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Enterprise PeopleTools 8.48 PeopleBook: Getting Started with PeopleTools

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Enterprise PeopleTools 8.48 PeopleBook: Getting Started with PeopleTools
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Contents

About This PeopleBook

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- 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 elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, 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 Enterprise applications most effectively.

Application Fundamentals

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

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 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 Enterprise applications. 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.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

Typographical Convention or Visual Cue	Description
[ ] (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 Enterprise 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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, . Or email us at appsdoc@us.oracle.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.

Getting Started with Enterprise PeopleTools Preface

This preface provides a general overview of the contents discussed in Getting Started with PeopleTools.

Getting Started with Enterprise PeopleTools

This document is designed to introduce PeopleTools in a high-level manner and provide a structure for understanding the categories of and usage of the PeopleTools technology.

CHAPTER 1

Getting Started with Enterprise PeopleTools

This chapter provides an overview of the contents of this book.

Enterprise PeopleTools Overview

Enterprise PeopleTools provides the underlying technology for PeopleSoft applications. All PeopleSoft Enterprise applications, such as Human Capital Management and Customer Relationship Management are built, deployed, and maintained using Enterprise PeopleTools.

With Enterprise PeopleTools you can:

- Develop new applications or customize existing applications.
- Administer applications that you have deployed within your organization.
- Provide decision support and reporting functionality to decision makers.
- Integrate PeopleSoft applications with other PeopleSoft applications or third party applications.

The area of Enterprise PeopleTools contains over 40 tools, utilities, and technologies. This document provides two frameworks with which you can gain a better understanding of the delivered technology, how to categorize the tools, and when to use particular tools.

Enterprise PeopleTools Categories

This framework divides the PeopleTools technologies, tools, and utilities into four categories:

- Development Tools.
- Administration Tools.
- Analytic Tools.
- Integration Tools.

Implementation Phases

This framework provides a sample set of implementation phases and lists the tools and technologies that are likely to be used or implemented within a particular phase. The implementation phases are:

- Installation.
- Application Configuration.
- System Configuration.
- Decision Support Configuration.
- Business Process Integration.

- Maintenance.

Note. The implementation phases in this framework are intended to help you gain a better understanding of Enterprise PeopleTools. The implementation phases in no way imply strict dependencies between phases or tools. Every implementation is unique.

Other Sources of Information

This section provides information to consider before you begin to use Enterprise PeopleTools. In addition to implementation considerations presented in this section, take advantage of all PeopleSoft sources of information, including the installation guides, release notes, PeopleBooks, and training courses.

See Also

Chapter 2, "Understanding Development Tools," page 3

Chapter 3, "Understanding Administration Tools," Understanding Administration Tools, page 7

Chapter 4, "Understanding Analytic Tools," Understanding Analytic Tools, page 15

Chapter 5, "Understanding Integration Tools," Understanding Integration Tools, page 21

Chapter 6, "Viewing PeopleTools Within Implementation Phases," page 29

Enterprise PeopleTools Implementation

Implementing Enterprise PeopleTools requires the installation of the PeopleTools CD within a supported environment as described in the Enterprise PeopleTools Installation guide.

See Also

Enterprise PeopleTools 8.48 Installation for your database platform

CHAPTER 2

Understanding Development Tools

This section provides overview information and discusses:

- PeopleSoft Application Designer.
- PeopleCode.
- PeopleSoft Application Engine.
- Global Technology.
- Workflow Technology.

Understanding Development Tools

The development tools that Enterprise PeopleTools provides offer a powerful application development environment in which you can build and customize PeopleSoft applications to suit your specific enterprise needs quickly and easily. By using Enterprise PeopleTools development tools you can complete a variety of tasks including:

- Design and define application objects.
- Enable applications to serve different locations and languages while sharing the same data.
- Define end-to-end processes in a user-friendly, graphical design environment.

PeopleSoft Application Designer

PeopleSoft Application Designer is a metadata driven, definitional development environment ensuring you can develop new functionality quickly and easily upgrade to new versions.

Every PeopleSoft application contains a collection of related definitions, such as fields, records, and pages, that work together to provide the functions of PeopleSoft applications. Developing and adapting PeopleSoft applications is a step-by-step process in which you define and build the definitions, establish relationships among definitions, implement security, deploy your PeopleSoft application to the browser environment, and test every aspect thoroughly.

To perform the majority of these development activities, you use one interactive tool, PeopleSoft Application Designer. The PeopleSoft Application Designer is an integrated development environment that enables you to work with the numerous definitions of a business application in a single work area.

PeopleSoft Application Designer enables you to perform numerous development tasks including:

- Create record and field definitions.

- Build SQL tables and indexes.
- Create and modify pages for the user interface.
- Create and modify components (groups of pages).
- Work with style sheets to customize the appearance of applications.
- Upgrade previous applications to new PeopleSoft versions.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer, "Getting Started with PeopleSoft Application Designer"

PeopleCode

PeopleCode is the PeopleSoft proprietary integrated programming language that touches virtually every aspect of PeopleSoft applications. For example, with PeopleCode you can:

- Control presentation of information to the user.
- Add and modify business logic.
- Validate user inputs.
- Perform calculations and data manipulation.
- Maintain data integrity.
- Update database tables.
- Manage portal navigation.
- Integrate with other PeopleSoft applications.
- Integrate with third-party applications.
- Manage workflow.
- Administer security.

PeopleCode enables you to create programs using structured and object-oriented techniques. PeopleSoft delivers numerous functions, classes, methods, and APIs.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleCode Developer's Guide, "Getting Started with PeopleCode"

PeopleSoft Application Engine

PeopleSoft Application Engine enables you to develop, test, and run Application Engine programs. You use PeopleSoft Application Engine to develop batch or online programs that perform high-volume, background processing against your data. In PeopleSoft Application Engine, a program is a set of SQL statements, PeopleCode, and program control actions that enable looping and conditional logic. You define PeopleSoft Application Engine programs in PeopleSoft Application Designer.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine, “Getting Started With PeopleSoft Application Engine”

Global Technology

PeopleSoft is built on a robust global framework enabling you to deploy your applications across the globe. Enterprise PeopleTools is designed so that a single implementation can serve users in different regions. Users can share the same data while operating in different languages and applying different date, time, and numeric formatting conventions.

PeopleSoft’s Global Technology provides the core global abilities that are common to all PeopleSoft application products enabling you to:

- Operate in your own language.
- Apply different numeric formatting.
- Use any currency and market rate.
- Support multiple languages in a single database.
- Display formatted data using standards that users expect based on their language and country.
- Deploy systems spanning multiple time zones.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Global Technology, “Getting Started with Global Technology”

Workflow Technology

Workflow enables collaboration between applications, organizations, and people. PeopleSoft Workflow enables you to:

- Automate paper-based business processes.
- Increase collaboration between employees, customers, and suppliers.
- Integrate your system according to business processes.

The main elements of PeopleSoft Workflow include:

- Business process definitions, which reflect the business process—from beginning to end.
- Activities, which are a set of logically ordered steps in a process.
- Worklists, which are the automated “to-do” lists.
- Rules, which determine the activities that are required to process your business data.
- Roles, which describe how people fit into the workflow.
- Routings, which specify where information goes and what form it takes—email message or worklist entry.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Workflow Technology, "Getting Started with PeopleSoft Workflow Technology"

CHAPTER 3

Understanding Administration Tools

This chapter provides overview information and discusses:

- Setup Manager.
- PeopleTools Security.
- PeopleSoft Portal.
- PeopleSoft Mobile Agent.
- PeopleSoft MultiChannel Framework.
- PeopleSoft Performance Monitor.
- PeopleSoft Process Scheduler.
- PeopleSoft Diagnostic Framework.
- Change Assistant.
- PeopleSoft Upgrade Assistant.
- PeopleSoft Data Mover.
- Data Integrity Tools.
- PeopleTools Utilities.
- PeopleSoft Configuration Manager.

Understanding Administration Tools

With Information Technology infrastructure becoming more complex, Enterprise PeopleTools offers the state-of-the-art tools to make maintenance easy and cost-effective. The Enterprise PeopleTools administration tools enable system administrators to manage the applications you have deployed within your organization. The administration tools enable you to perform numerous administrative tasks, such as configure security, monitor performance, troubleshoot, upgrade to new versions, apply patches, and transfer data from target to source systems. Most of the tasks can be completed using the same browser interface used for completing business transactions in PeopleSoft applications.

Setup Manager

Setup Manager supports application configurations with a step-by-step process for identifying, managing, and executing setup tasks based either on business processes or the PeopleSoft products and features you select. Based on specific configuration templates the PeopleSoft Setup Manager actually generates a setup task list and pages you can use to manage the completion of setup tasks.

Setup Manager reduces the time and cost required to implement your PeopleSoft applications by ensuring the application setup is completed accurately and in the correct sequence, thus eliminating costly rework.

The Setup Manager also provides links to relevant integration points, which include the documentation for and online pages used for managing the data.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Setup Manager, "Getting Started with Setup Manager"

PeopleTools Security

The PeopleSoft security approach is tailored for the internet. As you implement PeopleSoft, you need a robust and scalable means by which you can grant authorization to users efficiently. When you deploy your applications to the internet, the number of potential users of your system increases exponentially. Suddenly, you have customers, vendors, suppliers, employees, and prospects all using the same system.

You can apply security to all users, including employees, managers, customers, contractors, and suppliers. You group your users according to roles to give them different degrees of access. For instance, there might be an Employee role, a Manager role, and an Administrator role. PeopleTools Security enables you to manage the role-based system, including directory group import capabilities, to leverage your Lightweight Directory Access Protocol (LDAP) directory facilities.

Users who belong to a particular role require a specific set of permissions, or authorizations, within your system so that they can complete their daily tasks. Because of the increase in users due to the internet deployment, PeopleTools Security enables you to perform numerous maintenance tasks programmatically, which enables your system administrators to focus on other tasks.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Security Administration, "Getting Started with Security Administration"

PeopleSoft Portal

The Enterprise PeopleTools internet technology is a combination of the PeopleSoft Pure Internet Architecture and the PeopleTools portal technology, which is used for creating and managing portals.

PeopleSoft Pure Internet Architecture enables internet application deployment through a browser, and enables you to take advantage of PeopleSoft intranet solutions, internet solutions, and integration technologies. PeopleSoft Pure Internet Architecture runs seamlessly in portals created and managed by PeopleSoft portal technology.

The PeopleTools portal technology is built on top of PeopleSoft Pure Internet Architecture and provides you with the ability to easily access and administer multiple content providers, such as PeopleSoft applications like CRM and HCM, as well as non-PeopleSoft content. It enables you to combine content from these multiple sources and deliver the result to end users in a unified, simple-to-use interface.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Internet Technology, “Getting Started with Internet Technology”

PeopleSoft Mobile Agent

PeopleTools Mobile Agent extends the functionality of PeopleSoft Pure Internet Architecture to disconnected mobile devices, enabling users to work with PeopleSoft applications on laptop computers or personal digital assistants (PDAs) while they are disconnected from the internet or local network. PeopleTools Mobile Agent uses standard internet tools and protocols—web browsers, HTTP, and Extensible Markup Language (XML)—to access a mobile database containing application definitions and data. Changes that users make while disconnected are distributed across the network when they reconnect.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Mobile Agent, “Getting Started with PeopleSoft Mobile Agent”

PeopleSoft MultiChannel Framework

PeopleSoft MultiChannel Framework delivers an integrated infrastructure to support multiple interaction channels for call center agents or other PeopleSoft users who must respond to incoming requests and notifications. The PeopleSoft MultiChannel Framework can be used from any PeopleSoft application.

A “channel” refers to the technology used to communicate during an interaction. PeopleSoft MultiChannel Framework supports the following channels:

- Voice (telephone).
- Web collaboration (chat).
- Email.
- Instant messaging.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft MultiChannel Framework, “Getting Started with PeopleSoft MultiChannel Framework”

PeopleSoft Performance Monitor

PeopleSoft Performance Monitor is a built-in diagnostic utility that enables system administrators to monitor performance of the main elements of your PeopleSoft system, such as web servers, application servers, and PeopleSoft Process Scheduler servers. You can monitor real-time performance as well as analyze historical data.

PeopleSoft Performance Monitor reports:

- Durations and key metrics of PeopleTools runtime execution, such as SQL statements and PeopleCode events.
- Key resource metrics, such as host CPU utilization and web server execution threads.

The metrics provided by PeopleSoft Performance Monitor enable system administrators to:

- Monitor real-time system performance.
- Identify poorly performing tiers, hosts, domains, servers, application code, and SQL in a PeopleSoft environment.
- Identify performance trends.
- Address and isolate performance bottlenecks.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Performance Monitor, “Getting Started with Performance Monitor”

PeopleSoft Process Scheduler

PeopleSoft Process Scheduler enables you to schedule and manage the execution of PeopleSoft batch processes. With PeopleSoft Process Scheduler you can:

- Schedule recurring processes to run on any date or time interval that your business requires, such as monthly, daily, hourly, or by the minute.
- Create jobs (groups of processes) that run several processes and conditionally schedule successive processes based on the status of a previous process in the job.

The primary role of Process Scheduler is to support the PeopleSoft application environment. With a PeopleSoft application, you might want to run certain processes (batch programs, reports, and so on) behind the scenes of the online system. Running reports, posting journal entries, loading benefit enrollment forms, and calculating payroll deductions are all examples of processes that you might want to perform offline.

Using PeopleSoft Process Scheduler can streamline your business practices by enabling you to take advantage of the distributed computing environment at your site, whereby you can schedule performance-sensitive jobs to run on a powerful server while the online system is still available to end users.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler, “Getting Started With PeopleSoft Process Scheduler”

PeopleSoft Diagnostic Framework

The PeopleSoft Diagnostic Framework is designed to facilitate the diagnosis and resolutions of incidents by PeopleSoft Global Support Center (GSC). It enables the critical system data to be packaged and sent to PeopleSoft Global Support Center without the need for IT intervention. This reduces administration overhead and can help PeopleSoft solve customer issues more quickly.

The diagnostic framework retrieves diagnostic information from a PeopleSoft database enabling you to:

- Discover problematic application-related data.
- Explore setup details.
- Present information to PeopleSoft support in a common format.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Data Management, "Getting Started with Data Management"

Change Assistant

The Change Assistant is an administration tool designed to automate the process of installing software patches, updates, and upgrades, reducing the time required for application updates. With Change Assistant, administrators can manage changes to their PeopleSoft Enterprise applications—from the smallest patch to a major update. PeopleSoft Change Assistant uses Customer Connection to retrieve only those patches that are needed for a specific PeopleSoft environment, thereby improving administrator productivity. Change Assistant uses the Environment Management Framework to store, retrieve and distribute system configurations across PeopleSoft implementations.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Software Updates, "Getting Started with Software Updates"

PeopleSoft Upgrade Assistant

PeopleSoft Upgrade Assistant is a template-based tool that includes upgrade steps. With this tool, you can run each required upgrade step by launching programs and processes, performing the necessary navigation, and checking for errors. The PeopleSoft Upgrade Assistant improves the quality of your upgrade, reduces errors, and shortens time to upgrade, ultimately lowering your total cost of ownership.

PeopleSoft Upgrade Assistant helps to assemble and organize all of the steps necessary to complete your upgrade. It can run some of the steps automatically, while others may require you to make changes manually. To run an upgrade using the PeopleSoft Upgrade Assistant, you must have an upgrade template and an upgrade job.

For supported upgrades, PeopleSoft provides predefined upgrade templates on Customer Connection. These templates comprise all of the steps necessary to complete an upgrade for a supported upgrade path. To run a process using PeopleSoft Upgrade Assistant, you use an upgrade job that is associated with an upgrade template. This upgrade job provides a set of filtered steps that are specific to your upgrade and relevant only to the release, platform, and products you are using.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Upgrade Assistant

PeopleSoft Data Mover

PeopleSoft Data Mover enables you to perform the following tasks:

- Transfer application data between PeopleSoft databases.
- Move PeopleSoft databases across operating systems and database platforms.
- Execute Structured Query Language (SQL) statements against any PeopleSoft database, regardless of the underlying operating system or database platform.
- Create, edit, and run scripts.

PeopleSoft Data Mover provides a development interface that enables you to create scripts using specific commands. You can run scripts from the development environment or from a command line. You use PeopleSoft Data Mover during the PeopleSoft installation, but it is also used for a variety of maintenance tasks.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Data Management, “Getting Started with Data Management”

Data Integrity Tools

PeopleSoft provides several tools to ensure the integrity of the data that is stored in the PeopleSoft system. Typically, you use these tools during installations, upgrades, and system configuration to verify the PeopleSoft system and compare it to the underlying SQL objects to ensure synchronization. Data Integrity tools include:

SYSAUDIT The System Audit (SYSAUDIT) identifies orphaned PeopleSoft objects and other inconsistencies within the system. An example of an orphaned object is a module of PeopleCode that exists, but which does not relate to any other objects in the system.

DDDAUDIT The Database Audit Report (DDDAUDIT) finds inconsistencies between PeopleTools record and index definitions and the database objects. This audit focuses on tables, views, and indexes.

SQL Alter The PeopleSoft Application Designer SQL Alter function brings SQL tables into accordance with PeopleTools record definitions.

See Also

Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration, “Getting Started with System and Server Administration”

Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration, “Using PeopleTools Utilities,” Using Audit Utilities

PeopleTools Utilities

As you work with the PeopleSoft system, you find that there are some administrative tasks that you only need to perform occasionally. The PeopleTools Utilities provides a set of tools for accomplishing some of these more infrequent tasks. Examples of tasks that require the use of the PeopleTools Utilities are:

- Setting your base language.
- Specifying a specific style sheet.
- Setting PeopleBook F1 Help locations.
- Editing messages in the message catalog.
- Entering values in the URL catalog.
- Setting PeopleCode and SQL trace options.

See Also

Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration, “Getting Started with System and Server Administration”

Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration, “Using PeopleTools Utilities”

PeopleSoft Configuration Manager

PeopleSoft Configuration Manager simplifies Windows workstation administration by enabling you to adjust PeopleSoft registry settings from one central location. Note that the Configuration Manager applies only to workstations being used by developers and system administrators who need access to the development environment. For example, developers who need to access PeopleSoft Application Designer to view and modify pages, records, components and so on need the appropriate options set in the PeopleSoft Configuration Manager.

PeopleSoft Configuration Manager contains a variety of controls that let you set up workstations for connecting to the database, connecting to application servers, or setting trace options. You can set up one development workstation to reflect the environment at your site, and then export the configuration file, which can be shared among all the development workstations at your site.

See Also

Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration, “Getting Started with System and Server Administration”

Enterprise PeopleTools 8.48 PeopleBook: System and Server Administration, “Using PeopleSoft Configuration Manager”

CHAPTER 4

Understanding Analytic Tools

This chapter contains overview information and discusses:

- XML Publisher for PeopleSoft.
- PeopleSoft Analytic Calculation Engine.
- PeopleSoft Query.
- PeopleSoft Tree Manager.
- PS/nVision.
- PeopleSoft Cube Manager.
- Crystal Reports for PeopleSoft.
- SQR for PeopleSoft.

Understanding Analytic Tools

PeopleSoft applications offer a wide range of query and reporting possibilities. These include the standard reports we deliver, as well as the reporting tools you can use to customize reports or create new ones. Enterprise PeopleTools reporting and decision support capabilities enable you to perform numerous tasks, such as create queries, create reports, and create online analytical processing (OLAP) cubes.

Your database contains a wealth of information that you've carefully entered, maintained, and secured for the ultimate purpose of generating timely, meaningful, presentation-quality reports as well as provide online analytical options. Our reporting and decision support capabilities enable you to access the data you need and present it in the form that is most useful for the decision makers in your organization.

XML Publisher for PeopleSoft Enterprise

Oracle provides a standalone Java-based reporting technology named XML Publisher (XMLP) that streamlines report and form generation. Enterprise PeopleTools is leveraging this technology with XML Publisher for PeopleSoft Enterprise, which provides native XMLP technology for PeopleSoft Query as well as any PeopleSoft application.

XMLP separates the data extraction process from the report layout. XMLP provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, you can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) and in many languages.

XML Publisher for PeopleSoft provides an environment for the power business user to manage templates, data sources, reports, translations, content components, and to produce reports according to a user-defined criteria. XML Publisher for PeopleSoft also can burst reports, such as annual wage statements for employees, electronically.

See Also

Enterprise PeopleTools 8.48 PeopleBook: XML Publisher for PeopleSoft Enterprise, “Getting Started with XML Publisher”

PeopleSoft Analytic Calculation Engine

PeopleSoft Analytic Calculation Engine combines a calculation engine plus several Enterprise PeopleTools features that enable application developers to define both the calculation rules and the display of calculated data within PeopleSoft applications. The calculated data is used for the purposes of multidimensional reporting, data editing, and analysis.

Application developers create *analytic models* which define the rules used to calculate data. To display the data to end users, application developers create PeopleSoft pages that include a specific type of grid—an analytic grid.

End users can view, analyze, and even make changes to analytic model data. When end users save any changes made to the analytic model, PeopleSoft Analytic Calculation Engine recalculates the data and sends the calculated data to the application database.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Analytic Calculation Engine, “Getting Started with PeopleSoft Analytic Calculation Engine”

PeopleSoft Query

PeopleSoft Query provides a user friendly, intuitive way to quickly generate ad-hoc and scheduled reports from any data stored in your PeopleSoft tables. Users can design and run queries using any supported web browser. Designers of queries do not need to write or be familiar with Standard Query Language (SQL). In addition, users who are less technically savvy can run predefined queries. Queries can be as simple or as complex as necessary. You can run queries from a web browser and then download the data as a Microsoft Excel spreadsheet.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Query, “Getting Started with PeopleSoft Query”

PeopleSoft Tree Manager

The PeopleSoft Tree Manager enables you to arrange data into a hierarchal format that can then be used in other areas, such as report generators, OLAP, chartfield field combination editing in PeopleCode, and security. Casual users have a familiar and easy-to-understand interface, as well as all of the functionality required for creating and maintaining trees.

PeopleSoft Tree Manager enables you to:

- Present summarization rules visually.
- Give the system a single place to look for summarization rules.
- Provide simpler selection and updating of values in reports, ledgers, or security profiles.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Tree Manager, "Getting Started with PeopleSoft Tree Manager"

PS/nVision

PS/nVision is a sophisticated tool for creating business reports in Microsoft Excel. Working within Microsoft Excel, you create a report layout that defines both the data to retrieve and the format of the report. Using PS/nVision, you can create report layouts that summarize information from your PeopleSoft database and use the DrillDown feature to expose the supporting details. You can share report layouts across multiple business units and time periods, creating reports that "roll" from unit to unit or period to period without changing the data-retrieval criteria.

PS/nVision works within spreadsheets. You access PS/nVision features from a special PS/nVision menu within Microsoft Excel to create templates (layouts) for data retrieval. Once you create a report layout (XNV file), you can use it to automatically format data. PS/nVision selects data from your PeopleSoft database using ledgers, trees, and queries.

PS/nVision enables you to extend the rich querying features that PeopleSoft Query offers. For example:

- With PeopleSoft Query you can generate tabular reports without formatting, and with PS/nVision you can deliver well formatted, easy-to-read reports.
- PS/nVision enables you to produce matrix reports in which you can use multiple ledgers or queries to define the reports.
- PS/nVision provides dynamic features, such as bursting and nPlosion, unavailable in static query results.
- PS/nVision offers built-in logic to detect detailed ledger metadata in multiple financial environments.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PS/nVision, "Getting Started with PS/nVision"

PeopleSoft Cube Manager

PeopleSoft Cube Manager provides a framework for modeling your OLAP cubes through its design tools. This framework supports the definition of all dimensions, attributes, measures, and cubes that you might want to build from PeopleSoft sources. All of these definitions can be shared across cubes to ensure that OLAP results are consistent across your enterprise.

What you design in PeopleSoft Cube Manager can be used across all target OLAP platforms supported by PeopleSoft. PeopleSoft Cube Manager provides all these benefits while achieving a nearly platform-independent solution. The majority of a cube's design attributes can be applied to Hyperion Essbase, Cognos PowerPlay, or a generic Star Schema. PeopleSoft Cube Manager also enables you to leverage your existing PeopleSoft metadata to define the cube structure.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Cube Manager, "Getting Started with PeopleSoft Cube Manager"

Crystal Reports for PeopleSoft

Crystal Reports enable you to generate clear and easy-to-read reports presenting data from your PeopleSoft applications. You can generate standard reports already created and saved in Crystal, or you can create your own custom reports.

Generating formatted output in Crystal involves two steps. First you create and save queries in PeopleSoft Query, and then you create report definitions in Crystal to format the fields (columns) used in the queries. You can generate reports in a variety of different formats, including text files, Microsoft Word documents, and spreadsheets.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Crystal Reports for PeopleSoft, "Getting Started With Crystal Reports for PeopleSoft Enterprise"

SQR for PeopleSoft

SQR for PeopleSoft is a powerful enterprise reporting system that provides direct access to multiple data sources. The SQR for PeopleSoft tools make it possible to create clear, professional reports from complex arrays of information systems.

SQR is a specialized programming language for accessing, manipulating, and reporting enterprise data. With SQR, you build complex procedures that perform multiple calls to multiple data sources and implement nested, hierarchical, or object-oriented program logic.

The high-level programming capabilities that SQR provides enable you to add procedural logic and control to data source calls. You can use SQR to write other types of applications, such as those for database manipulation and maintenance, table loading and unloading, and interactive querying and displaying.

See Also

Enterprise PeopleTools 8.48 PeopleBook: SQR for PeopleSoft Developers, "Getting Started with SQR for PeopleSoft"

CHAPTER 5

Understanding Integration Tools

This chapter provides overview information and discusses:

- PeopleSoft Integration Broker.
- PeopleSoft Component Interfaces.
- File Interfaces.
- Supported Integration Tools.
- Integration testing tools.
- Enterprise integration utilities.

Understanding Integration Tools

IT departments are challenged by:

- Multiple types of disparate systems.
- Lack of communication standards.
- Islands of automation (business applications) operating unaware of each other.

These conditions can lead to:

- Duplicate data entry.
- Unavailable or inaccurate information.
- Inefficient operations.

The Enterprise PeopleTools integration tools enable you to share information seamlessly with other PeopleSoft applications, third party ERP vendors, legacy applications, and your business partners.

PeopleSoft Integration Broker

PeopleSoft Integration Broker provides service oriented architecture (SOA) technology that facilitates the transmission of synchronous and asynchronous service operations. Use the PeopleSoft Integration Broker to:

- Perform asynchronous and synchronous messaging among internal systems and third-party systems.
- Expose PeopleSoft business logic as web services to PeopleSoft and third-party systems.
- Consume and invoke web services from third-party and PeopleSoft systems.

The two major components of PeopleSoft Integration Broker are the integration gateway and the integration engine. The integration gateway is a platform that manages the receipt and delivery of service operations passed among systems through PeopleSoft Integration Broker. The integration engine is an application server process that routes service operations to and from PeopleSoft applications as well as transforms the structure of service operations and translates data according to specifications that you define.

PeopleSoft Integration Broker offers the following benefits:

- PeopleSoft Integration Broker is provided with PeopleTools so you don't need to purchase additional, third party integration tools.
- Consistent infrastructure using PeopleSoft Application Servers and web servers.
- Ability to reuse development staff skills.
- "Out-of-the-box" integration to all PeopleSoft applications.
- Supports all major integration methods, such as web services.

See Also

Enterprise PeopleTools 8.48 PeopleBook: Integration Broker, "Getting Started with PeopleSoft Integration Broker"

PeopleSoft Component Interfaces

Component interfaces provide a way to access the PeopleSoft database without using a graphical user interface. A component interface encapsulates a PeopleSoft component, which is a logical grouping of PeopleSoft pages representing a complete business transaction. You create component interfaces using PeopleSoft Application Designer.

A PeopleSoft component provides all of the business rules, through PeopleCode and edits, for interacting with the PeopleSoft database. Components are based on pages and are presented to the user to view and update with a browser. The component interface takes this same functionality and exposes it to third-party systems without using a graphical user interface.

Component interfaces:

- Enforce all of the business rules defined on the component.
- Provide synchronous access to the PeopleSoft database.
- Provide access to PeopleSoft components through APIs.

Component interfaces expose the rich functionality delivered in the hundreds of components within PeopleSoft products. A component is an atomic transaction that implements a business process or function. A component interface provides real-time synchronous access to the PeopleSoft business rules and data associated with a business component.

The interface is exposed via standard access methods: Java, C/C++, COM, SOA, and CORBA (through partnership). Component interfaces encapsulate PeopleSoft data and business processes, and they hide the details of the structure and implementation of the underlying page and data. The actual interface consists of a set of clearly defined properties and methods that follow an object-oriented programming model. External applications can access component data only by using the properties or methods specified in the component interface.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces, “Getting Started with PeopleSoft Component Interfaces”

File Interfaces

File-based integrations provide the ability to exchange files with third-party systems or legacy systems that do not support messaging. Files are exchanged using file layouts or PeopleSoft Application Engine programs. File layouts are used to graphically define where data is located in a file. The file definition layout is then accessible to the PeopleSoft Application Engine program to import or export the file.

The File class provides methods and properties for reading from and writing to external files. Most application interfaces to files require complex parsing of file data. Files that allow for this kind of complexity in a PeopleSoft application are based on a File interface.

A File Interface is a definition (or mapping) of a file to be processed. It identifies where data fields are located in the file. This powerful interface enables application developers to access data from a file as they would a message or a page buffer (scroll). There is no need to parse each file record into fields.

File interfaces are unique to a specific format and may only process that particular type of formatted file. The definition created in Application Designer retains a consistent look and feel regardless of format.

File layouts support the following file types:

- Fixed format sequential files.
- Comma delimited files.
- XML files.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer, “Getting Started with PeopleSoft Application Designer”

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Designer, “Constructing File Layouts and Performing Data Interchanges”

Supported Integration Tools

PeopleSoft supports these additional integration utilities:

- EDI Manager.
- Outgoing Forms API.
- Open Query ODBC Driver and API.

Electronic Data Interchange (EDI) is a standard means of exchanging data between companies so they can transact business electronically. For example, using EDI a company can submit an order to a vendor, and the vendor can acknowledge and fulfill the order without any paper changing hands or any contact between company representatives.

With PeopleSoft Application Designer, you can implement routings, which transfer data from one step in a business process to another. One type of routings is a forms routing. With a forms routing, the system takes data from a PeopleSoft page the user is working on, enters it onto a third-party form, and mails the completed form to designated users by means of the forms product's mail capabilities.

The PeopleSoft Open Query ODBC driver and API allow third-party reporting tools or applications to access PeopleSoft data in conformance with the PeopleSoft Query access architecture (the embedded SQL access intelligence provided by PeopleSoft Query).

See Also

Enterprise PeopleTools 8.48 PeopleBook: Supported Integration Technologies, "Getting Started with Supported Integration Technologies"

Integration Testing Tools

PeopleSoft provides these tools for testing your integration development:

- Send Master Utility.
- Simple Post Utility.
- Automated integration point testing.
- Transformation Test Utility.
- Handler Tester.
- Schema Tester.

Send Master Utility

The Send Master utility enables you to test PeopleSoft Integration Broker messaging interactions with PeopleSoft and third-party web servers, application servers, and integration gateways. It can test listening connector functionality, target connector functionality, connector introspection and transactions. Send Master enables you to post any data format, including the PeopleSoft Multipurpose Internet Mail Extensions (MIME) message format, to web and application servers over HTTP and HTTPS. You can also use Send Master to simultaneously test groups of different types of messages, as well as stress test your system.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Getting Started with PeopleSoft Integration Testing Utilities and Tools"

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Using the Send Master Utility"

Simple Post Utility

The Simple Post utility enables you to use shell scripts or a Java API to post XML messages from third-party systems to the integration gateway. The utility wraps the incoming messages in the PeopleSoft XML wrapper format and posts them to the HTTP listening connector. The Simple Post utility reads ASCII, UTF-8 and UTF-16 file formats for incoming messages and converts them to UTF-8 to send to the integration gateway.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Getting Started with PeopleSoft Integration Testing Utilities and Tools"

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Using the Simple Post Utility"

Automated Integration Point Testing

PeopleSoft provides a means for automated integration point testing. You can perform automated integration point testing as a means to unit test, perform cross-application business process testing, or regression test integration points. Automated integration point testing is suitable for testing integration points between PeopleSoft systems, PeopleSoft systems and third-party systems, and PeopleSoft systems and open interfaces. You can use automated integration point testing with the following PeopleSoft integration technologies:

- Messaging, including asynchronous and synchronous publishing and subscribing.
- Component interfaces.
- Flat files.
- Staging tables.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Getting Started with PeopleSoft Integration Testing Utilities and Tools"

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Using Automated Integration Point Testing"

Transformation Test Utility

PeopleSoft Integration Broker provides the Transformation Test utility, which you can use to test Application Engine transform programs without sending messages, and with minimal development effort.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Getting Started with PeopleSoft Integration Testing Utilities and Tools"

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Using the Transformation Test Utility"

Handler Tester

The Handler Tester allows you to test handlers defined for rowset-based and nonrowset-based service operations from within the PeopleSoft Pure Internet Architecture. You can test handlers without setting up a routing, without having pub/sub booted on your application server, and without impacting other developer activity on the system.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Getting Started with PeopleSoft Integration Testing Utilities and Tools"

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Using the Handler Tester"

Schema Tester

The Schema Tester Utility enables you to validate rowset-based and nonrowset-based messages against message schemas during development to determine if messages adhere to defined message schemas.

See Also

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Getting Started with PeopleSoft Integration Testing Utilities and Tools"

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Testing Utilities and Tools, "Using the Schema Tester Utility"

Enterprise Integration Utilities

In addition to the integration technology provided by Enterprise PeopleTools, there is a set of utilities shipped with your PeopleSoft applications that are also a part of the PeopleSoft integration solution.

Note. The documentation for these utilities is not shipped with the Enterprise PeopleTools documentation; it is shipped with your PeopleSoft application documentation and resides in the PeopleSoft Enterprise Components for <your application> PeopleBook.

These additional utilities include:

- Publish utility.
- Error Handling utility.
- Effective Date Publish utility.
- Flat File utility.
- XML Schema utility.

Publish Utility

The Publish utility automates the process of copying the contents of an entire table into a remote database or legacy system. Use the utility to synchronize data from an existing system when a new PeopleSoft system is installed. The data is chunked based on the maximum size set for a message. You can control the size, number, and frequency of these data messages by using a series of data publishing rules and:

- Whether to create header and trailer records.
- Where the data comes from.
- Whether to chunk the message.

- Which related languages to publish.

The publishing rules include pages for full table publishing rules, batch publishing rules, record mapping, languages, and batch programs.

Error Handling Utility

The Error Handling utility is a PeopleTools application that you use to view and correct messages that are received by the subscriber. You can also use this utility to correct data that is stored in staging tables.

PeopleSoft applications that receive flat file data from other systems through batch processes have built-in facilities to validate and correct data prior to updating the main application tables. Likewise, before updating core PeopleSoft application tables, the subscription process detects data errors in the messages that it receives. These error messages are stored in either message queues or staging tables.

In some cases, however, errors can't be sent back to the third party for correction (such as when data is in a flat file). In these cases, you must provide error processing on incoming data so that messages that contain information on business objects, such as items and vendors, can be corrected and reprocessed in the PeopleSoft system. The Error Handling utility enables you to achieve this task.

Effective Date Publish Utility

The Effective Date Publish utility enables you to design processes to update external systems that process only current data and don't use or recognize effective dating.

For example, for full data messages that are intended for vendors who do not handle effective dating, the Effective Date Publish utility enables you to publish only those rows that are currently active. Any future-dated rows are not published and written to the delay table instead.

Flat File Utility

The Flat File utility enables you to develop complementary processes to translate incoming files into messages or translate outbound messages into files. You use this utility when external systems send you flat files, when external systems only accept flat files sent to them.

The Flat File utility reads the data in an incoming flat file and copies the rowsets of the data file into a message. When the utility sends the message to the subscribers, the subscribing systems receive the message an initiate normal inbound data processing. This process works in reverse for outbound flat files.

XML Schema Utility

PeopleSoft Open Integration Framework enables near real-time messaging and transactions by using a format that is based on XML to convey information between diverse applications in a standard way. To take advantage of this standardization, you must obtain clear XML definitions (schemas) for each application message, component interface, or business interlink.

The XML Schema utility provides the following features:

- Output options for the XML Schema utility, document type definition (DTD), or BizTalk definition for all application messages.
- The ability to create an XML definition for a single object, for all of the objects, or for all of the objects by a specific owner.

- A single flat file for each XML definition that is written to your system's %TEMP directory (when you use the Microsoft Windows client) or the server's common access file directory (when you use PeopleSoft Internet Architecture).
- An application foundation for future standards of XML definitions.

CHAPTER 6

Viewing PeopleTools Within Implementation Phases

This chapter provides overview information related to using PeopleTools within a sample implementation framework.

Note. The implementation phases in this framework are intended to help you gain a better understanding of Enterprise PeopleTools regarding how and when they may be used. The implementation phases in no way imply strict dependencies between phases. Every implementation is unique.

Understanding the Phases of Implementation

Although few implementations follow exactly the phases of a system development life cycle (SDLC) or implementation plan, the following implementation phases are provided as a framework through which you can gain an understanding of how specific Enterprise PeopleTools are intended to be used. This framework should be viewed as a high-level educational guide rather than a strict, implementation model.

Note. Some PeopleTools may be used in multiple phases of an implementation.

Using PeopleTools within Implementation Phases

The following table describes the implementation phases and lists the tools and technologies that are likely to be used within the particular phases.

Phase	Description	Tools and Technologies Used
Installation	This phase covers the activities involved in installing the PeopleSoft CDs and setting up your demonstration PeopleSoft environment. A demonstration environment includes application servers, Process Scheduler servers, web servers, and a PeopleSoft database.	• Data Mover • Configuration Manager • Application Designer • PeopleTools Security • Data Integrity Tools (DDDAUDIT and SYSAUDIT)
Application Configuration	This phase covers the activities involved in configuring the PeopleSoft applications you have purchased to fit the business processes of your organization. This phase includes setting up security access, customizing pages, creating custom batch programs, and so on.	• PeopleTools Security • PeopleSoft Application Designer • Global Technology • PeopleCode • PeopleSoft Application Engine • PeopleSoft Setup Manager

Phase	Description	Tools and Technologies Used
System Configuration	This phase covers the activities involved in setting up and configuring the infrastructure that supports the deployment of your application configuration. For example, in this phase you would set up the servers, the security, and processes required to be in place for your end users to use the PeopleSoft system to complete business transactions with a browser or other device.	• Internet Technology (portal) • PeopleTools Security • PeopleSoft Application Server • PeopleSoft Process Scheduler • PeopleSoft MultiChannel Framework • PeopleSoft Setup Manager • PeopleSoft Mobile Agent • PeopleSoft Application Engine
Decision Support Configuration	This phase covers the activities involved with setting up the reporting and decision support systems that decision makers will use to gather business information. This includes developing predefined queries and reports, setting up a system to generate reports at scheduled times, set up access to OLAP cubes, and so on.	• PeopleSoft Process Scheduler • PeopleSoft Query • PeopleSoft Analytic Calculation Engine • PeopleSoft Tree Manager • Crystal Reports for PeopleSoft • PS/nVision • PeopleSoft Cube Manager • SQR for PeopleSoft PeopleCode
Business Process Integration	This phase covers the activities involved in setting up systems that enable your business processes to span multiple business areas, such as HR and Finance, within your organization. This phase includes setting up our XML-driven integration technology that enables disparate systems to exchange data seamlessly, and it also includes setting up PeopleSoft Workflow to enable multiple users within a business process to easily route data and notifications to each other.	• PeopleSoft Integration Broker • Workflow Technology • PeopleSoft Component Interfaces • PeopleSoft Application Designer • PeopleCode • PeopleSoft Application Engine
Maintenance	This phase covers the activities that are involved in maintaining your PeopleSoft system once you have rolled out the system to your end users. This phase includes monitoring system performance, upgrading to new releases, applying patches, and so on.	• PeopleSoft Performance Monitor • Diagnostic Framework • PeopleSoft Data Archive Manager • PeopleSoft Change Assistant • PeopleSoft Upgrade Assistant • PeopleTools Utilities

Glossary of PeopleSoft Enterprise 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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template

In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise 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 Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, 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 Enterprise 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 Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Enterprise 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 Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft Enterprise 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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

collection To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Enterprise 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 Enterprise. 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-plus contract line A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class.*

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also *population* and *cohort.*
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise 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 Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit.*

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Enterprise 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 Enterprise 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, and user interaction objects.
incentive rule	In PeopleSoft Enterprise 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 Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also *update access.*
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise 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 Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI — An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file — Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft Enterprise data and directory data.

learner group — In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components — In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment — In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping — You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section — In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section — In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable — In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS — Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise 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 Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine.*

match group In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Enterprise 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 SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft Enterprise 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 Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need
In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree
A tree that is based on a detail structure, but the detail values are not used.

pagelet
Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.

participant
In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object
Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner
A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle
In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise applications wherever PeopleCode can be executed.

PeopleCode event
See *event.*

PeopleSoft Pure Internet Architecture
The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement
In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context
In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest
A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio
In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

plan
In PeopleSoft Enterprise 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 Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population
In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort.*

portal registry
In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 appear with the product name and release number.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft 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 Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise 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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

reference data In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.

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 Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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 Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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 Enterprise application server, access a second PeopleSoft Enterprise 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 Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See *communication key.*
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise 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 Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.

system source The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).

When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).

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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Enterprise 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 Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise 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 Enterprise Projects.

trace usage
In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock
In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access
In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object
In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

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

VAT suspension — Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse — A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order — In PeopleSoft Enterprise 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 Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist — The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link — The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema — An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI — Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation — In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT — Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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