PEOPLESOFT ENTERPRISE

PeopleSoft Enterprise Supply Chain Portal Pack 9.0 PeopleBook

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About This PeopleBook Preface

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, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. 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.

PeopleSoft Enterprise Supply Chain Portal Pack Preface

This preface discusses related documentation.

Related Documentation

This PeopleBook provides information about the Oracle's PeopleSoft Enterprise Supply Chain Portal Pack pagelets. However, additional, essential information describing the applications that enable the PeopleSoft Supply Chain Portal Pack pagelets appears in the PeopleBooks specific to those applications.

Additional information about portals appears in the PeopleSoft Enterprise Portal PeopleBook as well as the current installation guides ("Portal Solutions Installation Guide" and "Portal Products Installation Guide") posted on the PeopleSoft Customer Connection website.

CHAPTER 1

Getting Started With the Supply Chain Portal Pack

This chapter discusses implementing PeopleSoft Enterprise Supply Chain Portal Pack.

PeopleSoft Supply Chain Portal Pack Business Processes

PeopleSoft Supply Chain Portal Pack provides data from PeopleSoft Order Management, PeopleSoft Promotions Management, and PeopleSoft Billing in pagelets. Employees and customers can view pertinent information when they log into the system.

PeopleSoft Supply Chain Portal Pack Implementation

PeopleSoft Supply Chain Portal Pack does not require table-loading implementation steps. In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Applications Fundamentals 9.0 PeopleBook*, with information about where to find the most current version of each.

See *PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook*, “PeopleSoft Enterprise Application Fundamentals PeopleBook Preface”.

CHAPTER 2

Introducing the PeopleSoft Supply Chain Portal Pack

This chapter provides an overview of the PeopleSoft Supply Chain Portal Pack and discusses the PeopleSoft Supply Chain Portal Pack pagelets.

Understanding the PeopleSoft Supply Chain Portal Pack

The PeopleSoft Supply Chain Portal Pack is a collection of portal pagelets for corporate intranet or extranet homepages that provides access to key data and transactions that are within the PeopleSoft Supply Chain Management applications for use in employee and customer portal registries.

When you install the PeopleSoft Supply Chain Portal Pack, users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft role-based security ensures that users can access only the pagelets that are appropriate to their roles.

You can configure the portal homepage with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When you see two object names for a pagelet, the first one refers to the narrow version.

Some pagelets support personalization; the Customize button in the pagelet title bar alerts you to this capability. Click the button to access the personalization page.

You can also design pagelets when the installation includes PeopleSoft Enterprise Portal.

See Also

PeopleSoft Enterprise Application Fundamentals 9.0 PeopleBook, “PeopleSoft Enterprise Application Fundamentals PeopleBook Preface”

Audience

The PeopleSoft Supply Chain Portal Pack pagelets are targeted for specific functional roles, which generally fit into two audiences (mirroring the different portal registries):

- Employee.
- Customer.

Pagelet Security

Similar to page access, you control pagelet security at the component level by associating it with a permission list (which is then associated with a role); each pagelet has its own component to enable more granular access. You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system, or object, name.

PeopleSoft groups pagelets into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before users can access them, or use the permission list definitions that PeopleSoft delivers in the sample data. We deliver sample data security objects (roles and permission lists) that you can use as an example of how to set up pagelet access.

The sample roles that include access to PeopleSoft Supply Chain Portal Pack pagelets are:

Employee (Internal)

Buyer.

Customer service manager.

Customer service representative.

Employee.

Purchasing manager.

Salesperson.

Warehouse manager.

Warehouse personnel.

Customer (External)

Broker.

Customer.

Note. We provide a breakdown of pagelets by functional role in the beginning of each audience-oriented chapter.

See Also

Chapter 3, "Employee-Facing Supply Chain Management Pagelets," page 15

Chapter 4, "Customer-Facing Supply Chain Management Pagelets," page 37

PeopleSoft Enterprise Portal 9 PeopleBook

PeopleSoft Supply Chain Portal Pack Pagelets

The following table lists all of the pagelets that make up the PeopleSoft Supply Chain Portal Pack, and identifies:

- The audience for the pagelet: employees, or customers.
- The functional role of the person who uses the pagelet.

- The pagelet's enabling application.

  (The enabling application provides the data that appears in the pagelet.)

Note. When combined with employee in the audience column, customer refers only to a broker user, an external customer who conducts business on behalf of other customers, and not to an individual consumer.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Availability (CDT_AVAIL_ PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	PeopleSoft Order Management.
Buying Agreements (CDT_ SCONSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays buying agreements. Employees can navigate into buying agreement details.	PeopleSoft Order Management.
Current Product Summary (CDT_PROD_ SUM_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays information about the selected product, including the description. Employees can navigate to see detailed product information, view the list prices by inventory business unit, and check price and availability.	PeopleSoft Order Management.
Customer Notes (CDT_ CUSTNOTE_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays notes that are assigned to a customer.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Customer Promotions Calendar (TD_NATIONAL_PGLT, TD_NATIONAL_PGLTW)	Broker, Salesperson.	Employee	Lists customer promotions and promotion details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, customer ID, customer name, and dates). **Note.** In the three-column format, the description and customer name columns don't appear on the pagelet.	PeopleSoft Promotions Management.
Customer Search (CDT_CUST_SRCH_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Enables employees to search for existing customers to populate the additional pagelets with customer data.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft Billing, or PeopleSoft Receivables.
Discretionary Funding Status (TD_MY_CHECKBOOK)	Broker, Salesperson.	Employee	Displays available discretionary fund total amounts (from top down funds and accrual funds) for which a user is authorized for a given period, as well as the amounts that are committed, planned, spent, and returned against all discretionary funds. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Discretionary Funding Status — Details by Fund pagelet (TD_DISC_ FUND_STAT)	Broker, Salesperson.	Employee	Displays available discretionary fund details (from top down funds and accrual funds) for each fund for which a user is authorized for a given period, as well as the amounts that are committed, planned, spent, and returned against these discretionary funds. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.
Discretionary Funding Status — Fund Details by Customer and Promotion pagelet (TD_FUND_ STAT_DTLS)	Broker, Salesperson.	Employee	Displays available discretionary fund total amounts by customer and promotion for a specific fund for which a user is authorized, as well as the amounts that are committed, planned, spent, and returned against this discretionary fund. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.
Expiring Buying Agreements (CDT_SCONDT_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	PeopleSoft Order Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Invoice Summary (CDT_INVCSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays summarized invoice information. Employees can navigate into invoice details.	PeopleSoft Billing.
Last 10 Product Purchases (CDT_RECPROD_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays the last ten purchases for a customer. Employees can navigate to see order and product information.	PeopleSoft Order Management.
Last 10 Shipments (CDT_RECSHIP_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays the last ten shipments for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management.
Most Recent Bills (WC_BILL_LIST_SS)	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click View All Bills to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Most Recent Consolidated Bills (WC_BILL_LIST_C_SS)	Broker, Customer.	Employee, Customer	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	PeopleSoft eBill Payment, PeopleSoft Billing.
My Promotions (MY_PROMO_PGLT, MY PROMO_PGLTW)	Broker, Salesperson.	Employee	Displays all customer promotions and national allowances for the user with promotion details (promotion description, status, customer name, and first and last order dates). **Note.** In the three-column format, first order and last order date columns don't appear and the customer ID displays on the pagelet instead of the customer name.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Nat'l Allow & Promo Calendar (National Allowance and Promotional Calendar) (TD_NATIONAL_ PGLT, TD_ NATIONAL_ PGLTW)	Broker, Salesperson.	Employee	Lists national allowance and customer promotion details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, customer ID, customer name and dates). **Note.** In the three-column format, the description and customer name columns don't appear on the pagelet.	PeopleSoft Promotions Management.
National Allowances Calendar (TD_NATIONAL_ PGLT, TD_ NATIONAL_ PGLTW)	Broker, Salesperson.	Employee	Lists national allowance details for the user in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion code, promotion description, and dates). **Note.** In the three-column format, the promotion description column does not appear on the pagelet.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Planned Promotional Funds (TD_PLAN_ PROMO_FUND)	Broker, Salesperson.	Employee	Displays the promotion description, customer ID, promotion costs (fixed and variable), net incremental sales, and return on investment for all promotions the user is authorized to that are not canceled, closed, or customer approved. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.
Product Alternates (CDT_PALT_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays alternates for a product. Employees can navigate to view product information.	PeopleSoft Order Management.
Product Notes (CDT_ PRODNOTE_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays notes that are assigned to a product.	PeopleSoft Order Management.
Product Sales (TD_PRODUCT_ SALES, TD_ PRODUCT_ SALESW)	Broker, Salesperson, Sales Manager, Customer Service Representative.	Employee	Displays in graphic format the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products that the user is authorized for on the PeopleSoft Promotions Management active product tree.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Product Search (CDT_PROD_ SRCH_PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Enables employees to search for existing products to populate the additional pagelets with product data.	PeopleSoft Order Management.
Product Specifications (CDT_PSPECS_ PGL)	Customer Service Representative, Customer Service Manager, Broker, Salesperson.	Employee, Customer	Displays product specifications for a product.	PeopleSoft Order Management.
Recent Conversations (CDT_ CONVSUM_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add new conversations.	Requires at least one of the following products: PeopleSoft Order Management, PeopleSoft eBill Payment, PeopleSoft Billing, or PeopleSoft Receivables.
Recent Orders (CDT_ORDSUM)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent orders. Employees can navigate into order details.	PeopleSoft Order Management.
Recent Quotes (CDT_ QUOTESUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent quotes. Employees can navigate into quotation details.	PeopleSoft Order Management.
Recent RMAs (CDT_RMASUM_ PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays recent quotes. Employees can navigate into RMA details.	PeopleSoft Order Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Review Promotions (REVIEW_ PROMO_PGLT, REVIEW PROMO_PGLTW)	Broker, Salesperson.	Employee	Displays all customer promotions and national allowances for the user with promotion details (description, status, customer ID, entered on date, contact ID, calendar code and promotion period). **Note.** In the three-column format, contact ID, calendar code and promotion period columns don't appear on the pagelet.	PeopleSoft Promotions Management.
Sales History by Customer (TD_SALES_ HIST)	Broker, Salesperson, Sales Manager, Customer Service Representative.	Employee	Displays customers with the expected promotional sales amount from all promotions for the user, the actual sales amount for the current period, and the actual sales amount from the same period last year. **Note.** This pagelet is only available in the two column format.	PeopleSoft Promotions Management.

Pagelet Name	Roles	Audience	Usage	Enabling Application(s)
Schedules Past Ship Date (CDT_PASTSHIP_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays schedules past the ship date for a customer. Employees can navigate to see order and shipping information.	PeopleSoft Order Management.
Trade Promotions (CDT_PROMO_PGL)	Customer Service Representative, Customer Service Manager, Salesperson.	Employee	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	PeopleSoft Promotions Management.

CHAPTER 3

Employee-Facing Supply Chain Management Pagelets

The PeopleSoft Supply Chain Portal Pack includes pagelets for use in the employee portal registry. This chapter discusses how to:

- Identify pagelets by functional role.
- Personalize PeopleSoft Promotions Management pagelets.
- View promotions.
- View promotion fund information.
- View product sales.
- View customer information.
- View product information.

Note. Pagelets are documented in a Pagelets Used to <Task Description> table when they do not require extensive discussion.

Identifying Pagelets by Functional Role

PeopleSoft provides these employee-oriented role groupings as examples of how to organize pagelet access by function.

This section discusses:

- Broker pagelets.
- Customer Service Manager and Customer Service Representative (CSR) pagelets.
- Salesperson pagelets.
- Sales Manager pagelets.

Note. Brokers also use many of the customer service-oriented pagelets. Additional broker-oriented pagelets are discussed in the "Customer-Facing Supply Chain Management Pagelets" chapter.

See Also

Chapter 2, "Introducing the PeopleSoft Supply Chain Portal Pack," Pagelet Security, page 4

Chapter 4, "Customer-Facing Supply Chain Management Pagelets," Broker Pagelets, page 37

Broker Pagelets

These pagelets enable brokers to view key information about customers and products and effectively manage promotions:

- Availability.
- Current Product Summary.
- Customer Promotions Calendar.
- Discretionary Funding Status.
- Discretionary Funding Status — Details by Fund.
- Discretionary Funding Status — Fund Details by Customer and Promotion.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar.
- National Allowance Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Review Promotions.
- Sales History by Customer.

Customer Service Manager and Customer CSR Pagelets

These pagelets enable customer service managers and representatives to view key information about customers and products and effectively manage promotions:

- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Search.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.

- Last 10 Shipments.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Recent Orders.
- Recent Quotes.
- Recent RMAs.
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Salesperson Pagelets

These pagelets enable salespersons to view key information about customers and products and effectively manage promotions:

- Availability.
- Buying Agreements.
- Current Product Summary.
- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Promotions Calendar.
- Customer Search.
- Discretionary Funding Status.
- Discretionary Funding Status — Details by Fund.
- Discretionary Funding Status — Fund Details by Customer and Promotion.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Most Recent Bills.
- Most Recent Consolidated Bills.

- My Promotions.
- Nat’l Allow & Promo Calendar.
- National Allowances Calendar.
- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Recent Orders.
- Recent Quotes.
- Recent RMAs.
- Review Promotions.
- Sales History by Customer.
- Schedules Past Ship Date.
- Trade Promotions.

Sales Manager Pagelets

These pagelets enable sales managers to effectively manage promotions:

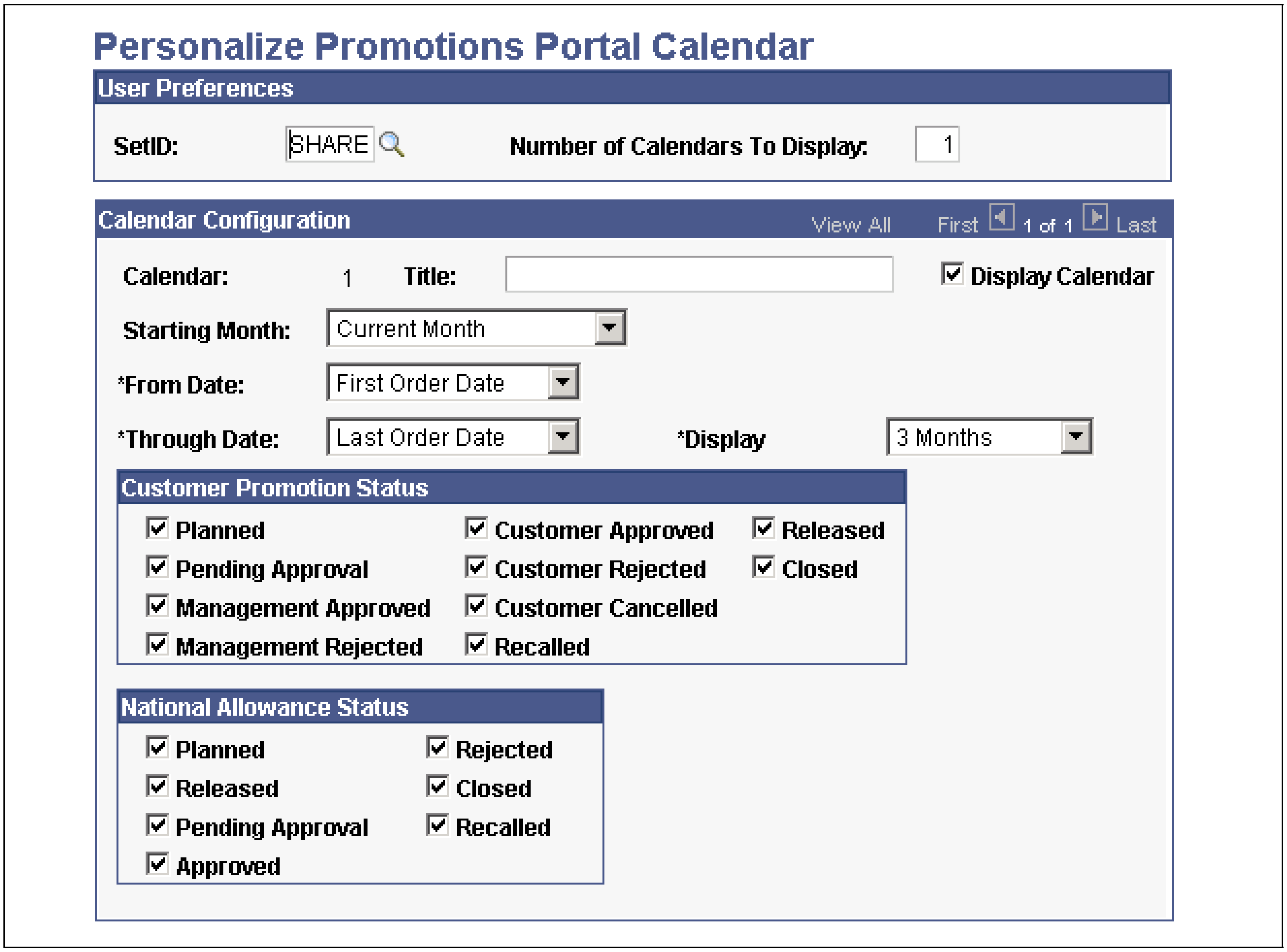
- Product Sales.
- Sales History by Customer.

Personalizing PeopleSoft Promotions Management Pagelets

This section discusses how to personalize promotion calendar options.

Personalizing Promotion Calendar Options

Access the Personalize Promotions Portal Calendar page from the Customer Promotions Calendar pagelet, the National Allowance Calendar pagelet, or the Nat’l Allow and Promo Calendar pagelet.



Personalize Promotions Portal Calendar pagelet

Employees can decide what months they want to display on the calendar pagelets and what customer promotion and national allowance statuses they want to include in the calendar data.

This page is dynamic. The status fields that appear are different depending on the calendar pagelet from which you access this page.

Number of Calendars To Display

Select the number of calendars to display on the pagelet. This option allows you to display multiple calendars with different customization options.

Display Calendar

Select to display the calendar on the pagelet. If this option is not selected, the promotion and national allowance details are displayed without the calendar.

Starting Month

Select the starting month for the calendar pagelet. Options are:

Current Minus x Months: The system displays data on the calendar beginning with the current month minus the number of months that is entered in the x Months field.

Current Month (default): The system displays data on the calendar beginning with the current month.

Current Plus x Months: The system displays data on the calendar beginning with the current month plus the number of months that is entered in the x Months field.

User Defined: Use this option if you want the system to display the calendar by using a user-defined option. This option requires custom coding to enable the calendar to work with the user-defined option.

From Date

Select the promotion date that the system uses to determine if a promotion appears on the calendar. Options are: *First Arrival Date, First Order Date,* or *First Ship Date.*

Through Date

Select the promotion date that the system uses to determine if a promotion appears on the calendar. Options are: *Last Arrival Date, Last Order Date,* or *Last Ship Date.*

Display

Select the number of months, one to six, to display for this calendar.

Customer Promotion Status

Select the customer promotion statuses for which you want to view data on the calendar.

This group box is available only when customizing the Customer Promotions Calendar pagelet or the Nat'l Allow & Promo Calendars pagelet.

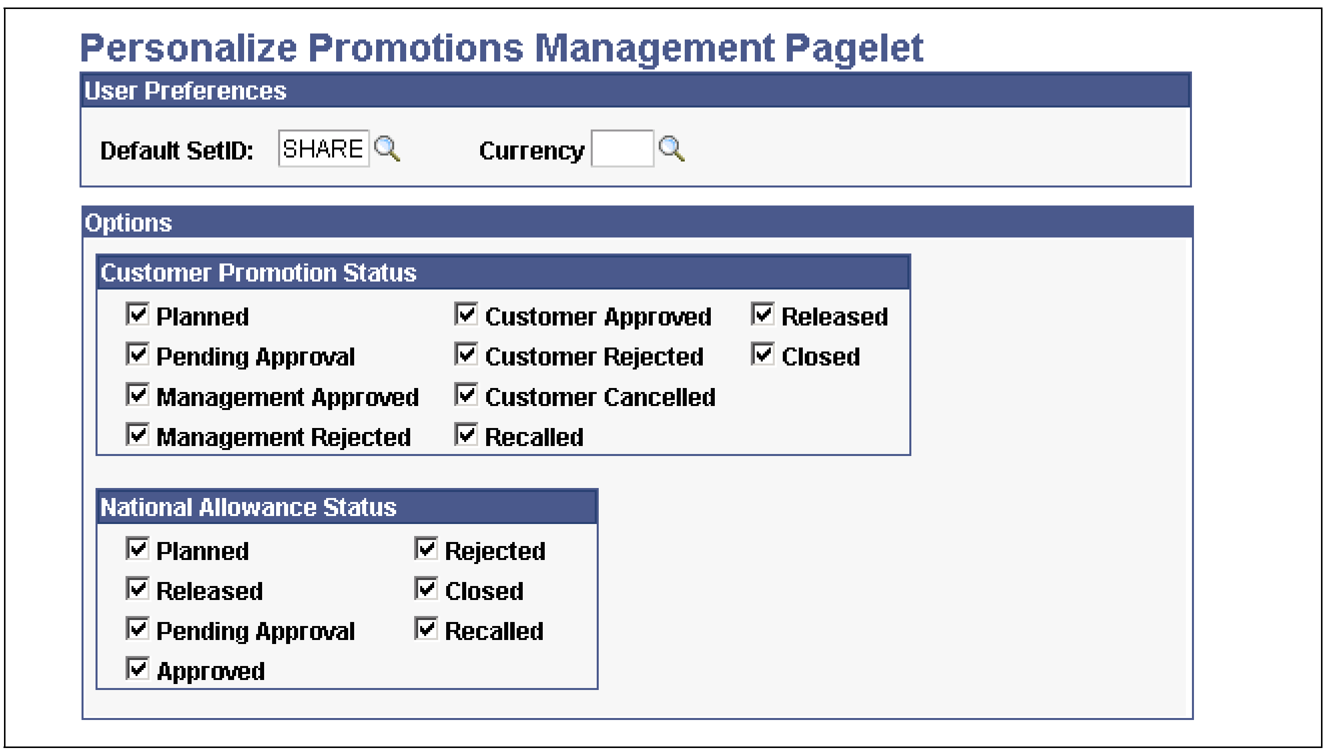
National Allowance Status

Select the national allowance statuses for which you want to view data on the calendar.

This group box is available only when customizing the National Allowances Calendar pagelet or the Nat'l Allow & Promo Calendars pagelet.

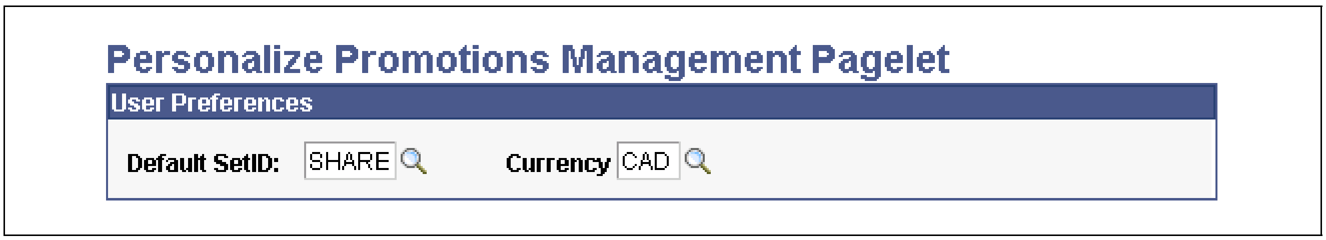
Personalizing Promotions Portal Options

Access the Personalize Promotions Management pagelet from the Review Promotions pagelet, the My Promotions pagelet, the Sales History by Customer pagelet, the Product Sales pagelet, the Discretionary Funding Status pagelet, or the Planned Promotional Funds pagelet.



Personalize Promotions Management pagelet when accessed from the Review Promotions or My Promotions pagelets.

Personalize Promotions Management Pagelet when accessed from the Sales History by Customer or Product Sales pagelet.



Personalize Promotions Management Pagelet when accessed from the Discretionary Funding Status or Planned Promotional Funds pagelets.

Users can select the currency and default setID in which to display the information on the pagelet.

Customer Promotion Status	Select the customer promotion statuses for which you want to view data on the My Promotions or Review Promotions pagelet.
National Allowance Status	Select the national allowance statuses for which you want to view data on the My Promotions or Review Promotions pagelet.
From Sales Calendar and **Through Sales Calendar**	Select a sales calendar from which and through which to display data on the Product Sales or Sales History by Customer pagelet.
Period	Select a period of time within the selected from and through sales calendar for which to display data on the Product Sales or Sales History by Customer pagelet.

Note. The default setID is used to determine the currency in which to display the data if one is not specified on this page. The default setID does not determine what promotional data is displayed because the user can view data from all setIDs for which they are authorized.

Viewing Promotions

This section discusses:

- My Promotions pagelet.
- Review Promotions pagelet.
- Customer Promotions Calendar.

- National Allowances Calendar.
- Nat’l Allow & Promo Calendar.

Pagelets Used to View Promotions

Use the following pagelets to view promotional information.

Pagelets	Usage	For More Information
Customer Promotions Calendar.	Lists customer promotions and promotion details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, customer ID, customer name, first order, and last order). **Note.** In the three-column format, the description and customer name columns don’t appear on the pagelet.	See *PeopleSoft Enterprise Promotions Management 9.0 PeopleBook*, “Defining Promotions”.
My Promotions	Displays all customer promotions and national allowances for the user with promotion details as specified on the Personalize Promotions Management page (description, status, customer name, first order date, and last order date). **Note.** In the three-column format, first order and last order date columns don’t appear and the customer ID displays on the pagelet instead of the customer name.	See *PeopleSoft Enterprise Promotions Management 9.0 PeopleBook*, “Defining Promotions”.
National Allowances Calendar	Lists national allowance details in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, first order and last order dates). **Note.** In the three-column format, the description column doesn’t appear on the pagelet.	See *PeopleSoft Enterprise Promotions Management 9.0 PeopleBook*, “Defining Promotions”.

Pagelets	Usage	For More Information
Nat’l Allow & Promo Calendar	Lists national allowances and customer promotion details, in a calendar format as specified on the Personalize Promotions Portal Calendar page (promotion, description, customer ID, customer name, first order and last order dates). **Note.** In the three-column format, the description and customer name columns don’t appear on the pagelet. In addition, the customer ID and customer name columns are not populated for a national allowance on the pagelet.	See *PeopleSoft Enterprise Promotions Management 9.0 PeopleBook*, “Defining Promotions”.
Review Promotions	Displays all customer promotions and national allowances for the user with promotion details as specified on the Personalize Promotions Management page (promotion, status, customer ID, entered on date, contact ID, calendar code, promotion period). **Note.** In the three-column format, contact ID, calendar code and promotion period columns don’t appear on the pagelet.	See *PeopleSoft Enterprise Promotions Management 9.0 PeopleBook*, “Defining Promotions”.

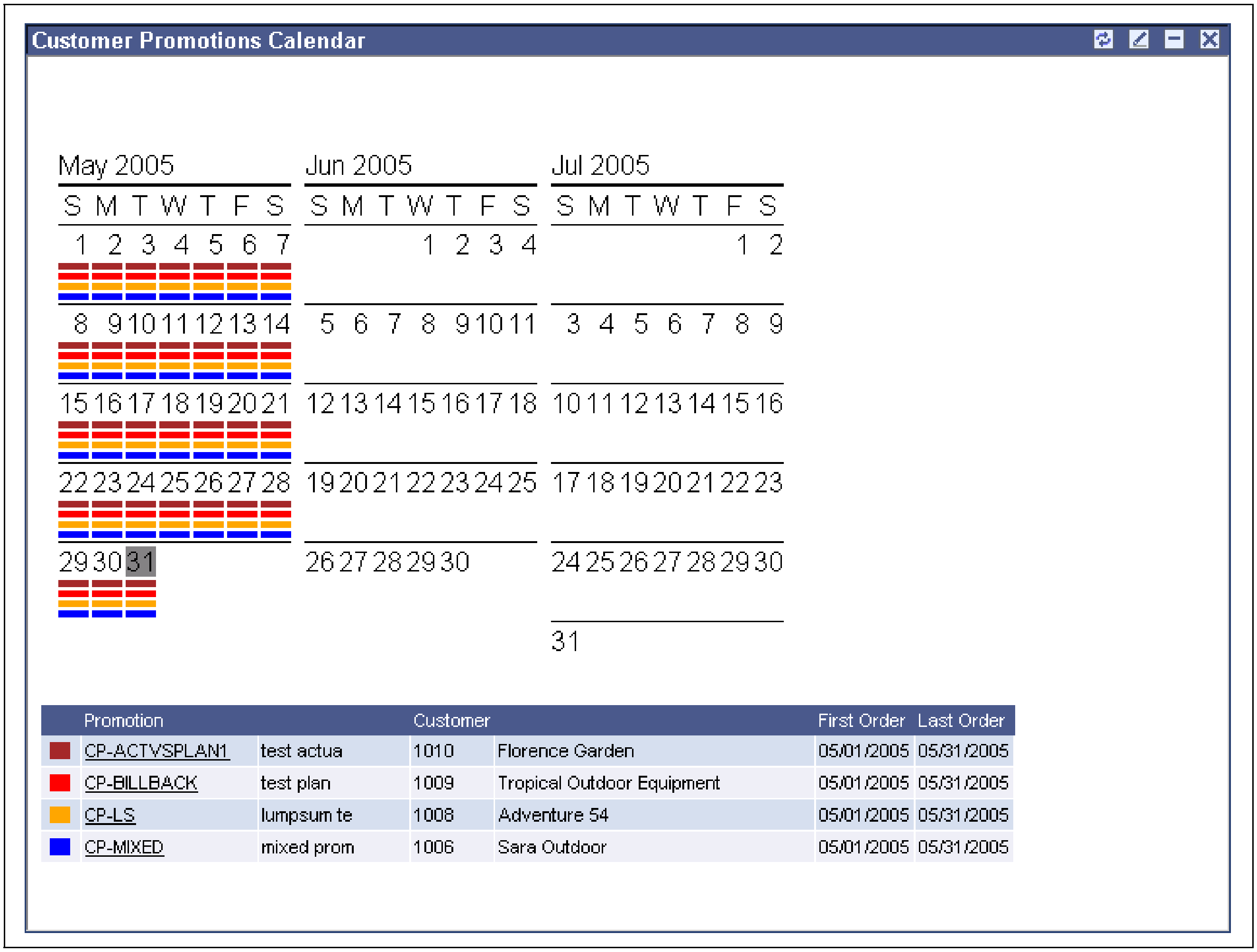
Viewing Calendar Information

This section discusses:

- Customer Promotions Calendar pagelet.
- Nat’l Allow & Promo pagelet.
- National Allowance Calendar pagelet.

Customer Promotions Calendar Pagelet

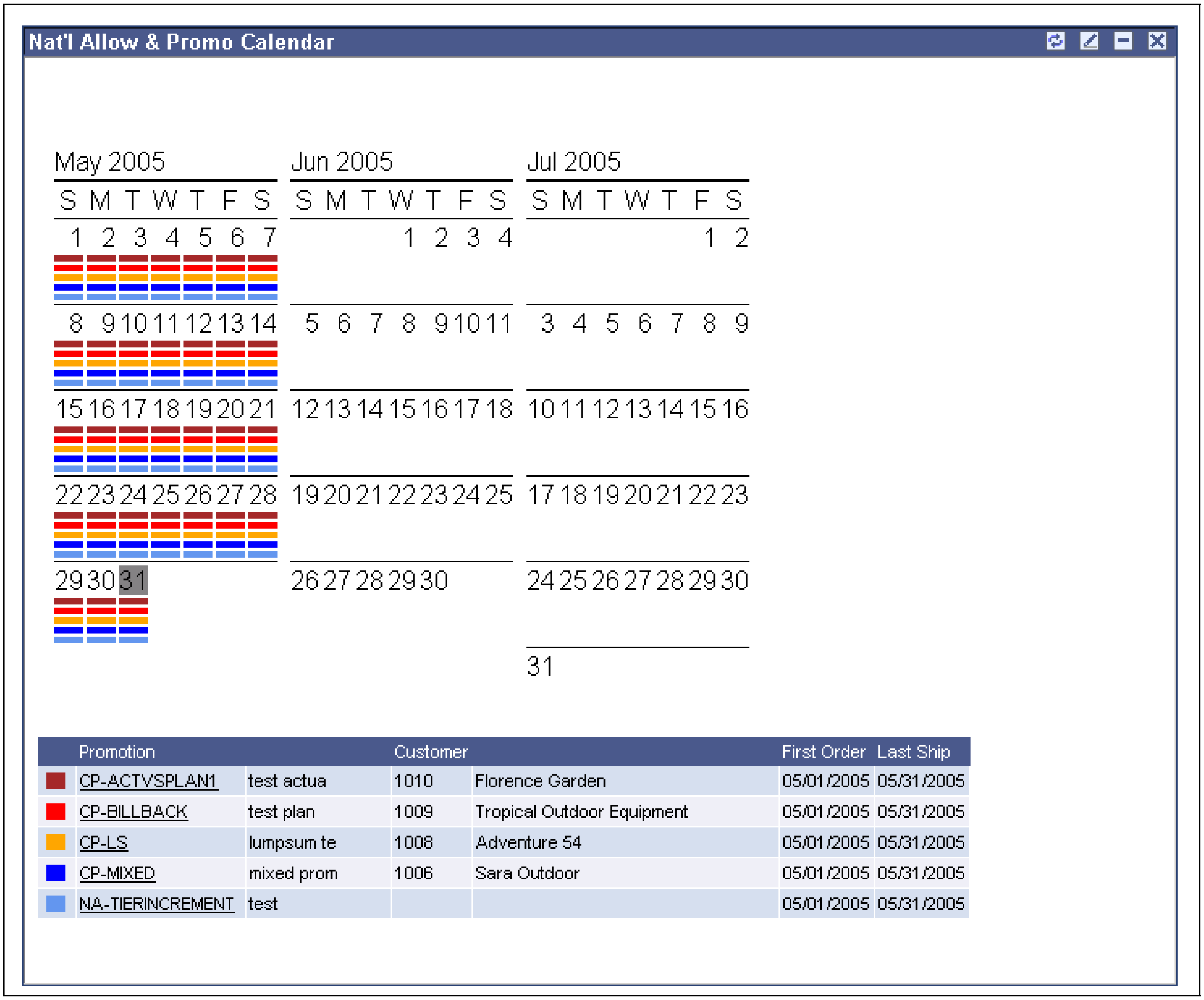
Access the Customer Promotions Calendar pagelet.



Customer Promotions Calendar pagelet

Nat’l Allow & Promo Calendar Pagelet

Access the Nat’l Allow & Promo Calendar pagelet.

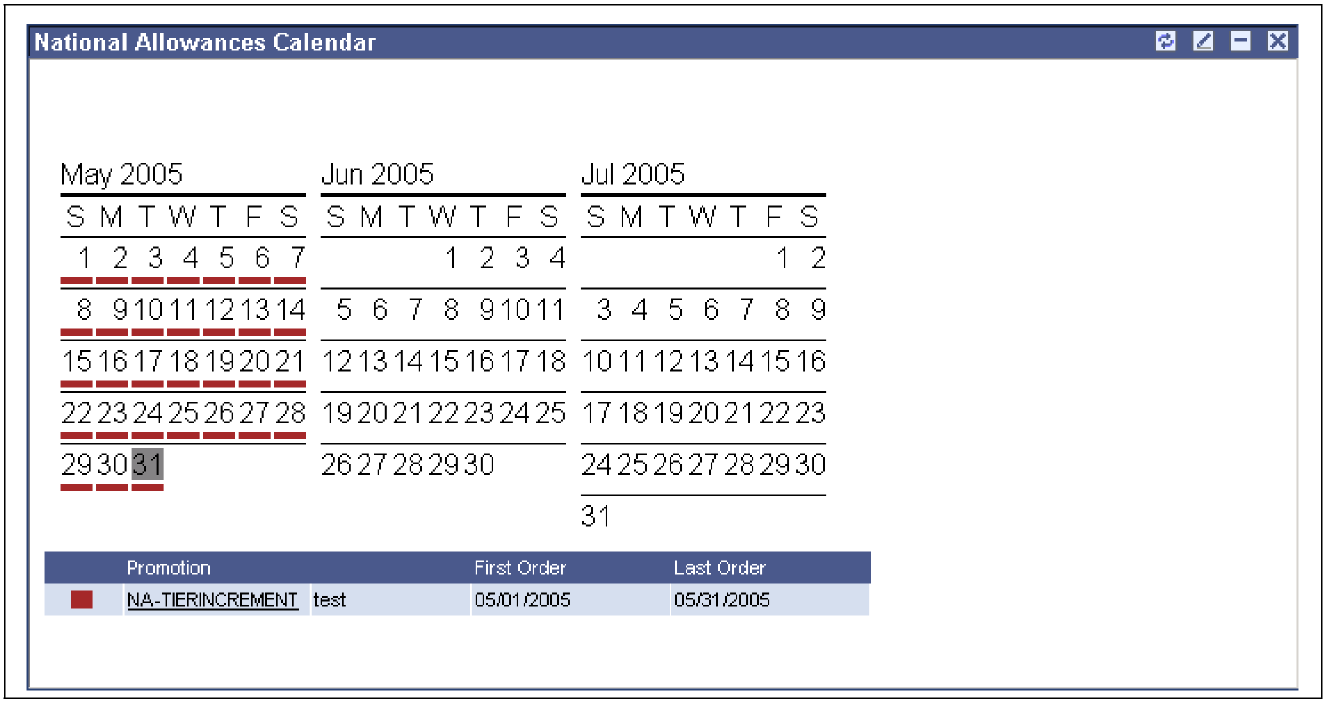


	Promotion		Customer		First Order	Last Ship
	CP-ACTVSPLAN1	test actua	1010	Florence Garden	05/01/2005	05/31/2005
	CP-BILLBACK	test plan	1009	Tropical Outdoor Equipment	05/01/2005	05/31/2005
	CP-LS	lumpsum te	1008	Adventure 54	05/01/2005	05/31/2005
	CP-MIXED	mixed prom	1006	Sara Outdoor	05/01/2005	05/31/2005
	NA-TIERINCREMENT	test			05/01/2005	05/31/2005

Nat'l Allow & Promo Calendar pagelet

National Allowances Calendar Pagelet

Access the National Allowances Calendar pagelet.



National Allowances Calendar pagelet

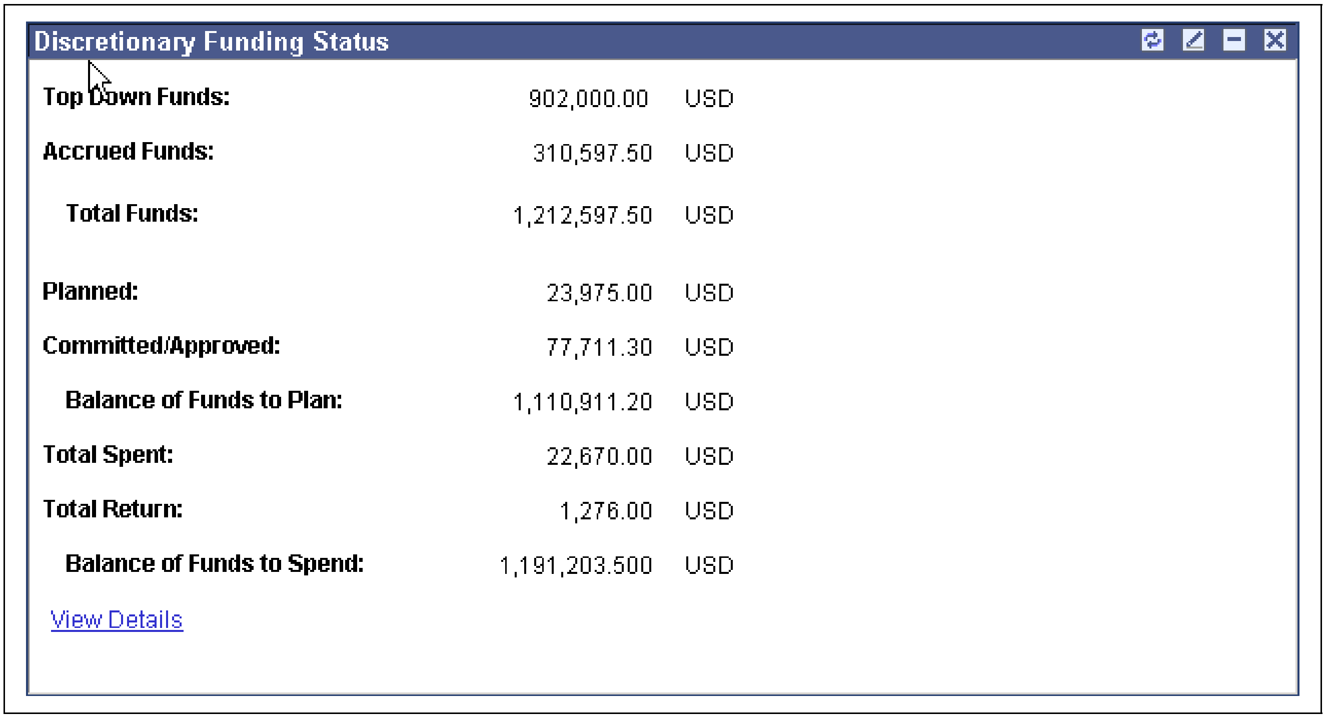
Viewing Promotion Fund Information

This section discusses:

- Discretionary Funding Status pagelet.
- Discretionary Funding Status — Details by Fund pagelet.
- Discretionary Funding Status — Fund Details by Customer and Promotion pagelet.
- Planned Promotional Funds pagelet.

Discretionary Funding Status Pagelet

Access the Discretionary Funding Status pagelet.



Discretionary Funding Status pagelet

Displays available discretionary fund total amounts for a period (from top down funds and accrual funds), as well as the amounts that are planned, committed, spent, and returned against all discretionary funds. Click on the View Details link to see detailed information about the amounts for specific funds.

Top Down Funds

This amount is summed from all funds with a Fund Type of *Discretionary*, a Funding Method of *Top Down*, and a Status of *Approved*.

Accrued Funds

This amount is summed from all funds with a Fund Type of *Discretionary*, a Funding Method of *Fixed Accrual, Rolling Accrual,* or *Zero-Based Accrual* and a Status of *Approved*.

Total Funds

This amount is calculated as top down funds plus accrued funds.

Planned

The amount is summed from all customer promotions with statuses of planned, released, pending approval, management approved, customer canceled, closed and recalled.

Committed/Approved

The amount is summed from all customer promotions with a status of Customer Approved.

Balance of Funds to Plan

Balance of funds to plan is calculated as total funds minus committed/approved minus planned.

Total Spent

The amount is summed from all off-invoice discounts that are given, all credits that are given, all deductions that are written off, all checks that are written and all overhead costs that are accumulated for promotions against discretionary funds.

Total Return

The total amount received against RMAs for promotions that are associated with discretionary funds.

Balance of Funds to Spend

Balance of funds to spend is calculated as total funds minus total spent plus total return.

Note. This pagelet is only available in the two column format.

See Also

PeopleSoft Enterprise Promotions Management 9.0 PeopleBook, “Defining Funds”

PeopleSoft Enterprise Promotions Management 9.0 PeopleBook, “Defining Promotions”

Discretionary Funding Status - Details by Fund Pagelet

Access the Discretionary Funding Status - Details by Fund pagelet.

Discretionary Funding Status - Details by Fund

Customize | Find | View All | First 1-15 of 20 Last

	Funds		Total Funds	Planned	Committed/Approved	Balance of Funds to Plan	Total Spent	Total Return	Balance of Funds to Spend
1	FND0000001	USD	140000.000	0.000	0.000	140000.000	0.000	0.000	140000.000
2	FND0000003	USD	625.000	0.000	7100.000	-6475.000	6675.000	0.000	-6050.000
3	FND0000004	USD	1432.500	0.000	11993.800	-10561.300	6425.000	0.000	-4992.500
4	FND0000005	USD	53890.000	0.000	0.000	53890.000	0.000	0.000	53890.000
5	FND0000008	USD	300000.000	22775.000	3600.000	273625.000	0.000	0.000	300000.000
6	FND0000010	USD	360000.000	0.000	0.000	360000.000	0.000	0.000	360000.000
7	FND0000012	USD	0.000	0.000	3297.500	-3297.500	2362.500	92.500	-2270.000
8	FND0000014	USD	81250.000	7575.000	9720.000	63955.000	9570.000	1276.000	72956.000
9	FND_Q22006	USD	81250.000	0.000	0.000	81250.000	0.000	0.000	81250.000
10	FUN0000001	USD	840.000	0.000	0.000	840.000	0.000	0.000	840.000
11	FUND05	USD	65000.000	1200.000	42000.000	21800.000	0.000	0.000	65000.000
12	FUND06	USD	25000.000	100.000	0.000	24900.000	0.000	0.000	25000.000
13	FUND07	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
14	FUND08	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
15	H2_2001	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000

Discretionary Funding Status- Details by Fund pagelet

Total Funds	This amount is the total budgeted amount for this fund.
Planned	The amount is summed from all customer promotions for this fund with statuses of planned, released, pending approval, management approved, customer canceled, closed and recalled.
Committed/Approved	The amount is summed from all customer promotions for this fund with a status of Customer Approved.
Balance of Funds to Plan	Balance of funds to plan is calculated as total funds minus committed/approved minus planned.
Total Spent	The amount is summed from all off-invoice discounts that are given, all credits that are given, all deductions that are written off, all checks that are written and all overhead costs that are accumulated for promotions against this discretionary fund.
Total Return	The total amount received against RMAs for promotions that are associated with this discretionary fund.
Balance of Funds to Spend	Balance of funds to spend is calculated as total funds minus total spent plus total return.

Note. This pagelet is only available in the two column format.

Discretionary Funding Status - Fund Details by Customer and Promotion Pagelet

Access the Discretionary Funding Status - Fund Details by Customer and Promotion pagelet.

Discretionary Funding Status - Fund Details by Customer and Promotion: FND0000014

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	Customer/Promotion	Curr	Total Funds	Planned	Committed/Approved	Balance of Funds to Plan	Total Spent	Total Return	Balance of Funds to Spend
1	1000	USD	0.000	2525.000	0.000	-2525.000	0.000	0.000	0.000
2	SCTEST	USD	0.000	3525.000	0.000	0.000	0.000	0.000	0.000
3	1001	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
4	1002	USD	0.000	2525.000	0.000	-2525.000	0.000	0.000	0.000
5	SCTEST	USD	0.000	3525.000	0.000	0.000	0.000	0.000	0.000
6	1003	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
7	1004	USD	18750.000	0.000	9720.000	9030.000	9570.000	1276.000	10456.000
8	PRO0000014	USD	0.000	0.000	9720.000	0.000	9570.000	1276.000	0.000
9	1005	USD	0.000	2525.000	0.000	-2525.000	0.000	0.000	0.000
10	SCTEST	USD	0.000	3525.000	0.000	0.000	0.000	0.000	0.000
11	1006	USD	25000.000	0.000	0.000	25000.000	0.000	0.000	25000.000
12	1007	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
13	1008	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
14	1009	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
15	1010	USD	37500.000	0.000	0.000	37500.000	0.000	0.000	37500.000
16	1011	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
17	BLG01	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
18	USA01	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
19	USA02	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000
20	USA04	USD	0.000	0.000	0.000	0.000	0.000	0.000	0.000

Discretionary Funding Status - Fund Details by Customer and Promotion pagelet

Total Funds This amount is the total budgeted amount for this specific customer and fund.

Planned The amount is summed from all customer promotions for this fund and specific customer with statuses of planned, released, pending approval, management approved, customer canceled, closed and recalled.

Committed/Approved The amount is summed from all customer promotions for this fund and specific customer with a status of Customer Approved.

Balance of Funds to Plan Balance of funds to plan is calculated as total funds minus committed/approved minus planned.

Total Spent The amount is summed from all off-invoice discounts that are given, all credits that are given, all deductions that are written off, all checks that are written and all overhead costs that are accumulated for promotions against this discretionary fund for this customer.

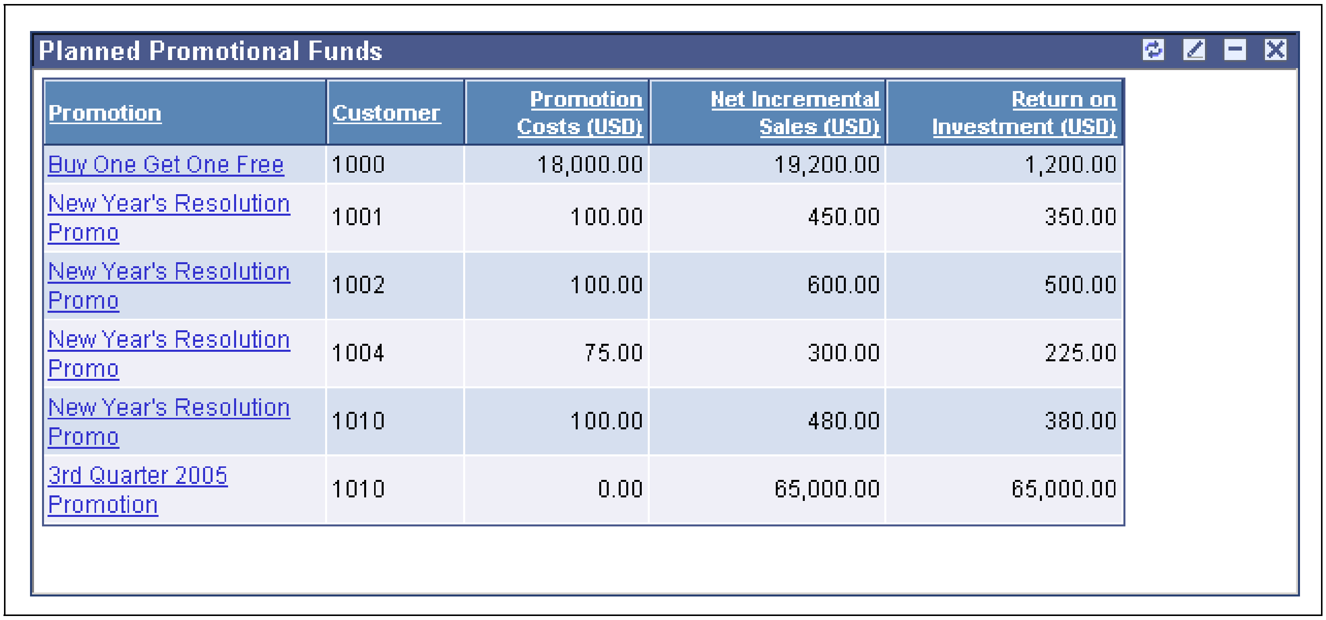
Total Return The total amount received against RMAs for promotions that are associated with this discretionary fund and customer.

Balance of Funds to Spend Balance of funds to spend is calculated as total funds minus total spent plus total return.

Note. This pagelet is only available in the two column format.

Planned Promotional Funds Pagelet

Access the Planned Promotional Funds pagelet.



Planned Promotional Funds

Promotion	Customer	Promotion Costs (USD)	Net Incremental Sales (USD)	Return on Investment (USD)
Buy One Get One Free	1000	18,000.00	19,200.00	1,200.00
New Year's Resolution Promo	1001	100.00	450.00	350.00
New Year's Resolution Promo	1002	100.00	600.00	500.00
New Year's Resolution Promo	1004	75.00	300.00	225.00
New Year's Resolution Promo	1010	100.00	480.00	380.00
3rd Quarter 2005 Promotion	1010	0.00	65,000.00	65,000.00

Planned Promotional Funds pagelet

Displays the promotion description, customer ID, promotion costs (fixed and variable), net incremental sales, and return on investment for all promotions that are not canceled, closed, or customer approved.

Note. This pagelet is only available in the two column format.

See Also

PeopleSoft Enterprise Promotions Management 9.0 PeopleBook, “Defining Funds”

PeopleSoft Enterprise Promotions Management 9.0 PeopleBook, “Defining Promotions”

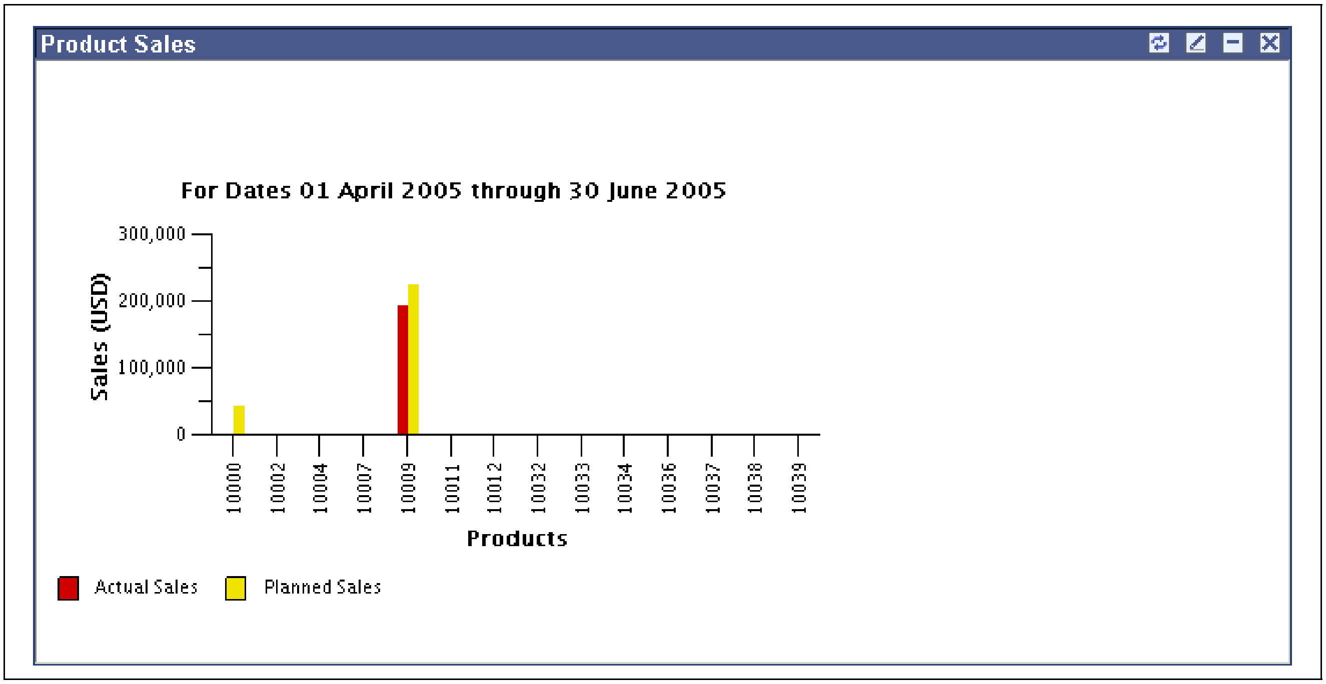
Viewing Product Sales

This section discusses:

- Product Sales pagelet.
- Sales History by Customer pagelet.

Product Sales Pagelet

Access the Product Sales pagelet.



Product Sales pagelet

Displays in bar chart format the actual versus planned sales amounts for a product during the current period. The pagelet displays data for all products that the user is authorized for on the active product tree defined on the Promotions Options - General Options page in PeopleSoft Promotions Management. If returns have been received for the product, the returned amount is subtracted from the actual sales amount.

See Also

PeopleSoft Enterprise Promotions Management 9.0 PeopleBook, "Defining Promotions"

PeopleSoft Enterprise Promotions Management 9.0 PeopleBook, "Setting Up PeopleSoft Promotions Management," Establishing Product Trees

PeopleSoft Enterprise Order Management 9.0 PeopleBook, "Introduction to Sales Order Entry"

Sales History by Customer Pagelet

Access the Sales History by Customer pagelet.

Sales History by Customer

Customer	Expected Promotional Sales (USD)	Actual Sales 01 April 2005 to 30 June 2005 (USD)	Actual Sales 01 April 2004 to 30 June 2004 (USD)
Alliance Group	902,000.00	0.00	0.00
Apex Systems	0.00	65,469.60	0.00
Easy Solutions	0.00	23,744.00	0.00
Central Association	0.00	0.00	0.00
Advanced Consulting	0.00	0.00	0.00
Golden Inc.	0.00	343.45	0.00
Sara Outdoor	172,800.00	71,000.00	0.00
Surplus Co.	0.00	0.00	0.00
Adventure 54	172,800.00	0.00	0.00
Tropical Outdoor Equipment	172,800.00	36,750.00	0.00
Florence Garden	118,800.00	76,500.00	0.00
Consolidated Business	0.00	0.00	0.00
Delta Outdoor Equipment	0.00	0.00	0.00
New World Outdoor Equipment, Inc.	0.00	0.00	0.00
Cracker Barrell Restaurant	0.00	0.00	0.00
Western Pacific Wholesaler	0.00	0.00	0.00
Benicia Unified School District	0.00	0.00	0.00

Sales History by Customer pagelet

Displays customers with the expected promotional sales amount from all promotions, the actual sales amount for the current period, and the actual sales amount from the same period last year. The expected promotional sales amount is the sum of all planned ship quantities multiplied by the product prices defined on the promotions. The actual sales amounts include all invoiced amounts for the customer, not just invoiced amounts for promotional activity, minus any returns received for the customer.

Note. This pagelet is only available in the two column format.

See Also

PeopleSoft Enterprise Promotions Management 9.0 PeopleBook, “Defining Promotions”

PeopleSoft Enterprise Order Management 9.0 PeopleBook, “Introduction to Sales Order Entry”

Viewing Customer Information

This section discusses:

- Buying Agreements.

- Customer Account Balances.
- Customer Aging.
- Customer Conversations.
- Customer Notes.
- Customer Search.
- Expiring Buying Agreements.
- Invoice Summary.
- Last 10 Product Purchases.
- Last 10 Shipments.
- Recent Orders.
- Recent Quotes.
- Recent RMAs.
- Schedules Past Ship Date.
- Trade Promotions.

Pagelets Used to View Customer Information

Use the following pagelets to view customer information.

Pagelet Name	Usage	For More Information
Buying Agreements	Displays buying agreements. Employees can navigate into buying agreement details.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, “Creating Buying Agreements”.
Customer Account Balances	Displays account balances for a customer.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Maintaining General Customer Information,” Setting Up and Reviewing Customer Credit Profiles.
Customer Aging	Displays customer aging information.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Maintaining General Customer Information,” Setting Up and Reviewing Customer Credit Profiles.
Customer Conversations	Displays recent conversations for a customer. Employees can navigate into individual conversation detail or add a new conversation.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Managing Conversations”.
Customer Notes	Displays notes that are assigned to a customer.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Maintaining General Customer Information,” Entering Customer Notes.

Pagelet Name	Usage	For More Information
Customer Search	Enables employees to search for existing customers to populate the additional pagelets with customer data.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining General Customer Information". See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Maintaining Additional Customer Information".
Expiring Buying Agreements	Displays buying agreements that are going to expire for a customer. Employees can navigate into buying agreement details.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Creating Buying Agreements".
Invoice Summary	Displays summarized invoice information. Employees can navigate into invoice details.	See *PeopleSoft Enterprise Billing 9.0 PeopleBook*, "Entering Bills Online".
Last 10 Product Purchases	Displays the last 10 purchases for a customer. Employees can navigate to see order and product information.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products".
Last 10 Shipments	Displays the last 10 shipments for a customer. Employees can navigate to see order and shipping information.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Maintaining Order Schedule Information".
Recent Orders	Displays recent orders. Employees can navigate into order details.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Introduction to Sales Order Entry". See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Maintaining Order Header and Line Information". See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Maintaining Order Schedule Information".
Recent Quotes	Displays recent quotes. Employees can navigate into quotation details.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Maintaining Quotation Information".
Recent RMAs	Displays recent returns. Employees can navigate into RMA details.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, "Maintaining Quotation Information".

Pagelet Name	Usage	For More Information
Schedules Past Ship Date	Displays schedules that are past the ship date for a customer. Employees can navigate to see order and shipping information.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, “Maintaining Order Schedule Information”.
Trade Promotions	Displays trade promotions for a customer. Employees can navigate into individual trade promotion detail.	See *PeopleSoft Enterprise Promotions Management 9.0 PeopleBook*, “Viewing Promotional Activity”.

Viewing Product Information

This section discusses:

- Availability.
- Current Product Summary.
- Product Alternates.
- Product Notes.
- Product Search.
- Product Specifications.

Pagelets Used to View Product Information

Use the following pagelets to view product information.

Pagelet Name	Usage	For More Information
Availability	Displays product availability information. Employees can view quantity that is on hand and quantity that is reserved for a product by ship from business unit and unit of measure.	See *PeopleSoft Enterprise Order Management 9.0 PeopleBook*, “Maintaining Order Schedule Information”.
Current Product Summary	Displays information about the product, including the description. Employees can navigate to see detail product information, view the list prices by inventory business unit, and check price and availability.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Setting Up Products”.
Product Alternates	Displays alternates for a product. Employees can navigate to view product information.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, “Setting Up Products,” Establishing Product Attachments.

Pagelet Name	Usage	For More Information
Product Notes	Displays notes that are assigned to a product.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Establishing Product Notes.
Product Search	Enables employees to search for existing products to populate the additional pagelets with product data.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Establishing Product Notes.
Product Specifications	Displays product specifications for a product.	See *PeopleSoft Enterprise Order to Cash Common Information 9.0 PeopleBook*, "Setting Up Products," Establishing Product Specifications.

CHAPTER 4

Customer-Facing Supply Chain Management Pagelets

The PeopleSoft Supply Chain Portal Pack includes pagelets for use in the customer portal registry. This chapter discusses how to:

- View pagelets by functional role.
- View billing information.

Note. Pagelets are documented in a Pagelets Used to <Task Description> table when they do not require extensive discussion.

Pagelets by Functional Role

PeopleSoft provides these customer-oriented role groupings as examples of how to organize pagelet access by function.

This section discusses:

- Broker pagelets.
- Customer pagelets.

Note. The sample data contains customer and broker roles that you can use as examples for organizing access and security.

Broker Pagelets

These pagelets enable a broker, an external user who conducts business on behalf of customers, to effectively manage promotions and view customer billing information:

- Availability.
- Current Product Summary.
- Customer Promotions Calendar.
- Discretionary Funding Status.
- Most Recent Bills.
- Most Recent Consolidated Bills.
- My Promotions.
- Nat'l Allow & Promo Calendar.
- National Allowance Calendar.

- Planned Promotional Funds.
- Product Alternates.
- Product Notes.
- Product Sales.
- Product Search.
- Product Specifications.
- Review Promotions.
- Sales History by Customer.

Note. Many of the broker-oriented pagelets are also used by customer service employees and are documented in the Employee-Facing Supply Chain Management Pagelets chapter.

See Also

Chapter 3, “Employee-Facing Supply Chain Management Pagelets,” page 15

Customer Pagelets

These pagelets enable customers to view billing information:

- Most Recent Bills.
- Most Recent Consolidated Bills.

Viewing Billing Information

This section discusses how to view billing information.

Pagelets Used to View Billing Information

Use the following pagelets to view billing information.

Pagelet Name	Usage	For More Information
Most Recent Consolidated Bills.	Customers can use this pagelet to review invoice information for the most recently generated consolidated bills. Customers can click View All Consolidated Bills to access the Consolidated Bills - Bill List page, where they can review details of their most recent nonconsolidated invoiced bills.	See *PeopleSoft Enterprise eBill Payment 9.0 PeopleBook*, “PeopleSoft eBill Payment Self-Service Transactions,” Viewing Consolidated Bills.
Most Recent Bills.	Customers can use this pagelet to review the invoice number, balance, and currency of the most recently generated bills. Customers can click View All Bills to access the Bills - Bill List page, where they can review details for their most recent nonconsolidated invoiced bills.	See *PeopleSoft Enterprise eBill Payment 9.0 PeopleBook*, “PeopleSoft eBill Payment Self-Service Transactions,” Viewing Bills.

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 — The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.

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.

auction event — In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.

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.

bid response — In PeopleSoft Strategic Sourcing, the response by a bidder to an event.

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 unit constraints — In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.

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.

buy event — In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.

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.

cash drawer — A repository for monies and payments taken locally.

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.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
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).

constraint A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.

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 plus pricing
In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.

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.

counter sale
A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.

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.

direct receipt Items shipped from a warehouse or vendor to another warehouse.

direct ship Items shipped from the vendor or warehouse directly to the customer (formerly referred to as *drop ship*).

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 constraints — In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.

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.

financial sanctions — For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment.

For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).

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.

GDS Abbreviation for *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.

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.

global constraints In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.

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.

ideal response In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.

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.

itinerary In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*

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.

KVI Abbreviation for *Known Value Item.* Term used for products or groups of products where the selling price cannot be reduced or increased.

landlord In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.

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.

lease In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.

lease abstract In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.

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.

line In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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.
NDP	Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.
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.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
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.

phase A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.

pickup quantity The product quantity that the customer is taking with them from the counter sales environment.

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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	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 adds — The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

product bidding — In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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.

proxy bidding — In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
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.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
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.

sell event In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.

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.

short-term customer A customer not in the system who is entered during sales order entry using a template.

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.

sourcing objective For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).

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.

task — A deliverable item on the detailed sourcing plan.

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.

tenant — In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.

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.

tiered pricing — Enables different portions of a schedule to be priced differently from one another.

time span — A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.

total cost — In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group In PeopleSoft Expenses, the organization’s travel rules and polices that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.

travel partner In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.

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.

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.

weight or weighting In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.

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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