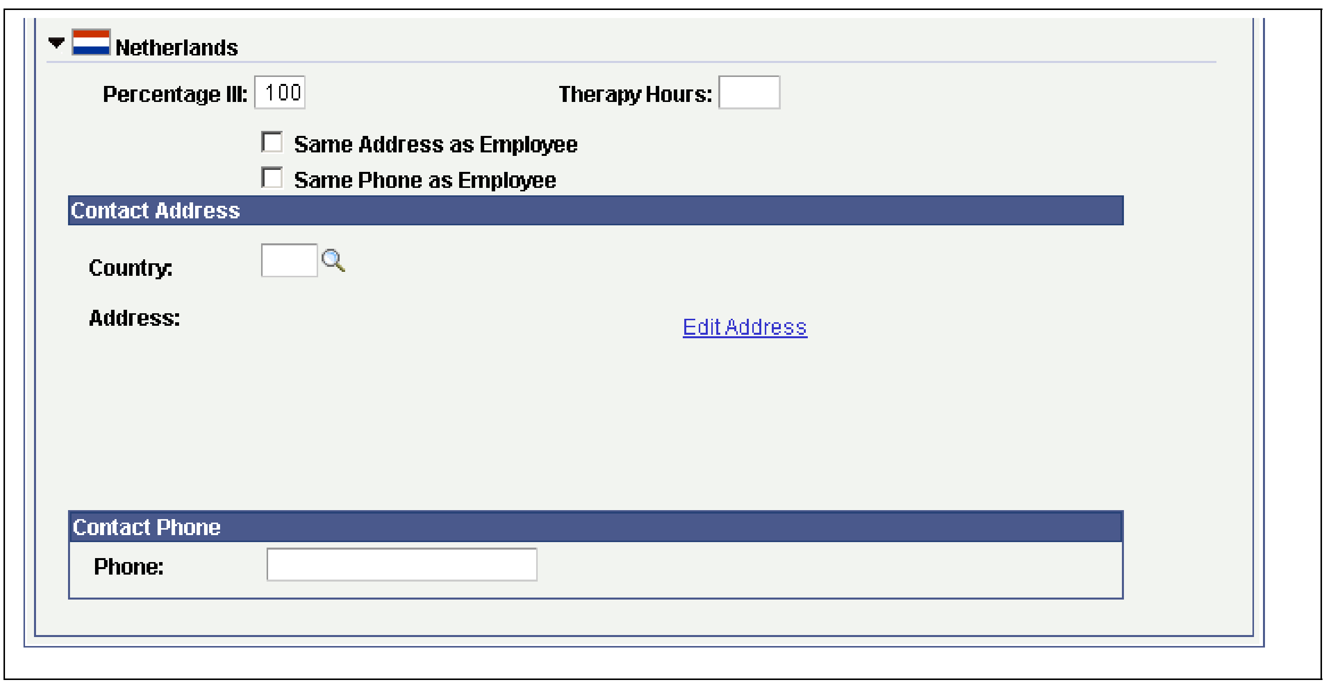
Chapter 2, "Setting Up Absence Data," Understanding Absence Data, page 3

Recording Comments About an Absence

Access the Create/Update Absence - Comments page.



Create/Update Absence - Comments page (1 of 2)



Create/Update Absence - Comments page (2 of 2)

(NLD) Netherlands

Percentage Ill (percentage illness)	Enter a percentage indicating how ill the person is. This information is especially useful for long periods of illness, because it enables you to gauge the person's return to full-time work.
Therapy Hours	Enter the number of hours that the person is undergoing therapy.
Same Address as Employee and **Same Phone as Employee**	Select these check boxes if the absent person is convalescing or rehabilitating at home. The person's personal address appears in the address fields and the fields are unavailable for entry. To change the person's address, use the Modify a Person component (PERSONAL_DATA). If the absent person is convalescing or rehabilitating at a different address, such as a clinic or hospital, clear the check box.
Contact Phone	Enter a telephone number to contact the person.

Reviewing Absence Summaries

This section provides an overview of absence indicators and discusses how to view absences on the calendar.

Understanding Absence Indicators

PeopleSoft delivers summary pages that enable you to review the history of absences for a person, for all reasons, including vacations and sickness. Reviewing this information can help you to identify absence trends and patterns.

When you set up absence parameters, you defined absence calendar options for the calendar. There are two types of indicators that appear on the calendar:

- Continuing absence indicator.

  If you enter an absence with no end date, you can see the continuing absence indicator. This means that the absence does not yet have an end date entered.

- Multiple absence indicator.

  If you enter more than one absence for a particular day for a person, you can see the multiple absence indicator. This means that there is more than one instance or type of absence entered for the person (for example, a combination of sick leave and personal leave).

Pages Used to Review Absence Summaries

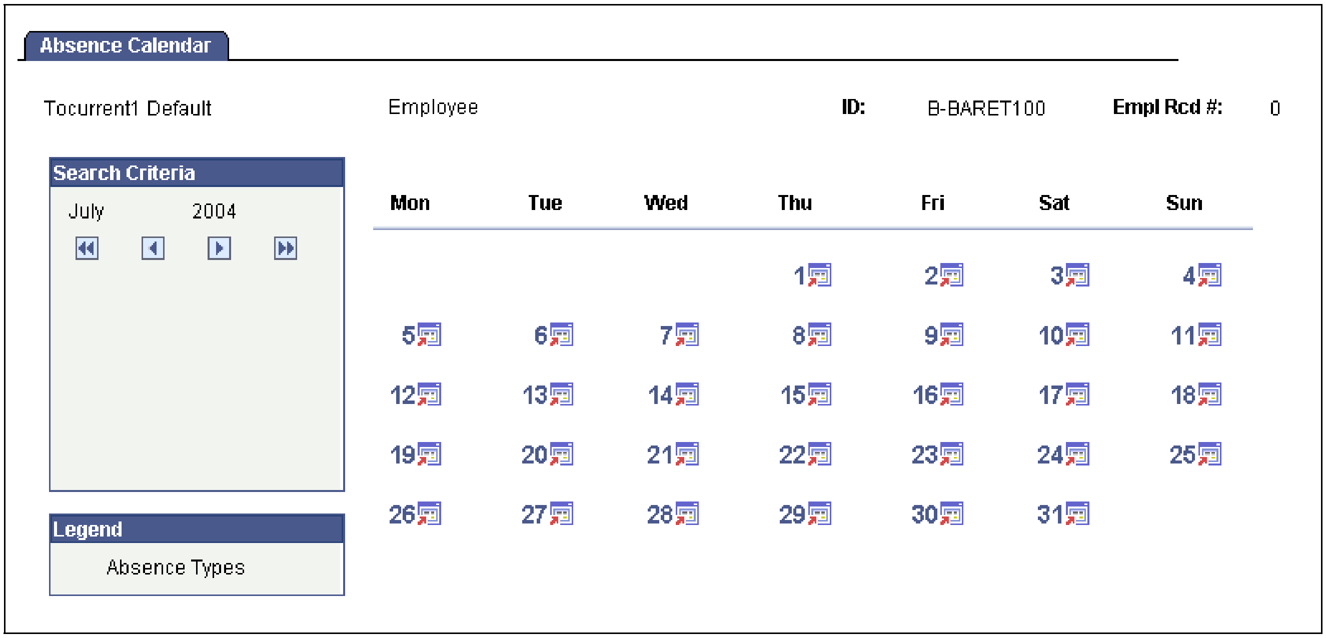
Page Name	Object Name	Navigation	Usage
Absence Calendar	ABSENCE_CALENDAR	Workforce Administration, Absence and Vacation, Track Absence History, Review Absence Calendar, Absence Calendar	View absences in graphical format.
Absence Calendar - Absence Type	ABS_TYPE_SEC	Click the Absence Types link in the Legend group box on the Absence Calendar page.	View a definition of all calendar images that appear on the calendar for the month.
Absence Summary by Employee	ABS_SUM_EMPL	Workforce Administration, Absence and Vacation, Track Absence History, Summary by Employee, Absence Summary by Employee	View a list of all absences for a person.
Absence Summary by Department	ABS_SUM_DEPT	Workforce Administration, Absence and Vacation, Track Absence History, Summary by Department, Absence Summary by Department	View all absences within a department.
Absence Summary by Department Tree	ABS_SUM_DEPT2	Workforce Administration, Absence and Vacation, Track Absence History, Summary by Dept Tree, Absence Summary by Department Tree	View all absences within a department and subordinate departments.
Create Statistics	RUNCTL_ABS702_NL	Workforce Administration, Absence and Vacation, Absence Reports, Create Illness Statistics NLD, Create Statistics	Create absence statistics for a company in the Netherlands. Run this process before creating an illness registration report. Run for a certain month of the year.
Parental Leave	ABS_PAR_EE_INQ_UK	Workforce Administration, Absence and Vacation, Maternity/Parental Leave UK, Review Parental Leave by Emp, Parental Leave	View a list of all parental leave absences for all dependents by individual. The list can be printed and passed on to the individual's next employer if requested.
Parental Leave by Dept (parental leave by department)	ABS_PAR_DEPTINQ_UK	Workforce Administration, Absence and Vacation, Maternity/Parental Leave UK, Review Parental Leave by Dept	View a list of parental leave absences for a department, by employee ID.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Application Fundamentals for HRMS Reports," Monitor Absence Reports

Viewing Absences on the Calendar

Access the Absence Calendar page.



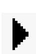
Absence Calendar page

For each day on which an absence occurred, the system shows a graphical image, if that type of absence has a defined image. If there is no defined image, nothing appears on the calendar.

Click a date or graphical image to view the details of a particular absence.

Search Criteria

The month and year that appear in the calendar are identified in this group box. Click the arrow icons to navigate from one month to another:

	Click this button to navigate to the same month of the previous year.
	Click this button to navigate to the previous month.
	Click this button to navigate to the next month.
	Click this button to navigate to the same month of the following year.

Legend

Absence Types	Click to access the Legend - Absence Types page, which provides a definition of all calendar images that appear on the calendar for the month.

See Also

Chapter 2, "Setting Up Absence Data," Defining Absence Parameters, page 7

Running Absence Reports

This section describes the pages used to run absence reports and discusses how to run the UK Bradford Score report (ABS004UK).

Pages Used to Run Absence Reports

Page Name	Object Name	Navigation	Usage
Absence Listing	RUNCTL_ABS001	Workforce Administration, Absence and Vacation, Absence Reports, Absence Listing	Run the Absence Listing report (ABS001) that provides information about a person's absence history. Run the Refresh Employees Table process (PRCSRUNCNTL) before running this report.
Absence Spells	RUNCTL_FROMTHRU	Workforce Administration, Absence and Vacation, Absence Reports, Absence Periods, Absence Spells	Run the Absence Periods report (ABS002) that provides information about the number of absence periods.
Time Lost due to Absence	RUNCTL_ABS003	Workforce Administration, Absence and Vacation, Absence Reports, Time Lost Due to Absence	Run the Time Lost Due to Absence report (ABS003) that provides absence information. **Note.** Run the Refresh Employees Table process before running this report.
UK Bradford Score	RUNCTL_ABS004UK	Workforce Administration, Absence and Vacation, Absence Reports, Bradford Score GBR, UK Bradford Score	(GBR) Run the Bradford Score report. This report lists absences for the regulatory region of UK only. It lists department, person name, employee ID, person type, job title, total number of absences, total number of days absent, and the Bradford score.

(GBR) Running the Bradford Score Report

Access the UK Bradford Score page.

UK Bradford Score page

The Bradford Score column of this report is calculated based on the following information:

- Total number of absences (A).
- Total number of days absent (B).
- $A^2 \times B$.

Note. Run the Refresh Employees Table process before running this report.

Regulatory Region

Enter the UK regulatory region for the report. If you set up regulatory regions for parts of the UK, you can run the report for a region such as Scotland or Wales.

Leave this field blank if you want the report to cover all individuals for UK companies.

CHAPTER 4

Tracking Vacations

This chapter discusses how to:

- Manage vacation accruals.
- Manage vacation absences.

Managing Vacation Accruals

This section discusses how to:

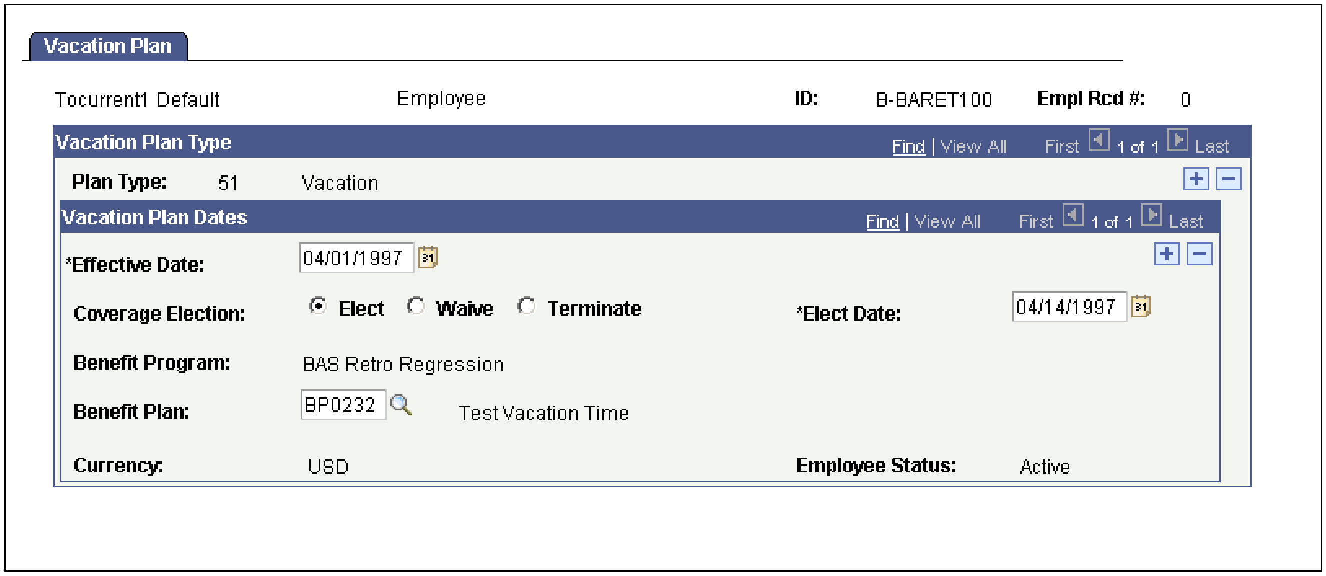
- Assign vacation plans to individuals.
- Update vacation accruals.

Pages Used to Manage Vacation Accruals

Page Name	Object Name	Navigation	Usage
Vacation Plan	ABSV_PLANS	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Vacation Plan	Assign vacation plans to individuals.
Vacation Accrual Process	RUNCTL_ABS701	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Accrue Vacation, Vacation Accrual Process	Update individuals' accrual records by company and vacation benefit plan.

Assigning Vacation Plans to Individuals

Access the Vacation Plan page.



Vacation Plan page

Plan Type Displays the vacation plan type. By default, the type is *Vacation.*

Coverage Election Select the coverage election. Options are:

Elect: The person uses the plan.

Waive: The person waives the plan.

Terminate: The person terminates coverage.

Elect Date Enter the date that the coverage election takes place.

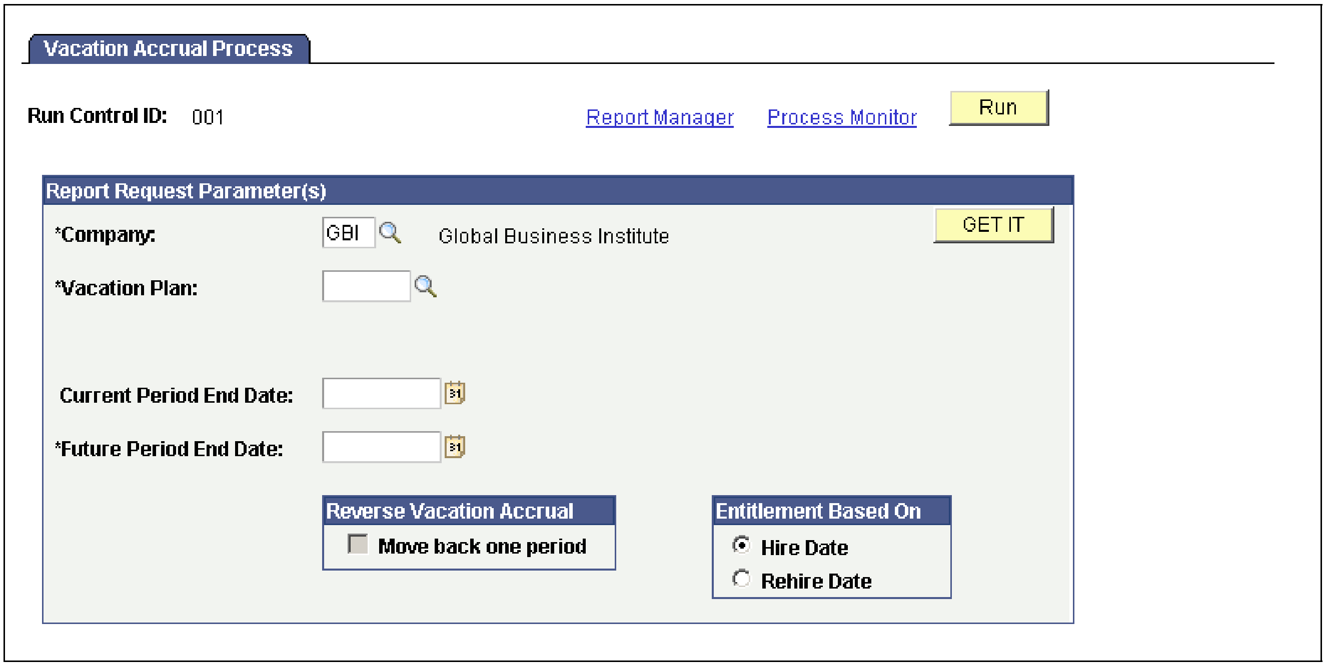
Benefit Program Displays information about the person’s benefit program.

Benefit Plan Select the vacation benefit plan from the values in the Benefit Plan table.

Currency Displays the currency that is associated with the benefit plan.

Updating Vacation Accruals

Access the Vacation Accrual Process page.



Vacation Accrual Process page

Vacation Plan Select the name of the vacation plan.

Current Period End Date If you have run the Vacation Accrual process before, the system sets the *Current Period End Date* field to the previous run's future period end date and makes the field display-only. It also sets the new future period end date to one year or month (depending on the accrual frequency value) from the current period end date.

Managing Vacation Absences

This section discusses how to:

- Enter vacation requests.
- Approve vacation requests.
- Track vacation absence data.

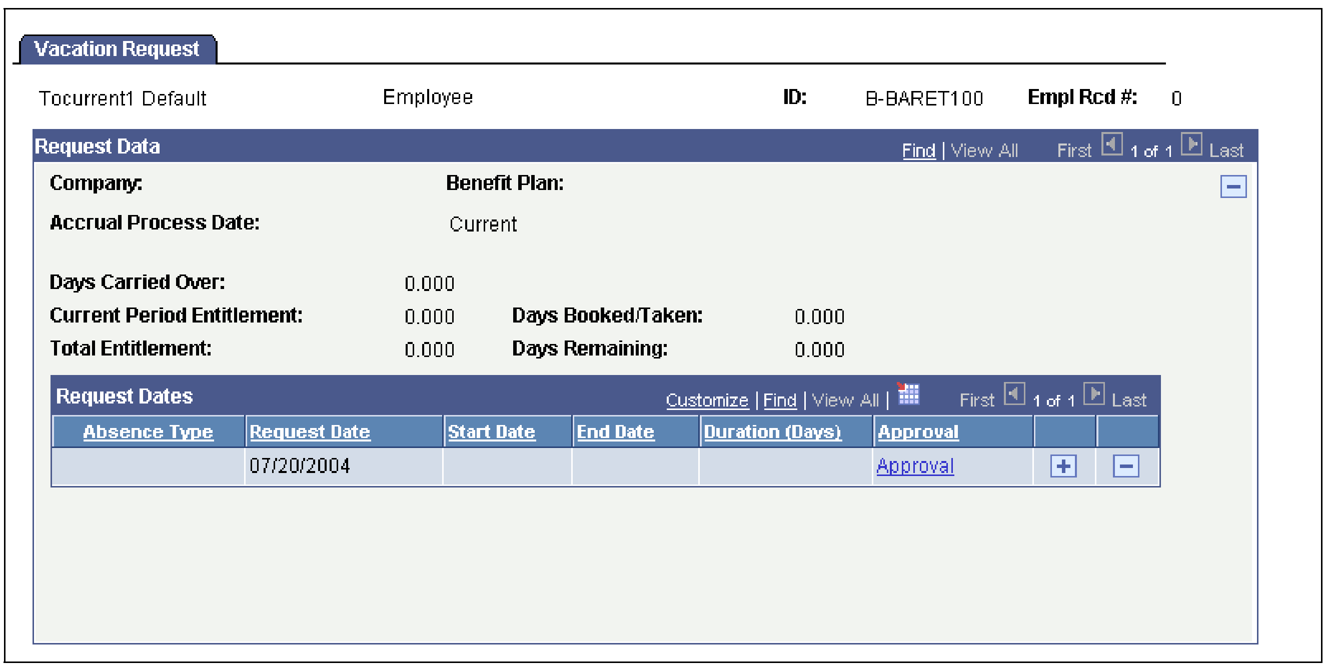
Pages Used to Manage Vacation Absences

Page Name	Object Name	Navigation	Usage
Vacation Request	ABSV_REQUEST	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Request/Approve Vacation, Vacation Request	Enter vacation requests, mark requests as approved, and enter additional tracking information about approvals.
Vacation Approval	ABSV_REQ_SEC	Click the Approval link on the Vacation Request page.	Indicate vacation approval.
Vacation Absence	ABSENCE_VACATION	Workforce Administration, Absence and Vacation, Create Vacation Schedule, Capture Vacation Absence, Vacation Absence	Track vacation absence data for your personnel.

Entering Vacation Requests

Access the Vacation Request page.

Note. Before you record vacation requests for a person, make sure the accrual records are current by running the Vacation Accrual process.



Vacation Request page

Accrual Process Date Displays the current end date that you selected on the Vacation Accrual Process page before running the process.

Days Carried Over Displays the days carried over from the last entitlement period.

Current Period Entitlement Displays the current entitlement, which the system calculates according to the information in the Vacation Plan table. It is calculated after the system runs the Vacation Accrual process for the current period.

Days Booked/Taken Displays the days booked or taken. Until the request is approved, this field is dynamically updated as you enter the start and end dates.

Total Entitlement Displays the total entitlement of vacation days, as updated by the Vacation Accrual process.

Days Remaining Displays the days remaining. Until the request is approved, this field is dynamically updated as you enter the start and end dates.

Absence Type Select the absence type for this request.

Request Date Enter the request date for the vacation. The default is the current date.

Start Date Enter the vacation start date for the request.

End Date Enter the vacation end date for the request.

Duration (Days) Displays the duration of the absence. The duration is not the difference between the start and end dates. The system compares the dates to the person's work and holiday schedules and calculates the number of actual work days that the person missed. You can override this value.

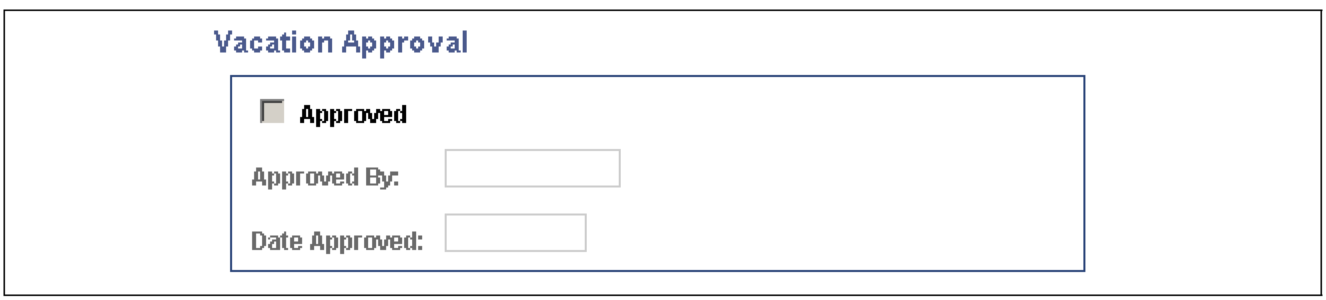
Approval Click to access the Vacation Approval page. You can save a vacation request prior to approval, or you can approve the request.

See Also

Chapter 4, "Tracking Vacations," Updating Vacation Accruals, page 34

Approving Vacation Requests

Access the Vacation Approval page.



Vacation Approval page

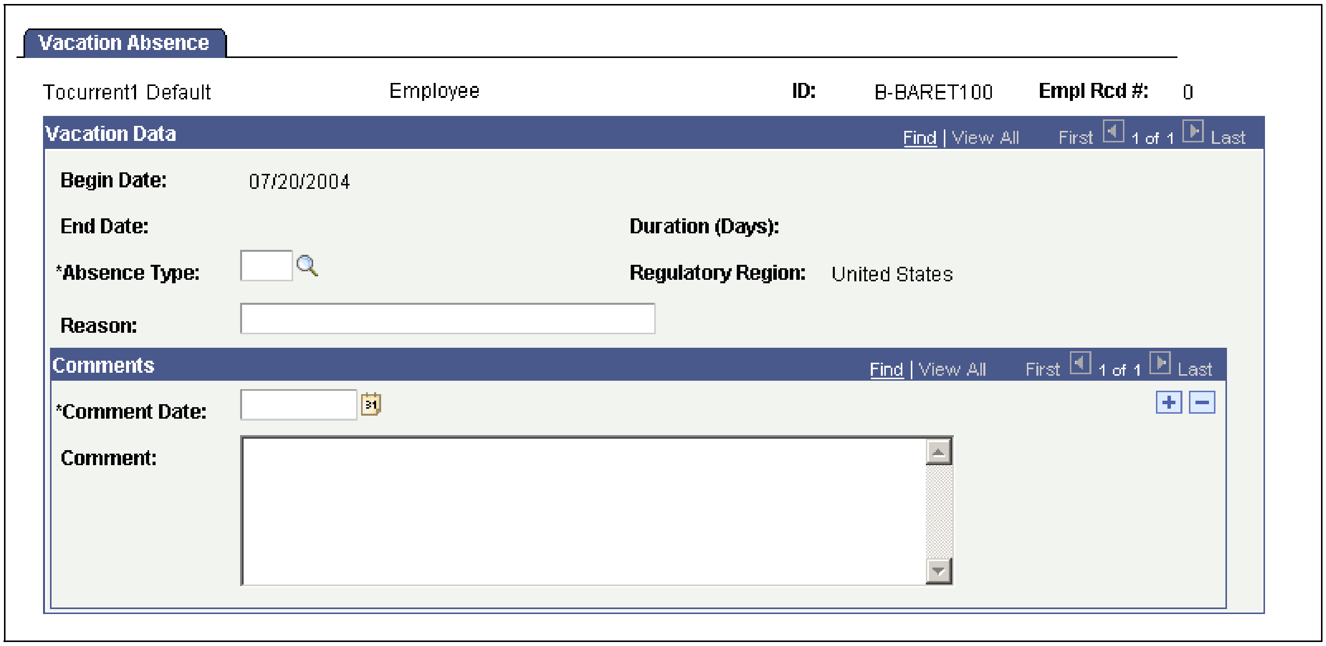
Approved Select to approve the request.

Approved By Select the approver's ID.

Date Approved Enter the date that the request is approved.

Tracking Vacation Absence Data

Access the Vacation Absence page.



Vacation Absence page

Note. Deleting a row on the Vacation Absence page doesn't delete a row on the Vacation Request page and doesn't reduce the number of days booked or taken by the person.

Begin Date The values in the Begin Date, End Date, and Duration (Days) fields come from the Vacation Request page and are display-only.

Absence Type Select the absence type.

Reason Enter a reason for the vacation.

CHAPTER 5

(NLD) Using Dutch Illness Reporting

This chapter provides an overview of Dutch illness reporting and discusses how to enter data for Dutch illness reporting.

Understanding Dutch Illness Reporting

Companies registered under a Dutch Industrial Insurance Board (*Bedrijfsvereniging*) must report daily illness absences for people employed under Dutch regulations. Absence reporting is made to the *Arbeidsomstandigheden (ARBO)*—or working conditions—service providers under the Dutch Occupational Health and Safety Act. The PeopleSoft system uses an interface to the third-party organization, ViaPrisma, that operates as an intermediary between companies and the ARBO service providers. ViaPrisma provides an application called Vpmeld, which communicates with any certified ARBO service provider.

The interface between the PeopleSoft system and Vpmeld includes a process that enables you to enter all required information within the PeopleSoft system; Vpmeld performs the validation and messaging.

The PeopleSoft system provides three processes for extracting and reporting illness absence information. All of these processes make import files for Vpmeld, based on the import definition of Vpmeld version 1.6. (They are compatible with version 1.7, as well.) The files are generated in the %PS_SERVDIR directory with automatically assigned sequence numbers.

The PeopleSoft system transfers the following information to Vpmeld, which then performs subsequent transactions with the applicable organizations:

- All company-related and person-related information from the PeopleSoft database.
- All illness notifications, including initial notifications, updates, and corrections.
- All illness-end notifications, including initial notification, updates, and corrections.

Note. Only absence information with absence types of *501, 502, 503, 504, 505, 506,* and *507* is captured for processing.

Prerequisites

Before you can use the Dutch illness reporting features, you must make the following modifications to the system:

- The interface relies on a valid company registration number available on the Company Table - Default Settings page; in the section for the Netherlands, select the Industrial Insurance Board and enter the registration number.
- For each person, a valid Dutch Social Fiscal Number must be available; enter this information on the Personal Data - Eligibility/Identity page.

Common Elements Used in This Chapter

From Date Select the date from which to start extracting information.

Absence Type Displays the absence type, as defined on the Absence Type page.

Note. Only absence information with absence types of *501, 502, 503, 504, 505, 506,* and *507* is captured for processing.

Absence Code Displays the absence code, as defined on the Absence Type page.

Begin Date Enter the date that the absence begins.

Return Date Enter the date that the absence ends.

Begin Notification Date Enter the date that notification of the illness absence was sent to Vpmeld.

End Notification Date Enter the date that notification of the end of the illness absence was sent to Vpmeld.

Entering Data for Dutch Illness Reporting

This section discusses how to:

- Extract company name and address information.
- Extract and report illness notification data by person.
- Extract and report notifications for previously unreported absences.
- Run the illness registration reports.

Use the pages in the Process Absence Data NLD (process absence data Netherlands) component to report on absence information for the Netherlands.

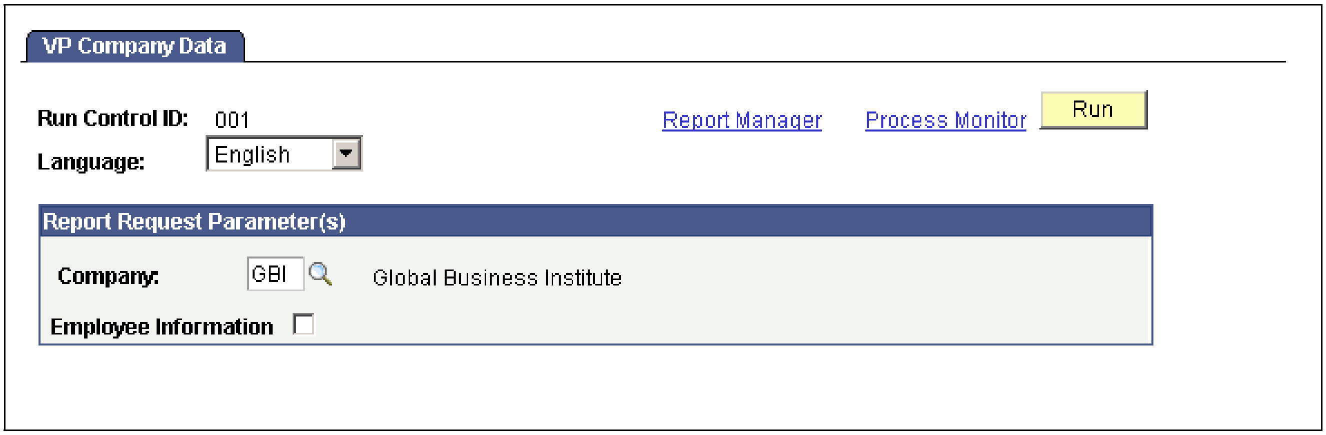
Pages Used to Enter Data for Dutch Illness Reporting

Page Name	Object Name	Navigation	Usage
VP Company Data (ViaPrisma company data)	PRISMA_COMP_RUNCTL	Workforce Administration, Absence and Vacation, Process Absence Data NLD, Export Company Data, VP Company Data	Extract company name and address information, with or without the personal information of the personnel within the company. A process then generates an import file that can be loaded into Vpmeld to initialize or update the basic information for the company and personnel.

Page Name	Object Name	Navigation	Usage
VP Employee Data (ViaPrisma employee data)	PRISMA_PERS_RUNCTL	Workforce Administration, Absence and Vacation, Process Absence Data NLD, Employee Illness Notification, VP Employee Data	Extract and report illness notification data by person.
VP Illness Data (ViaPrisma illness data)	PRISMA_ILL_RUNCTL	Workforce Administration, Absence and Vacation, Process Absence Data NLD, Illness Notification by Group, VP Illness Data	Extract and report illness begin or end notifications for all absences that weren't previously reported.
Illness Registration	RUNCTL_ABS005_NL	Workforce Administration, Absence and Vacation, Absence Reports, Illness Registration NLD, Illness Registration	(NLD) Use this page to run these reports: • Illness Registration report (ABS005NL) that calculates the illness totals, percentages, and frequencies. • Illness Registration report (ABS006NL). Before you run these reports, first run the Create Statistics (ABS702) process.
Longterm Illness Report	RUNCTL_ABS007_NL	Workforce Administration, Absence and Vacation, Absence Reports, Longterm Illnesses NLD, Longterm Illness Report	(NLD) Use this page to run the Longterm Illness report (ABS007NL), which lists illnesses from which the person hasn't fully recovered. These illnesses are subject to the Dutch law *Poortwachter*. This report is also accessible through Global Payroll, Absence and Payroll Processing, Absence Reports, Longterm Illnesses NLD.

Extracting Company Name and Address Information

Access the VP Company Data page.



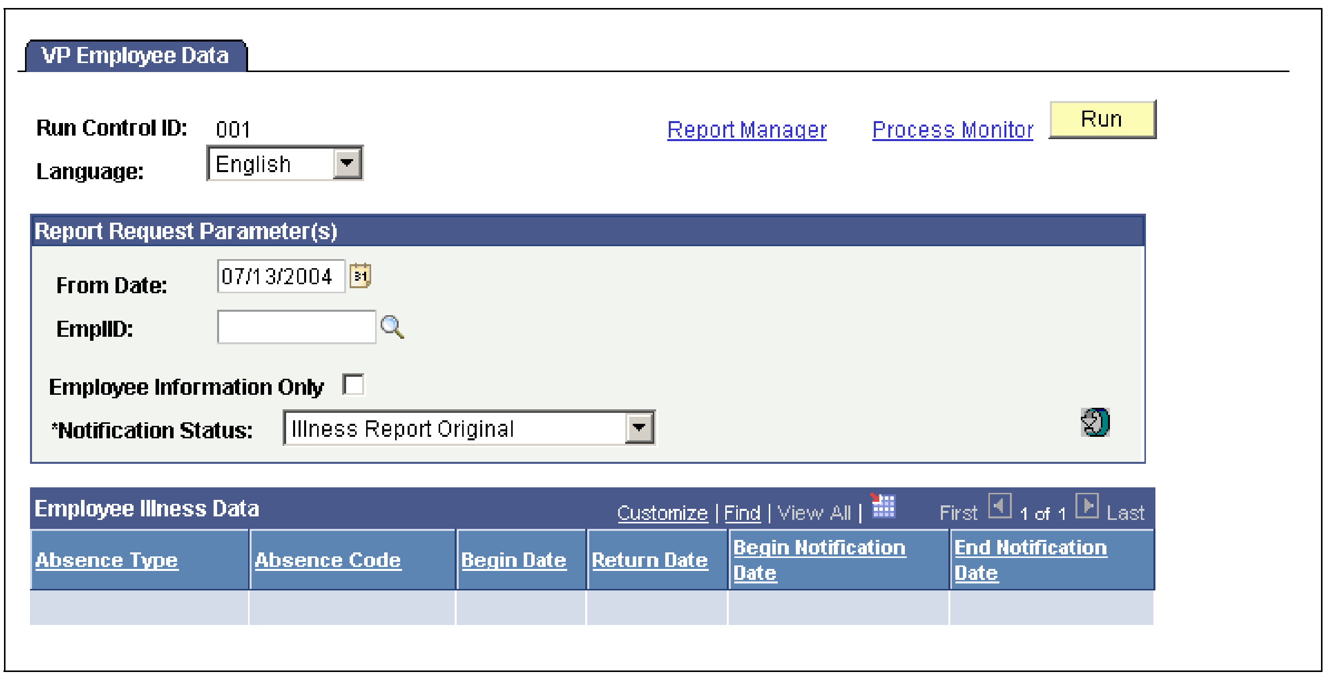
VP Company Data page

Company Select the company from which to extract information.

Employee Information Select to extract employee information that is associated with the company.

Extracting and Reporting Illness Notification Data by Person

Access the VP Employee Data page.



VP Employee Data page

Report Request Parameters

Employee Information Only Select to extract employee information only when you want to create or update the personal information for the person. When you select this check box, the Illness Status Information field becomes unavailable for data entry.

Notification Status Select the notification status. Options are:

Illness Report Change: Send an illness notification change to Vpmeld.

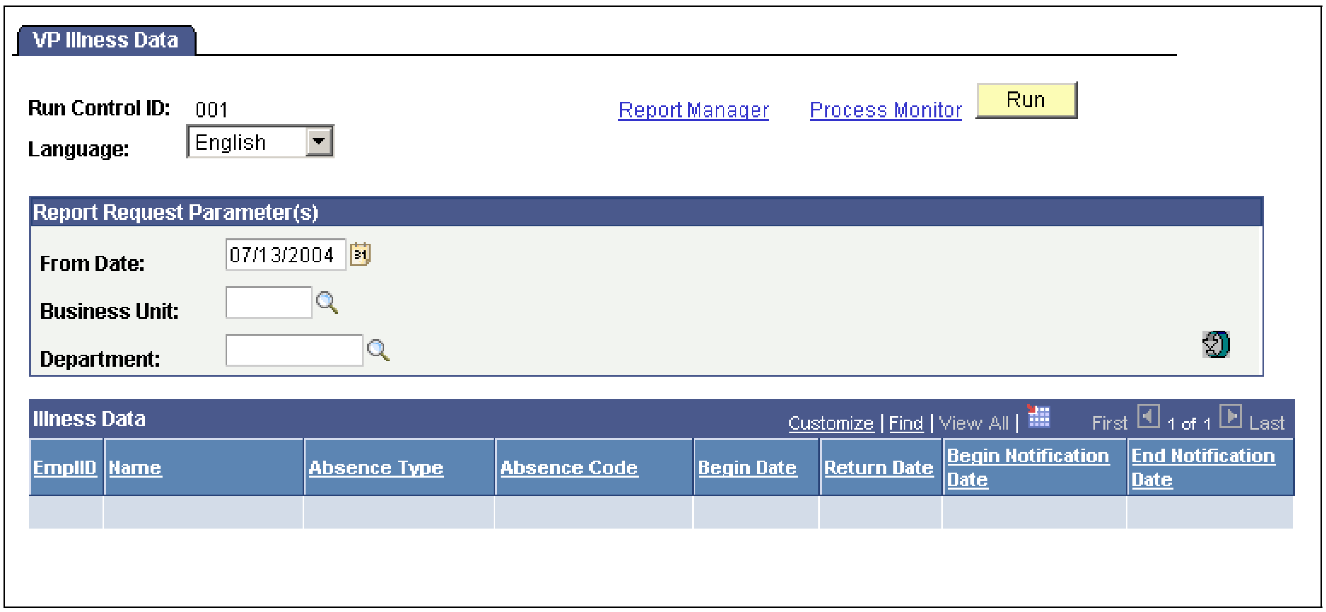
Illness Report Original: Send an original illness notification to Vpmeld. If you select this option, the report lists illness data in addition to information about the person.

Illness Report Replace: Send an illness notification replacement to Vpmeld. If you select this option, the report lists illness data in addition to the person's information.

Note. When you click the Refresh button, the system populates the remaining fields.

Extracting and Reporting Notifications for Previously Unreported Absences

Access the VP Illness Data page.



VP Illness Data page

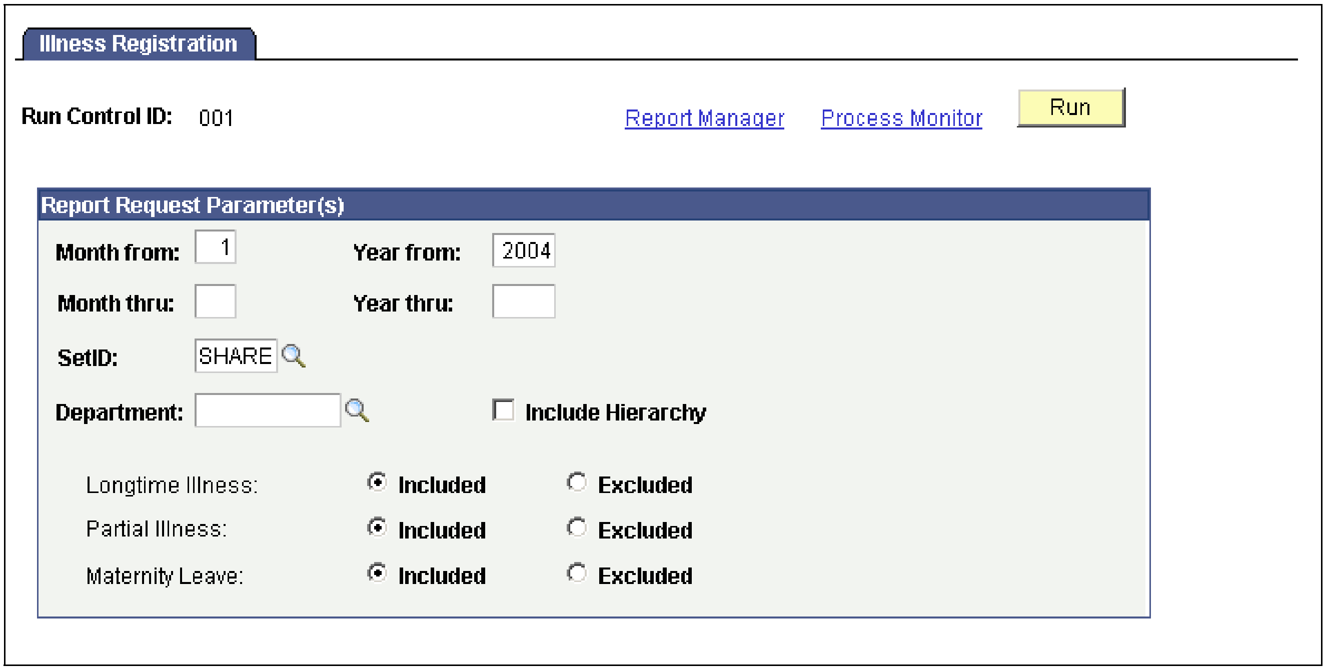
Report Request Parameters

Department Select a department for which to extract information. You must first select a business unit.

Note. When you click the Refresh button, the system populates the remaining fields.

Running the Illness Registration Reports

Access the Illness Registration page.



Illness Registration page

Month from and **Month thru** — Enter the beginning and ending months of the time period on which to report.

Year from and **Year thru** — Enter the beginning and ending years of the time period on which to report.

Include Hierarchy — Select to include departments within the selected department, based on the department security tree.

Longtime Illness — Select to include or exclude longtime illness. Options are:

Included: Include longtime illnesses in the report. An illness is considered to be longtime if the duration of the illness falls within the illness-length category Long, as specified in the absence parameters.

Excluded: Do not include longtime illnesses in the report.

The system counts an illness that becomes longtime within the reporting period as an ended illness. The system counts available employment days only until the day that an illness becomes longtime.

The system does not report an illness that becomes longtime before the start of the reporting period, and the system does not calculate the person's available employment days.

Partial Illness — Select to include or exclude partial illness. Options are:

Included: Include partial illnesses in the report.

The system considers an illness to be partial while the illness percentage is less than 100 percent, as specified in the General Absence parameters.

Excluded: Do not include partial illnesses in the report.

An illness that becomes partial within the reporting period after being a longtime illness is counted as an ended illness.

	An illness that becomes longtime after being partial is counted as a newly started illness.
Maternity Leave	Select to include or exclude maternity leave in the report.

CHAPTER 6

(GBR) Tracking Maternity and Parental Leave

This chapter discusses how to:

- Track maternity absence data.
- Track parental leave absence data.

Tracking Maternity Absence Data

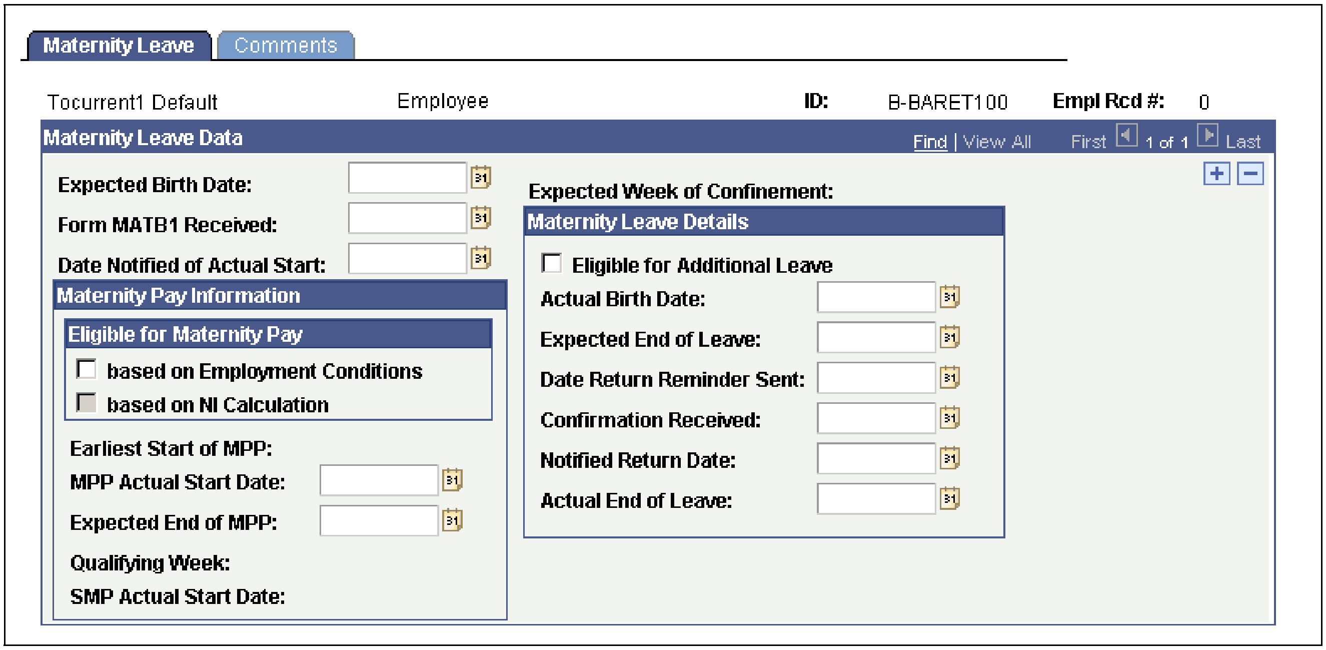
This section discusses how to track maternity absence data.

Pages Used to Track Maternity Absence Data

Page Name	Object Name	Navigation	Usage
Maternity Leave	ABS_MATERNITY_UK	Workforce Administration, Absence and Vacation, Maternity/Paternal Leave UK, Maintain Maternity Leave, Maternity Leave	Track maternity absence data.
Maintain Maternity Leave - Comments	ABS_MAT_COM_UK	Workforce Administration, Absence and Vacation, Maternity/Paternal Leave UK, Maintain Maternity Leave, Comments	Record your comments about the record.

Tracking Maternity Absence Data

Access the Maternity Leave page.



Maternity Leave page

Expected Birth Date

Enter the expected birth date as it appears on the MATB1 form or other official notification.

When you exit this field, the system completes the Expected Week of Confinement (EWC) field, the Earliest Start of MPP (earliest start of maternity pay period) field, and the Qualifying Week field. The system also calculates whether the person is eligible for maternity pay based on employment conditions.

Form MATB1 Received

Enter the date that you receive medical evidence of the pregnancy.

Date Notified of Actual Start

Enter the date that the person notified you of her intended leave start date.

Eligible for Maternity Pay

Based on Employment Conditions

By default, this check box is selected if the person is eligible for maternity pay based on her employment history.

The system reviews the person's record for length of service and compares it to the qualifying data on the Absence Parameters page to determine whether she is eligible for maternity pay.

Based on National Insurance (NI) Calculation

This check box appears only if you have PeopleSoft Enterprise Global Payroll UK installed.

A payroll process reviews the person's average earnings and uses the expected week of confinement date to calculate whether the person is eligible for maternity pay based on NI contributions. If the person is eligible, the check box is selected by default. Remember that the process is run only at scheduled times, so you don't know whether the person is eligible for maternity pay until you run the process.

Maternity Pay Information

Earliest Start of MPP (earliest start of maternity pay period)	Displays the earliest start of the maternity pay period. The system calculates the earliest date that the maternity pay period can start based on the information that was entered on the Absence Parameters page.
MPP Actual Start Date (maternity pay period actual start date)	Enter the last day that the person expects to work before the start of leave.
Expected End of MPP (expected end of maternity pay period)	Displays the expected end of the maternity pay period. The system automatically calculates the date when the maternity payments cease based on the earliest start of MPP date.
Qualifying Week	The system populates this field; it is display-only. The qualifying week is 15 weeks before the expected week of confinement. The system uses this date to determine if the person is eligible for maternity pay.
SMP Actual Start Date (statutory maternity pay actual start date)	This field appears only if you have Global Payroll for the UK installed. The statutory maternity pay actual start date is the first date that the person is entitled to SMP. The system calculates this date based on the maternity pay period actual start date; this field is display-only.
Expected Week of Confinement	The system calculates the expected week of confinement, which begins on the Sunday of the week that the baby is due to be born. This field is display-only.

Maternity Leave Details

Eligible for Additional Leave	By default, this check box is selected if the person is eligible for additional leave based on the additional maternity leave parameters on the Absence Parameters page. You can override the default as necessary.
Actual Birth Date	Enter the actual date on which the baby is born.
Expected End of Leave	The system calculates the expected end of leave based on length of service and the absence parameters. You can override the default date if necessary.
Date Return Reminder Sent	As the end date of the MPP approaches, you can send a return-to-work reminder to the person. Enter the date in this field.
Confirmation Received	When you receive a reply from the person, enter the date in this field.
Notified Return Date	Enter the date on which the person informs you that the employee will return to work.
Actual End of Leave	Enter the date on which the person returns to work.

See Also

Chapter 2, "Setting Up Absence Data," Setting Up Absence Classes, Types, Codes, and Parameters, page 4

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(GBR) Tracking Parental Leave Absence Data

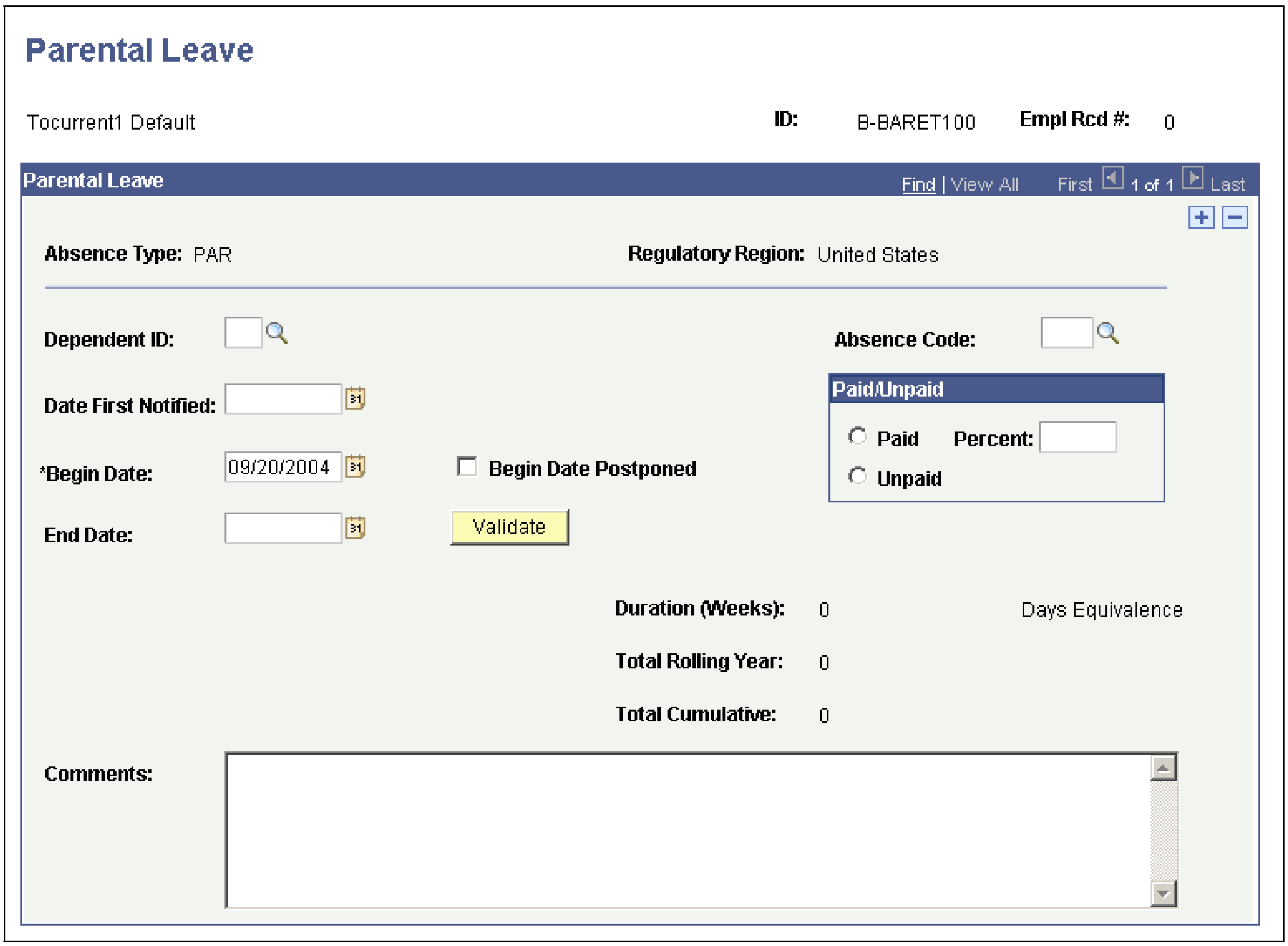
This section discusses how to track parental leave absence data.

Page Used to Track Parental Leave Absence Data

Page Name	Object Name	Navigation	Usage
Parental Leave	ABS_PARENTAL_UK	Workforce Administration, Absence and Vacation, Maternity/Parental Leave UK, Maintain Parental Leave, Parental Leave	Track parental leave absence data.

Tracking Parental Leave Absence Data

Access the Parental Leave page.



Parental Leave page

Dependent ID

Select the dependent from the list that was created during dependent data setup. The system displays the dependent's name as an active link to the dependent's Details page.

Absence Code	Select the absence code from the Absence Code table for the parental leave.
Date First Notified	Enter the date that the person notified the organization of the need for this leave.
Begin Date Postponed	Select if the leave is postponed after approval.
Paid or **Unpaid**	Select either *Paid* or *Unpaid* for this leave. If *Paid* is selected, enter the percentage of normal pay that the person will receive.
Validate	After entering all of the leave information, click the Validate button to verify the leave against the parameters of parental leave and to calculate the duration of the leave in weeks and in days.
Duration (Weeks)	Displays the total number of weeks for this leave.
Total Rolling Year	Displays the total number of parental leave weeks taken in the 12 month period that precedes the begin date of the leave.
Total Cumulative	Displays the total number of parental leave weeks taken during the person's present and past employment for each dependent.
Days Equivalence	Convert the number of weeks into days.

See Also

Chapter 2, "Setting Up Absence Data," Setting Up Absence Classes, Types, Codes, and Parameters, page 4

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 *receivables specialist.* 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 *detailed business process.*

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 *course.*

Class ChartField A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

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 *copy* 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 *population* and *division*.

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 *communication key.*

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 *comm keys* or *speed keys*) 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 *class.*

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 rollup 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 *population* and *cohort*.

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 *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
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 *donor pyramid* 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 *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* 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 *General Ledger Interface process.* 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 *update access.*

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 *key performance indicator.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

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 *learning management system.* 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 *1*—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 *3C engine*.

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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* 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 — Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook — 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 *need analysis.*
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 *compensation object.*
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 *event.*
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 *division* and *cohort*.

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 *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for *record output value-added tax flag.* See *record input VAT flag.*
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 *real-time event notification server* 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 *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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 *communication key.*

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 *basis* 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 *Communications, Checklists, and Comments engine.* 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 *Communications, Checklists, and Comments group.* 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 *locked*) 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 *inquiry access.*

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 *value-added tax exception.* 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 *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* 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 *eXtended Process Integrator.* 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 *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. 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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