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PeopleSoft Enterprise eProfile 9.0 PeopleBook

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PeopleSoft Enterprise eProfile 9.0 PeopleBook
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Contents

About This PeopleBook Preface

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

Additional Resources

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in PeopleBooks

As of Date The last date for which a report or process includes data.

Business Unit An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise eProfile Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

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

PeopleSoft Products

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

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.

The *PeopleSoft Enterprise eProfile PeopleBook* provides you with implementation and processing information for your PeopleSoft Enterprise eProfile system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in PeopleSoft Enterprise eProfile 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 product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

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

Common Elements Used in this PeopleBook

administrator Refers to PeopleSoft power users. Power users generally have access to the core PeopleSoft Human Resources Management System. Depending on the organization, any of the following system delivered roles are recognized as a power user: Benefits Administrator, Federal Self-Service Administrator, HR Administrator, HR Processor, Payroll Administrator, and Personnelist.

originator The person who makes the initial request. For self-service transactions, this is usually an employee or manager.

reviewer The person who either approves or denies a submitted request.

CHAPTER 1

Getting Started with eProfile

This chapter provides an overview of PeopleSoft Enterprise eProfile and discusses:

- eProfile business processes.
- eProfile implementation.

PeopleSoft Enterprise eProfile Overview

eProfile is a collaborative application that enables employees to maintain their own profiles, thereby decreasing administrative time, costs and increasing data integrity. eProfile ensures that data changes comply with your organization's requirements.

With this application, employees can view, update, and request changes to their personal data, such as:

- Email address.
- Emergency contact.
- Home and mailing addresses.
- Marital status.
- Name.
- Personal information.
- Phone number.

For U.S. federal customers, additional transactions include:

- Checking the status of requests they have submitted.
- Requesting a leave of absence.
- Requesting a termination.

PeopleSoft Enterprise eProfile Business Processes

PeopleSoft Enterprise eProfile supports these business processes:

- Maintaining name, address, phone number, marital status, date of birth, and other data.
- Requesting leaves of absence or terminations (U.S. federal employees).
- Determining how workflow notifications are received.

PeopleSoft Enterprise eProfile Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all sources of information about the PeopleSoft Enterprise system, including installation guides, table-loading sequences, data models, and business process maps.

See Also

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

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager.

CHAPTER 2

(USF) Setting Up Approvals

This chapter provides an overview of approvals and discusses how to:

- Define steps and workflow notification details.
- Define Personnel Action Request (PAR) tracking data.
- Identify self-service administrators and define notification details.

Understanding Approvals

eProfile delivers a three-step approval process: Request, 1st-Authorization, and 2nd-Authorization, for the following eProfile transactions:

- Address changes
- Marital status
- Name change
- Phone number change

Step 1 – Request

Requests are submitted by an originator. An originator can be an employee or manager. When the originator submits the request, the system triggers workflow that sends a confirmation email to the originator and a notification to the person or role that is to review the transaction.

Step 2 – First Approval Level

The reviewer reviews the change request information. The reviewer has two possible actions to take, approve or deny.

If the reviewer approves the request, the system triggers workflow that sends a notification to the person or role that is identified as the next reviewer.

If the reviewer denies the request, the system triggers workflow that sends an email to the originator informing them that the request was denied and closes the request.

Step 3 – Second Approval Level

Step 3 is the final self-service approval step in the delivered federal self-service approval process. Just as in step 2, the reviewer has two possible action, approve or deny.

If the reviewer approves the request, the system updates the federal Personnel Action Request (PAR) tables and triggers workflow that sends a notification to the person assigned to the Personnelist role that informs him or her of the request.

If the reviewer denies the request, the system triggers workflow that sends an email to the originator informing him or her that the request was denied and the system closes the request.

When approval is given, the system processes the request and triggers workflow that notifies the Personnelist of the request.

Transaction Processing

Processing is automatically triggered when the reviewer, in the final step of the self-service approval process, clicks the Approve button. Data is pulled from the self-service transaction tables and uses it to populate the federal PAR tables: the Federal Job, Federal Personal Data, and the employee tracking tables.

Workflow is triggered and a notification is sent to the federal self-service administrator:

- Automatically when an error occurs.
- When set up to recognize successful completions or warnings.

Note. The Request Leave of Absence and Request Termination transactions use the USFED Approval Transactions definitions that write directly to the PAR tables.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “(USF) Setting Up the Work-in-Progress Management System”.

Note. The Full/Part-time Status Change, Location Change, and Reporting Change transactions are not processed by the component interface. When final approval is submitted for these transactions, a notification is sent to the self-service administrator for processing. The self-service administrator determines whether the employee’s position data or the position-level data is to be updated using the HR Processing component. If position-level data is updated, then multiple incumbents could be affected.

The Change Phone Number transaction does not use the approval process either. When the request is submitted, it automatically updates the PeopleSoft Human Resources tables.

Defining Steps and Workflow Notification Details

This section provides an overview of approval steps and discusses how to:

- Define status and status types.
- Define approval steps.
- Define workflow notification details.
- Add an approval step.
- Delete one approval step.
- Delete all approval steps.

Understanding Approval Steps

Approval steps define the self-service approval process that a self-service transaction must go through. As delivered, the federal self-service transactions use a three-step self-service approval process: Request, 1st-Authorization, and 2nd-Authorization.

However, you can configure the system so that the requests made using the federal self-service transactions:

- Go directly to the personnelist for processing.
- Go through one level of approval before being routed to the personnelist for processing.
- Go through three or more levels of approval before being sent to the personnelist for processing.

There are no limits to the number of steps you define for the self-service approval process.

For each step, you define:

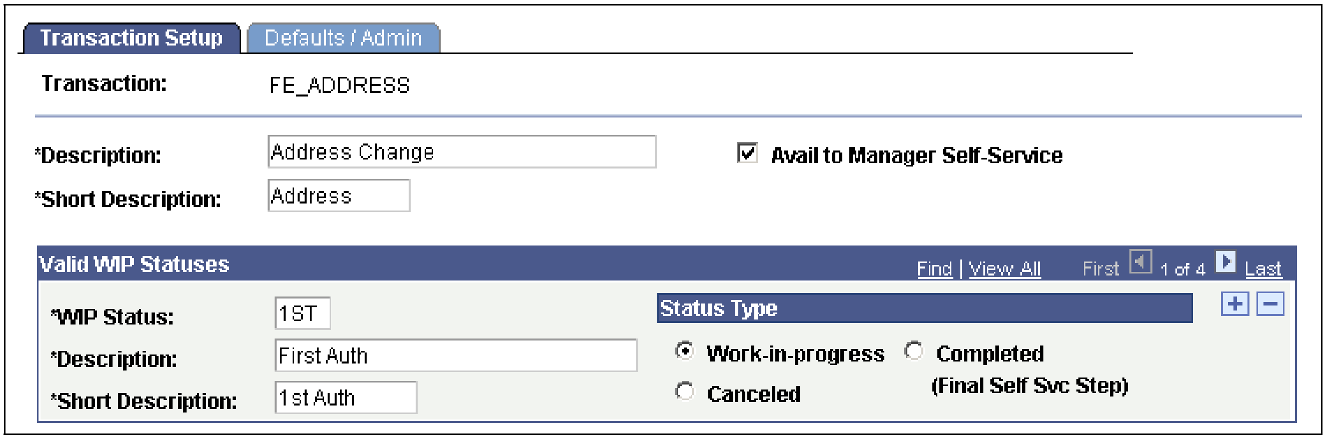
- The number of the step in the sequence of steps.
- Actions available at that step.
- The person or role that is to receive workflow notifications for a specific step and action combination.
- The WIP status resulting from the action.
- Detailed information for workflow notifications.

Pages Used to Define Steps and Workflow Notification Details

Page Name	Object Name	Navigation	Usage
Transaction Setup	GVT_WIP_RECORD1	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Transaction Setup	Define statuses and status types.
Define Steps	GVT_WIP_ACTVTY4	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Flow	Define approval steps.
Workflow Notification Details	FE_WF_DETAIL	Click the Workflow Notification Details link on the Define Steps page.	Define workflow objects that are used for the notifications that are generated for a particular approval step and action.

Defining Statuses and Status Types

Access the Transaction Setup page.



Transaction Setup page

Avail to Manager Self-Service

Select to indicate that this is a self-service transaction. It is recommended that you not change this field for the delivered self-service transactions.

Valid WIP Statuses

WIP Status (work-in-progress status)

Enter a three-character code to represent the status.

Note. These codes must be defined as valid statuses for the USFED transaction. This enables the system to process the request using the existing HR Processing component when the request has reached final approval in the self-service approval process.

Status Type

Work-in-progress

Select this status to indicate that the request is not complete nor canceled.

Canceled

Select this status to indicate that the request has been denied.

Completed

Select this status to indicate that the request has reached the final level of self-service approval and can be processed by an administrator using the existing HR Processing Component.

Note. When changing the status type for a transaction to *Completed*, remember to update the Workflow message. When changing the status type of a transaction to *Completed*, the workflow message may be affected. You may have to update the corresponding workflow notification details in the Approval Flow component.

Defining Approval Steps

Access the Define Steps page.

Define Steps page

Approval Process Steps

Step Number Enter a number that identifies the order that the approval process will follow. The numbering of the approval steps must be sequential and begin with the number 1. The system is designed to recognize step 1 as a request.

Step Name Enter a name for this step. The name can be up to 10 characters long.

Actions For Step

On Action Of Add or modify the action that can be taken for this step. Available actions are *Approve,Deny,* or *Request.*

Set Status To Select the WIP status to which the transaction should be set upon completing the action. The available statuses are those which were defined for the transaction on the Transaction Setup page. Available options are: *1st – First Auth, 2nd – Second Auth,* or *DNY – Denied, REQ – Requested.*

Route To Select to whom you want a notification sent to when this action occurs. Valid options are:

- *Employee,* which requires the transaction user to select an employee ID at the time they perform the action.
- *Role,* which indicates that the notification is sent to all employees in the specified role.
- *Supervisor,* which indicates the notification is sent to the supervisor of the person currently working on the request. The individual to whom the notification is routed is the only user granted access to perform the next sequential step for the request.

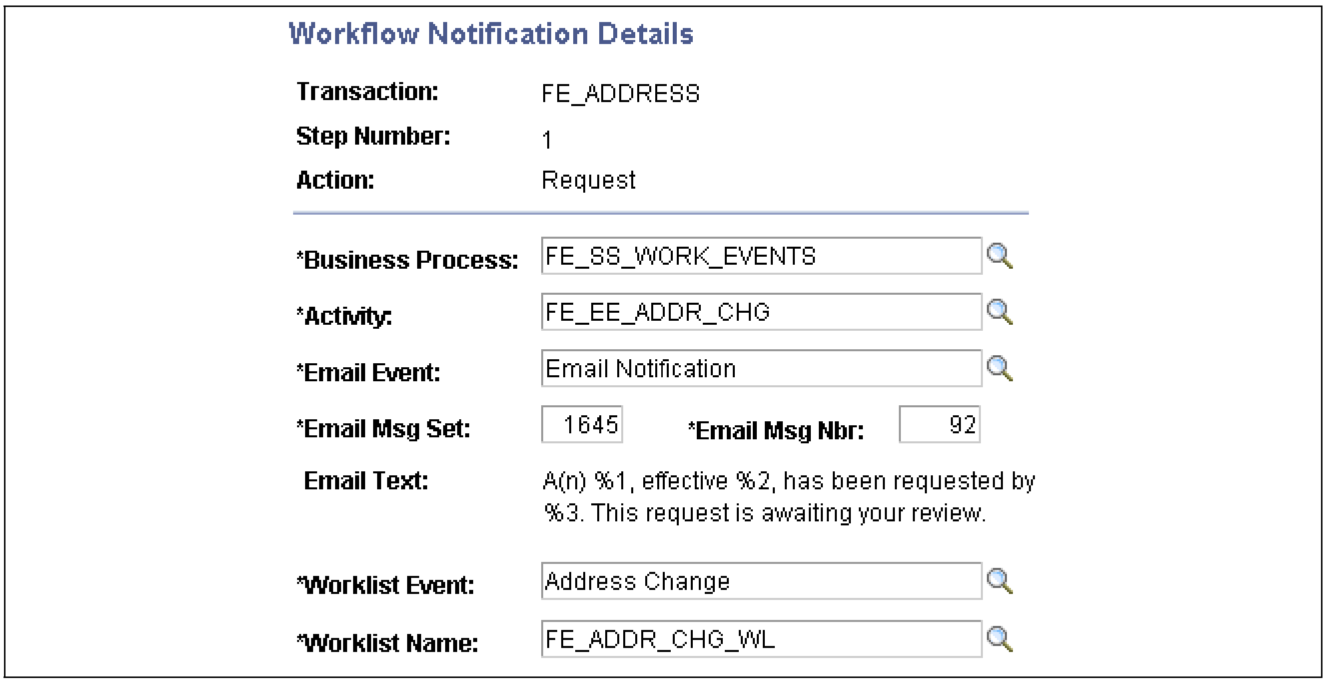
Prompt Table
This field appears when you select *Employee* in the Route To field. Enter the record name from which the employee ID is selected.

Role Name
This field appears when you select *Role* in the Route To field. Select the role that you want a notification sent to when this action occurs.

Description
This field appears when you select *Employee* in the Route To field. Enter the instructional text that appears on the transaction page that instructs the user to enter the next reviewer’s employee ID.

Defining Workflow Notification Details

Access the Workflow Notification Details page.



Workflow Notification Details page

It is recommended that you not change the information on this page for the delivered self-service transactions.

Business Process
Select the name of the business process that is used for notification upon completion of the given step and action.

Activity
Select the name of the activity that is used for notification upon completion of the given step and action.

Email Event
Select the name of the event that is used for email notification upon completion of the given step and action.

Email Msg Set (email message set)
Select the message set that is used for the body of the email notification upon completion of the given step and action.

Email Msg Nbr
Select the message number that is used for the body of the email notification upon completion of the given step and action.

Worklist Event
Select the name of the event that is used for the worklist notification upon completion of the given step and action.

Worklist Name	Select the name of the worklist that is used for the worklist notification upon completion of the given step and action.

Adding an Approval Step

Here is an example of how to add an approval step between step 2 and 3 of the delivered three-step approval process for the transaction FE_ADDRESS:

1. Access the Define Steps page for the transaction FE_ADDRESS.
2. Change the following information for step 3:

Field	New Value
Step Number	*4*
Step Name	*FINAL*
Description	*Final Authorization*
Short Description	*Final Auth*

3. Add a new row to the Approval Process Steps group box on the Define Steps page.
4. Enter the following information:

Field	New Value
Step Number	*3*
Step Name	*2nd AUTH*
Description	*2nd Authorization*
Short Description	*2nd Auth*

5. In the Actions For Step group box, enter the following:

Field	New Value
On Action Of	*Approve*
Set Status To	*1st*
Route To	*Supervisor*

6. Click the Workflow Notification Details link.
7. Enter the following information:

Field	New Value
Business Process	*FE_SS_WORK_EVENTS*
Activity	*FE_EE_ADDR_CHG*
Email Msg Set	*1645*

Field	New Value
Email Msg Nbr	*92*
Worklist Event	*Address Change*
Worklist Name	*FE_ADDR_CHG_WL*

8. Click OK.
9. Add a new row in the Actions For Step group box.
10. Enter the following information:

Field	New Value
On Action Of	*Deny*
Set Status To	*DNY*

11. Click the Workflow Notification Details link.
12. Enter the following information:

Field	New Value
Business Process	*FE_SS_WORK_EVENTS*
Activity	*FE_EE_ADDR_CHG*
Email Event	*Email Notification*
Email Msg Set	*1645*
Email Msg Nbr	*71*

13. Click OK.
14. Click Save.

Deleting One Approval Step

Here is an example of how to delete an approval step between step 2 and 3 of the delivered three-step approval process for the transaction FE_ADDRESS:

Note. You may want to take a screen capture of the data you are deleting, in case you want to add it back later.

1. Access the Define Steps page for the transaction FE_ADDRESS.
2. Delete step 2 – 1st Authorization.
3. Change the Step Number field for step 3 – 2nd Authorization to *2*.
4. Click Save.

Deleting All Approval Steps

Here is an example of how to delete all the approval steps of the delivered three-step approval process for the transaction FE_ADDRESS:

Note. You may want to take a screen capture of the data you are deleting, just in case you want to add it back later.

1. Access the Define Steps page for the transaction FE_ADDRESS.
2. Delete step 1 – Request.
3. Delete step 2 – 1st Authorization.
4. Modify step 3 – 2nd Authorization as follows:

Field	New Value
Step Number	*1*
Step Name	*REQUEST*
Description	*Request*
Short Description	*Request*

5. Click Save.

Defining PAR Tracking Data

This section provides an overview of default PAR data and describes how to enter the PAR tracking data for federal self-service transactions.

Understanding PAR Tracking Data

Self-service transactions are designed so that employees can easily enter requests to change their own personal data and managers can enter requests to change their direct reports' job data. The government requires that certain information be included with each personnel action request. However, this data would not ordinarily be known by the self-service user.

To ensure that this information is recorded accurately, the system enables you to define the appropriate action/reason codes, Notice of Action (NOA) codes, legal authorities, and PAR remarks for each transaction. This default information is automatically written to the government PAR records when the federal component interface is run at the completion of the final self-service step for the transaction.

Note. Full/Part-time Status Change, Location Change, and Reporting Change do not automatically update the federal PAR tables.

See Also

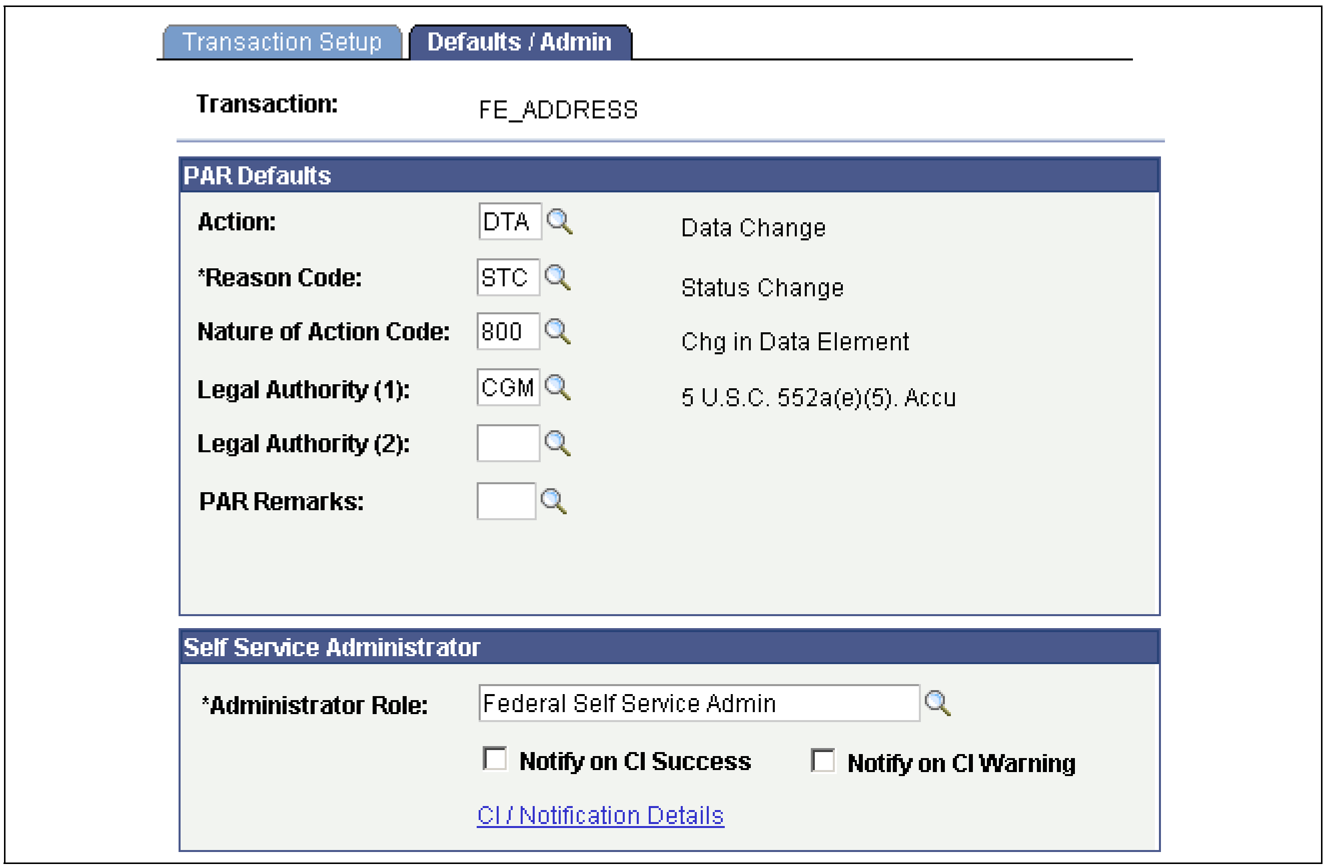
PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Administer Workforce, "(USF) Administering Personnel Action Requests"

Page Used to Define PAR Tracking Data

Page Name	Object Name	Navigation	Usage
Defaults / Admin	GVT_WIP_RECORD3	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin	Define PAR tracking data.

Defining PAR Tracking Data

Access the Defaults/Admin page.



Defaults / Admin page

PAR Defaults

Action Select the action that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reason page.

Reason Code Select the reason code that you want written to the government PAR tables for the transaction. These codes are defined on the Action Reason page.

Nature of Action Code Select the nature of action code that you want written to the government PAR tables for the transaction. These codes are defined on the Nature of Action Table page.

Legal Authority (1)	Select the legal authority (1) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority Table page.
Legal Authority (2)	Select the legal authority (2) that you want written to the government PAR tables for the transaction. These codes are defined on the Legal Authority Table page.
PAR Remarks	Select the PAR remarks that you want written to the government PAR tables for the transaction. These codes are defined on the Par Remarks Table page.

Identifying Self-Service Administrators and Defining Notification Details

This section provides an overview of the self-service administrator's role and discusses how to:

- Identify the self-service administrator.
- Define notification details.

Understanding the Self-Service Administrator's Role

Problems may occur when the federal component interface updates the federal PAR tables. The system is designed to recognize:

- Errors
- Warnings
- Successful completions

You use the Defaults/Admin page to define the role of the person that you want to receive the notification when any of these conditions occur.

See Also

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

Pages Used to Identify the Self-Service Administrator and Define Notification Details

Page Name	Object Name	Navigation	Usage
CI/Notification Details (component interface/notification details)	FE_CI_DETAIL	Set Up HRMS, Product Related, Workforce Administration, Workforce Data USF, Approval Transactions, Defaults / Admin Click the CI/Notification Details link on the Defaults/Admin page.	Identify the self-service administrator and define notification details.

Identifying the Self-Service Administrator

Access the Defaults/Admin page.

Self-Service Administrator

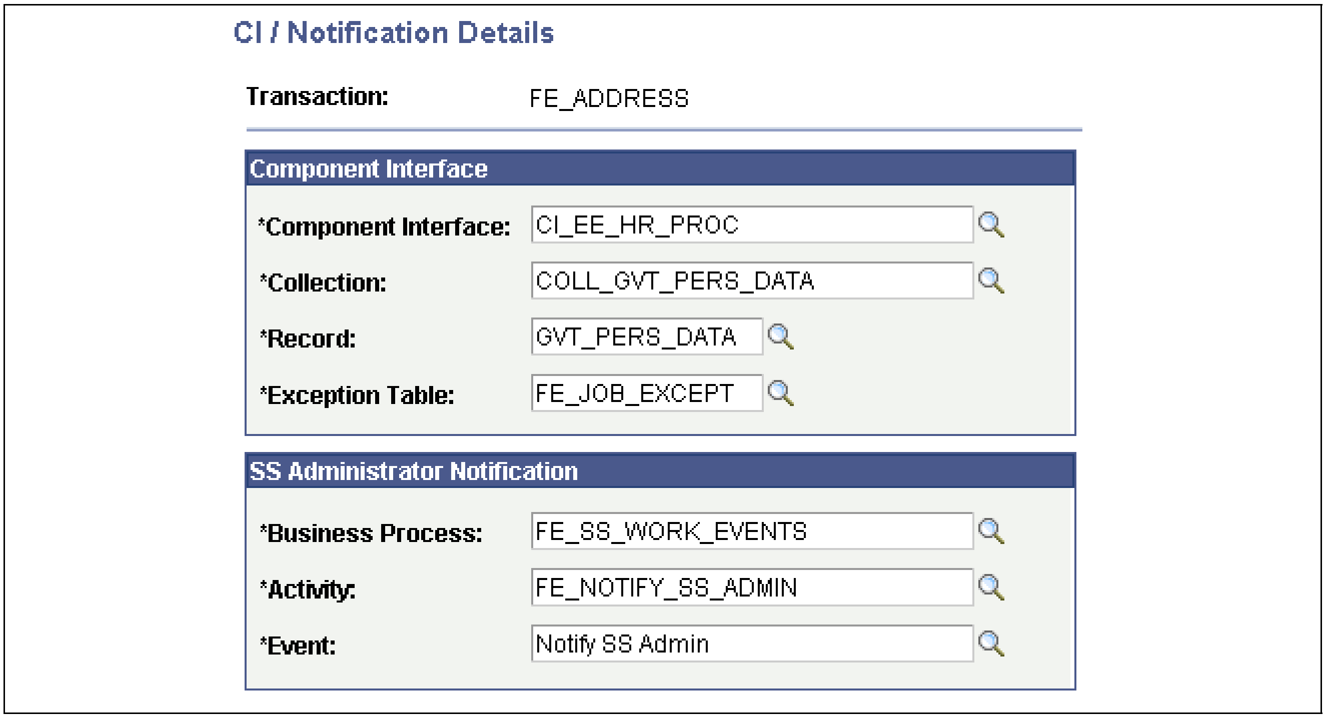
Administrator Role Select the role that you want notified when an error, warning, or success occurs.

Notify on CI Success (notify on component interface success) Select this check box to have the person who is identified in the Administrator Role field notified when the process runs successfully.

Notify on CI Warning (notify on component interface warning) Select this check box to have the person who is identified in the Administrator Role field notified when a warning occurs during processing.

Defining Notification Details

Access the CI/Notification Details page.



CI/Notification Details page

Note. It is recommended that you not change the information on this page for the delivered federal self-service transactions.

Component Interface

Component Interface Select the name of the component interface process that is used for this transaction.

Collection Select the name collection that is used by the component interface process for this transaction.

Record Select the name of the record that is used by the component interface process for this transaction.

Exception Table Select the name of the exception table that is used by the component interface process to store errors and warnings for this transaction.

SS Administrator Notification

Business Process Select the name of the business process that is triggered to send component interface notifications to the self-service administrator.

Activity Select the name of the activity that is triggered to send component interface notifications to the self-service administrator.

Event Select the name of the event that is triggered to send component interface notifications to the self-service administrator.

CHAPTER 3

Using eProfile

This chapter lists prerequisites and discusses how to:

- Review and update personal information.
- (USF) Request leave of absence.
- (USF) Request termination.
- (USF) Review change requests.
- Review workflow inquiries.

Prerequisites for Using eProfile

Before you can use the eProfile transactions,

1. Activate eProfile on the Installation Table.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up and Installing PeopleSoft HRMS,” Selecting PeopleSoft Applications for Your Installation.

2. Define position management on the HRMS Options page.

   The position management setting determines whether automatic updates, by nonadministrators, are allowed for certain transactions. Automatic updates can occur only if position data is not affected.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up and Installing PeopleSoft HRMS,” Selecting HRMS Options.

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

3. Set up security.

   eProfile uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. The following table lists the permissions and roles delivered with eProfile:

Permission Lists	Roles
HCCPSS2000	Manager
HCCPFE2000	Manager Self Service - Fed
HCCPFE1060	Personal Info-Employee - Fed

Note. Remember to enter an email address for each user profile; otherwise, email routings that are used by workflow will not work.

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Administering HRMS Security".

4. Define whether a transaction automatically updates the database.

   Use the Self Service Workflow Configurations page to define whether the transaction will update the database without an administrator's intervention.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Approvals and Database Updates.

5. Define rules for workflow notifications.

   Workflow can be set up to notify the administrator when a transaction successfully updates the database and when the system detects a warning with the update.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Setting Up and Working with Self-Service Transactions," Setting Up Administrator Notification Rules.

6. Set up the manager's data access to his or her direct reports.

   eProfile uses access types to control a manager's access to employee data. Normally, the manager who initiates a transaction can view only data for his or her direct reports. Access types enable the system to determine who reports to the initiating manager.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "Working with Common Components," Configuring Direct Reports Functionality.

7. Configure the USFED WIP transaction.

   See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, "(USF) Setting Up the Work-in-Progress Management System".

Reviewing and Updating Personal Information

This section provides an overview of reviewing and updating personal information and lists the pages that are used to review and update personal information.

Understanding Reviewing and Updating Personal Information

PeopleSoft delivers the following transactions that enable employees to view, add, change, and delete personal information in the PeopleSoft database.

Commercial	Federal
Personal Information Summary	Personal Information Summary
Email Addresses	Address Change
Emergency Contacts	Email Addresses

Commercial	Federal
Home and Mailing Address	Emergency Contacts
Marital Status	Marital Status
Name Change	Name Change
Phone Numbers	Phone Number Change
Ethnic Groups	Ethnic Groups

The following transactions can be configured to automatically update the database and send notifications to the administrator:

- Name change
- Marital status change
- Address change

If workflow is activated, when a user performs one of these transactions, the system automatically routes the transaction request to the appropriate person for approval. Updating your personal information becomes a two-step process:

1. The employee submits the change request.
2. The administrator finalizes the change request.

(USF) When the request has been submitted, employees can review the status of the change requests that they have submitted.

Pages Used to Review and Update Personal Information

Page Name	Object Name	Navigation	Usage
Personal Information	HR_EE_PERS_INFO	Self-Service, Personal Information, Personal Information Summary	Employees view a summary of and are able to change their personal information in the PeopleSoft database.
(USF) Address Change	FE_EE_ADDRESSES	Self-Service, Personal Information, Address Change (USF)	Initiate the address change request.
(USF) Address Change	FE_ADDRESS_STS	Click the Submit button on the (USF) Address Change page.	Confirms that the request was submitted.
Email Addresses	HR_EMAIL_ADDRESSES	Self Service, Personal Information, Email Addresses	Employees view, add, change, and delete email addresses in the PeopleSoft database. Employees cannot delete business email addresses; only the system administrator can do this.

Page Name	Object Name	Navigation	Usage
Emergency Contacts	HR_EMERGENCY_CNTCT	Self-Service, Personal Information, Emergency Contacts	Employees view, add, change, and delete emergency contact information in the PeopleSoft database.
Emergency Contact Detail	HR_EMERG_CNTCT_DET	• Click a contact name on the Emergency Contacts page. • Click the Add an Emergency Contactbutton on the Emergency Contacts page.	View, add, and change emergency contact address and telephone information.
Change Primary Contact	HR_PRIMARY_CONTACT	Self-Service, Personal Information, Emergency Contacts Click the Change the primary contact button on the Emergency Contacts page.	Employees change their primary contact for emergencies.
Home and Mailing Address	HR_HOME_MAILING	Self-Service, Personal Information, Home and Mailing Address	Employees view and change home and mailing addresses in the PeopleSoft database.
Marital Status Change Life Event	HR_EE_MAR_STATUS	Self-Service, Personal Information, Marital Status, Marital Status Change Life Event	Employees view current marital status and submit a request to change marital status in the PeopleSoft database. *Note.* If you have licensed eBenefits, this transaction acts differently. By default, it goes to the Marital Status Change Life Events page.
(USF) Marital Status Change	FE_MARITAL	Self-Service, Personal Information, Marital Status (USF), Marital Status Change	Submit a marital status change.
(USF) Marital Status Change	FE_MARITAL_STS	Click the Submit button on the (USF) Marital Status Change page.	Confirms that the request was submitted.
Name Change	HR_EE_NAME	Self-Service, Personal Information, Name Change	Employees submit a name change request.
(USF) Name Change	FE_EE_NAME	Self-Service, Personal Information, Name Change (USF)	Federal employees submit a name change request.
(USF) Name Change	FE_EE_NAME_STS	Click the Submit button on the (USF) Name Change page.	Confirms that the request was submitted.

Page Name	Object Name	Navigation	Usage
Phone Numbers	HR_PERSONAL_PHONE	Self-Service, Personal Information, Phone Numbers	Employees view, add, change, and delete personal phone numbers in the PeopleSoft database.
(USF) Phone Number	FE_EE_PHONE_CHG	Self-Service, Personal Information, Phone Number Change (USF), Phone Numbers	Submit a phone number change.
(USF) Save Confirmation	EO_SAVE_CONFIRM	Click the Save button on the Phone Numbers page.	Confirm that the phone number change was saved.
Ethnic Groups	HR_ETHNIC_GROUPS	Self Service, Personal Information, Ethnic Groups	Employees self-identify their ethnic groups.

(USF) Requesting Leave of Absences

This section provides an overview of the requesting leave of absence process and lists the page that is used to request leave of absences.

Page Used to Request Leave of Absences

Page Name	Object Name	Navigation	Usage
Federal Request for Leave	FG_EE_LEAVE_REQ	Self Service, Personal Information, Request Leave of Absence (USF), Federal Request for Leave	Enter a request for leave of absence.

(USF) Requesting Termination

This section provides an overview of the termination process and lists the page that is used to request termination.

Page Used to Request Termination

Page Name	Object Name	Navigation	Usage
Federal Termination Request	FG_EE_TERMINATION	Self Service, Personal Information, Request Termination, Federal Termination Request	Federal employees enter a request for termination.

(USF) Reviewing Change Requests

This section provides an overview of reviewing change requests and lists the page that is used to review change requests.

Page Used to Review Change Requests

Page Name	Object Name	Navigation	Usage
Select a Request	FE_EE_CHG_REQ_STAT	Self-Service, Personal Information, Review Change Requests (USF)	Select a change request to review.

Reviewing Workflow Inquiries

This sections provides an overview of workflow inquiries and lists the pages that are used to review self-service activity.

Understanding Workflow Inquiries

The Workflow Inquiry page enables the self-service administrator to:

- Review the status of any self-service transaction, except phone number changes.
- Review errors and warnings that occurred during the component interface processing.
- Change the workflow status of a transaction.

Reviewing the Status

Workflow Inquiry enables the self-service administrator to review a transaction for any employee for whom the self-service administrator has security. The self-service administrator searches by transaction name, request date, workflow status, or employee ID.

Reviewing Errors and Warnings

The Workflow Inquiry enables the self-service administrator to review errors or warnings that occur during the processing of the component interface. The self-service administrator must process the request using the Workflow Inquiry page.

Errors can occur when:

- The email or worklist notification fails to be generated.
- The system tried to route the transaction to the next reviewer in the approval process, but could not find that person. This means a problem occurred in the reporting structure based on what was entered in the Route To field on the Define Steps page.

If a warning occurs, the self-service administrator can be notified if the Notify on CI Warning check box is selected on the Defaults/Admin page. Warnings don't stop the tables from being updated.

See Also

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

Pages Used to Review Self-Service Activity

Page Name	Object Name	Navigation	Usage
Workflow Inquiry	WF_SS_STAGED	Workforce Administration, Self Service Transactions, Workflow Inquiry	Review submitted requests and correct errors and warnings.
Transaction Errors/Warning	FE_JOB_ERR_WRN_ALL	Click the Error link on the Workflow Inquiry page.	Review error and warning messages.

APPENDIX A

Delivered Workflows for PeopleSoft Enterprise eProfile

This appendix discusses delivered workflows for PeopleSoft Enterprise eProfile.

Delivered Workflows for PeopleSoft Enterprise eProfile

This section discusses eProfile workflows. The workflows are listed alphabetically by workflow name.

Address Changes - Requesting

This section discusses the address change request workflow.

Description

Event Description	An employee uses the Home and Mailing Address page to review and update their current address information in the database.
Action Description	Upon saving their change, an email and worklist entry is sent to the Personnel Administrator to review, and upon approval, enter into the system.
Notification Type	Email and Worklist.

Workflow Objects

Event	HR_HOME_MAILING
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	ADDR_CHANGE_NOTIFICATION
Business Process	HR_EE_ADDR
Business Activity	HR_EE_ADDR
Business Event	EE_ADDR_CHANGE

Address Changes - Processing

This section discusses the address change processing workflow.

Description

Event Description	HR processes the address change request.
Action Description	An email is sent to the originating employee notifying them that HR has processed their address change.
Notification Type	Email.

Workflow Objects

Event	HR_HOME_MAILING
Workflow Action	Automatic
Role	Roleuser By Roleuser Qry
Email Template	Notify Originator
Business Process	HR_EE_ADDR
Business Activity	HR_EE_ADDR
Business Event	Notify Originator

Marital Status - Updating

This section discusses the marital status update workflow.

Description

Event Description	An employee uses Self-Service to update their Marital status.
Action Description	An email and worklist item are sent to the Personnel Administrator indicating the employee's change in status.
Notification Type	Email and worklist.

Workflow Objects

Event	HR_EE_MAR_STATUS
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	Marital Status Change
Business Process	Marital Status Change Request
Business Activity	HR_MAR_STATUS_CHANGE
Business Event	Request Marital Status Change

Marital Status - Processing

This section discusses the marital status processing workflow.

Description

Event Description	HR processes the employees Marital Status change.
Action Description	An email is sent to the originating employee notifying them that the marital status change has been processed.
Notification Type	Email.

Workflow Objects

Event	HR_EE_MAR_STATUS
Workflow Action	Automatic
Role	Roleuser By Roleuser Qry
Email Template	Notify Originator
Business Process	Marital Status Change Request
Business Activity	HR_MAR_STATUS_CHANGE
Business Event	Notify Originator

Name Changes - Requesting

This section discusses requesting a name change workflow.

Description

Event Description	An employee uses the Name Change page to review and update their name in the database.
Action Description	Upon saving their change, the request is sent by email and worklist item to the Personnel Administrator to review, and upon approval, entry into the system.
Notification Type	Email and Worklist.

Workflow Objects

Event	EE_NAME_CHANGE
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	NAME_CHANGE_NOTIFICATION
Business Process	HR_EE_NAME
Business Activity	HR_EE_NAME
Business Event	EE_NAME_CHANGE

Name Changes - Processing

This section discusses processing a name change request workflow.

Description

Event Description	HR processes the name change request.
Action Description	An email is sent to the originating employee notifying them that HR has processed the name change request.
Notification Type	Email.

Workflow Objects

Event	HR_EE_NAME
Workflow Action	Automatic
Role	Roleuser By Roleuser Qry
Email Template	Notify Originator
Business Process	HR_EE_NAME
Business Activity	HR_EE_NAME
Business Event	Notify Originator

Glossary of PeopleSoft Enterprise Terms

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

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

action template
In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity
In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage
In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar
In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function
In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type
In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement
In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule
In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account
A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database
In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging — PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist — Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.

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

assessment rule — In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class — An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair — In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.

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

audience — In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server — A server that is set up to verify users of the system.

base time period — In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.

benchmark job — In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

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

billing career — In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief — In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book — In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch — A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only — An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also *detailed business process.*
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction.For bidders, the sale of goods or services.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
cash drawer	A repository for monies and payments taken locally.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

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

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

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

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

See also *course.*

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

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

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

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

See also *population* and *division*.

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

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

comm key See *communication key.*

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

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

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

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

condition In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

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

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table — Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

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

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

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

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

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

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

See also *class.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *population* and *cohort.*

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.

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

event propagation process In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

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

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

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

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

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

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

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

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

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

See also *business unit.*

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

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

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

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

In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.

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

incentive object — In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

incentive rule In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

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

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

LMS — Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load — In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.

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

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

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

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

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

See also *3C engine.*

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

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

merchandising activity — In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL — Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

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

multibook — In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency — The ability to process transactions in a currency other than the business unit's base currency.

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

NDP — Abbreviation for *Non-Discountable Products.* Term used for products or groups of products where the selling price cannot be decreased.

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

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

Optimization Engine — A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.

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

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

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

See also *compensation object.*

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

pay cycle — In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle — In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item — In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort.*

portal registry In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

predecessor task A task that you must complete before you start another task.

price breaks In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.

price components In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.

price list Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule conditions Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.

price rule key The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.

product adds The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as *giveaways*).

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

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.

product line The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

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

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

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

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

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

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

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

record input VAT flag — Abbreviation for *record input value-added tax flag.* Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.

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

See *record input VAT flag.*

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

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

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

reference object — In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction — In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

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

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

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

REN server	Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

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

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
task	A deliverable item on the detailed sourcing plan.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

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

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

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

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

trace usage — In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation — In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state — In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table — A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree — The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

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

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

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

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

	See also *inquiry access.*
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

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

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

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