
PeopleSoft Enterprise eDevelopment 9.0 PeopleBook

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PeopleSoft Enterprise eDevelopment 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.
<i>Italics</i>	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 <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (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 eDevelopment Preface

This preface discusses:

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise eDevelopment.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft Enterprise eDevelopment operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*.

See Also

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

PeopleBook Structure

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

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

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

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

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started with...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other applications. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. Note. Not all applications have delivered custom navigation pages.
Understanding...	(Optional) This is an introductory chapter that broadly explains the application and the functionality within the application.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of a application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. Note. Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started with eDevelopment

This chapter discusses:

- eDevelopment business processes.
- eDevelopment integrations.
- eDevelopment implementation.

eDevelopment Business Processes

eDevelopment is comprised of self-service transactions that interface with the PeopleSoft Enterprise Human Resources system.

Employees use eDevelopment to:

- Maintain their personal profiles.
- View job profiles.
- Search and compare job profiles.
- Create an interest list of job profiles in which they are interested.
- Review approval history of profiles
- Request training.
- Review their training information.

Managers use eDevelopment to:

- Review and update profiles for their direct reports.
- Approve profile changes.
- Search and compare profiles.
- View and maintain job profiles.
- Complete reviews and observations for regulated individual reports.
- Request training for their direct reports.
- Review training information for their direct reports.

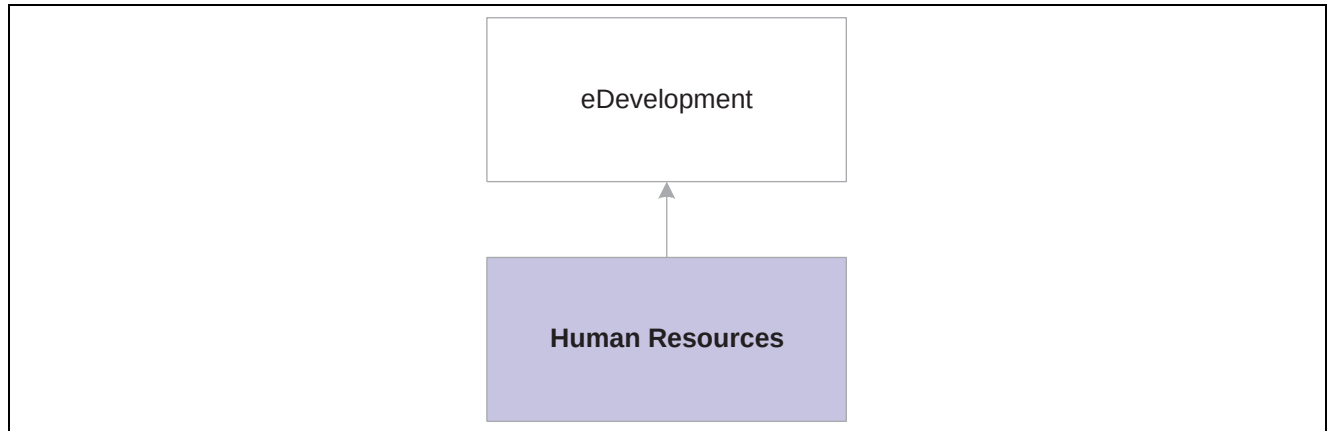
Faculty members use eDevelopment to enter the following training and development information:

- Professional training.
- Activities, administrative posts, and teaching responsibilities.

- Presentations and publications.
- Committees.
- Student advising.

eDevelopment Integrations

eDevelopment integrates with the following PeopleSoft application:



eDevelopment integrations

eDevelopment Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS Application Fundamentals Preface"

CHAPTER 2

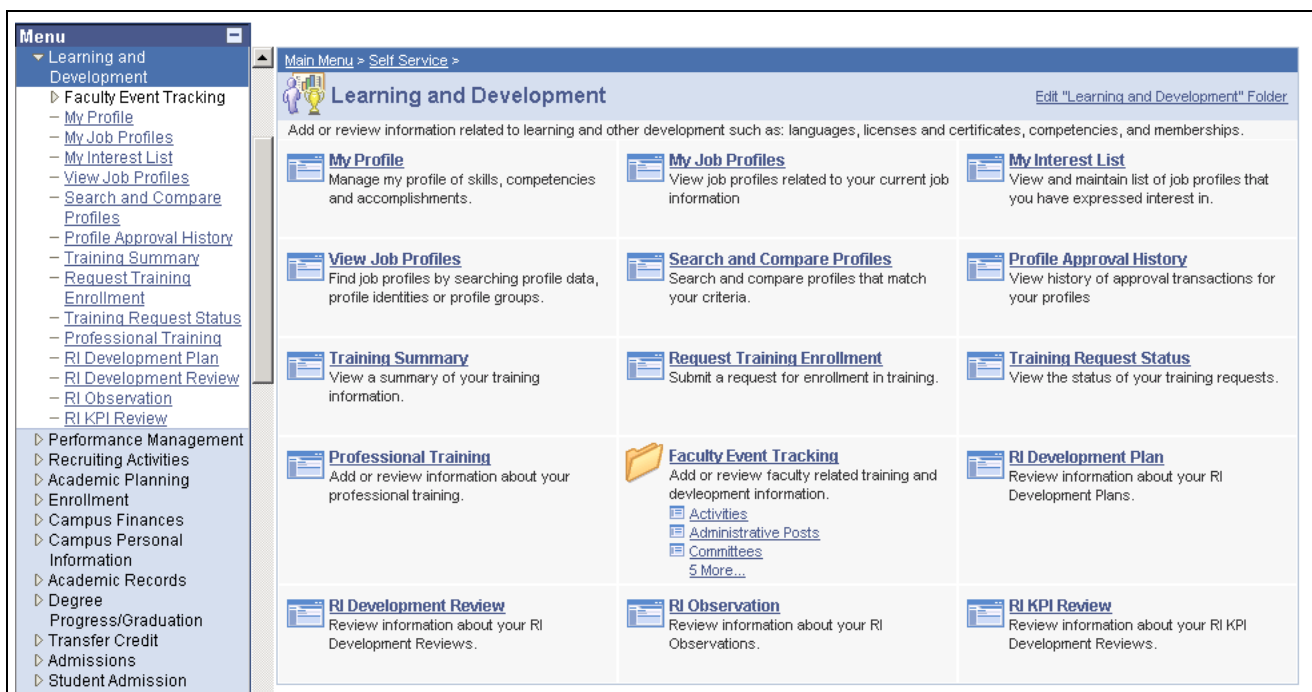
Maintaining My Profiles

This chapter discusses how to:

- Navigate in eDevelopment.
- Maintain person profiles.
- Approve profile changes and view approval history.
- Maintain interest lists.
- View and update job profiles.
- Search and compare profiles.

Navigating in eDevelopment

The standard menu-driven navigation path is the standard access method for eDevelopment. Employees access eDevelopment by selecting Self Service, Learning and Development. Managers access eDevelopment by selecting Manager Self Service, Learning and Development.



eDevelopment navigation path

Roles

The self-service components can be used by both the employee and the manager; therefore, PeopleSoft delivers definitions for these roles and defines a menu for each role.

These delivered roles for employees and managers are configured specifically for profile management self service:

- Profile Mgmt Employee
- Profile Mgmt Manager

Note. In this PeopleBook, the term *employee* refers to all people who work for and report time in the organization. This can include regular employees as well as contractors and other temporary assignment workers.

Security

The user profile that you create for each individual who accesses the self-service components determines the components that the user can access by default. Create user profiles by using the User Profiles component (USERMAINT). Assign a role to each user profile, which is linked to permission lists. Each permission list identifies components that individuals can access. To modify the access for specific components for each role, modify the permission list for the user's role. Define which data the user can access in the user profile.

Typically, employees can access only their own data and managers can access their direct reports' data, although managers can access data for indirect reports in some situations.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Understanding Profile Maintenance

eDevelopment provides employees and managers with self-service options that integrate with the Manage Profiles business process in PeopleSoft Enterprise Human Resources. eDevelopment profiles are divided into two categories:

- Person profiles.

Person profiles describe a person's skills, competencies, accomplishments and performance. Person profiles are linked to a person ID.

- Job profiles.

Job profiles (known as non-person profiles in the Manage Profiles business process) describe the competencies, qualifications, and responsibilities of a job. You can link job profiles to a variety of entities, not just job codes. For example, job profiles can be linked to job codes, positions, job families, and salary grades.

The format of profiles is the same in eDevelopment and the Manage Profiles business process. Profile content is divided into tabs and content sections that are defined by the profile type used to create the profile.

This is discussed in the *PeopleSoft Enterprise Human Resources PeopleBook: Manage Profiles*.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles*, "Managing Profiles," Understanding Profiles and Profile Types.

This chapter discusses the self-service profile management options available to employees and managers that enable them to:

- Create and maintain person profiles.

Employees use the My Profile option to view and edit their existing person profiles, and create new profiles. Managers can create, view, and update the person profiles for their team. Depending on the configuration of your profile types, approvals workflow is triggered when employees update their person profiles and changes are typically approved by managers.

- Approve changes to person profiles.

Managers use the Approve Profiles option to review changes to their employees' person profiles that require approval, and approve or deny the changes.

- View approval history.

Employees use the Profile Approval History option to view the approval status of profile changes that they have submitted for approval and view the history of profile approvals.

- Manage interest lists.

An interest list is a collection of job profiles that is associated with an employee. Typically interest lists are used to identify jobs that an employee is interested in applying for, or jobs that match an employee's profile, or jobs that an employee wants to include in a career planning discussion with their manager. Employees can add to and remove job profiles from their interest list. Managers can also view and update their employees' interest lists.

- View job profiles.

Employees have two options for viewing job (non-person) profiles, My Job Profiles lists job profiles related to their current jobs, and View Job Profiles is a general option for viewing any job profile. Managers view job profiles using the View Job Profiles option. If employees find a job profile that they are interested in, they can add it to their interest list. Similarly, managers can add job profiles to their employees' interest list from the Job Profiles — Profile Details page.

- Create and maintain job profiles (manager only).

Managers can create and update job profiles. Depending on the configuration of your profile types, approvals workflow is triggered when managers update job profiles. The typical approver for job profiles is the profile administrator, although this can be configured according to your business needs.

- Search and compare profiles.

Employees and managers use Search and Compare Profiles to run any of the search types that have been configured for them.

Prerequisites

Before employees and managers can use the profile management self-service transactions, you must set up the following:

- Define the content catalog.
- Define your profile types.
- (Optional). Define and configure approvals for profiles.

The use of approval processing for profiles is optional. You associate approvals workflow to profile types.

- Define search types and run the Build Manager List and Build Profile Search Indexes processes required by the profile search and compare feature.

- Set up the text on the self-service pages.

The profile management self-services pages use the Text Catalog. You can modify the delivered text to meet your organization's business needs. The Text Catalog is discussed in the *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook*.

- Configure the Direct Reports functionality for your organization.

The manager self-service options for profile management use the direct reports functionality to determine managers' direct reports. The Direct Reports functionality is discussed in the *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up Profile Management"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up Search and Compare Profiles"

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, "Working with Common Components"

Maintaining Person Profiles

This section provides an overview of person profiles and lists pages to review and update personal profiles.

Understanding Person Profiles

Employees can have one or more profiles, but only one profile per profile type. PeopleSoft delivers the profile type PERSON to create person profiles, but you can create other profile types according to your organizational requirements. For further information about creating profile types see the *PeopleSoft Enterprise Human Resources PeopleBook: Manage Profiles*.

Employees and managers use the Profile Details page to view and update person profiles. Here is an example person profile:

Profile Details

Allan Martin Edit Profile

Photo

This profile displays your skills, competencies and accomplishments. Navigate using the bold hyperlinks in the blue shaded area. Use the Profile Actions dropdown to view your profile as of a different date.

As Of Date: 19/08/2006

***Description:** Allan Martin

Comments:

Profile Actions: .Select Action... Go

links to items that are not approved → 17 item(s) pending approval

3 item(s) approved (since 15/02/2006)

3 item(s) denied (since 15/02/2006)

tabs → **Competencies** [Responsibilities](#) [Qualifications](#) [Education](#) [NVQ](#)

[Projects](#) [Worn Rank](#)

content section for Competencies tab → Enter details for this profile item

content items →

ID	Competency	Proficiency	
0400	Persuasive	3-Good	
0401	Strategically influences	3-Good	

[+ Add New Competencies](#)

tabs → **Competencies** [Responsibilities](#) [Qualifications](#) [Education](#) [NVQ](#)

[Projects](#) [Worn Rank](#)

Save Submit Cancel

Example person profile

Profile content is divided into tabs which appear as links in navigation bars. Between the navigation bars, the page lists the content sections of the tab that is currently selected. When the employee or manager selects a different tab, the system updates the page to show the content sections for that tab. The content sections that employees and managers can view and update is determined by the security settings for the content sections in the profile type definition. This means that the profile content can vary according to the role accessing the profile.

Employees and managers add items to the person profile from the content catalog that you set up in Manage Profiles. They can also copy items from job profiles that are related to the employee's job, by selecting *Copy from Job Profile* in the Profile Actions field and clicking the Go button. The system searches for job profiles that match the employee's job data. There could be more than one profile related to the employee's job data. For example, if you have set up profiles for job codes and positions and the person has a position selected in job data, the system lists these profiles and the employee or manager selects the profile that they want to use.

The Profile Details page lists the approved items only. If changes have been made to the profile but not yet approved, links appear on the Profile Details page to indicate that there are items that are saved, pending approval, or denied. When the employee or manager clicks the link, the system displays a list of the items with that approval status.

Items added, updated, or deleted from a profile are assigned a Saved status when the employee or manager clicks the Save button. The changes are submitted for approval when they click the Submit button.

For changes that don't require approval, the items are automatically set to approved when the employee or manager clicks the Submit button and the Profile Details page is updated with the changes.

Warning! After clicking the Save button, the Profile Details page is refreshed to show approved items only. This means that the changes that were saved are no longer visible because these items do not have an approved status. However, a link appears to indicate that there are saved items and clicking the link enables the employee or manager to view and update the changes.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up the Content Catalog"

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, "Setting Up Profile Management"

Pages Used to Review and Update Person Profiles

Page Name	Object Name	Navigation	Usage
View Person Profiles	HR_DR_ADDL_INFO	Manager Self Service, Learning and Development, Team Person Profiles, View Person Profiles	Displays the instructions for the transaction and the effective date field. Managers can change the default effective date to view profiles of the new effective date.
View Person Profiles — Select Employees to Process	HR_DR_SELECT_EMPS	Click Continue on the View Person Profiles page.	Displays a list of the people who report to the manager. Managers select the person whose profile they want to view and click Continue.
Select Profile Type	JPM_JP_SEL_PRF_EMP	- Self Service, Learning and Development, My Profile, Select Profile Type - Select an employee on the View Person Profiles — Select Employees to Process page and click Continue. - Select the Profile Action <i>Select Another Profile Type</i> and click Go on the Profile Details page.	Displays a list of the person profile types. Employees and managers select the profile type. This page is only displayed if there are two or more active person profile types. If there is only one active person profile type, this page is not displayed.

Page Name	Object Name	Navigation	Usage
Profile Details	JPM_JP_PROFL2_EMP	Select a profile type on the Select Profile Type page and click the Select button.	Displays the person profile. Initially the profile is display-only. However, when employees or managers click the Edit Profile link, the system refreshes the page and makes the fields available. Employees or managers can add and delete items on the profile or modify existing profile items. The structure of a profile and the items that are available to add to the profile are determined by the profile type and the content catalog. When employees and managers click the Submit button, approval processing is initiated for those changes that require approval. The profile type definition determines which changes require approval. The Profile Details page shows only approved items. Any new profile items, changes to existing items, or deletions that have not been approved do not appear on the profile tabs after clicking Save to save the changes. Links appear on the page that indicate how many items have been saved but not submitted, are pending approval, or denied approval. Use these links or the corresponding Profile Actions to view the items that are unapproved.
Select New As of Date	JPM_JP_SELECT_DATE	Select the Profile Action View as of Another Date and click Go on the Profile Details page.	Employees and managers enter a different effective date and click OK to view the profile as of the new effective date.

Page Name	Object Name	Navigation	Usage
Add New <content type>, View <content type>, □ Update <content type>	JPM_ITM_EMPDTL_SEC	- Click the Add New <content type> link on the Profile Details page. - Click a profile item from the Profile Details page.	Employees and managers use this page to view, update, or add profile item details. If the profile is not in edit mode, the page is display-only. The fields on the page vary according to the content type of the item and the profile type definition. Changes that require approval are submitted for approval processing when the employee or manager clicks the Submit button on the Profile Details page.
Related Items	JPM_PROF_DETAIL	- Click the Related Content link on the Update <content type> page. - Click the Related Content link on the View <content type> page. - Click the Related Content link on the Add <content type> page.	Displays details of profile items that are related to the selected profile item.
Copy Items from Job Profile	JPM_COPY_PROFL_SEC	Select the Profile Action <i>Copy from Job Profile</i> and click Go on the Profile Details page.	Displays the job profiles associated with the employee's job data. The system determines which job profiles are related to the employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the active jobs for matching job profiles. Employees or managers select the job profile that they want to copy items from, and click the Select button. This page only appears if there are two or more active job profiles associated with the employee's job data. The system adds items in the job profile that are not already in the employee's profile.

Page Name	Object Name	Navigation	Usage
Person Profile — Saved Items, Person Profile — Pending Items, Person Profile — Denied Items	JPM_JP_PRF_VW_CHGS	• Select the Profile Action View Saved Items and click Go or click the Items saved link on the Profile Details page. • Select the Profile Action View Pending Items and click Go or click the Items pending approval link on the Profile Details page. • Select the Profile Action View Denied Items and click Go or click the Items denied link on the Profile Details page.	This page lists saved items, items awaiting approval (pending items), or items that were not approved (denied items). Saved items are changes that have been saved but not submitted. Employees and managers can edit saved items on the Saved Items page; the Pending Items page and the Denied Items page are display-only.
View All Rows	JPM_PROF_HIST_SEC	• Click the View All Rows icon on the Profile Details page. • Click the View All Rows icon on the Job Profile — Profile Details page.	View all effective-dated rows for an item on a person's profile or a job profile. This page lists the current, future, and historical rows for a profile item. Employees and managers use this page to track the history of a profile item. They click the profile item link to view details of the profile item for the selected effective date.
<content type>	JPM_APR_DTL_SEC	• Click a profile item on the Person Profile — Saved Items page. • Click a profile item on the Person Profile — Pending Items page. • Click a profile item on the Person Profile — Denied Items page. • Click a profile item on the Person Profile — Approval page.	Displays the details of the saved, pending or denied item. Employees and managers can update saved items. However, they cannot update pending or denied items.

Page Name	Object Name	Navigation	Usage
Person Profile — Summary of Changes	JPM_JP_PERSUMM_SEC	Click the Submit button on the Profile Details page.	Lists the changes made to the profile. There is a scroll area for each section of the profile that was modified, which lists any items added, deleted or edited. If the content section changes need approval, <i>Requires Approval</i> is shown in title of the scroll area. Employees and managers can enter comments for the approver before clicking the Submit button. The comments box is only displayed if there are items requiring approval.
Approvals	JPM_JP_PROFL_APPR	- Click the Submit button on the Person Profile — Summary of Changes page. - Click the Submit button on the Job Profile — Summary of Changes	Displays a confirmation of the approval submission. If approval is required for some of the changes, the Approval Routing group box provides a summary of the approval routing. Items that do not require approval are automatically approved and appear in the profile when employees and managers click OK to return to the Profile Details page.

Approving Person Profile Changes and Viewing Approval History

This section provides an overview of profile approvals and lists the pages used to approve profile changes and view approval history.

Understanding Profile Approvals

The use of approvals processing with profiles is optional. If your organization uses approvals processing, it is configured at the profile type level. An approval definition is selected for a profile type on the Profile Types — Attributes page and you then specify whether a content section requires approval on the Content Section page. For further information about defining profile types see the *PeopleSoft Enterprise Human Resources PeopleBook: Manage Profiles*.

If approval is required for a content section, any additions, updates or deletions trigger approvals workflow. PeopleSoft delivers approval definitions for person profiles that are configured so that when employees update or create a profile, their manager approves changes. However, you can create approval definitions to configure approvals according to your requirements.

Managers use the Manage Approvals page to view approvals and they approve or deny changes at the profile level. Employees can track their own approvals using the Approval Transaction History page.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Approvals”

Pages Used to Approve Profile Changes and View Approval History

Page Name	Object Name	Navigation	Usage
Manage Approvals	JPM_JP_MNG_APPRVL	Manage Self Service, Learning and Development, Approve Profiles	Managers use this page to view a list of profiles that are waiting for approval, profiles that have been approved, and profiles that have approval status of <i>Denied</i> . Managers click the profile name to view the Person Profile — Approval page that lists the changes.
Person Profile — Approval	JPM_JP_PERS_APPR	- Click the profile name on the Manage Approvals page. - Click the profile name on the Approval Transaction History page.	View a list of the changes to the person profile and details of the approvals processing. Managers click the Approve button to approve the changes or click the Deny button to reject the changes.
Person Profile — Approval Confirmation, Person Profile — Deny Confirmation	JPM_JP_PER_APR_CNF	- Click the Approve button on the Person Profile — Approval page. - Click the Deny button on the Person Profile — Approval page.	Displays a confirmation message when managers click the Approve button to approve profile changes or click the Deny button to reject profile changes submitted for approval
Approval Transaction History	JPM_JP_APPRVL_HIST	Self Service, Learning and Development, Profile Approval History, Approval Transaction History	Lists profile approval transactions that the employee submitted. Employees can search for transactions within a specific date range and restrict the search to transactions with a specific status (<i>Pending</i> , <i>Denied</i> , or <i>Approved</i>).

Maintaining Interest Lists

This section provides an overview of interest lists and lists the pages used to maintain employee interest lists.

Understanding Interest Lists

Interest lists enable employees and managers to identify jobs that are of interest to the employee. Each employee has one interest list that is accessed by the employee, the employee's manager, and the profile administrator.

Employees can add profiles to their interest list using the My Interest List option, when viewing job profiles, or from the Search Results page. Similarly, managers can view and update their employees' interest lists using the Team Interest Lists option or they can add a profile to an employee's interest list while viewing job profiles.

Employees and managers can only delete a job profile from the interest list if they added the profile to the list (shown in the Assigned By field).

See Also

Chapter 2, "Maintaining My Profiles," Viewing and Updating Job Profiles, page 15

Page Used to Maintain Employee Interest Lists

Page Name	Object Name	Navigation	Usage
Manage Interest Lists	HR_DR_ADDDL_INFO	- Manager Self Service, Learning and Development, Team Interest Lists - Select the Profile Action Express Interest for Employee and click Go on the Job Profiles — Profile Details page.	Displays the instructions for the transaction and the effective date field. Managers can change the default effective date.
Manage Interest List — Select Employees to Process	HR_DR_SELECT_EMPS	Click Continue on the Manage Interest List page.	Displays a list of the people who report to the manager. Managers select the person whose interest they want to view and click Continue.
Interest List	JPM_INTEREST	- Self Service, Learning and Development, My Interest List - Select an employee on the Manage Interest List — Select Employees to Process page.	Lists the job profiles in the employee's interest list. The Assigned By column shows who added the profile to the interest list. Employees add profiles to their interest list, managers can add job profiles to their employees' interest lists, and profile administrators can add profiles to employees' interest lists. Employees and managers can only delete a job profile from the interest list if they added the profile to the list.

Viewing and Updating Job Profiles

This section lists the pages used to view job profiles.

Pages Used to View Job Profiles

Page Name	Object Name	Navigation	Usage
My Job Profiles — Select Profile	JPM_JP_REL_PRF_EMP	- Self Service, Learning and Development, My Job Profiles - Select the Profile Action View Related Job Profiles and click Go on the Person Profile — Profile Details page. - Select a search on the Search for Profiles page that has a non-person profile type defined as the source profile type and a criteria rule of <i>Default and Display</i> or <i>Default, No Display</i>.	Lists the profiles that are associated with the employee's job. Employees select the job profile that they want to view or use in the search and compare. This page is only displayed if there are two or more active job profiles related to the employee. If there is only one active job profile, this page is not displayed. The system determines which job profiles are related to an employee by searching the employee's job data record. If the employee has multiple jobs, the system checks all the person's active jobs for matching profiles.
View Job Profiles — Select a Profile, Interest List — Add Profiles	JPM_COM_PROF_SRCH	- Self Service, Learning and Development, View Job Profiles - Manager Self Service, Learning and Development, View Job Profiles - Click the Add Profile link on the Interest List page.	Employees and managers search for a job profile by either selecting a profile type or entering a profile name. They can view active job profiles that are defined as end profiles; profiles defined as templates only are not available to self-service users. This is defined in the profile type definition on the Profile Type — Identities page. From the list of profiles, employees and managers click the profile name to view the profile details. Managers can create a new profile by clicking the Add a Profile link on this page. This link is not available to employees.

Page Name	Object Name	Navigation	Usage
Job Profiles	JPM_MGRSS_PROFL1	Click the Add a New Profile link on the View Job Profiles — Select a Profile page.	Managers select the profile type for the new profile. The system then displays the content sections that are set up for the selected profile type.
Job Profiles — Profile Details	JPM_MGRSS_PROFL1B, JPM_MGRSS_PROFL1C	- Select a job profile from the My Job Profiles — Select Profile page. - Select a job profile from the View Job Profiles — Select a Profile page.	Displays the job profile that the employee or manager selected. Employees add job profiles to their interest list from this page by selecting <i>Express Interest</i> in the Profile Actions field and clicking the Go button. Managers add a profile to the interest list of a team member by selecting <i>Express Interest for Employee</i> in the Profile Actions field and clicking the Go button. The system displays only those content sections that are authorized for the employee or manager roles in the profile type definition. Managers can also use this page to create and edit job profiles. When the page is initially displayed, the fields are display-only. However, if the manager clicks the Edit Profile link, the system refreshes the page and makes the fields available. Managers can only update content sections to which they have update access, as defined on the Content Section page in the profile type definition.
Update <content type>, □ View <content type>, □Add New <content type>	JPM_PROF_DTL_SEC	- Select a profile item from the Job Profiles— Profile Details page. - Click the Add New <content type> link on the Job Profiles— Profile Details page.	Displays the details of a profile item. The fields on this page vary according to the content type of the item. Managers can update this information. Changes that require approval are submitted for approval processing when the manager clicks the Submit button on the Job Profiles — Profile Details page.

Page Name	Object Name	Navigation	Usage
Related Items	JPM_PROF_DETAIL	- Click the Related Content link on the Update <content type> page. - Click the Related Content link on the View <content type> page. - Click the Related Content link on the Add <content type> page.	Displays details of profile items that are related to the selected profile item.
Profile Identity Search	JPM_JP_PID_SRCH	Click the Search button in the Profile Identities scroll area of the Job Profiles—Profile Details page.	Managers use this page to select a profile identity for the job profile that they are editing.
Non-person Profile — Summary of Changes	JPM_JP_NPSUMM_SEC	Click the Submit button on the Job Profiles — Profile Details page.	Lists the changes that the manager has made to the job profile. The manager clicks the Submit button to submit the changes for approval or clicks Cancel to return to the Job Profiles — Profile Details page.

Searching and Comparing Profiles

This section provides an overview of search and compare profiles and lists pages used to search and compare profiles.

Understanding Search and Compare Profiles

Employees and managers use the Search and Compare Profiles option to search for profiles that match certain search criteria. When employees and managers select this option, the system lists the search types that are defined for their role. Search types are configured on the Search Configuration page (Set Up HRMS, Product Related, Profile Management, Define Search Configuration) for the profile types that you have defined. For further information about setting up Search and Compare Profiles, see the *PeopleSoft Enterprise Human Resources PeopleBook: Manage Profiles*.

Depending on how the search is configured, employees and managers can set up or modify the search criteria before running the search. The system assigns matching profiles a score that indicates how well the profile matches the search criteria. For further information about how the system calculates the scores, see the *PeopleSoft Enterprise Human Resources PeopleBook: Manage Profiles*.

The Search Results page lists the matching profiles in descending score order, with the highest scoring profile listed first. Employees and managers can compare profiles listed on the Search Results page with the search criteria either by clicking the score link for a profile or using the Compare Profiles button to compare more than one profile. The comparison provides a list of each item in the search criteria with the score for the matching profile.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, “Setting Up Search and Compare Profiles”

Pages Used to Search and Compare Profiles

Page Name	Object Name	Navigation	Usage
Search for Profiles	JPM_SRCH_TRANSFER	- Self Service, Learning and Development, Search and Compare Profiles, Search for Profiles - Manager Self Service, Learning and Development, Search and Compare Profiles	Lists the search types that are available to the employee or manager. Searches are defined on the Search Configuration page. Employees or managers select the search that they want to run by clicking the search name link.
Search and Compare Profiles — Select a Profile	JPM_COM_PROF_SRCH	Click a search link on the Search for Profiles page.	This page is displayed if an employee or manager selects a search that has a source profile type with profile usage of <i>End/Final/Job</i> (non-person profile). The page displays the default source profile type that is defined for the search. Employees and managers use this page to search for, and select, the profile that they want to use as the source profile.
My Job Profiles — Select Profile	JPM_JP_REL_PRF_EMP	Employees select a search on the Search for Profiles page that has a non-person profile type defined as the source profile type and a criteria rule of <i>Default and Display</i> or <i>Default, No Display</i> .	Lists the profiles that are associated with the employee’s job. Employees select the job profile that they want to use in the search and compare. This page is only displayed if there are two or more active job profiles related to the employee. If there is only one active job profile, this page is not displayed. The system determines which job profiles are related to an employee by searching the employee’s job data record. If the employee has multiple jobs, the system checks all the person’s active jobs for matching profiles.

Page Name	Object Name	Navigation	Usage
Search and Compare Profiles	HR_DR_ADDL_INFO	Click a search link on the Search for Profiles page.	This page is displayed if a manager selects a search that has a source profile type with profile usage of person. Displays the instructions for the transaction and the effective date field. Managers can change the default effective date.
Search and Compare Profiles — Select Employees to Process	HR_DR_SELECT_EMPS	Click the Continue button on the Search and Compare Profiles page.	Displays a list of the people who report to the manager. Managers select the person to use in the search and click Continue.
Search for Profiles — Search Criteria	JPM_SRCH_CRITERIA	- Click one of the search links on the Search for Profiles page. - Click the Modify Search Criteria link on the Search Results page.	Displays the search criteria for the search that the employee or manager selected on the Search for Profiles page. If the search selected has a criteria rule of <i>Default, No Display</i> the system runs the search without displaying this page; for this type of search employees and managers can view the search criteria after running the search by selecting the Modify Search Criteria link on the Search Results page. Employees and managers use this page to view and modify the search criteria before running the search. They also use this page after running a search to modify the search criteria and re-run a search. When the employee or manager clicks the Search button, the system runs the search using the criteria defined on the page.
Search for Profiles — Search Results	JPM_SRCH_RESULT	- Click one of the search links on the Search for Profiles page. - Click the Search button on the Search Criteria page.	Displays the results of the search. The page lists the profiles that best match the search criteria. The value in the score column indicates how well the profile matches the criteria. The system lists the matching profiles according to their score, the highest score listed first and then in descending order of score.

Page Name	Object Name	Navigation	Usage
Search and Compare Profiles — Match Result	JPM_COMPARE_RESULT	- Click a score link on the Search Results page. - Click the Compare Profiles button on the Search Results page.	Displays a comparison of the search criteria and the selected profiles. The left hand column lists each search criterion. The remaining columns list the percentage scores for each profile that indicate how well the profile matches that criterion.
Add to Interest List — Confirmation	JPM_INT_CONFIRM	- Click the Add to Interest List button on the Search Results page. - Select the Profile Action Express Interest and click Go on the Job Profile — Profile Details page.	Displays the profiles that have been added to the employee's interest list.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, “Setting Up Profile Management”

CHAPTER 3

Entering Faculty Member Training and Development Information

This chapter discusses how to:

- Enter training information.
- Manage activity information.
- Set up administrative post information.
- Manage committee information.
- Manage presentation information.
- Enter special project information.
- Review, update, and add student advising information.
- Enter teaching responsibility information.

Entering Training Information

This section lists the pages used to enter training information.

Pages Used to Enter Training Information

Page Name	Object Name	Navigation	Usage
Professional Training	EG_SSTRAINING_L	Self-Service, Learning and Development, Faculty Event Tracking, Professional Training	Faculty members add detailed information about the training course.
Professional Training - Change a Course, Professional Training - Add a Course, Professional Training — Training Detail	EG_SSTRAINING_D	Click Edit, Add a Course, or a course link on the Professional Training page.	Faculty members add detailed information about the training course.

Managing Activity Information

This section provides an overview of the Activities transaction and lists the pages used to manage activity information.

Understanding the Activities Transaction

Faculty members use the Activities self-service transaction to review, add, update, or delete records about their academic activities. The Activity Detail page enables faculty members to record information about their academic activities, such as activity type, sponsor, and beginning and end dates.

Pages Used to Manage Activity Information

Page Name	Object Name	Navigation	Usage
Activities	EG_SSACTIVITY_LIST	Self Service, Learning and Development, Faculty Event Tracking, Activities	Faculty members review, add, update, or delete information about their academic activities, such as activity type, sponsor, and beginning and end dates.
Change Activity, Add Activity, Activity Detail	EG_SSACTIVITY_DET	Click Edit, Add Activity, or an activity on the Activities page.	Faculty members create new activity records, and review and edit details about activity records already assigned to them.

Setting Up Administrative Post Information

This section provides an overview of the Administrative Posts self-service transaction and lists the pages used to review and update administrative post information.

Understanding the Administrative Posts Self-Service Transaction

Faculty members use the Administrative Posts self-service transaction to review, add, update, or delete Administrative Post records. The Administrative Post Detail page enables faculty members to enter details about their administrative posts, such as post type, begin and end dates, and organization.

Before you can track administrative posts, define administrative posts on the Administrative Post Table. Examples of an administrative post are Department Head and Chairperson.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Faculty Events, “Tracking Events,” Tracking Faculty Events

Pages Used to Set Up Administrative Post Information

Page Name	Object Name	Navigation	Usage
Administrative Posts	EG_SSADMIN_POSTS_L	Self Service, Learning and Development, Faculty Event Tracking, Administrative Posts	Faculty members review, add, update, or delete information about their administrative posts, such as post type, begin and end dates, and organization.
Change Administrative Post, Add Administrative Post, Administrative Post Detail	EG_SSADMIN_POSTS_D	Click Edit or Add Administrative Post on the Administrative Posts page.	Faculty members create new administrative post records, and review and edit details of administrative post records already assigned to them.

Manage Committee Information

This section provides an overview of the Committee self-service transaction and lists the pages used to manage committee information.

Understanding the Committee Self-Service Transaction

Faculty members use the Committee self-service transaction to review their committee membership information. The Committee Detail page displays the committee name, the dates of membership, and role in the committee.

For faculty members to view their committee memberships, you need to set up these tables:

- Use the Committee Type Table page to maintain different committee types and committee roles within each type.

The committee types that you set up on this page are used in the Committee page.

- Use the Committee page to establish a committee and attach a committee type to it.

For example, you can establish the research Committee Type and attach it to the research and development committee.

- Use the Committee Members page to assign faculty members to a committee type within the committee.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Track Faculty Events, “Tracking Events,” Tracking Faculty Events

Pages Used to Manage Committee Information

Page Name	Object Name	Navigation	Usage
Committees	EG_SSCOMMIT_MBR_L	Self Service, Learning and Development, Faculty Event Tracking, Committees	Faculty members review their committee membership information.
Committee Details	EG_SSCOMMIT_MBR_D	Click a committee start date on the Committees page.	Faculty members review details about administrative post records already assigned to them.

Managing Presentation Information

This section provides an overview of the Presentations transaction and lists the pages used to manage presentation information.

Understanding the Presentations Transaction

Faculty members use the Presentations self-service transaction to review, add, update, or delete records of their presentations. The Presentation Detail page enables faculty members to record information about the presentations they have given, including the presentation type, date, title, and the audience or function at which they gave the presentation.

Pages Used to Manage Presentation Information

Page Name	Object Name	Navigation	Usage
Presentations	EG_SSPRESENTATN_L	Self Service, Learning and Development, Faculty Event Tracking, Presentations	Faculty members review, add, update, or delete information about the presentations they have given.
Change Presentation, Add Presentation, Presentation Detail	EG_SSPRESENTATN_D	Click Edit, Add Presentation, a presentation link on the Presentations page.	Faculty members create new presentation records, and review and edit details about presentation records already assigned to them. This includes the presentation type, date, title, and the audience or function at which they gave the presentation.

Reviewing, Updating, and Adding Student Advising Information

This section provides an overview of the Student Advising self-service transaction and lists the pages used to review, update, and add student advising information.

Understanding the Student Advising Self-Service Transaction

Faculty members use the Student Advising self-service transaction to review, add, update, or delete student advisee records. The Student Advising Detail page enables faculty members to record information about their student advisees, including the level at which they are advising the students, the dates they will be advising the students, and the student's projects.

Pages Used to Review, Update, and Add Student Advising Information

Page Name	Object Name	Navigation	Usage
Student Advising	EG_SSADVISING_LIST	Self Service, Learning and Development, Faculty Event Tracking, Student Advising	Faculty members review, add, update, or delete information about their student advisees.
Change Student Advising, Add Student Advising, Student Advising Detail	EG_SSADVISING_DET	Click Edit, Add Student Advising, or click a student name link on the Student Advising page.	Faculty members create new student advising records, and review and edit details about student advising records already assigned to them. This includes the level at which they are advising the students, the dates they will be advising the students, and the student's projects.

Entering Teaching Responsibility Information

This section provides an overview of the Teaching Responsibilities self-service transaction and lists the pages used to enter teaching responsibility information.

Understanding the Teaching Responsibilities Self-Service Transaction

Faculty members use the Teaching Responsibilities self-service transaction to review, add, update, or delete Teaching Responsibilities records. The Teaching Responsibility Detail page enables faculty members to record information about their teaching responsibilities, including course type and description, units, term, percent taught (if they are sharing teaching with another faculty member) and the type of enrollment.

Pages Used to Enter Teaching Responsibility Information

Page Name	Object Name	Navigation	Usage
Teaching Responsibilities	EG_SSTEACH_RESP_L	Self Service, Learning and Development, Faculty Event Tracking, Teaching Responsibilities	Faculty members review, add, update, or delete information about their teaching responsibilities.
Change Teaching Responsibility, Add Teaching Responsibility, Teaching Responsibility Detail	EG_SSTEACH_RESP_D	Click Edit, Add Teaching Responsibility, or teaching responsibility link on the Teaching Responsibilities page.	Faculty members create new teaching responsibility records, and review and edit details about teaching responsibility records already assigned to them.

CHAPTER 4

Requesting Employee Training

This chapter provides an overview of the self-service training development process and discusses how to:

- Submit training requests.
- Approve training requests.
- View the status of training requests.
- Review training history information.
- Review workflow information.

Understanding the Self-Service Training Development Process

This section lists prerequisites and discusses the self-service training development process.

Prerequisites

Before employees and managers can submit training requests, complete the following:

1. Activate workflow.
2. Set up group build if you plan to use group ID as the access type for a manager to request training for his or her direct reports.
3. Set up the access type for HR_DR_TRN_SUMMARY and TRN_REQUEST_LNK on the Direct Reports Setup page.
4. Define the rules for Training Enrollment and Training Enrollment by Manager on the Configuration Options, Notification Setup, and Component Interface Setup pages.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Self-Service Transactions”

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Group Definitions”

The Self-Service Training Development Process

eDevelopment provides four self-service transactions that improve the efficiency of employee development:

- Request Training Enrollment.

An employee or manager accesses the Request Training Enrollment transaction. Employees request training on their own behalf and managers request training for their direct reports. Whether you are an employee or manager submitting the request, the system considers you the originator.

The originator selects a method for searching for course sessions that are set up in PeopleSoft Enterprise Human Resources: Administer Training. The system displays a list of available courses and the originator can pick the course and session that meets their needs.

The system checks to see if there are any prerequisites that must be met. For managers, the system displays either a list of their direct reports who meet the prerequisites and or a list of those who don't. If an employee is scheduled to take a course that meets the prerequisite for the selected course, the system considers this employee as meeting the requirement.

Managers select the employees they want to enroll in the course. The system displays a summary of the course. Employees or managers can enter any relevant comment and request to be placed on a waiting list if the course is full.

- Approve Training Request.

Managers use the Approve Training Request transaction to either approve or deny a request. Information about the request cannot be changed; however, the approver can enter a comment.

- Training Request Status.

Employees and managers can check the status of a request using the View Training Request Status transaction.

- Training Summary.

Employees and managers can access the Training Summary transaction. Employees can view a summary of the training courses that they have completed, and courses for which they are enrolled or on the waiting list. Managers view the same information for their direct reports.

Note. If a manager requests training for a group of direct reports and the class exceeds the number allotted during the enrollment process, the system enrolls the entire group into the class and updates their statuses to enrolled. The system then notifies an administrator to handle this situation.

Submitting Training Requests

This section lists the pages used to submit training requests.

Pages Used to Submit Training Requests

Page Name	Object Name	Navigation	Usage
Request Training Enrollment	TRN_SEL COURSE_MGR	- Self-Service, Learning and Development, Request Training Enrollment - Manager Self-Service, Learning and Development, Request Training Enrollment	Employees or managers select the method by which they want to search for training courses.

Page Name	Object Name	Navigation	Usage
Course Search	HR_TRN_SRCH_COURSE	Click one of the four search method links on the Request Training Enrollment page.	Employees or managers enter the appropriate information to display a list of courses that match their criteria.
Course Detail	HR_TRN_ENROLL_DESC	Click the Information button on the Course Search page.	Employees or managers review detailed information about the course.
View Available Sessions	HR_TRN_COURSE_SESS	Click the View Available Sessions link on the Course Search page.	Employees or managers review the available course sessions and select the desired session.
Prerequisites Not Met	EO_ERR_CONTINUE	Click a session ID on the View Available Sessions page.	Displays the prerequisites for the course selected. This page is displayed if the employee does not meet the prerequisites.
Session Detail	HR_TRN_SESS_DETAIL	Click a session ID on the View Available Sessions page.	Employees or managers review the details of a course session. This page displays the session location, start date, and language of the session. Employees click Continue to process the training request or be placed on the waiting list. Managers click Continue to select the employees that they want to enroll in this course or place on a waiting list.
Select Employees	TRN_OPRROWS_MULTI	Click Continue on the Session Detail page.	Lists the manager's direct reports who meet the course prerequisites and those who don't meet the prerequisites. Managers select the employees that they want to enroll in the selected course from the list of employees who meet the course prerequisites.
Submit Request	TRN_REQUEST_MGR	Click Continue from the Select Employee page or the Session Detail page.	Managers or employees enter any comments and click the Submit button to submit the request. If the request was successfully submitted, this page is re-displayed with details of the submitted request.

Approving Training Requests

This section provides an overview of training request approval processing and lists the pages used to approve training requests.

Understanding Training Request Approval Processing

When employees and managers submit training requests, the requests may require one or both of the following before the employee is enrolled in, or added to the waiting list for, a course session:

- Manager approval.

Managers approve training requests for their employees using the Approve Training Request self-service transaction.

- Processing by the training administrator.

Training administrators use the Administer Request page (Enterprise Learning, Approve Training Request) to approve the training request. Depending on the option selected on the Administer Request page, the training administrator may also need to manually enroll the employee in the session.

You configure training request processing on the Self Service Workflow Configurations page (Set Up HRMS, Common Definitions, Self Service, Workflow Configuration, Self Service Workflow Configurations).

The training request self-service transactions are:

- Training Enrollment.
- Training Enrollment by Manager.

The check boxes Approval Process? and Allow DB Update on the Self Service Workflow Configurations page affect the way that the training requests are processed. This table describes the training request processing for the different configurations:

Approval Process?	Allow DB Update	Manager Approval	Training Administrator Approval
Selected	Not Selected	Required	Required
Not Selected	Not Selected	Not required	Required
Selected	Selected	Required	Required
Not Selected	Selected	Not required	Not required

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Self-Service Transactions,” Setting Up Approvals and Database Updates

Pages Used to Approve Training Requests

Page Name	Object Name	Navigation	Usage
Approve Training Request	SS_LIST	Manager Self-Service, Learning and Development, Approve Training Request	Managers view a list of employees that require training approval.
Approve Training Request	TRN_REQUEST_MGR	Manager Self-Service, Learning and Development, Approve Training Request Click the Training Enrollment by Manager link.	Managers approve or deny each employee's training request and enter comments.
Save Confirmation	EO_SAVE_CONFIRM	Select Approve or Deny on the Approve Transaction page.	Managers approve or deny the request.
Administer Training Request	TRN_REQUEST_ADM	Enterprise Learning, Administer Training Requests	Training administrators use this page to approve or deny training requests. In the Administrator Actions group box, the administrator has three options: • To approve the training request and allow the system to automatically enroll or add the employee to the waiting list for the selected course session. • To approve the training request, without the automatic update. If the training administrator selects this option, the system does not enroll the employee. The training administrator must do this manually. • To deny the training request.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Training, “Enrolling and Wait-Listing Students”

Viewing the Status of Training Requests

This section lists the pages used to view the status of training requests.

Pages Used To View the Status of Training Requests

Page Name	Object Name	Navigation	Usage
Training Request Status Training Request Status List	SS_LIST	- Self-Service, Learning and Development, Training Request Status, Training Request Status - Manager Self-Service, Learning and Development, View Training Request Status, Training Request Status List	Displays current status summary information for each training request.
Training Request Status	TRN_REQUEST_MGR	Click the Training Enrollment link on the Training Request Status or Training Request Status List page.	Displays details of the current status for the selected training request.

Reviewing Training History Information

This section lists the page used to review training history.

Page Used to Review Training History

Page Name	Object Name	Navigation	Usage
Select Employee	OPPROWS	Manager Self-Service, Learning and Development, Training Summary, Select Employee	Displays a list of the employees who report to the manager. Managers select the employee whose training summary they want to review.
Training Summary	HR_TRN_SUMMARY	- Click an employee's name link in the Name column on the Select Employee page. - Self-Service, Learning and Development, Training Summary, Training Summary	Displays a summary of training courses that the employee has completed, is enrolled in, or on the waiting list. You can also initiate enrollment into another course by clicking the Internal Training Enrollment link.
Training Summary - Course Detail	HR_TRN_CRSDISC	Click a link in the Course Name column on the Training Summary page.	Displays detailed information about the training course.

Reviewing Workflow Information

This section lists the page used to review workflow information for the self service transactions.

Page Used to Review Workflow Information

Page Name	Object Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry	Administrators use this page to review transactions that successfully updated the database or require further processing. This page also provides an audit trail of who made the update to the database. Administrators either enter an employee ID or select a transaction name. For training requests, select either HR_TRAIN_ENROLL for employee requests or HR_TRAIN_ENROLL_MGR for manager requests. For training requests, if you click the Go to Enrollment link the Course Session Enrollment page is displayed with the request information.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Self-Service Transactions”

CHAPTER 5

Managing Professional Compliance

This chapter provides an overview of professional compliance and discusses how to:

- Complete regulated individual (RI) development reviews.
- Complete RI observations.
- Complete RI key performance indicator (KPI) reviews.
- View RI development records.
- View RI development reviews.
- View RI observation history.
- View regulated individual KPI review history.

Understanding Professional Compliance

Manage Professional Compliance is a PeopleSoft Enterprise Human Resources business process that enables you to manage the professional certification of both employees and non-employees.

With Manage Professional Compliance, you can:

1. Define the certification requirements established by a regulatory authority.
2. Set up classifications used to define the status of regulated individuals.
For example, an individual can be classified as compliant or noncompliant with the requirements for certification.
3. Assign regulated individuals to compliance managers/supervisors.
4. Enroll regulated individuals in development plans designed to help individuals obtain a level of competence to attain a specified classification.
5. Monitor individuals in their progress by completing reviews, observations, KPIs, and checks.

Using Self-Service Transactions with Manage Professional Compliance

The Manage Professional Compliance business process provides self-service transactions for both compliance supervisors/managers and regulated individuals (RI):

- Supervisors/managers can view the status of their regulated individuals and perform actions such as completing development reviews, entering observations, and completing KPI reviews.
- Regulated individuals can view key data related to their compliance status and development plans.

Note. All RI direct reports display on the RI pages regardless of their assignment statuses. The assignment status also displays in the Direct Reports grids on the RI pages.

For Manage Professional Compliance transactions, individuals that a manager/supervisor can view in the Direct Reports grid are their regulated individuals. It is possible for a manager/supervisor to have direct reports who are not RIs in which case the direct report would not display in the grid.

It is also possible for a manager/supervisor to be responsible for an RI, who is not one of their direct reports. In this case, the RI would still display in the grid since it is an RI transaction. Regulated individuals who are not also a direct report of a manager/supervisor will not display in the Direct Reports grid for any self-service transactions other than those for Manage Professional Compliance.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance, “Monitoring Regulated Individuals”

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance, “Entering and Maintaining Regulated Individual Data”

Completing Regulated Individual Development Reviews

This section provides an overview of RI development reviews and lists the pages used to complete development reviews.

Understanding RI Development Reviews

Compliance managers/supervisors use the Complete RI Development Review transaction to select regulated individuals from a list and then review their development plans. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor, and the development plans available for review include only those for which the expected completion date (defined on the Development Record page) has not yet passed.

Before you can complete this transaction, you must define your development plans and enroll individuals in these plans as part of Manage Professional Compliance setup in Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance

Pages Used to Complete Regulated Individual Development Reviews

Page Name	Object Name	Navigation	Usage
Complete a Regulated Individual Development Review - Select Regulated Individual	PCMP_OPRROWS, PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI Development Review  Click to access an employee ID list.	Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select the regulated individual for whom they want to complete a development review.
RI Development Review (regulated individual development review)	HR_PCMP_T_DEVREV, HR_PCMP_T_DEVREV2, HR_PCMP_T_DEVREV3	Select a regulated individual on the Complete a Regulated Individual Development Review - Select Regulated Individual page.	Managers complete development reviews. Using the pages, managers select statuses for development plan areas, and add optional comments about a particular area. They can also update review dates and the review status.

Completing RI Observations

This section provides an overview of RI observations and lists the pages used to complete observations.

Understanding RI Observations

Compliance managers/supervisors use the Complete RI Observation transaction to select a regulated individual from a list and complete an observation. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete an observation, you must define observation elements and construct observation models as part of the setup of Manage Professional Compliance in Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance, “Monitoring Regulated Individuals,” Observing Regulated Individuals

Pages Used to Complete RI Observations

Page Name	Object Name	Navigation	Usage
Complete a Regulated Individual Observation - Select Regulated Individual	PCMP_OPRROWS, PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI Observation  Click to access an employee ID list.	Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual for whom they want to complete an observation.
RI Observation (regulated individual observation)	HR_PCMP_T_RIOBS, HR_PCMP_T_RIOBS2, HR_PCMP_T_RIOBS3	Select a regulated individual on the Complete a Regulated Individual Observation - Select Regulated Individual page.	Compliance managers/supervisors enter the observation information, including the observation models, the observation date, the statuses of observation model elements, and optional comments.

Completing RI Key Performance Indicator Reviews

This section provides an overview of RI key performance indicator reviews and lists the pages used to complete KPI reviews.

Understanding RI Key Performance Indicator Reviews

Compliance managers/supervisors use the Complete RI KPI Review transaction to select a regulated individual from a list and then enter KPI review details. The list of regulated individuals is limited to those under the control of the compliance manager/supervisor.

Before you can complete a review of an individual's progress against KPIs, you must define the specific indicators that you want to use as part of the setup of Manage Professional Compliance in Human Resources. PeopleSoft includes the following broad categories of performance indicators as part of the delivered application; within these categories, however, you must choose (and in some cases set up) the exact indicators that you want to use:

- Complaints – Number of complaints against the individual versus those against the company.
- Persistency (of business sold) – Percentage of business sold that is still in force.
- Spread of Business – Measure the range of applications being sold by the individual.
- Not Taken Up (NTU) – Number of proposals submitted, but not put into force.
- Factfind Completion – Check on accuracy, completeness and quality of service.

Note. The KPIs listed here are directly targeted at the U.K. financial services arena. However, the key structure of the KPI records, and the way that the functionality is incorporated within Professional Compliance, can be used as a guide for creating additional, modified KPIs.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance, “Monitoring Regulated Individuals,” (GBR) Monitoring KPIs

Pages Used to Complete RI Key Performance Indicator Reviews

Page Name	Object Name	Navigation	Usage
Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual	PCMP_OPRROWS, PCMP_OPRROWS2	Manager Self Service, Learning and Development, Complete RI KPI Review  Click to access an employee ID list.	Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual for whom they want to complete a KPI review.
RI KPI Review (regulated individual key performance indicators review)	HR_PCMP_T_RIKPI, HR_PCMP_T_RIKPI2, HR_PCMP_T_RIKPI3	Select a regulated individual on the Complete a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page.	Compliance managers/supervisors perform a key performance indicator review by completing details for each indicator, entering the date of the review, the frequency, and optional comments about the review.

Viewing RI Development Records

This section provides an overview of the view RI development records transaction and lists the pages used to view RI development records.

Understanding the View RI Development Records Transaction

Compliance managers/supervisors use the View RI Development Record transaction to view details of a development plan for regulated individuals, and employees use this transaction to view details of their own development plans.

Before you can view details of a development plan, you must define your development plans and enroll individuals in them as part of the setup of Manage Professional Compliance in Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance

Pages Used to View RI Development Records

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Development Record - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI Development Record  Click to access an employee ID list.	Displays a list of the compliance manager/supervisor's regulated individuals. Managers/supervisors select a regulated individual whose development plan they want to view.
RI Development Record (regulated individual development record), Development Record	HR_PCMP_DEVREC2	- Select a regulated individual on the View a Regulated Individual Development Record - Select Regulated Individual page. - Self-Service, Learning and Development, RI Development Plan, Development Record	Compliance managers/supervisors view details of development plans for regulated individual. Employees can view details of their own development plans.

Viewing RI Development Reviews

This section provides an overview of the View RI Development Review transaction and lists the pages used to view development reviews.

Understanding the View RI Development Review Transaction

Compliance managers/supervisors use the View RI Development Review transaction to view the development review history of regulated individuals, and regulated individuals use this transaction to see details of their own development reviews.

To view a development review, you must have already created the review using the RI Development Review page in eDevelopment, or the RI Dev Review and RI Dev Area Review pages in Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance, “Monitoring Regulated Individuals”

Pages Used to View RI Development Reviews

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Development Review - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI Development Review  Click to access an employee ID list.	Select a regulated individual whose development review you want to view.
Development Review	HR_PCMP_DEVREV2	- Select a regulated individual on the View a Regulated Individual Development Review - Select Regulated Individual page. - Self-Service, Learning and Development, RI Development Review, Development Review	Compliance managers/supervisors view development review histories of regulated individual. Employees can view details of their own development reviews.

Viewing RI Observation History

This section provides an overview of the View RI Observation transactions and lists the pages used to view RI observation history.

Understanding the View RI Observation Transaction

Compliance managers/supervisors use the View RI Observation transaction to view observations of regulated individuals, and regulated individuals use this transaction to view details of their own observations.

To view an observation, you must have already created the observation using the RI Observation page in eDevelopment, or the RI Observation and Obs Elements pages in Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance, “Monitoring Regulated Individuals”

Pages Used to View RI Observation History

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Observation - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI Observation  Click to access an employee ID list.	Select a regulated individual whose observation history you want to view.
RI Observation (regulated individual observation), Regulated Individual Observation	HR_PCMP_RIOBS	- Select a regulated individual on the View a Regulated Individual Observation - Select Regulated Individual page. - Self-Service, Learning and Development, RI Observation, Regulated Individual Observation	Compliance managers/supervisors view observation history. Employees view details of their own observation history.

Viewing Regulated Individual KPI Review History

This section provides an overview of the View RI KPI Review transaction and lists the pages used to view regulated individual KPI review history.

Understanding the View RI KPI Review Transaction

Compliance managers/supervisors use this transaction to view the KPI reviews of regulated individuals, and regulated individuals use this transaction to view details of their own KPI reviews.

To view a KPI review, you must have already created the review using the RI KPI Review page in eDevelopment, or the KPI Review and KPI Statistics pages in Human Resources.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Professional Compliance, “Monitoring Regulated Individuals”

Pages Used to View Regulated Individual KPI Review History

Page Name	Object Name	Navigation	Usage
View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual	PCMP_OPRROWS	Manager Self-Service, Learning and Development, View RI KPI Review  Click to access an employee ID list.	Select a regulated individual whose KPI review you want to view.
RI KPI Review (regulated individual key performance indicators review), Regulated Individual KPI Review	HR_PCMP_RIKPI	- Select a regulated individual on the View a Regulated Individual Key Performance Indicators Review - Select Regulated Individual page. - Self-Service, Learning and Development, RI KPI Review, Regulated Individual KPI Review	Compliance managers/supervisors view regulated individual KPI reviews. Employees can view details of their own KPI reviews.

APPENDIX A

Delivered Workflow for eDevelopment

This appendix discusses workflow for eDevelopment.

See Also

PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook, “Setting Up and Working with Approvals”

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflow for eDevelopment

This section discusses eDevelopment workflow.

Understanding Delivered Profile Approval Workflow

Profile approvals processing uses the approval workflow engine. The delivered approval definitions provide the following approval processing:

- When employees make changes to their personal profiles, the changes that require approval (as defined by the profile type definition) are routed to their manager for approval.
- When managers create or update non-person profiles, the changes are routed to the profile administrator for approval.

The delivered definitions enable you to set up a one-step or two-step profile approval process. You can use the delivered definitions or set up new approval definitions according to your business requirements. Approval definitions are linked to profile types on the Profile Types — Attributes page.

See Also

PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Profiles, “Setting Up Profile Management”

Non-Person Profile Approval Workflow

This section discusses the non-person approval workflow.

Description

Event Description	A manager creates a new job profile or updates an existing job profile using the View Job Profiles self-service option.
Action Description	When the profile administrator selects the worklist entry or clicks the link in the email, the system links the profile administrator to the Non-person Profile — Approval page.
Notification Method	Email and worklist.

Approval Workflow Definitions

Process ID	JPMNonpersonProfiles
Workflow Transaction	JPMNonpersonProfiles
Definition ID	Two delivered definition IDs: ByProfileAdministrator is a one-step approval by the profile administrator (user list JPMApprovalAdministrator). ProfileAdminThenCompAdmin is a two-step approval. The first approver is the profile administrator (user list JPMApprovalAdministrator) and the second approver is the compensation administrator (user list JPMCompensationAdministrator).
Email Templates	JPMApproveNonpersonProfile JPMDenyNonpersonProfile JPMErrorsNonpersonProfile JPMSubmitNonpersonProfile JPMPushbakNonpersonProfile Note. The pushback email template JPMPushbakNonpersonProfile is not enabled in eDevelopment as delivered.

Person Profile Approval Workflow

This section discusses the person profile approval workflow.

Description

Event Description	An employee creates a new person profile or updates an existing person profile using the My Profile self-service option.
Action Description	When the employee's manager selects the worklist entry is selected or clicks the link in the email, the system links the manager to the Person Profile — Approval page.
Notification Method	Email and worklist.

Approval Workflow Definitions

Process ID	JMPPersonProfiles
Workflow Transaction	JMPPersonProfiles
Definition ID	Six delivered definition IDs for the different reporting structures: ByDepartmentManager for approval by the department manager defined by the Manager ID field on the Department Profile page (user list JPMDepartmentManager). ByReportsToOrDepartmentMgr for approval by the manager defined by the Reports To field on the Job Information page, or, if that manager is not found, the Manager ID for that department on the Department Profile page (user list JPMPartPosnMgmtDeptMgr). ByReportsToOrSupervisorID for approval by the manager defined by the Reports To field on the Job Information page, or, if that manager is not found, the Supervisor ID for that person (user list JPMPartPosnMgmtSupervisor). ByReportsToPosition for approval by the manager defined by the Reports To field on the Job Information page (user list JPMReportsToPosition). BySupervisorID for approval by the supervisor defined by Supervisor ID field on the Job Information page (user list JPMSupervisorID) TwoLevelManager is a two-step approval process. The approval is routed to the employee's manager (user list JPMPartPosnMgmtSupervisor) and then the manager's manager (user list JPMPartPosnMgmtSupervisor)
Email Templates	JPMApprovePersonProfile JMPPushbackPersonProfile JPMDenyPersonProfile JPMErrorPersonProfile JPMSubmitPersonProfile Note. The pushback email template JMPPushbackPersonProfile is not enabled in eDevelopment as delivered.

Professional Training

This section discusses the Professional Training workflow that is based on PeopleTools workflow; it does not use the approvals workflow engine.

See *Enterprise PeopleTools PeopleBook: Workflow Technology*

Description

Event Description	An employee uses self-service to update their personal development information for professional training. This generates either a worklist entry or email to the manager.
Action Description	When the worklist entry is selected (or the link in the email is selected), the system links the manager to the page where she can view changed personal development information for professional training.
Notification Method	Email, worklist, or both.

Workflow Objects

Event	HR_PROF_TRAINING
Workflow Action	Automatic
Role	Roleuser by EmplID query
Email Template	Notify Manager
Business Process	Professional Training
Business Activity	HR_PROF_TRAINING
Business Event	Training

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 <i>receivables specialist</i> . 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 <i>detailed business process</i>.
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 <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft 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 <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, 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 <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft 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 <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft 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 <i>drop ship</i>).
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 <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft 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 <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft 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 <i>donor pyramid</i> 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 <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
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 <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft 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 <code>ADVANCED_SHIPPING_ORDER</code> 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 <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
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 <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
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 <i>learning management system</i> . 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 <i>1</i> —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 <i>3C engine</i> .
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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft 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 <i>Non-Discountable Products</i> . 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 <i>need analysis</i> .
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 <i>compensation object</i> .
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 <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
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 <i>division</i> and <i>cohort</i> .
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 <i>giveaways</i>).
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 <i>record input value-added tax flag</i> . 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 <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft 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 <i>real-time event notification server</i> 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 <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . 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 <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft 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 <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft 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 policies 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 <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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 <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft 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 <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft 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 <i>eXtended Process Integrator</i> . 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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