



PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Positions

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About This PeopleBook Preface

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

This preface discusses:

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

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

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

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

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

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

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Additional Resources

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

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Manage Positions Preface

This preface discusses:

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Manage Positions.

PeopleSoft Enterprise HRMS Application Fundamentals

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

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook

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.
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.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of 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 Manage Positions

This chapter provides an overview and discusses:

- Manage Positions integrations.
- Manage Positions implementation.

Manage Positions Overview

The Manage Positions business process helps you define Human Resources by position, rather than job or by employee.

With this application, you can:

- Create and track positions data and history.
- Process employee appointments by position.
- Maintain incumbent data.
- Budget for positions and departments.
- View incumbent, position, and budget histories.

Manage Positions Integrations

Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

We cover integration considerations in this PeopleBook.

Manage Positions 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.

Manage Positions also provides component interfaces to help you load data from your existing system into Manage Positions tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists the component that has a setup component interface:

Component	Component Interface	References
CI_POSITION_DATA	POSITION_DATA	See Chapter 3, “Setting Up Positions,” Creating Positions, page 15.

Other Sources of Information

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

See Also

PeopleSoft Enterprise Global Payroll 8.9 PeopleBook, “PeopleSoft Enterprise Global Payroll Preface”

PeopleTools PeopleBook: PeopleSoft Component Interfaces

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

CHAPTER 2

Understanding Position Management

This chapter discusses:

- Use positions versus jobs to structure your human resources system.
- Decide when to use the Manage Positions business process.

Using Positions Versus Jobs to Structure Your Human Resources System

You can structure your human resources system by position instead of by job.

- When you structure your HR system by employee, you get broader information about your organization's jobs. Use job codes to group jobs into general classifications so job codes and employees have a one-to-many relationship. Many employees share a job code, though they might perform the work in different departments, locations, or companies. Identify the job an employee performs through the data you enter in their employee record.
- Use positions to track details on a particular job in a particular department or location that usually have a one-to-one relationship with employees. When you structure your system by position, you attach data to the positions and move employees in and out of those positions. By focusing on the position, you can track information related to it, such as salary or standard hours, regardless of whether an employee holds the position. When the position is vacant you won't lose the common thread that binds the data together. Use data specific to each position as the basis for organizational planning, recruitment, career planning, and budgeting.

Deciding When To Use the Human Resources Manage Positions Business Process

When deciding when to use the Manage Positions business process, consider the following:

- If your organization is fluid—you tend to view broader groupings of employees and often create new jobs—you'll probably find that structuring the system by employee is best. This method is useful if your organization is expanding, or if you often create new jobs or job types.
- If your organization is fairly static—jobs and job descriptions are mostly fixed, and people move in and out of them—you'll probably find that structuring the system by position is most effective. Government agencies and hospitals, which plan positions based on budgets, find this method useful.
- If both methods serve you well in different areas of your organization, you can choose to structure Human Resources by position for some departments or management levels and by employee for others. Human

Resources enables you to use both—select a setting called partial position management to use both methods wherever they suit you.

CHAPTER 3

Setting Up Positions

This chapter provides an overview of setting up positions and discusses how to:

- (USF) Set up occupation series classifications and standards.
- (USF) Set up position titles.
- Create positions.
- (USF) Run reports on position data and related tables.
- Assign employees to positions.

Understanding Positions

Human Resources helps your organization keep an effective-dated history of all positions, regardless of whether they are filled. If jobs and their scope change less often than the employees filling them in your organization, Human Resources enables you to structure human resource data by position. You can track organizational reporting relationships independently of the employees in the positions. To do this, enable the Manage Positions business process on the HRMS Options - Installation page.

This section discusses how to:

- Set up tables.
- Manage position data.
- Manage position data security.

Setting Up Tables

When the system assigns position defaults, it uses information stored in the system general tables. The system uses this same information when you structure your human resources system by employee. However, with Position Management you set up all the data in advance, so when you hire an employee, all you do is assign them to a position, and the system uses the position information to complete the rest of the job data record.

Before you start working with the pages described in this chapter, you must set up information in the following tables:

- Installation Table

Note. In addition to the general application controls on the Installation table, you must select Position Management in order to engage the functionality across the application.

- Department Table

- Company Table
- Job Code Table
- Location Table (USF)
- Sub-Agency Table (USF)
- POI Table (USF)

If you have implemented multiple business units and set IDs in your Human Resources system, the information that you use and create will be determined by how business unit and set ID functionality has been set up for your user ID.

See Also

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

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “Setting Up Organization Foundation Tables”

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

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “(USF) Setting Up Human Resources Management Tables”

Using Position Data

When you create new positions, Human Resources uses data that you entered in the Department Table, Job Code Table, and Location Table and inserts the default values in several position data fields. You can override some defaults when you need to enter exceptions for a particular position.

When you change the department ID, job code, or location, the system will change the default values of the salary plan, grade, and step fields. The system first defaults to the salary plan to the plan associated with the selected location. If there is no salary plan associated with the location, the system defaults to the salary plan associated with the selected job code. The system defaults to the salary grade and step associated with the job code.

When you change the Job Code value, the system inserts new default values into select fields even if the fields are populated. Default field values are derived from the source tables.

Note. New default values for changes to the job code are generally associated with the Job Code field on the Job Code component, but exceptions are identified in the following table.

Updated Field	Default Field Value	Source Table
Manager Level	Manager Level	Job Code Table: Manage Level
Regular/Temp	Reg/Temp	Job Code Table: Regular/Temp
Full/Part Time	Full	Resets to Full
Regular Shift	Not Applicable	Resets to Not Applicable
Union Code	Union Code	Job Code Table: Union Code
Position Title	Job Title	Job Code Table: Job Title
Position Short Title	Position Short Title	Job Code Table: Short Job Title

Updated Field	Default Field Value	Source Table
Detailed Position Description	Detailed Position Description	Job Code Table: Job Description
Salary Plan	Salary Admin Plan	Location Table: Salary Admin Plan OR When there is no default location value and corresponding salary plan, Job Code Table: Salary Admin Plan
Grade	Grade	Job Code Table: Grade Note. The system only updates this field when the Include Salary Plan/Grade checkbox is selected on the Position Data – Description page.
Step	Step	Job Code Table: Step
Standard Hours	Standard Hours	Job Code Table: Standard Hours
Work Period	Work Period	Job Code Table: Standard Work Period
Mon-Sun	Mon-Sun	Job Code Table: Standard Hours/5, populated as Mon-Fri
Calc Group (Flex Service)	Calc Group (Flex Service)	Job Code Table: Service Calculation Group (E&G only)
FLSA Status	FLSA Status	Job Code Table: FLSA Status (USA only)

When you change the Department ID value, the system inserts new default values into select fields even if the fields are populated. Default field values are derived from the source tables.

Updated Field	Default Field Value	Source Table
Location	Location	Department Table: Location
Company	Company	Department Table: Company
Reports To	Reports To	Department Table: Manager Position

When you change the Location value, the system inserts new default values into select fields even if the fields are populated. Default field values are derived from the source tables.

Updated Field	Default Field Value	Source Table
Salary Plan	Salary Plan	Location Table: Salary Admin Plan OR When there is no default location value and corresponding salary plan, Job Code Table: Salary Admin Plan.

Updated Field	Default Field Value	Source Table
Standard Hours	Standard Hours	Salary Admin Plan Table: Standard Hours
Work Period	Work Period	Salary Admin Plan Table: Work Period

Note. If you change the default values in the Job Code, Department, or Location components after creating the position, the system does not update the values in the Position Data component.

Updating Position Changes in the Job Data Component

Several fields in the Position Data component match fields in the Job Data component. When you modify information on the position data pages, the system can maintain matching fields in the position incumbent's job data record if:

- The position is active.
- You have selected the update incumbent option for the position.
- The incumbent's job data record does not have the Override Position Data option selected.

When you change fields in the Position Data component, the Update Incumbent process may run, thereby updating fields in the incumbent's job record.

Note. The system updates the Department Entry Date and Job Entry Dt with the position data's effective date.

Updated Field In Position Data Component	Updated Field In Incumbent's Job Record
Adds to FTE Actual	Adds to FTE Actual (E&G only)
Business Unit	Business Unit Department SetID Location SetID Salary SetID Jobcode SetID
Classified Indicator	Classified Indicator (E&G only)
Company	Company
Department	Department ID Department Entry Date
FLSA Status	FLSA Status
Full or Part Time	Full or Part Time

Updated Field In Position Data Component	Updated Field In Incumbent's Job Record
Grade	Grade
Jobcode	Jobcode Job Entry Dt
Location	Location
Reg/Temp	Reg/Temp
Regulatory Region	Regulatory Region Labor Agreement SetID
Reports to	Reports to
Salary Admin Plan	Salary Admin Plan
Standard Hours	Standard Hours
Shift	Shift
Step	Step
Union Code	Union Code
Work Period	Work Period

Note. The system only updates the Grade, Salary Admin Plan and the Step fields when the Include Salary Plan/Grade checkbox is selected on the Position Data – Specific Information page.

See Also

Chapter 3, “Setting Up Positions,” Creating Positions, page 15

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

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

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “Updating Person and Job Information”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “(USF) Administering Personnel Action Requests”

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, “(USF) Processing Personnel Action Requests”

Managing Position Data Security

If you try to create a position (using the Add action) that already exists in Human Resources, the system displays a message informing you that a position already exists with that number and enables you to access the existing record. If you access the record for the position, the system allows you to update the data for the existing position, even if it belongs to a department for which you don’t have security access. This is because:

- You won’t create duplicate positions in the system, so the system won’t issue lower level SQL errors when you create new positions.
- The system enables you to make departmental transfers.

For example, if a position is moving to your department from another department for which you aren’t cleared for security access, you can still make the transfer using the Add action, provided you know the exact position number.

Position data is less sensitive than employee data because no salary data appears in the Position Data pages. Thus viewing position data briefly when the system generates the error message is less critical than being aware of a position’s existence in the system. You can modify the system so that users can’t see position data even briefly using the Add action.

To prevent users from viewing position data using the Add action:

1. In PeopleSoft Application Designer, access the POSITION_DATA component.
2. Highlight the DESCR field and select View PeopleCode.
3. For the POSITION_DATA component, select the Row Select PeopleCode.
4. Read the instructions for uncommenting the code that restricts this situation.
5. Open the POSITION_DATA component Properties and change the search record for the Add action to POSITION_SRCH.

See Also

PeopleTools PeopleBook: PeopleSoft Application Designer

(USF) Setting Up Occupation Series Classifications and Standards

To set up occupational series classifications and standards, use the Occupational Series (GVT_OCCUPATION), Classification Standard Table, Classification Factor Table, Classification Level Table, and the Grade Conversion Table (GVT_CLASS_STD_TBL) components.

This section discusses how to:

- Define occupation series classifications.
- Define classification standards.
- Designate the Classification Standards' classification factors.
- Associate classification factor levels and points with classification factors.
- Enter grades and point ranges.

Pages Used to Set Up Occupation Series Classifications and Standards

Page Name	Object Name	Navigation	Usage
Occupation Series	GVT_OCCUPATION	Set Up HRMS, Product Related, Organizational Development, Occupational Series USF, Occupation Series	Define the occupation series classifications.
Classification Standard Table	GVT_CLASS_STD_TBL	Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Standard Table	Create classification standards by establishing a description and level for each type of classification.
Classification Factor Table	GVT_CLASS_FCTR_TBL	Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Factor Table	Designate Classification Standards' classification factors.
Classification Level Table	GVT_CLASS_LVL_TBL	Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Classification Level Table	Associate classification factor levels and points with classification factors.
Grade Conversion Table	GVT_CLASS_GRD_CNV	Set Up HRMS, Product Related, Organizational Development, Classification Standards USF, Grade Conversion Table	Enter a grade and point range for each grade.

Defining Occupation Series Classifications

Access the Occupation Series page.

Occupation Series

Occupational Series: 0025

Find | View All First 1 of 1 Last

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

*Description: Park ranger

Short Description: Park ranger

*PATCOB Code: Professnl ☐ Functional Class Required

Occupation Series page

PATCOB Code Select the PATCOB code that should be associated with this occupational series from the list of available options.
(professional, administrative, technical, clerical, other, blue collar code)

Functional Class Required Select if a functional class is required for the position.

Defining Classification Standards

Access the Classification Standard Table page.

Classification Standard Table Classification Factor Table Classification Level Table Grade Conversion Table

Classification Standard: SENIOR

Classification Standard Information Find | View All First 1 of 1 Last

*Effective Date: 07/07/2004 *Status: Active

*Description:

*Play Plan /*Occ Series: 0025

*Manager Level: All Other Positions

Classification Standard Table page

Pay Plan / Occ Series
(occupation series)

Select the occupation series to associate with the classification standard from the list of available options. The system displays the associated pay plan. Occupation series are maintained on the Occupation Series page.

Manager Level

Select the manager level to associate with the classification standard from the list of available options.

Designating the Classification Standards' Classification Factors

Access the Classification Factor Table page.

Classification Factor Table page

Classification Factor

Select the classification factor to associate with the classification standard from the list of available options. You can associate multiple classification factors with this classification standard by inserting more rows.

Associating Classification Factor Levels and Points with Classification Factors

Access the Classification Level Table page.

Classification Standard Table	Classification Factor Table	Classification Level Table	Grade Conversion Table
Classification Standard: SENIOR Pay Plan/Series/Supv:			
Classification Standard Information Find View All First 1 of 1 Last			
Effective Date: 07/07/2004 Active			
Classification Factor Details Find View All First 1 of 1 Last			
Classification Factor: 06 Personal Contacts			
Factor Levels and Points Find View All First 1 of 1 Last			
*Factor Level: ☐ Classification Levels: 0 + -			

Classification Level Table page

Factor Level

For each classification factor that you specify, enter the applicable factor levels that are relevant to a specific occupation or category of work. Assign multiple factor levels to a classification factor by inserting more rows.

Classification Levels

Assign the point values for each factor level.

Entering Grades and Point Ranges

Access the Grade Conversion Table page.

Classification Standard Table	Classification Factor Table	Classification Level Table	Grade Conversion Table
Classification Standard: SENIOR Pay Plan/Series/Supv:			
Classification Standard Information Find View All First 1 of 1 Last			
Effective Date: 07/07/2004 Active			
Standard Grade Conversion Data Find View All First 1 of 1 Last			
*Grade: Point Range for Grade: 0 thru: 0 + -			

Grade Conversion Table page

Grade

Enter the grade to associate with this classification standard. Associate multiple grades with this classification standard by inserting more rows.

(USF) Setting Up Position Titles

To set up position titles, use the Official Position Titles — Position Title Codes (GVT_PSN_TTL_TBL) and the Organizational Posn Title — Position Title Codes (GVT_ORG_PSN_TTL) components.

An *official position title* is the title of a position that is in accordance with the Office of Personnel Management (OPM) position classification standards. An *organizational position title* is the *unofficial* title that is given to a position based on how your agency is organized and where the position fits in the organization.

Pages Used to Set Up Position Titles

Page Name	Object Name	Navigation	Usage
Official Position Titles	GVT_PSN_TTL_TBL	Set Up HRMS, Product Related, Organizational Development, Official Position Titles, Position Title Codes	Set up official position titles that will later be associated with positions. Note. Before using the page, set up Occupation Series classifications.
Organization Posn Titles USF	GVT_ORG_PSN_TTL	Set Up HRMS, Product Related, Organizational Development, Organizational Posn Titles USF, Position Title Codes	Set up organization position titles that will later be associated with positions. Note. Before using the page, set up Occupation Series classifications.

Creating Positions

To create positions, use the Position Data (POSITION_DATA) component.

This section discusses how to:

- Enter information about a position.
- Enter position-specific information.
- Review budget and incumbent information.

Pages Used to Create Positions

Page Name	Object Name	Navigation	Usage
Position Data - Description	POSITION_DATA	Set Up HRMS, Product Related, Organizational Development, Position Data, Description Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info, Description Organizational Development, Succession Planning, Define Key Positions, Key Positions, Description Organizational Development, Succession Planning, USF, Identify Key Positions, Description	Enter a description of the position.
Position Data - Specific Information	POSITION_DATA	Set Up HRMS, Product Related, Organizational Development, Position Data, Specific Information Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info, Specific Information Organizational Development, Succession Planning, Define Key Positions, Key Positions, Specific Information Organizational Development, Succession Planning USF, Identify Key Positions, Specific Information	Enter information that is specific to the position you're creating, such as the work phone number and the mail drop ID.

Page Name	Object Name	Navigation	Usage
Position Data - Budget and Incumbents	POSITION_DATA	Set Up HRMS, Product Related, Organizational Development, Position Data, Budget and Incumbents Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info, Budget and Incumbents Organizational Development, Succession Planning, Define Key Positions, Key Positions, Budget and Incumbents Organizational Development, Succession Planning USF, Identify Key Positions, Budget and Incumbents	Review the position's current budget and incumbents.
Detailed Position Description	POSN_DESCR_SEC	Set Up HRMS, Product Related, Organizational Development, Position Data, Description. Click Detailed Position Description link. Organizational Development, Position Management, Maintain Positions/Budgets, Add/Update Position Info, Description Click Detailed Position Description link. Organizational Development, Succession Planning, Define Key Positions, Description Click Detailed Position Description link. Organizational Development, Succession Planning USF, Identify Key Positions, Description Click Detailed Position Description link.	View the detailed position description for this position.

Entering Information About a Position

Access the Position Data - Description page.

Description	Specific Information	Budget and Incumbents
Position Information Find View All First 1 of 1 Last		
Position Number: 19000085		
Headcount Status: Partially Filled		Current Head Count: 3 out of 4
*Effective Date: 01/01/1980		*Status: Active
Reason: NEW New Position		Action Date: 02/01/1996
*Position Status: Approved		Status Date: 01/01/1980
☒ Key Position		
Job Information		
*Business Unit: GBIBU Global Business Institute BU		
Job Code: 820125 Specialist-Tech Training		Manager Level: Non-Manager
*Reg/Temp: Regular		*Full/Part Time: Full-Time
*Regular Shift: N/A		Union Code:
Title: Technical Training Specialist		Short Title: Tech Trnr
Detailed Position Description		
Work Location		
*Reg Region: USA United States		
Department: 54000 Assembly		Company: GBI Global Business Institute
Location: KUOH00 Ohio Operations		
Reports To: 19000004 Manager-Employment/Recruitment		Dot-Line:
Supervisor Lvl:		

Position Data - Description page (1 of 2)

Salary Plan Information															
Salary Admin Plan:	Grade:														
Standard Hours: 40.00	Work Period: W Weekly														
<table border="1"> <thead> <tr> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> <th>Sun</th> </tr> </thead> <tbody> <tr> <td>8.00</td> <td>8.00</td> <td>8.00</td> <td>8.00</td> <td>8.00</td> <td></td> <td></td> </tr> </tbody> </table>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	8.00	8.00	8.00	8.00	8.00			
Mon	Tue	Wed	Thu	Fri	Sat	Sun									
8.00	8.00	8.00	8.00	8.00											
USA															
FLSA Status: Nonexempt	Bargaining Unit: 8888														
Germany															
From Grade/Step:	To Grade/Step:														
Australia															
Salary Packaging															
Package Template ID:															
Package Rule ID:															

Position Data - Description page (2 of 2)

Position Information

Position Number

The unique number assigned to the position. You can specify the position number when creating a new position or you can enable the system to assign

the next number for you (when you save) by accepting the default value *00000000* in the Add a New Value page.

To avoid maintaining two different sets of position numbers, PeopleSoft recommends that you either always assign numbers manually or always enable the system to do it; do not do both.

Initialize

Note. This button appears only if you're adding a new position.

Click to copy all or many of the characteristics of a similar existing position. When you click this button, a dialog box prompts you for the position number of the position that you want to copy. Click OK to populate the Position Data component with the position information of the position that you selected. You can override any information that doesn't apply to the new position.

If you are not aware of any similar positions that you could use to populate the remaining fields, just populate the fields individually.

Reason

Select a reason for the change or creation of the position from the list of available options.

Position Status

Indicate when the position is *Approved*, *Frozen*, or *Proposed*.

Status Date

Indicate the date for the position status.

Key Position

Select if this is a key position.

Job Information

Business Unit

Enter the business unit for the position.

Job Code

Select the job code that is associated with this position. The job title associated with this jobcode is defaulted into the (position) title field when a jobcode is selected.

Reg/Temp (regular or temporary)

The system enters a default value of *Regular* for a new position. If the position is temporary, select *Temporary* from the available options.

Note. (USF) Federal users: If the position is *Temporary*, enter a date in the Not To Exceed Date field on the Federal Data Position Job Information page.

Full/Part Time (full-time or part-time)

The system enters a default value of *Full-Time* for a new position. If the position is part-time, select *Part-Time* from the available options.

Regular Shift

If your organization assigns shifts to positions, select a regular shift code.

Union Code

Enter the union code for the position.

Title

This field displays a title for the selected position. This field is defaulted from the title associated with the jobcode. The user can override this defaulting by typing in a new title.

Note. If you have Update Incumbents selected on the Specific Information page, modifications to the position title will be reflected on each incumbents job data as a change in the employee's job title. This job title can be seen on the Job Information page of the Job Data component.

Short Title	Enter a short title of the position. When you select a job code on the Job Information page, this field displays the short title associated with that job code. You can override the default value.
Detailed Position Description	Click to access the Detailed Position Description page and enter a detailed position description, if required, for this position.
Work Location	
Reg Region (regulatory region)	Enter a regulatory region for the position.
Department	Select the department that this position is associated with from the list of available options.
Company	When you select a department this field displays the associated company and is unavailable for entry. If the department that you select has no associated company, select one from the list of available options.
Location	Select the location that this position is associated with from the list of available options.
Reports To	To establish reporting relationships, select the position number that this position reports to from the list of available options. If this is the top position record, enter the position's number here. For example, in the CEO's position record, enter the CEO's position number in this field.
Dot-Line	If there is a dotted line reporting relationship to another position, select that position number from the list of available options.
Supervisor Lvl (supervisor level)	Select the supervisor level, if applicable, associated with the position from the list of available options.
Salary Plan Information	
Salary Admin Plan (salary administration plan)	Select the salary plan associated with the position from the list of available options. The value that you select appears on the Job Data component when you assign a new employee to a position.
Grade	Select the grade associated with the position from the list of available options.
Step	Select the step associated with the position from the list of available options.
Standard Hours	Enter the standard hours worked in the associated Work Period for this position. For example, if the Work Period is <i>Weekly</i> , the Standard Hours might be 40.00.
Work Period	Select the work period associated with this position. The work period is the smallest unit of time that employers use to communicate working hours to their employees. If you select a <i>Weekly</i> Work Period, enter the hours worked per day in the fields provided.

(USA) United States**FLSA Status** (Fair Labor Standards Act status)Determine the appropriate coverage under the Fair Labor Standards Act, and select *Administrative*, *Executive*, *Management*, *No FLSA Required*, *Nonexempt*, *Outside Salesperson* or *Professional*.**(DEU) Germany****From Grade/Step and To Grade/Step**

Enter the salary grade and step from which the salary range begins and which the salary range ends for this position.

(AUS) Australia**Package Template ID**

Select a salary package template ID.

Package Rule ID

Select a salary package rule ID.

Entering Position-Specific Information

Access the Position Data - Specific Information page.

The screenshot displays the 'Position Data - Specific Information' page. At the top, there are three tabs: 'Description', 'Specific Information' (selected), and 'Budget and Incumbents'. Below the tabs, the 'Position Number' is 19000085, 'Headcount Status' is 'Partially Filled', and 'Current Head Count' is '3 out of 4'. The 'Specific Information' section has a sub-header with 'Find | View All' and 'First 1 of 1 Last'. It contains fields for 'Effective Date' (01/01/1980) and 'Status' (Active). Below these are fields for 'Job Profile ID', 'Max Head Count' (4), 'Mail Drop ID', 'Work Phone', 'Health Certificate', and 'Signature Authority'. To the right of these fields is an 'Incumbents' section with checkboxes for 'Update Incumbents', 'Include Salary Plan/Grade', 'Budgeted Position', 'Confidential Position', and 'Job Sharing Permitted'. Below the 'Incumbents' section is an 'Education and Government' section with fields for 'Position Pool ID', 'Pre-Encumbrance Indicator' (Immediate), 'Encumber Salary Option' (Salary Step), 'Encumber Salary Amount' (0.000), and 'Classified Indicator' (Classified). At the bottom right, there is an 'FTE' field (0.000000) and a checkbox for 'Adds to FTE Actual Count'.

Position Data – Specific Information page

Job Profile ID

Enter the job profile ID for the position, if applicable.

Max Head Count
(maximum head count)

Enter the maximum head count allowed for this position. The default value is 1 because positions normally have a one-to-one relationship with employees (a position usually has one person assigned to it). However, if this position

	permits job sharing or can be assigned to more than one person, change the head count to the appropriate number.
Mail Drop ID and Work Phone	Enter the mail drop ID and work phone number assigned to this position, if applicable.
Budgeted Position	This check box is selected by default. If this position's status is proposed or frozen, clear this check box. Otherwise, leave it selected for reporting purposes, so that the system knows that this is an approved position.
Health Certificate	Select the health certificate required for this position from the list of available options, if applicable.
Confidential Position	Select if this position is confidential.
Signature Authority	Select the signature authority assigned to this position from the list of available options, if applicable.
Job Sharing Permitted	Select if job sharing is permitted for this position. If job sharing is permitted, indicate the position's maximum head count (the maximum number of people who can share the position) in the Max Head Count field.

Incumbents

Update Incumbents	Select to have the system automatically update incumbent job data on the Job Data component. This option isn't applicable until you have assigned an employee to the position. The default is off. If clear or off then Include Salary Plan/Grade will be grayed out. If the employee record is using Position Data and the Update Incumbents is checked, then you can also check Include Salary Plan/Grade, which is controlled by the position and cannot be modified in Job Data.
--------------------------	--

Note. (USF) Federal users don't currently use this field.

Include Salary Plan/Grade	Select to include the salary plan and grade in the incumbents update. When you check Include Sal Plan/Grade, then salary plan and grade are included in the Incumbents Update. When you clear Include Sal Plan/Grade, then the salary plan and grade are not included in the Incumbents Update.
----------------------------------	---

(E&G) Education and Government

Position Pool ID	If appropriate, select a position pool ID from the list of available options. This code maps to the position pool with which this position should be budgeted in Commitment Accounting. Position pools enable you to group related positions together for budgeting purposes. For instance, you could group all positions related to your PeopleSoft HRMS implementation project in a single position pool and then assign a budget to that pool.
Pre-Encumbrance Indicator	Indicate if you want the position to encumber immediately. Values include: <i>Immediate, Noneor Requistn</i> (requisition).
Calc Group (Flex Service) (calculation group [flexible service])	If you are using Track Flexible Service, select a calculation group for this position.

- Encumber Salary Option** If you encumber salaries using Manage Commitment Accounting, select an encumber salary option. The system uses the option that you select here to determine salary when it encumbers the salaries of vacant positions.
- Academic Rank** If this is a faculty position, select an academic rank.
- Classified Indicator** Associate the position with an FTE (Classification (full time equivalents classification) that you established on the Department Budget FTE page.
- When you hire a worker into a position in the Workforce Administration menu, the system displays the FTE data tied to the Position in the Job Data pages for the worker.
- FTE (full time equivalents)** Enter the FTE value for this position to be used for defining an FTE budget in Manage Commitment Accounting.
- Adds to FTE Actual Count** Select to include this position when processing FTE edits for budgeting purposes. Don't select this check box if you don't want to include this position when processing FTE edits.

See Also

Chapter 4, “Managing Position Data,” page 27

Reviewing Budget and Incumbent Information

Access the Position Data - Budget and Incumbents page.

Description	Specific Information	Budget and Incumbents
Position Number:	19000001	
Headcount Status:	Overallocated	Current Head Count: 2 out of 1
Current Budget		
Head Count:	0	Current Budget FTE: 0.00 Amount: 0.000 
Core Current Incumbents Customize Find  First  1-2 of 2  Last		
EmplID	Empl Rcd Nbr	Name
KU0001	0	Douglas Lewis
KU0209	0	Andy Lee
FPS Current Incumbents Customize Find  First  1 of 1  Last		
EmplID	Empl Rcd Nbr	Name
	0	

Position Data - Budget and Incumbents page

- Current Budget** The Current Budget group box displays the position's Head Count, Current Budgeted FTE, and Amount.
- Core Current Incumbents** After you assign an employee to the position, this group box displays the Core incumbent's EmplID (employee ID), Empl Rcd Nbr (employee record number), Name, and a Job Data link.

Select the Job Data link to access the Job Data component, EMPLID is populated automatically. The system transfers you back to the Position Data component when you complete your review or after you have made changes.

FPS Current Incumbents

After you assign an employee to the position, this group box displays the FPS incumbent's EmplID (employee ID), Empl Rcd Nbr (employee record number), and Name.

(USF) Running Reports on Position Data and Related Tables

This section discusses how to generate reports of the position data and other setup tables you have defined. These reports are for U.S. Federal Government installations.

Pages Used to Run the Reports

Page Name	Object Name	Navigation	Usage
Occupational Series USF - Run Control	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Occupational Series USF	Occupation Series report (FGOCC800) that provides details of the Occupational Series table.
Position Title Table USF - Run Control,	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Position Title Table USF	Run the Position Title Table report (FGPER815) that lists the Position Title Table records. (Crystal)
Job Code USF - Run Control	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Job Code USF	Run the Job Code USF (FGPER823) to print a list of all job codes and the date on which they become effective. (Crystal)
OF8 Report	RUNCTL_FGOF8	Organizational Development, Position Management, Position Reports, OF8 Report USF, OF8 Report	Run the optional (USF) OF8 report (FGOF8) which provides a standardized mechanism to identify position information such as title, occupational series, grade, organizational structure, certification blocks, and other position related information.
Job Code/Position Audit USF - Parameters	RUNCTL_FGASOFDT	Organizational Development, Position Management, Position Reports, Job Code/Position Audit USF	Run the Job Code/Position Audit report (FGHR009) to cross reference position numbers and job codes. (SQL)

Assigning Employees to Positions

Once you've set up positions, you can assign employees to them. Enter personal data for employees on the Workforce Administration Personal Data pages. Because you have already set up most job-related data on the Manage Positions pages, the system automatically populates organizational and job data in many fields on the employee Job Data pages.

CHAPTER 4

Managing Position Data

This chapter discusses how to:

- Maintain position data.
- Update position data.
- Update incumbent job data.
- Verify position data.

Maintaining Position Data

Periodically, you have to enter changes to position data, such as a title change or a position that becomes inactive. You also must update employee data occasionally, such as entering a pay rate change or a leave of absence. You might make a change that affects both position and *incumbent* (an employee assigned to a position) job data, such as changing the department code for the position. To do this, use the same pages that you used to create positions and assign employees to them.

The system processes position data changes differently if the data that you are updating pertains only to the employee, only to the position, or affects both position and incumbent job data.

This section discusses how to:

- Determine where to update data.
- (USF) Update the data.
- Distinguish incumbent and position data.

Determining Where To Update Data

Once you've determined the type of change that you want to make, where do you make the changes?

- For incumbent data, go to Workforce Administration, Job Information, Job Data to make your changes.
- For position-related data, make your changes in the Position Data pages.
- If your changes affect both position and incumbent data, use the Position Data pages; the system automatically maintains the current incumbent data in the Job Data pages.

Note. The Update Incumbents functionality isn't active for Federal users. Federal users must update incumbent data manually to reflect changes made in the Position Data pages.

For example, when you want to move positions from one location to another, use the Position Data pages to make the changes. Enter a new department or location to move the position *and* the current incumbent to the new locale or department. This type of transfer implies that the employee is making a lateral move and not getting a promotion or a pay increase.

Use the Transfer Action in the Workforce Administration Job Data pages when you are moving an employee from one position to another. This type of transfer implies that the employee is being promoted or demoted and will get a pay change.

(USF) Updating the Data

Once you've determined the type of change that you want to make, go to the following pages:

- For employee data, go to the Workforce Administration, Job Information components to make your changes.
- For position-related data, make your changes in the Position Data component.
- If your changes affect both position and incumbent data, use the Position Data component and then update the employee-level information in the components in the Workforce Administration menu.

Use the Transfer Action in the Job Information pages to move an employee from one position to another. This type of transfer implies that the employee is being promoted or demoted and will get a pay change.

Distinguishing Incumbent and Position Data

Depending on the type of information that you're updating, you make changes in the Position Data pages or in the Job Data pages. Before you begin, consider what kind of action that you are taking because the action controls whether your changes affect incumbent data, position data, or both position and incumbent data. Furthermore, the type of data determines where you make your changes in Human Resources.

Position Data Changes

If you are making changes to the position, such as changing the position's DeptID, Salary Plan, or Title, make these changes in the Position Data pages. These changes are applied to the position and the incumbent.

Changes to some fields in the Position Data component update the incumbent's job record. In the Updating Position Changes to the Job Data Component section of Setting Up Positions, is a table of fields that are common to the Position Data component and the incumbent's job record. The table indicates which of those fields are updated in the job record when changed in the Position Data component.

Incumbent Data Changes

If you want to make a change that affects only the employee and not the position, make the changes on the incumbent's job record. Note that these are changes that aren't to be associated with the position and applied to future incumbents or they are changes independent of position. This includes changes in the incumbent's employee status, such as Leave of Absence or Rehire, or position assignment, such as a transfer or promotion.

Position and Incumbent Data Changes

If you are making a change to a Position Data field that doesn't update the incumbent's job record, make your change in both the Position Data pages and the incumbent's Job Data record. For instance, if you change a position's Work Phone, the system does not update the incumbent's job record with the new value. You need to update the job record manually.

See Also

Chapter 3, "Setting Up Positions," Creating Positions, page 15

Updating Position Data

Use the Position Data pages to make changes to any information that pertains to the job or position itself, such as moving the position from one department to another, work phone, and status.

This section discusses:

- Making changes to position data.
- Understanding effective dates and updating position data.

Making Changes to Position Data

To make changes to position data, follow these steps:

1. Open Position Data - Description.
2. Insert a new data row.

The system enters the system date, which is usually today's date, as the effective date. Change this unless today is the first day that the change takes effect.

Note. The Update Incumbent function will only run if you are entering a current or future dated row.

3. Enter a reason for the new row.
4. Make your changes to the appropriate pages.
5. Save the changes that you made to the position.

Understanding Effective Dates and Updating Position Data

You usually update position information in Human Resources by adding effective-dated data rows to the position data and incumbent job records. Effective dates enable you to maintain a complete chronological history of all your data and tables, whether you changed them two years ago or want them to go into effect in two months. With this information, you can *roll back* your system to a particular time to perform analyses on position data or employee records. Similarly, you can *roll forward* and set up tables and data before they take effect.

The system also uses effective dates to compare pages and tables so that the prompt tables that you see display only the data that is valid as of the effective date of the page on which you're working.

Effective dates are always important in Human Resources, but they take on special significance when you maintain positions, particularly when you change data in the fields that appear in both the Position Data and Job Data pages. To update this information, enter the changes by inserting new data rows in the Position Data pages. The system maintains the data in the current incumbent Job Data pages by inserting a new data row for you with the same effective date.

However, the system can only maintain the incumbent data if the new or changed data row is either the *current* row or a *future* row for both position data and job data. Unfortunately, Human Resources can't determine your intention: it doesn't know whether you wanted overrides on or off in the past, whether you made mistakes that you're trying to fix, or whether you just forgot to put some data in when it took effect. If the system inserted data rows with effective dates that fell in the middle of either of the stacks, you'd run the risk of getting the effective dates out of order and having incorrect data inserted.

This also means the system cross-updates *current and future* incumbent job data. It can't go back and update previous incumbents that were assigned to the position because they are linked in historical data rows. The only way to make sure historical information matches in both the position data table and the incumbent job data table is to update it manually.

To make sure the system cross-updates data when you want it to and to save yourself cross-checking time, try to update data in both the Position Data and Job Data pages in the correct chronological order the first time that you enter it or make corrections shortly thereafter.

Only one person should update the incumbent and position data in both the Workforce Administration pages and the Position Data pages because the effective dates and sequence of data rows greatly affect how the system updates and maintains matching incumbent and position data. So that they can update data in both places, the user must have security access to both the position and the person.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Administering HRMS Security"

Updating Incumbent Job Data

To ensure that the system cross-updates the incumbent job record when you want it to, follow these guidelines, which vary with the action that you take:

- When you make insertions, deletions, or corrections to job data that affect the current incumbent payroll, the system, where needed, marks payroll records for recalculation. When payroll is recalculated, the payroll system uses the new information.
- When you make insertions, deletions, or corrections to the current incumbent job data or employment data that affect benefits, the system sets the flags controlling event maintenance to indicate that a change has occurred. During the next event maintenance process, the system processes the event.
- When a position changes from full- to part-time, the system automatically sets the flag for COBRA activity in benefits.

When you make changes to data in the fields that appear in both the Job Data and Position Data pages, always use the Position Data pages. You can easily determine which rows the system created in the Job Data pages as the Position Management Record check box will be selected.

This section discusses how to:

- Update job data.
- Insert new rows.
- Delete rows.
- Make corrections.
- When you don't want to update job data.

Updating Job Data

You modify data in the Position Data pages by making insertions, deletions, and corrections. Because the changes that you make to the position management pages can impact the incumbent's job data, when you undertake any of these actions in the Position Data pages, it can have significant consequences in the Job Data pages. The following sections outline how the system updates the Job Data pages after you make changes in the Position Data component.

Inserting New Rows

The most common way that you make changes is by inserting new data rows. You can enter a new effective date and make changes without losing any of the data that was already in the record.

When the system updates incumbent job data, it inserts a new data row on top of the current row. If you have already inserted any future job data rows, the system also updates the future rows with the changes that you made.

To ensure that the system updates incumbent job data when you insert new rows, make sure that:

- The position row that you insert is current or future effective-dated.
- The current incumbent Job Data - Work Location page uses the position data in the current job data row. (If the position data is used, the position related fields are auto-populated and not available for entry and the Override Position Data button is visible.)
- The Update Incumbents check box on the Position Data - Specific Information page is selected.

You can verify that the system has made the changes by checking the employee's Job Data - Job Information page. The system inserts a new data row with the same effective date as the one that you inserted on the Position Data - Description page.

Deleting Rows

Let's say you've inserted a data row and now realize that you have inserted it for the wrong position; for example, you wanted to change information on Position 14 instead of Position 15. You can easily delete the row that you've just created.

To maintain incumbent job data when you make row deletes, make sure that you're changing the following options:

- A current or future effective-dated position row.
- A position data row that has a matching job row (same effective date, created from the Position Data component) in the Job Data component.
- The matching job row in the Job Data pages is also current or future dated.

Use the Correction action for current rows and the Update/Display action for future effective-dated rows.

To delete a row:

1. Access the Position Data - Description page.
2. To delete the incorrect information, position the cursor in the Effective Date field for the row that you want to delete and click the Delete button.

Remember that if any job data rows exist that have an effective date *after* the row that you're deleting, you must update them manually.

3. Save the changes that you have made to the position.

4. You can now make changes to the correct position.

Making Corrections

What if you've just saved a new data row, and you discover that you entered the wrong information in one of the fields that you changed? You don't want to insert a new row to correct the mistake, nor do you want to delete the row because it's essentially correct. To solve this problem, use the Correction action to fix the data but keep the row intact.

The system cross-updates data when you're making corrections, provided that:

- You're correcting a current or future effective-dated position row.

Note. You can't change the effective date.

- The position data row has a matching job row (same effective date, created from the Position Data pages) in the Job Data pages.
- The matching job data row in the Job Data pages is also current or future.
- Position data has not been overridden on the Job Data - Work Location page for related incumbents.

When You Don't Want to Update Job Data

For typical position data changes, you save time if the system cross-updates information for you. But what happens if you don't want the system to make changes automatically? For example, you change a position from *Temporary* to *Regular* for the current incumbent, but the change doesn't normally apply to this position, and you don't want the system to write over your exceptions.

You can prevent automatic job data maintenance by completing either of these two tasks:

- Click Override Position Data in the incumbent Job Data - Work Location page.
- Clear the Update Incumbents check box in Position Data - Specific Information page.

You can use these options whenever you need to. Furthermore, whenever you set them to the settings for cross-updating to take place, the system begins updating the records automatically again. This is particularly useful if you entered some exceptions for a short period of time, but they no longer apply.

Whenever you select the check box so that maintaining job data won't occur, check and update the affected data rows manually. When you save your changes in the Position Data pages and job data needs to be updated manually, the system does not issue a warning message.

Selecting the Override Position Data Button in Incumbent Job Data, Work Location

When you have exceptions to default position data, they usually apply only to the current incumbent. You use the Override Position Data button generally to enter exceptions and ensure that the system doesn't automatically insert changes that you make to default position data. The Override Position Data button is on the Job Data - Work Location page.

If you override the defaults for position-related data, you must maintain the employee data manually. The system doesn't update the position data on the Job Data pages with data from the Position Data pages until you click the Use Position Data button on the Job Data - Work Location page.

Clearing the Update Incumbents Check Box in Position Data, Specific Information

This check box is selected by default for every new data row that you enter. You won't clear the check box very often because when you want to make sure the system doesn't overwrite exceptions to position data, you usually click Override Position Data. However, if you forget, for example, to click Override Position Data, or you're making corrections to historical data and need to update data manually in both the Position Data and Job Data pages, you clear the Update Incumbents check box. The Update Incumbents check box is located on the Position Data - Specific Information page.

Verifying Position Data

As you update data in fields that match in the Position Data and incumbent Job Data pages, periodically you should check the data to ensure the system contains the right information in both places. You can run an SQR audit, the Exception/Override report, to determine any data that doesn't match in the two components. You can choose between:

- Override report that prints incumbent job data where you have prevented automatic cross updating from occurring.
- Exception report that prints only exceptions where the incumbent job and position data is out of sync for other reasons.

Pages Used to Verify Position Data

Page Name	Object Name	Navigation	Usage
Exception/Override USF - Parameters	RUNCTL_FGHR028	Organizational Development, Position Management, Position Reports, Exception/Override USF, Exception Override Report	Run the (USF) Exception/Override report (FGHR028) to audit the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)
Exception/Override - Parameters	RUNCTL_POS008	Organizational Development, Position Management, Position Reports, Exception/Override, Parameters	Run the Exception/Override report (POS008) to audit the data in fields that match in the Position Data component and the current incumbent Job Data component. (SQR)

CHAPTER 5

Maximizing Position Data

This chapter provides an overview of maximizing your position data, lists common elements, and discusses how to:

- Create departmental budgets.
- View budget summary information.
- View and report on vacant budgeted position information.
- Review position summary information.
- Maintain your organizational structure.
- Run the organizational structure reports.
- Use nVision reports.

Understanding How to Maximize Position Data

The information you use to maintain and track positions can help in organizational planning, budgeting, recruitment, and career planning. With the Manage Positions business process, you can choose to manage budget information at various levels within a department. You can set up reporting relationships to create an organizational hierarchy. You can enter data on proposed, approved, or frozen positions. You can enter requested and approved budget amounts, and even enter year-to-date adjustments to approved budgets. To help in organizational planning, you can view reporting relationships among positions. And finally, to help plan your organization's future, you can see position, incumbent, and budgeting data from the past and present.

Common Elements

Actual Head Count	Displays the actual number of employees assigned to this position.
Job Code	Displays the job code associated with the position and a short description of the job code.
Location	Displays the location this position is associated with as of the effective date.
Max Head Count (maximum head count)	Displays the maximum head count defined for this position.
Position	Displays the position number and title of the position.
Rate Code Group	Displays a rate code group for this rate code.

Reports To	Displays the number and title of the position this position reports to as of that effective date.
Default Without Override	Indicates that the system directly set the compensation rate on the rate code.
Calculated By	Indicates whether the compensation rate for this rate code is directly set on the rate code or is system-generated using a rate matrix. A value of <i>None</i> indicates the rate is directly set on the rate code. A value of <i>Rate Matrix</i> indicates that the compensation rate is system-generated by a matrix. The Matrix Definition page, located on the Setup HRMS, Common Definitions, Configurable Matrices, Define Matrices component, displays the name of the matrix, if applicable.

Creating Departmental Budgets

When you structure the system by position, you can create budgets that include partial year estimates for positions, such as mid-year retirements, and you can accurately track budgeted and approved head counts and salaries within departments. Your budgets can be for any time period that you designate, such as fiscal years or calendar years, or quarters.

You set up budgets on a department-by-department basis. You don't have to create budgets for every department in your organization. Select the departments for which you find the budgeting feature the most effective.

You can establish budgets at several levels: by department, job code, or position. Examples in this section show budgeting at the position level, because it provides the most detail and takes full advantage of the budgeting pages. However, you can use this page for budgeting by job code or by department.

To create a departmental budget by position, you must set the budget level to Position Number in the Department Table.

This section discusses how to:

- Establish department, job code, or position budgets.
- View details about a department's budget.

Pages Used to Create Departmental Budgets

Page Name	Object Name	Navigation	Usage
Departmental Budget	POSN_BUDGET_DATA	Organizational Development, Position Management, Maintain Positions/Budgets, Update Dept Budget Data, Departmental Budget	Establish department, job code, or position budgets.
Department Position Details	POSN_BUD_DATA_DTL	Click Department Position Details on the Departmental Budget page.	View details about the department.

Establishing Department, Job Code, or Position Budgets

Access the Departmental Budget page.

Departmental Budget

SetID: AUS01 Department: 11000 Information Services [Department Position Details](#)

Budget Periods Find | View All First 1 of 1 Last

*Effective Date: 07/07/2004 *Budget End Date: Budget Level: Department

Total Budget FTE: 0.00 Budget Salaries: 0.000000 USD

Budget Data Find | View All First 1 of 1 Last

Budget Status: Proposed Date Last Change: 07/07/2004

	Head Count	FTE	Amount	*Currency	Date
Requested:			0.00	USD	
Approved:			0.00		
YTD Adjustments:			0.00		
Current Budget:					

Departmental Budget page

Department Position Details

Click to access the Department Position Details page, which displays information about the department.

Budget Periods

Budget End Date

Enter the date the budget ends.

Budget Level

Displays the budget level that you specified on the Department Table.

Total Budget FTE (total budget of full time equivalents)

Displays the total number of FTE budgeted for all positions in this department.

Budget Salaries

Displays the total budget salaries for all positions in this department.



Calculate and display budget figures in alternate currencies.

Budget Data

Budget Status

Select the budget status.

Values include:

Approved: The system copies the Requested figures to the Approved field and this becomes available for data entry so that you can enter the actual amounts, if different.

Frozen: Only the Requested field remains available for you to enter data.

Proposed: This is the default value. Selecting this causes the Approved and YTD Adjustments fields to be unavailable for entry.

Date Last Change	Every time you modify information in this page, the system updates this field with the system date.
Requested	Enter the requested Head Count, FTE, Amount, Currency code, and Date for the budget. If you select <i>Approved</i> in the Budget Status field, these fields are unavailable for entry. Note. Select a currency code if you're using a currency for this departmental budget that's different from the base currency specified in the Installation Table.
Approved	Enter the approved Head Count, FTE, Amount, Currency code, and approval Date, if different from the values that appear by default from the Requested line.
YTD Adjustments (year-to-date adjustments)	Enter any adjustments made to the Head Count, FTE, Amount, Currency code, and approval Date values after the budget was approved.
Current Budget	The system calculates the Head Count, FTE, and Amount totals using the values in the Approved field, plus or minus the adjustments entered in the YTD Adjustments.

Note. After you've entered and saved a departmental budget, the system displays the total salaries and total budgeted FTEs. The total salary amounts appear in the currency specified in the Primary Permission List Preferences Table.

Viewing Details About a Department's Budget

Access the Department Position Details page.

SetID: AUS01 Department: 11000 Information Services

Total Position Count: 0

Approved Head Count: 0

Total Incumbent Count: 0

Total Actual FTE: 0.00

Total Annual Salaries: USD

OK

Cancel

Department Position Details page

Total Position Count	Displays the total number of approved budgeted positions.
Approved Head Count	Displays the total maximum headcount of all the approved, budgeted positions.
Total Incumbent Count	Displays the number of employees currently holding positions in this department.
Total Actual FTE	Displays the FTE total of this department.
Total Annual Salaries	Displays the sum of all annualized salaries in this department converted to the user's preferred currency as defined on the Primary Permission List Preferences page.

See Also

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

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Manage Commitment Accounting, “Defining Fiscal Year Budgets”

Viewing Budget Summary Information

When you're planning next year's budget, you can retrieve information from previous planning sessions. However, you may want a more condensed view of the information than what you can get from the individual pages. You need summaries of what is happening (or has happened) with positions or departmental budgets. Human Resources offers you some quick ways to review this data. You can access pages containing prior and current budget data to help prepare for the next round of budgeting.

When you maintain a departmental budget at the position level, use the Position Budget Status summary to see any differences between budgeted and actual figures for departments. If there is more than one incumbent, you can scroll through their compensation-related data. The summary displays all the figures while the budget period is still open.

When you budget for a department at the department or job code level, you see only actual figures displayed on the page.

This section discusses how to:

- View a summary of budgeted and actual figures for departments.
- Review detailed salary information.
- Display comp rate code information.

Pages Used to View Budget Summary Information

Page Name	Object Name	Navigation	Usage
Position Budget Status	POSN_BUDGET_STATUS	Organizational Development, Position Management, Review Position/Budget Info, Budget Status, Position Budget Status	View a summary of budgeted and actual figures for departments.
Salary Components	COMP_POSN_BUDG_SEC	Click the Components link on the Position Budget Status page.	Review detailed salary information about the position incumbents at the position entry date and the position end dates.
Comp Rate Code (components rate code)	COMP_RATECD5_SEC	Click Details on the Salary Components (Controls tab) page.	Display comp rate code information.

Viewing Summary of Budgeted and Actual Figures for Departments

Access the Position Budget Status page.

Position Budget Status							
Position Number:	19000030	Systems Analyst					
Position Status:	Active	Approved	Status Date:	01/01/1980	☒ Budgeted		
Business Unit:	GBIBU	Global Business Institute BU					
Job Code:	140080	Analyst-Systems					
Department:	11000	Information Systems					
Current Budget							
Max Head Count:	5						
Actual Head Count:	1	Total Budget FTE:	1.00	Total Budget Amount:	48,006.400000	USD	
Current Budget Head Count:	0	Current Budget FTE:		Current Budget Amount:			
Head Count Variance:	1	FTE Variance:	1.00	Amount Variance:	48,006.40		
Current Incumbents							
		Find View All First 1 of 1 Last					
EmplID	Name	Payroll Status		Position Entry Date			
KU0081	Alain Gasse	Active		07/27/1995			
Annual Rate		Full/Part Time	Reg/Temp	Standard Hours	FTE	Sal Plan	Grade Step
48,006.40	USD	Full-Time	Regular	40.00	1.000000	KU01	004

Position Budget Status page

Current Budget

Total Budget FTE	Displays the total budgeted FTE for this position. This information is specified on the Position Data - Specific Data page.
Total Budget Amount	Displays the total salary amount for the incumbents assigned to this position.
Current Budget FTE	Displays the current budgeted FTEs for this position. FTE budgets are defined on the Departmental Budget page.
Current Budget Amount	Displays the current budgeted salary amount for incumbents assigned to this position.
Current Budget Head Count	Displays the current budgeted head count for this position. Head count budgets are defined on the Departmental Budget page.
Head Count Variance	Displays the difference between the Actual Head Count and the Current Budget Head Count values.
FTE Variance	Displays the difference between the Total Budget FTE and the Current Budget FTE values.
Amount Variance	Displays the difference between the Total Budget Amount and the Current Budget Amount values.

Note. Salaries appear in the currency that you designated when creating the budget. If the currency differs from the base currency specified in the Installation Table, a converted amount appears at the top of the screen. If the actual figures are over budget, the variances are *positive* numbers. If the actual figures are under budget, they appear as *negative* amounts. And if the actual and budget amounts match, no figure appears in the variance fields.

Current Incumbents

This group box contains information on the current incumbent, or incumbents. If more than one incumbent is assigned to this position (when the position has job-sharing), you can scroll through the data. Incumbent data is stored on the Job Data component.

Components Click to view the Salary Components page.

Reviewing Detailed Salary Information

Access the Salary Components page.

Salary Components

Alain Gasse

EmplID: KU0081

Empl Rcd Nbr: 0

Compensation Rate:

4,000.53

USD

Compensation Frequency:

M

Monthly

Pay Components

Amounts

Controls

Changes

Conversion

	Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	NAHRLY	0	23.08	USD	Hourly			

Salary Components page: Amounts tab

Note. Select the tabs to view additional information.

Common Page Information

- Compensation Rate

Displays the position incumbent’s compensation rate.
- Compensation Frequency

Displays the position incumbent’s compensation frequency.

Amounts Tab

Select the Amounts tab.

- Rate Code

Displays a rate code. Rate codes are IDs for pay components. The system displays any compensation information associated with this rate code in the compensation grid.
- Seq (sequence)

Displays a number indicating multiple use of the same rate code if it is used more than once.
- Comp Rate (compensation rate)

Displays the position incumbent’s annual compensation rate.

Frequency	Displays the frequency over which the payee is paid the compensation rate.
Points	Displays the salary points associated with this rate code, if any.
Percent	If the rate type for this rate code is Percent, the system displays the percent to be applied to the job compensation rate or to a rate code group if you're using rate code groups.

Controls Tab

Select the Controls tab.

Salary Components

Alain Gasse
EmplID: KU0081
Empl Rcd Nbr: 0

Compensation Rate: 4,000.53 USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls Changes Conversion

	Rate Code	Seq	Source	Calculated By	Manually Updated	Default Without Override	Details
1	NAHRLY	0	Manual	None	☒	☐	Details

Salary Components page: Controls tab

Manually Updated Indicates that the rate for this rate code was manually updated on the Job compensation record.

Details This link shows the rate code definition.

Changes Tab

Select the Changes tab.

Salary Components

Alain Gasse
EmplID: KU0081
Empl Rcd Nbr: 0

Compensation Rate: 4,000.53 USD

Compensation Frequency: M Monthly

Pay Components

Amounts Controls Changes Conversion

	Rate Code	Seq	Change Amount		Change Points	Change Percent
1	NAHRLY	0	USD	Hourly		

Salary Components page: Changes tab

Change Amount Displays the overall change amount in this pay component rate.

Change Points Displays the overall change amount (in points) for this pay component. This field is visible only if Salary Points is selected on the Installation Table page.

Change Percent

Displays the overall change amount for this pay component. This field isn't applicable to rate codes that have a rate code type of Percent or Points.

Conversion Tab

Select the Conversion tab.

Salary Components

Alain Gasse

EmplID: KU0081

Empl Rcd Nbr: 0

Compensation Rate:

4,000.53

USD

Compensation Frequency:

M

Monthly

Pay Components

Amounts

Controls

Changes

Conversion

Rate Code	Seq	Converted Comp Rate			Apply FTE
1 NAHRLY	0	4,000.533333	USD	Monthly	☐

Salary Components page: Conversion tab

Apply FTE (apply full time equivalents)

The value associated with the rate code is multiplied by the FTE factor for annualization and deannualization. FTE is the percent of full time the employee should normally work in the corresponding job. This field isn't applicable for rate codes of type Percent.

Converted Comp Rate (converted compensation rate)

Displays the converted compensation rate for this pay component. The system converts all base pay components to the currency and compensation frequency that you specify.

Displaying Comp Rate Code Information

Access the Comp Rate Code page.

Rate Code

Compensation Rate Code:

NAHRLY

Details

Description:

Default NA Hourly

☒ Base Pay

☐ Use Highest Rate

☐ Default Without Override

Rate Code Type:

Hourly Rate

Rate Code Class:

Calculated By:

None

Comp Rate Code page

Base Pay

Indicates if this comp rate code is included in the job compensation rate calculation.

Use Highest Rate	Indicates if payroll should use the highest rate of pay for this comp rate code.
Rate Code Type	Displays one of the following compensation rate types: <i>Flat Amount:</i> Identifies a flat (or fixed) amount. <i>Hourly Rate + Flat Amount:</i> Identifies a flat amount additionally paid per hour. This type can't be a base pay component. <i>Hourly Rate:</i> Identifies an hourly rate of pay. <i>Percent:</i> Identifies a percentage assignment for this rate code. <i>Points:</i> Identifies salary points paid for a job. The point's monetary value is set up on the Company Table.
Rate Code Class	Displays the rate code class associated with this compensation rate code.

Viewing and Reporting on Vacant Budgeted Position Information

This section discusses how to view department vacant position information. This information about vacant budgeted positions can help you plan recruitment activities and costs.

Pages Used to Run Reports on Vacant Budgeted Positions

Page Name	Object Name	Navigation	Usage
Vacant Budgeted Positions	POSN_BUDGET_VACANT	Organizational Development, Position Management, Review Position/Budget Info, Vacant Budgeted Positions	View position information about the positions currently vacant in a department and the attendant position information.
Vacant Position - Run Control	PRCSRUNCNTL	Organizational Development, Position Management, Position Reports, Vacant Position	Run the Vacant Position report (POS007) that lists all currently vacant, budgeted positions in your organization. (Crystal)

Viewing Department Vacant Position Information

Access the Vacant Budgeted Positions page.

Vacant Budgeted Positions

SetID: SHARE Department: 10000 Human Resources

Total Vacant Positions: 13

Customize | Find | View All |  First | 1-7 of 7 | Last

Position Information

Job Information

Work Location

Position	Description	Position Status	Reports To	Short Description	Vacant Positions	Max Head Count	Full/Part Time	Regular/Temporary
19000010	Benefits Specialist	Approved	19000003	Mgr-Cmp/Bn	1	4	Full-Time	Regular
19000012	HRIS Specialist	Approved	19000013	Mgr-Fin	2	2	Full-Time	Regular
19000015	Labor Relations Specialist	Approved	19000013	Mgr-Fin	1	1	Full-Time	Regular
19000084	HR/Payroll Analyst	Approved	19000210	Dir-HR	1	1	Full-Time	Regular
19000102	Human Resources Analyst	Approved	19000101	Mgr ER	2	5	Full-Time	Regular
19000104	Analyst Trainee	Approved	19000101	Mgr ER	2	3	Full-Time	Regular
19000602	Human Resources Analyst	Approved	19000101	Mgr ER	4	5	Full-Time	Regular

Vacant Budgeted Positions page

Note. Select the tabs to view additional information.

Common Page Information

Total Count Displays the total number of vacancies in the department.

Position Information Tab

Posn Status (position status) Displays the status (for example *Approved* or *Frozen*) of any vacant, budgeted position.

Full/Part (full-time or part-time) Displays if the vacant position is *Full-Time* or *Part-Time*.

Reg/Temp (regular or temporary) Displays if the vacant position is *Regular* or *Temporary*.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” Manage Positions Reports

Reviewing Position Summary Information

When reviewing your organizational structure, you can retrieve information from prior planning sessions. But if you want a more high-level view of the information than what you can get from the individual pages you need summaries of what is happening (or has happened) with positions and incumbents.

Human Resources provides some quick ways to review this data. Manage Positions provides display-only pages and reports of current and historical position data.

Use the Position Data Summary component to get an overview of a position’s current and historical data. You can see a list of all actions, such as department moves or title changes, which have occurred.

This section discusses how to:

- View general current and historical information about a position.

- View position history.
- View current position information.
- View salary components information.

Common Elements Used in This Section

Show Components

Select to have the report display compensation component information for each incumbent.

Pages Used to View and Run Reports of Position Summary Information

Page Name	Object Name	Navigation	Usage
Position Data Summary	POSITION_SUMMARY	Organizational Development, Position Management, Review Position/Budget Info, Position Summary, Position Data Summary	View general current and historical information about a position.
Position History	POSITION_HISTORY	Organizational Development, Position Management, Review Position/Budget Info, Position History, Position History	View information on incumbents currently and previously assigned to a position.
Position History – Current Position Data	CURRENT_POSN_DATA	Click the Current Position Data button on the Position History page.	View current position details.
Position History - Salary Components	COMP_POSN_HIST_SEC	Click the Components link on the Position History page.	View detailed salary information about the position incumbents at the position entry date or the position end dates.
Comp Rate Code (components rate code)	COMP_RATECD5_SEC	Click the Details link on the Salary Components page.	View information that can help you plan recruitment activities and costs.

Page Name	Object Name	Navigation	Usage
Position Status - Parameters	RUNCTL_ASOFDATE	Organizational Development, Position Management, Position Reports, Position Status Organizational Development, Position Management, Position Reports, Active Position History	Use this page to run these reports: - Position Status report (POS001). This report inventories the types of positions in your organization, and lists all filled and vacant positions. - Active Position History report (POS004). This report lists all current and historical data related to a position, for all active positions in the organization.
Active/Inactive Positions - Parameters	RUNCTL_POS002	Organizational Development, Position Management, Position Reports, Active/Inactive Positions, Parameters	Run the Active/Inactive Positions report (POS002). This report lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)
Active/Inactive Positions - Parameters	RUNCTL_FGHR025	Organizational Development, Position Management, Position Reports, Active/Inactive Positions USF, Active/Inactive Positions	Run the Active/Inactive Positions USF report (FGHR025). This report lists the current position-related data for active positions, inactive positions, or both, depending on which you select to run. (Crystal)
Incumbent History - Parameters	RUNCTL_ASOFDT_COMP	Organizational Development, Position Management, Position Reports, Incumbent History, Parameters	Run the Incumbent History report (POS003). This report lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. (SQR)

Page Name	Object Name	Navigation	Usage
Incumbent History USF - Parameters or Active Position History USF - Parameters	RUNCTL_FGASOFDT	Organizational Development, Position Management, Position Reports, Incumbent History USF Organizational Development, Position Management, Position Reports, Active Position History USF	Use this page to run these reports: - Incumbent History USF report (FGHR026). This report lists, by position, all current and former incumbents in the organization, beginning with the current incumbent for each position and going back in time. Prints entry and exit dates for each incumbent, and starting and ending salaries. - Active Position History USF report (FGHR027). This report lists all current and historical data related to a position, for all active positions in the organization.

Viewing General Current and Historical Information About a Position

Access the Position Data Summary page: General tab.

Position Data Summary

Position Number: 19000003 Manager-Compensation/Benefits

Position Data

Customize | Find |

First
1-2 of 2
Last

General
Work Location
Payroll Info

Effective Date	Action Reason	Short Name	Status Date	Max Head Count	Budgeted
01/01/1996		Approved	01/01/1980	3	Y
01/01/1980	New Posn	Approved	01/01/1980	1	Y

Position Data Summary page: General tab

Note. Multiple views of this page are available by selecting the tabs in the scroll area.

General Tab

Action Reason

Displays the action and reason for changes to the position as of that effective date.

Status Date

Displays the date the position first had that status. For example, if a position has a status of *Active* at its most recent position change, effective 01/04/1998 and the position's status was last changed to *Active* 01/01/1996, the status date for the position change effective 01/04/1998 is 01/01/1996.

Budgeted

Indicates if the position is budgeted (Y) or not (N).

Work Location Tab

Reports To Displays the number and title of the position this position reports to as of that effective date.

Jobcode Displays the job code this position is assigned to as of that effective date.

Payroll Info Tab

Reg/Temp (regular or temporary) Displays if the position is regular or temporary as of that effective date.

Full/Part (full-time or part-time) Displays if the position is *Full-Time* or *Part-Time* as of that effective date.

Standard Hours Displays the position's standard hours as of that effective date.

Work Period Displays the position's standard work period as of that effective date. The standard work period is the time period in which employees must complete the standard hours. Valid values are stored on the Frequency Table.

Shift Displays the shift information as of that effective date, if applicable.

Viewing Position History

Access the Position History page.

The screenshot shows the 'Position History' page. At the top, there is a header 'Position History' and a link 'Current Position Data'. Below this, the 'Position Number' is 10000003, and the title is 'Benefits Specialist'. The page displays a list of position history entries. The first entry is for 'XC3032' held by 'Ava Morris'. It shows the 'Position Entry Date' as 01/09/2002, 'Position End Date' as blank, and 'Exit Reason' as blank. The 'Compensation Rate' is listed as 'USD Monthly' with a 'Components' link. The 'Sal Plan' is 'KU01' and the 'Grade Step' is '005'. The second entry is for 'MTA0031' held by 'Peter Preston'. It shows the 'Position Entry Date' as 10/18/1999, 'Position End Date' as blank, and 'Exit Reason' as blank. The 'Compensation Rate' is listed as '3,000.00 USD Monthly' with a 'Components' link. The 'Sal Plan' is 'KU01' and the 'Grade Step' is '005'. The page also includes navigation links like 'Find | View All' and 'First 1-2 of 5 Last'.

Position History page

Displays incumbent salary information, which you can use for budgeting and to anticipate the approximate salary a new incumbent will receive. And by examining the exit reasons, you can find ways to reduce incumbent turnover in a position.

Current Position Data Click to access the Current Position Data page.

Position Entry Date and Position End Date	Displays the date the employee was assigned to the position and exited the position.
Compensation Rate	Displays the compensation amount, currency, and frequency associated with the position at the incumbent's position entry and end dates.
Components	Click to access the Salary Components page. You can view the salary components information associated with the position at the incumbent's position begin and end dates. Click the Components in either the Position Entry Date or Position End Date rows.
Sal Plan (salary plan), Grade, and Step	Displays the salary plan, salary grade, and salary step at the incumbent's position entry and end dates.

Viewing Current Position Information

Access the Position History - Current Position Data page.

Current Position Data		
Position Number:	10000003	Benefits Specialist
Company:	GBI	Global Business Institute 9999
Business Unit:	GBIBU	Global Business Institute BU
Department:	10500	Benefits
Job Code:	820005	Specialist-Benefits
Salary Administration Plan:	KU01 005	
Max Head Count:	2	
Current Head Count:	5	
Headcount Status:	Overallocated	

Position History - Current Position Data page

Salary Administration Plan	Displays the position's salary plan.
Current Head Count	Displays the current headcount assigned to this position.
Headcount Status	Displays the headcount status for this position.

Viewing Salary Components Information

The Salary Components page that you access from the Position History page is identical to the Salary Components page that you access from the Position Budget Status page.

See Also

[Chapter 5, "Maximizing Position Data," Reviewing Detailed Salary Information, page 41](#)

Maintaining Your Organizational Structure

With the Manage Positions business process, you can create reporting relationships among positions, showing how they look in hierarchical form. Use this information, either through a report or online, for organizational planning.

Human Resources provides two ways to see positions in hierarchical form:

- By entering supervisory position numbers in the Reports To Posn (position) field in the Position Data - Description page, you can generate reports that show position hierarchies.
- If you want to see part of your organization chart online, use PeopleSoft Tree Manager to create a position tree, which illustrates position hierarchies.

This section discusses how to:

- Establish position hierarchies in Position Data.
- Maintain position hierarchies in PeopleSoft Tree Manager.

Establishing Position Hierarchies

You can establish hierarchical information for your entire organization in the Position Data pages by establishing reporting relationships among positions. Assign positions to one another directly, indirectly, or both, where applicable.

Here's how to set up position hierarchies:

1. Open the Position Data - Description page.
2. Establish direct and or indirect (dotted-line) reporting relationships.
 - a. To establish direct reporting relationships, enter the supervisor's position number in the Reports To Posn (Position) field on the Position Data, Description page for each position that you create.
 - b. To establish indirect reporting relationships, select a position number in the Dotted-Line Rpt (report) field on the Position Data - Description page.
3. Save your changes.

Once you enter all the reporting relationships among positions, run the Build Position Structure SQR (POS006A), which links the positions in the system and creates an organizational hierarchy.

Establishing Direct Reporting Relationships

This data links positions to one another, and establishes reporting relationships among positions. Viewing position hierarchies are especially useful for budgeting and organizational planning.

When Position Management is set to Partial in the Installation Table and the Reports to Position field contains a value in Position Data, the system hides the Supervisor ID in the incumbent Job Data. Otherwise, both fields appear in Job Data until you enter a value in one or the other.

Currently, if you save a position without selecting a position number in the *Reports To Posn* field, the system issues a warning message. You don't have to enter a position number after you acknowledge the message. But if you want to require this field for all positions, change the warning message to an error message. The system won't allow you to save the data without an entry in this field.

Establishing Indirect Reporting Relationships

You can enter this data for employees who officially report to one position, while on a functional basis they also work for another position.

For example, Joe Conrad, a computer technician, officially reports to the Plant Manager in Milwaukee, but functionally he works for the Computer Services Manager in the head office. Enter the Computer Services Manager position number in the Dotted-Line Rpt field to reflect this situation.

Establishing Reporting Hierarchies by Creating a Top Position

To establish reporting hierarchies, you must create a top position that reports to itself.

To establish a top position:

- 1. Add the top position.
- 2. Save the top position.
- 3. Reopen the top position and enter the top position number in the Reports To field on the Position Data - Description page.
- 4. Save the top position again.

Maintaining Position Hierarchies in PeopleSoft Tree Manager

If you want to represent a portion of your organizational structure graphically, create position hierarchies in PeopleSoft Tree Manager. It enables you to view all the positions in hierarchical order at the levels that you designate, such as the top five levels of management. This is useful for *what-if* scenarios in organizational planning. For planning at the department level, create a position tree with only the positions in a particular department.

Note. Review the PeopleSoft Tree Manager documentation for a full, detailed discussion about PeopleSoft Tree Manager before you attempt to modify or create Position Trees. This section discusses using PeopleSoft Tree Manager to define and maintain Position Trees in Human Resources and is *not* an exhaustive discussion about the use of PeopleSoft Tree Manager.

Within PeopleSoft Tree Manager you can also view incumbent and position data in the context of the department or other part of the organization you’re viewing. To do so, click a position number to display the Position Data pages.

Note. PeopleSoft recommends that you use the Tree Manager for position trees only if your company is small or, if your organization is large, you plan to only represent a few levels of management. You can also create separate position trees that incorporate small portions of your organization. Otherwise, generate the report, POS006, to manage and view your reporting hierarchies.

Building Position Trees

How to create a new position tree is described in the PeopleSoft Tree Manager documentation. Enter the following data in the Tree Definition and Properties page to create a position tree:

Field	Value
Tree Name	Enter a name to help you identify this tree.

Field	Value
Structure ID	Select <i>Position</i> . PeopleSoft delivers the system with this Structure ID set up.
Description	Enter a description of the tree.
Effective Date	Enter the date the tree becomes effective.
Status	Select the status of the tree.
Category	Select the category of the tree.
Use of Levels	Select <i>Strictly Enforced</i> if your levels consist of only one type of entity. For example, only Regions report to the Company level, and only Divisions report to Regions. Select <i>Loosely Enforced</i> if the entities combine different types of entities. For example, both Regions and Divisions report to the Company level. Select <i>Not Used</i> if your security structure is very flat and you don't need to set up groupings of units in levels.
All Detail Values in this Tree	Leave this blank.
Allow Duplicate Detail Values	Leave this blank.

Inserting Nodes

Once you've created the basic tree structure, add the nodes. In a position tree, each node represents a position, defined on the Position Data table. The first node is known as the root node, and is the highest level in the hierarchy or reporting structure.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Running the Organizational Structure Reports

Once you enter all the reporting relationships among positions, run the Build Position Structure SQR to link the positions in the system and create an organizational hierarchy. Run this utility at the following times:

- When you first enter the reporting relationships.
- Any time that you add new positions.
- When you change reporting relationships among existing positions.

You can generate a report listing the relationships in an indented organizational chart format, the Indented Position report.

This section discusses how to run the Organizational Structure Report.

Pages Used to Run the Organizational Structure Reports

Page Name	Object Name	Navigation	Usage
Build Position Structure - Parameters	RUNCTL_ASOFDATA	Organizational Development, Position Management, Create Organization Structure, Build Position Structure, Parameters	Run the Build Position Structure SQR (POS006A). This SQR links the positions in the system and creates the reporting hierarchy represented in the Indented Position Report.
Create Organizational Report - Parameters	RUNCTL_POS006	Organizational Development, Position Management, Create Organization Structure, Create Organizational Report, Parameters	Run the Organizational report (POS006) which provides a visual representation of reporting relationships among positions by level, if any, in the organization. (SQR) Always run this after running Build Position Structure.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, “PeopleSoft Application Fundamentals for HRMS Reports,” PeopleSoft HRMS Reports: Selected Reports

Running the Organizational Report

Access the Create Organizational Report - Parameters page.

Parameters

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameter(s)

As Of Date: 31

Create Organizational Report - Parameters page

Rpt Lvl (report level)

Enter the highest report level you want reported on. For example, if you have 10 report levels and you only want to report on the bottom 5, enter 5 in the Rpt Lvl field.

Using Manage Positions nVision Reports

Filled/Approved Positions By Department is an nVision report that supports the Manage Positions business process in your Human Resources system. Use this report to review and analyze the number of approved, filled, and budgeted positions in the Departments within a Business Unit.

Note. This report doesn't apply to PeopleSoft HRMS for Education and Government users.

Viewing Status Information for Approved Head Count in a Department

Cells in the Approved Head Count and Budgeted Positions columns on Sheet 1 of this report all go to this same page. Use this page to review and analyze detailed status information for individual Approved Head Count within a Department.

Viewing Status Information for Actual Headcount in a Department

Cells in the Actual Head Count column on Sheet 1 of this report all go to this same page. Use this page to review and analyze detailed status information for individual Actual Headcount within a Department.

See Also

Enterprise PeopleTools PeopleBook: PS/nVision

Glossary of PeopleSoft Terms

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

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

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

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

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i>.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

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

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

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

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

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

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

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

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

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

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i>. See <i>record input VAT flag</i>.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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

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

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

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

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

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

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