
PeopleSoft Enterprise eProfile Manager Desktop 9.0 PeopleBook

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PeopleSoft Enterprise eProfile Manager Desktop 9.0 PeopleBook
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About This PeopleBook Preface

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

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

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

Additional Resources

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

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

PeopleSoft Enterprise eProfile Manager Desktop 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 Manager Desktop.

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 Manager Desktop PeopleBook* provides you with implementation and processing information for your PeopleSoft Enterprise eProfile Manager Desktop 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 Manager Desktop 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.
approval level	A step in the approval process. The number of steps is defined by the organization's needs. Once a request is submitted, it may go through an approval level where a reviewer will approve or deny the request.
federal PAR CI (federal personnel action request component interface)	This component interface, <code>CI_EE_HR_PROC</code> , reads data from the self-service tables and copies it to the federal PAR tables.
federal PAR tables (federal personnel action request tables)	Tables which hold the personnel action request information required by the government for auditing purposes: <code>GVT_JOB</code> , <code>GVT_PERS_DATA</code> , or <code>GVT_EMPLOYMENT</code> , to name a few.
originator	The person who makes the initial request. For self-service transactions, this is usually an employee or manager.
PAR (personnel action request)	Used to describe the entire federal transaction process flow: request to approval to human resources processing.
PAR Push (personnel action request push)	This process, <code>FGPAR_PU</code> , pulls data from the federal PAR tables and updates the PeopleSoft Human Resources tables.
reviewer	The person who either approves or denies a submitted request.

CHAPTER 1

Getting Started with eProfile Manager Desktop

This chapter discusses:

- eProfile Manager Desktop overview.
- eProfile Manager Desktop business processes.
- eProfile Manager Desktop implementation.

eProfile Manager Desktop Overview

eProfile Manager Desktop is a collaborative application that gives managers greater control over employee information. With eProfile Manager Desktop, managers in your organization can perform routine tasks necessary to manage direct reports.

eProfile Manager Desktop Business Processes

eProfile Manager Desktop supports the following business processes:

- Review employee information.
- Change employees' reporting manager.
- Transfer employees.
- Promote employees.
- Change employees' location.
- Change employees' full-time or part-time status.
- Retire employees.
- Terminate employees.
- Request job changes requiring Works Council approval.

(USF) With this application, you can also:

- Reassign employees.
- Separate employees.

We discuss these business processes in the business process chapters in this PeopleBook.

eProfile Manager Desktop 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 PeopleSoft sources of information, including the 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

Managing Direct Reports

This chapter provides an overview of managing direct reports, and discusses how to:

- View direct reports personal information.
- Change part-time or full-time status.
- Change reporting managers.
- Change work locations.
- Promote employees.
- Retire employees.
- Terminate employees.
- Transfer employees.
- Change jobs requiring Works Council approval.

Understanding the Management of Direct Reports

This section provides an overview of eProfile Manager Desktop transactions, prerequisites, and the process flow for these transactions.

eProfile Manager Desktop Transactions

Managers can use the following eProfile Manager Desktop transactions to:

- View a direct report's information on one page.
- Change an employee's status to full-time or part-time.
- Change an employee's reporting manager.
- Assign an employee to another work location.
- Promote an employee.
- Initiate the employee retirement process.
- Initiate the employee termination process.
- Transfer an employee.
- Request an employee job change that requires works council approval.

Process Flow for Transactions

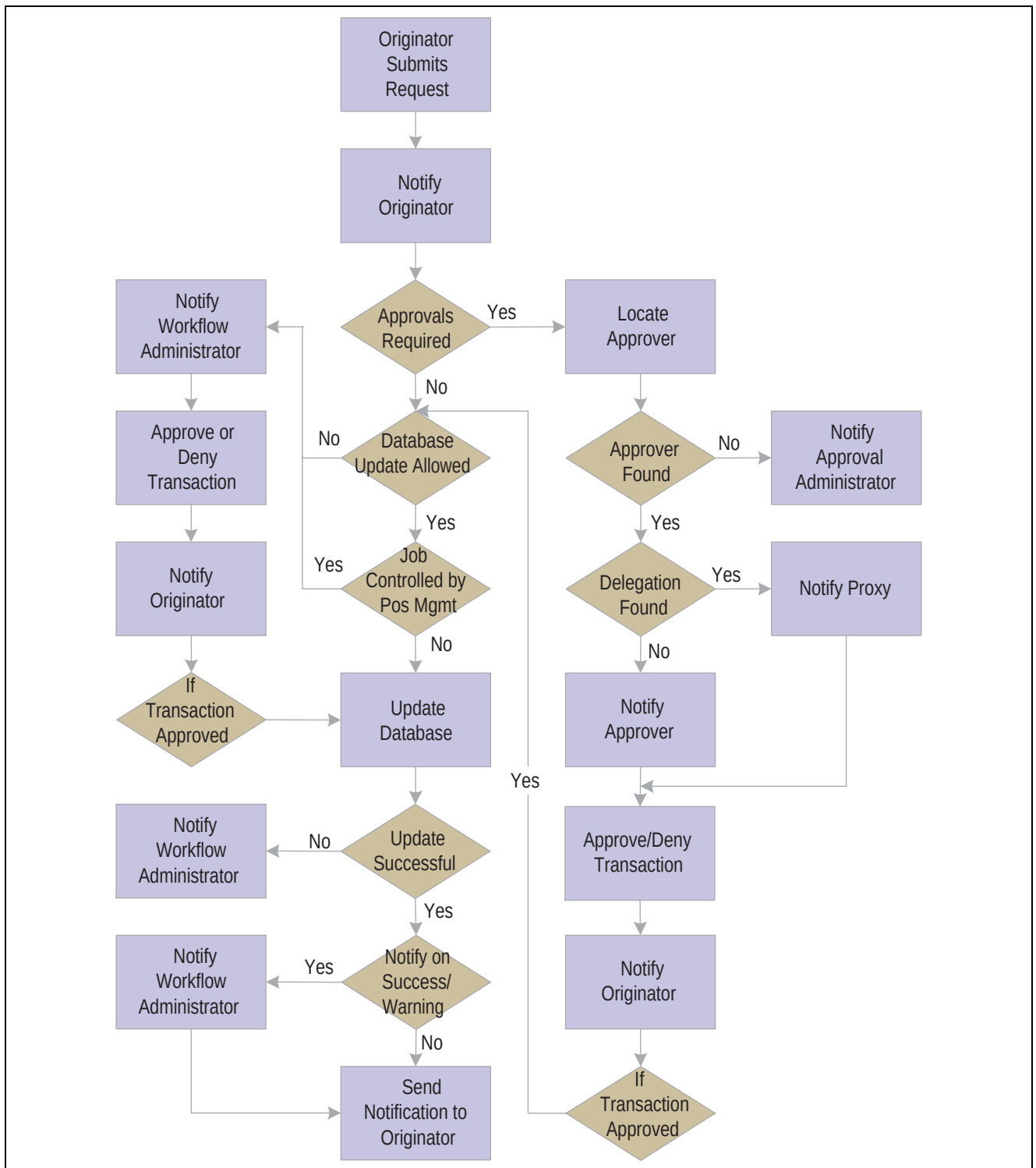
Most of the transactions can be configured to either:

- Use an approval process.
- Automatically update the database.
- Send notifications to an administrator.

The following table lists each of the self service transactions and the features that can be configured for each:

Transaction	Use Approval Process	Automatic Database Update	Send Notifications
Change Full/Part Time Status	No	Yes	Yes
Change Reporting Managers	Yes	Yes	Handled by approval process.
Change Work Locations	No	Yes	Yes
Promote Employees	Yes	Yes	Handled by approval process.
Retire Employees	No	Yes	Yes
Terminate Employees	No	Yes	Yes
Transfer Employees	Yes	Yes	Handled by approval process.
View Employees' Information	Not Applicable	Not Applicable	Not Applicable
Change Jobs (Works Council)	Not Applicable	Not Applicable	Not Applicable

The following diagram illustrates the basic process flow that the self-service transactions uses:



Basic process flow for self-service transactions

There are four main sections to this process flow:

- A request is submitted.
- The request uses an approval process.
- The request allows automatic updates to the database.

- The request doesn't allow automatic updates to the database.

Request is Submitted

When a manager submits a request, an email notification confirming that the request was successfully submitted may be sent to the manager. The following table lists the eProfile Manager Desktop transaction, the criteria that determines whether a notification is sent, and the template that is used:

Transaction	Criteria	Template
Change Full/Part Time Status Change Location Retire Employee Terminate Employee	Notify - on Submit check box is selected on the System Workflow Rules page.	See Appendix A, "Delivered Workflow for eProfile Manager Desktop," page 39.

Transaction	Criteria	Template
Promotion Transfer	Handled by approval process. The email that is sent depends on is determined by the following conditions: • Are approvals required? • Are database updates allowed? • Is the changed controlled by position management?	For requests that: • Require an approval process, HR_SUBMIT_SINGLE_EE • Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_SINGLE_EE. The notification is sent when the transaction is saved successfully to the database. • Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_APV_MANUAL_PROC_SINGL. • Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_SINGLE_EE
Reporting Change	Handled by approval process. The email that is sent depends on is determined by the following conditions: • Are approvals required? • Are database updates allowed? • Is the changed controlled by position management?	For requests that: • Require an approval process, HR_SUBMIT_MULTI_EE. • Do not require an approval process, allow database updates, and the job is not controlled by position management, HR_TRANSACTION_SAVED_MULTI_EE. The notification is sent when the transaction is saved successfully to the database. • Do not require an approval process, allow database updates, and the job is controlled by position management, HR_ADMIN_MANUAL_PROC_REPCH. • Do not require an approval process, nor do they allow database updates, HR_SUBMIT_NOAPV_REPCHG_EE.

Approval Process Required

Approvals apply only to the Change Reporting Manager, Promote Employee, and Transfer Employee transactions. PeopleSoft delivers the following approval process IDs that are set up using the Register Transactions (PTAF_TXN) component.

- ReportingChgEmployee
- PromoteEmployee

- TransferEmployee

When approvals are required, the system uses the following rules to identify the approving manager:

- For promotions and transfers, the originator must select a promotion or transfer method. If the method is By Position, the Reports To field on the Job Code page determines the approving manager. If the method is By Job Title/Department, the Supervisor ID field on the Job Code page for the new position determines the approving manager.
- For reporting changes, the Supervisor ID corresponding to the reporting change determines the approving manager.

Note. If an approving manager cannot be found, AWE automatically routes the transaction to any person who is in the administrator role listed on the process definition.

Once the approving manager is determined, the system checks to see if a proxy is active for the manager. If so, that proxy becomes the approving manager. A notification is sent to either the approving manager or the proxy that states there is a request that requires his or her attention.

For	Template
Promote Employee Transfer Employee	HR_APPROVAL_REQUEST_SINGLE_EE
Reporting Change	HR_APPROVAL_REQUEST_MULTI_EE

The approving manager either approves or denies the request. If the manager approves the request, the following notification is sent to the originator stating that the request has been approved.

For	Template
Promote Employee Transfer Employee	HR_STEP_APPROVAL_SINGLE_EE
Reporting Change	HR_STEP_APPROVAL_MULTI_EE

If the manager denies the request, the following notification is sent to the originator stating the request has been denied.

For	Template
Promote Employee Transfer Employee	HR_STEP_DENY_SINGLE_EE
Reporting Change	HR_STEP_DENY_REPCHG_EE

You can add more approvers to the approval process, either by modifying the approval process using the 9.0 Approvals component.

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

Database Update Not Allowed

The system checks to see if automatic updates to the database are allowed. If the Allow DB Update check box on the Self Service Workflow Configurations page is not selected, the system sends the following notification to the administrator stating the transaction requires their approval:

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	See Appendix A, “Delivered Workflow for eProfile Manager Desktop,” page 39.
Promote Employee Transfer Employee	HR_ADMIN_APV_REQ_SINGLE_EE
Reporting Change	HR_ADMIN_APV_REQ_MULTI_EE

If the administrator approves the transaction, the system sends the following email to the originator stating the request has been approved and applied to the database:

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	See Appendix A, “Delivered Workflow for eProfile Manager Desktop,” page 39.
Promote Employee Transfer Employee	HR_ADMIN_APV_MANUAL_PROC_SINGL
Reporting Change	HR_ADMIN_APV_MANUAL_PROC_REPCH

If the administrator does not approve the transaction, the system sends the following email to the originator stating the request has been denied:

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	See Appendix A, “Delivered Workflow for eProfile Manager Desktop,” page 39.

For	Template
Promote Employee Transfer Employee	HR_ADMIN_DENY_SINGLE_EE
Reporting Change	HR_ADMIN_DENY_REP_CHG_EE

Database Updates Allowed

The system checks to see if automatic updates to the database are allowed. This processing occurs if the Allow DB Update check box on the Self Service Workflow Configurations page is selected.

If automatic updates are allowed, the system also checks to see if the transaction involves an employee whose job is controlled by position management. If the job is controlled by position management, an administrator must update the database. The following email notification is sent to the workflow administrator stating that a transaction requires his or her attention:

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	See Appendix A, “Delivered Workflow for eProfile Manager Desktop,” page 39.
Promote Employee Transfer Employee	HR_MANUAL_PROC_REQ_SINGLE_EE
Reporting Change	HR_MANUAL_PROC_REQ_REPCHG_EE

If the update to the database is a success, the system sends the following email to the originator:

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	See Appendix A, “Delivered Workflow for eProfile Manager Desktop,” page 39.
Promote Employee Transfer Employee	HR_TRANSACTION_SAVED_SINGLE_EE
Reporting Change	HR_TRANSACTION_SAVED_MULTI_EE

If the update to the database is a success, the system checks to see if the administrator needs to be notified. The system sends the following email, if the check boxes for Notify On Success or Notify on Warnings on the Admin Notification Setup page are selected, or if the system updated the database with a future dated row:

For	Template
Change Full/Part Status Change Location Retire Employee Terminate Employee	See Appendix A, “Delivered Workflow for eProfile Manager Desktop,” page 39.
Promote Employee Transfer Employee	HR_CI_UPDATE_SUCCESS HR_CI_WARNINGS_SINGLE HR_CI_FUTURE_ROWS_EXIST
Reporting Change	HR_CI_UPDATE_SUCCESS_MULT HR_CI_WARNINGS_MULTI HR_CI_FUTURE_ROWS_EXIST_MULTI

Prerequisites for Managing Direct Reports

Before you can use the eProfile Manager Desktop transactions you must:

1. Activate eProfile Manager Desktop 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 only occur 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 Manager Desktop uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. PeopleSoft delivers the following permission lists and roles for eProfile Manager Desktop:

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 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 uses an approval process.

You can activate an approval process for the Promote Employee, Reporting Change, and Transfer Employee transactions using the Self Service Workflow Configurations page. If the system identifies that an approval process is used by a transaction, the HCM Approval Framework for the transaction is followed. PeopleSoft delivers the PromoteEmployee, TransferEmployee, and ReportingChgEmployee approval processes.

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 if 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.

6. Link the self-service transaction to the approval process ID in the Approved Workflow Engine Transaction grid on the Workflow Transaction page.

PeopleSoft delivers the PromoteEmployee, ReportingChgEmployee, and TransferEmployee approval processes already linked to their appropriate self-service transaction.

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

7. 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.

8. Set up the manager’s data access to their direct reports.

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

Note. This does not apply to the Promote Employee, Reporting Change, and Transfer Employee transactions.

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

Viewing Direct Reports’ Personal Information

This section provides an overview of viewing personal information and lists the pages used to view employees’ personal information

Understanding View Personal Information

The View Personal Information transaction enables managers to view information about their direct reports. The View Employee Personal Information page displays basic job information and provides links to other information such as:

- Email addresses.
- Phone numbers.
- Emergency contacts.
- Accomplishments and competencies.

Pages Used to View Personal Information

Page Name	Object Name	Navigation	Usage
View Employee Personal Information	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, View Employee Personal Info, View Employee Personal Information	Enter the date to use to view the information.
View Employee Personal Information	HR_DR_SELECT_EMPS	Click the Continue button on the View Employee Personal Information page.	Select the employee whose information you want to review.
Employee Information	HR_EE_INF_HOME	Click the Continue button on the View Employee Personal Information page.	View job information for a specific direct reports.
Photo	HR_EE_PHOTO	Click the Photo button on the Employee Information page.	View a photo of the employee.
Home and Mailing Addresses	HR_EE_ADDRESS_MGR	Click the Home and Mailing Addresses link on the Employee Information page.	View the employee's home and mailing address information.
Email Addresses	HR_EMAIL_ADDRESSES	Click the Email Addresses link on the Employee Information page.	View the employee's home and mailing address information.
Phone Numbers	HR_PERSONAL_PHONE	Click the Phone Numbers link on the Employee Information page.	View the employee's phone numbers.
Emergency Contacts	HR_EMERGENCY_CNTCT	Click the Emergency Contacts link on the Employee Information page.	View the employee's emergency contact information.
Birthday	HR_EE_BIRTHDATE	Click the Birthday link on the Employee Information page.	View the employee's birthdate information.
Memberships	HR_MEMBERSHIPS	Click the Memberships link on the Employee Information page.	View the employee's membership information.
Membership Detail	HR_MEMBER_DETAIL	Click the organization link on the Memberships page.	View details of the organizational membership.

Page Name	Object Name	Navigation	Usage
Honors and Awards	HR_HONORS_AWARDS	Click the Honors and Awards link on the Employee Information page.	View the employee's honors and award information.
Honor/Award Detail	HR_HONOR_DETAIL	Click the honor/award link on the Honors and Awards page.	View details of the honor or award.
Competencies	HR_COMP_SUMMARY	Click the Competencies link on the Employee Information page.	View the employee's competency information.
Languages	HR_LANGUAGES	Click the Languages link on the Employee Information page.	View the employee's language information.
Language Detail	HR_LANGUAGE_DETAIL	Click the language link on the Languages page.	View details of the employee's proficiency in the selected language.
Training	HR_TRN_SUMMARY	Click the Training link on the Employee Information page.	View the employee's internal and professional training information.
Course Detail	HR_TRN_CRSDISC	Click the course name link on the Training page.	Review the course description.
Education	HR_EDUCATION	Click the Education link on the Employee Information page.	View the employee's education information.
Education Detail	HR_EDUCATION_DET	Click the degree link on the Education page.	View the details of the employee's degree.
Licenses and Certificates	HR_LIC_CERT	Click the Licenses and Certificates link on the Employee Information page.	View the employee's license and certificate information.
Compensation History	HR_SS_MG_COMP_HIST	Click the Compensation History link on the Employee Information page.	View the employee's salary, variable cash, and variable noncash information.
Stock Option Summary	ST_GRANT_SUMM_MGR	Click the Review Employee Options link on the Compensation History page.	View the employee's stock option information.
Total Compensation	HR_SS_TC_MG_REVIEW	Click the Total Compensation link on the Employee Information page.	View the employee's total compensation information.

Changing Full-Time or Part-Time Status

This section provides an overview of part-time or full-time status changes and lists the pages used to change part- or full-time status.

Understanding Changing Full-Time or Part-Time Status

PeopleSoft provides the Change Full/Part Time Status transaction that enables managers to change employees from part-time status to full-time status and back. To change the full or part-time status, managers

1. Access the Change Full/Part Time Status page.
2. Enter the effective date for the change and click the Continue button.
3. Select the employee and click the Continue button.
You may select more than one employee.
4. Select the new status and click the Submit button.

Once the Submit button is clicked, the system proceeds according the parameters that have set up for Retire Employees.

See [Chapter 2, “Managing Direct Reports,” Understanding the Management of Direct Reports, page 3.](#)

Pages Used to Change Part- or Full-Time Status

Page Name	Object Name	Navigation	Usage
Change Full/Part Time Status	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Change Full/Part Time Status	Enter the effective date for the change.
Change Full/Part Time Status	HR_DR_SELECT_EMPS	Click the Continue button on the Change Full/Part Time Status page.	Select the employee whose status you want to change.
Full/Part Time Status Change	HR_MGR_FULL_PART	Click theContinue button on the Change Full/Part Time Status page.	Initiate the request to change an employee’s status to full or part-time.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Full/Part Time Status Change page.	Confirms the request was successfully submitted.

Changing Reporting Managers

This section provides an overview of change reporting managers and list the pages used:

Understanding Changing Reporting Managers

PeopleSoft provides three transactions to facilitate the changing of an employee’s reporting manager:

- Request Reporting Change.
- Approve Reporting Change.
- View Reporting Change Status.

Requesting a Reporting Change

To request a change in an employee’s reporting manager, managers:

1. Access the Reporting Change page.
2. Enter the effective date for the change and click the Continue button.
3. Click the check box next to the name of the employee or employees for which the change is to be made and click the Continue button.
4. Select the new Supervisor or Department ID and click the Submit button.

Approving a Reporting Change

To approve a request:

1. Access the Select a Reporting Change Request page.
2. Select the reporting change you want to approve.
3. Enter a comment relevant to the approval or denial of the request.
4. Click the Approve or Deny button.

Viewing a Reporting Change Status

To view the status of a reporting change request:

1. Access the Select a Reporting Change Request page.
2. Select the transaction you want to view.

Pages Used to Change Reporting Managers

Page Name	Object Name	Navigation	Usage
Reporting Change	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Request Reporting Change, Reporting Change	Enter the effective date for the change.
Reporting Change	HR_DR_SELECT_EMPS	Click the Continue button on the Reporting Change page.	Select the employee whose reporting you want to change.
Reporting Change	HR_MGR_REPORT_CHNG	Click the Continue button on the Reporting Change page.	Select the ID of the new manager.
Select a Reporting Change Request	HR_MGR_REP_APPR_L	Manager, Self Service, Job and Personal Information, Approve Reporting Change, Select a Reporting Change Request	Select the transaction to approve or deny.
Reporting Change Details	HR_MGR_REPORT_CHNG	Click the transaction number link on the Select a Reporting Change Request page.	Approve or deny the request. View the status of reporting change requests that you have submitted.
Confirmation	HR_REPORT_CONFIRM	Click the Approve and Deny button on the Reporting Change Details page.	Confirms the request was successfully submitted.
Select a Reporting Change Request	HR_MGR_REP_VW_L	Manager Self Service, Job and Personal Information, View Reporting Change Status, Select a Reporting Change Request	Select the transaction to view.

Changing Work Locations

This section provides an overview of the changing work locations process and lists the pages used:

Understanding Changing Work Locations

PeopleSoft provides the Request Location Change transaction that enables managers to initiate the work location change process. To change the work location for an employee, managers

1. Access the Location Change page.
2. Enter the effective date for the change and click the Continue button.
3. Select the employee and click the Continue button.
You may select more than one employee.
4. Select the new location and click the Submit button.

Once the Submit button is clicked, the system proceeds according the parameters that have set up for Retire Employees.

See [Chapter 2, “Managing Direct Reports,” Understanding the Management of Direct Reports, page 3.](#)

Pages Used to Change Locations

Page Name	Object Name	Navigation	Usage
Location Change	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Request Location Change	Enter the effective date for the change.
Location Change	HR_DR_SELECT_EMPS	Click the Continue button on the Location Change page.	Select the employee whose location you want to change.
Change Location	HR_MGR_LOCATION	Click the Continue button on the Location Change page.	Initiate the request to change the employee’s location.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Change Location page.	Confirms the request was successfully submitted.

Promoting Employees

This section provides an overview of employee promotions, promoting employees, approving promotions, and viewing promotion status, and list the pages used for employee promotions.

Understanding Employee Promotions

PeopleSoft provides three self-service transactions to facilitate employee promotions:

- Promote Employees, which enables managers to submit a promotion request.
- Approve Promotion, when enables approving managers to either approve or deny the request.
- View Promotion Status, which enables managers to review where the request stands in the approval process.

Requesting a Promotion

To request an employee’s promotion, managers:

1. Access the Promote Employee page.
2. Enter the effective date and click the Continue button.
3. Select the employee or employees to promote and click the Continue button.
4. Enter the reason for the promotion and the promotion method, and click the Submit button.

If position management is set to None, then the only promotion method allowed is By Job Title/Department. If position management is set to Full, then By Position is the only promotion method allowed.

Approving a Promotion

To approve a promotion, the approving manager or proxy:

1. Access the Approve Promotion page.
2. Click the Approve or Deny button.
3. To add an approver, click the (+) plus button and select the approver from the list.
4. Click the Submit button.

Viewing a Promotion Status

To view the status of an employee's promotion:

1. Access the Select a Transaction page.
2. Select the transaction you want to view.

Pages Used to Promote Employees

Page Name	Object Name	Navigation	Usage
Promote Employee	HR_DR_ADDDL_INFO	Manager Self Service, Job and Personal Information, Promote Employee	Enter the effective date of the promotion.
Promote Employee	HR_DR_SELECT_EMPS	Click the Continue button on the Promote Employee page.	Select the employee to promote.
Promotion Details	HR_PROMOTE_EE	Click the Continue button on the Promote Employee page.	Request a promotion for one of your direct report employees.
Approve Promotion	HR_PROMOTE_APPR_L	Manager Self Service, Job and Personal Information, Approve Promotion	Approve or deny a request to promote an employee.
View Promotion Status	HR_PROMOTE_VW_L	Manager Self Service, Job and Personal Information, View Promotion Status	View the status of an employee's promotion request that you have submitted.

Retiring Employees

This section provides an overview of retiring employees and list the pages used to retire employees.

Understanding Retiring Employees

PeopleSoft provides the Retire Employee transaction that enables managers to initiate the retirement process. To retire an employee, managers

1. Access the Retire Employee page.
2. Enter the effective date for the retirement and click the Continue button.
3. Select the employee to retire and click the Continue button.
4. Enter the reason for the retirement and click the Submit button.

Once the Submit button is clicked, the system proceeds according the parameters that have set up for Retire Employees.

See [Chapter 2, “Managing Direct Reports,” Understanding the Management of Direct Reports, page 3.](#)

Pages Used to Retire Employees

Page Name	Object Name	Navigation	Usage
Retire Employee	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Retire Employee	Enter the effective date for the retirement.
Retire Employee	HR_DR_SELECT_EMPS	Click the Continue button on the Retire Employee page.	Select the employee to retire.
Retire Employee	HR_RETIRE_EE	Click the Continue button on the Retire Employee page.	Initiate the retirement process for one of your direct reports.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Retire Employee page.	Confirms the request was successfully submitted.

Terminating Employees

This section provides an overview of terminating employees and lists the pages used:

Understanding the Terminating Employees Process

PeopleSoft provides the Terminate Employee transaction that enables managers to initiate the termination process. To terminate an employee, managers

1. Access the Terminate Employee page.
2. Enter the effective date for the termination and click the Continue button.
3. Select the employee to terminate and click the Continue button.
4. Enter the reason for the termination and click the Submit button.

Once the Submit button is clicked, the system proceeds according the parameters that have set up for Terminate Employees.

See [Chapter 2, “Managing Direct Reports,” Understanding the Management of Direct Reports, page 3.](#)

Pages Used to Terminate Employees

Page Name	Object Name	Navigation	Usage
Terminate Employee	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Terminate Employee	Enter the effective date for the termination.
Terminate Employee	HR_DR_SELECT_EMPS	Click the Continue button on the Terminate Employee page.	Select the employee to terminate.
Terminate Employee	HR_EE_TERMINATE	Click the Continue button on the Terminate Employee page.	Initiate the termination process for one of your direct reports.
Submit Confirmation	EO_SUBMIT_CONFIRM	Click the Submit button on the Terminate Employee page.	Confirms the request was successfully submitted.

Transferring Employees

This section provides an overview of transferring employees and list the pages used:

Understanding Changing Reporting Managers

PeopleSoft provides three transactions to facilitate the changing of an employee's reporting manager:

- Transfer Employee
- Approve Transfer
- View Transfer Status

Transferring an Employee

To request an employee transfer:

1. Access the Transfer Employee page.
2. Enter the effective date for the transfer and click the Continue button.
3. Select the employee to transfer and click the Continue button.
4. Enter the detail information about the transfer and click the Submit button.

Approving a Transfer

To approve an employee transfer:

1. Access the Select a Transaction page.
2. Select the transaction you want to approve or deny.
3. Click the Approve or Deny button.

Viewing a Transfer Status

To view an employee transfer:

1. Access the Select a Transaction page.
2. Select the transaction you want to view.

Pages Used to Transfer Employees

Page Name	Object Name	Navigation	Usage
Transfer Employee	HR_DR_ADDL_INFO	Manager Self Service, Job and Personal Information, Transfer Employee, Transfer Employee	Enter the effective date for the transfer.
Transfer Employee	HR_DR_SELECT_EMPS	Click theContinue button on the Transfer Employee page.	Select the employee to transfer.
Transfer Details	HR_TRANSFER_EE	• Click theContinue button on the Transfer Employee page. • Click the OK button on the Submit Confirmation page. • Click the name link on the Select a Transaction page. • Click the name link on the View Transfer Status page.	Request a transfer for one of your direct report employees. View summary information for submitted transfers. Approve or deny a transfer.
Submit Confirmation	HR_TRANSFER_CONFRM	Click theSubmit button on the Transfer Details page. Click the Approve or Deny button on the Transfer Details page.	Confirms the request was successfully submitted.
Select a Transaction	HR_TRANSFER_APPR_L	Manager Self Service, Job and Personal Information, Approve Transfer, Select a Transaction	Select a transaction to approve or deny.
Select a Transaction	HR_TRANSFER_VW_L	Manager Self Service, Job and Personal Information, View Transfer Status	Select a transfer transaction to view.

Changing Jobs Requiring Works Council Approval

This section provides an overview requesting job changes requiring Works Council approval and lists the pages used:

Understanding Job Changes

The Request Job Change transaction is the self-service transaction that works with Manage Labor Administration. Managers use this transaction to enter the regulatory region, action code, and reason for the action. The HR Administrator is notified and reviews the request. If the HR Administrator approves the request, the Works Council is notified.

Managers can use the Review Job Change Request transaction to see the status of the request.

See *PeopleSoft Enterprise Human Resources 9.0 PeopleBook: Manage Labor Administration*, “Requesting Works Councils Approval”.

Pages Used to Change Jobs

Page Name	Object Name	Navigation	Usage
Select Employee	WC_JCR_SEARCH	Manager Self Service, Job and Personal Information, Request Job Change	Enter the required data and initiate the job change request. The Job Change Request page requires different data entry depending on the type of request—either hire, transfer or termination.
Job Change Request Status	WC_JCR_STATUS_INQ	Manager Self Service, Job and Personal Information, Review Job Change Request	Review Job Change requests.
Review My Job Change Request	WC_JCR_STATUS2_INQ	Workforce Administration, Job Information, Review My Job Change Request	Review the status of a job change request requiring Works Councils approval.
Job Change Request Approval	WC_JCR_APPR_INQ	Workforce Administration, Labor Administration, Job Change Request Approval	Mass-approve job change requests.

CHAPTER 3

(USF) Managing Direct Reports

This chapter provides an overview of direct reports management and discusses how to:

- Change part-time or full-time status.
- Change work location.
- Promote employees.
- Reassign employees.
- Request reporting changes.
- Retire employees.
- Separate employees.
- Approve change requests.

Understanding Direct Reports Management

PeopleSoft Enterprise eProfile Manager Desktop provides the following self-service transactions that enable you to perform routine tasks necessary to manage direct reports.

- Status changes.
- Reporting changes.
- Transfers.
- Promotions.
- Job changes.
- Employee Information transactions.

Some of these transactions are designed to incorporate workflow for self-service transactions. If workflow is activated, when a person performs one of the following transactions, the system will automatically route the transaction request to the appropriate person for approval.

See [Chapter 2, “Managing Direct Reports,” Viewing Direct Reports’ Personal Information, page 12.](#)

Prerequisites for Managing Direct Reports

Before you can use the eProfile Manager Desktop transactions, you must:

1. Activate eProfile Manager Desktop 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 when 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 Manager Desktop uses permission lists, roles, and user profiles to authorize or deny access to transactions and data. The following tables lists the delivered permission lists and roles for eProfile Manager Desktop:

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, the 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 rules for workflow notifications.

Set up workflow so that a notification is sent to the originator of the transaction when he or she submits the request, each time the request is approved, and when the request is finalized. Workflow can be set up to notify the administrator when a transaction successfully updates the database and when the system encounters a problem 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.

5. Define the rules that enable the system to automatically update 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.

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

eProfile Manager Desktop 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.

7. Set up group build if you plan to use Group ID as the access type for a manager’s direct reports.

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

8. Configure the USFED WIP transaction.

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

Changing Part-Time or Full-Time Status

This section provides an overview of the process flow for part-time or full-time status changes and lists the pages that are used to change part-time or full-time status.

Understanding the Process Flow for Part-Time or Full-Time Status Changes

Changing part-time or full-time status is a two-step process:

1. Request changes to part-time or full-time status.
2. Approve changes.

Requesting Changes to Part-Time or Full-Time Status

To change an employee's part-time or full-time status, managers:

1. Access the Change Full/Part-time Status page.
2. Enter the effective date for the change, and click Continue.
3. Select the employee for whom the change in part-time or full-time status is being requested, and click Continue.

The Change Full/Part-time Status page appears with the employee's current job data. The New Status fields are populated by default with the new status for the employee.

4. Enter any relevant comments, and click Submit.

When the Submit button is clicked, the system displays a confirmation page and triggers workflow.

Approving Changes

To approve an employee's part-time or full-time status, approving managers:

1. Access the Review Change Requests – Select a Request page.

A list of requests requiring the approving manager's attention appears.

The manager can change the contents of the displayed list by entering a specific employee's name or selecting another option in the Show me: group box and clicking the Search button.

2. Click the Approve/Deny link next to the request that is to be approved or denied.

The Full/Part-time Status Change page appears with the employee's current job data.

3. Enter any appropriate comments, and click Approve or Deny.

A confirmation page appears and the approve or deny workflow is triggered. When the final approval is submitted, the last approve workflow is triggered.

Pages Used to Change Part-Time or Full-Time Status

Page Name	Object Name	Navigation	Usage
Change Full/Part-time Status – Select Employee (USF)	HR_DR_SELECT_EMPS	Manager Self Service, Job and Personal Information, Change FTPT Status (USF), Change Full/Part-Time Status – Select Employee	Select the employee to have the full/part-time status changed.
Full/Part-time Status Change	FE_MGR_FULL_PART	Click the Continue button on the Change Full/Part-time Status - Select Employee page.	Submit a change to the employee's full/part-time status.

Changing Work Location

This section provides an overview of work location changes and lists the pages that are used to change work location.

Understanding Work Location Changes

Changing work locations is a two-step process:

1. Request a change to work location.
2. Approve the change to work location.

Requesting Changes to Work Location

Requests can be made for an individual employee or a group of employees. To request a change to work location, managers:

1. Access the Location Change page.
2. Enter the date that the change in reporting structure goes into effect, and click Continue.
3. Select the employee or employees for whom the change in location is being requested, and click Continue.

The Location Change page appears with the employee or employees' current job row data.

4. Enter the new location and any relevant comments, and then click Submit.

When the Submit button is clicked, the system displays a confirmation page and triggers workflow.

Approving Changes to Work Location

Approval or denial the request is always given on an individual employee basis. To approve a change to work location, approving managers:

1. Access the Review Change Requests – Select a Request page.

A list of requests requiring the approving manager's attention appears.

The manager can change the contents of the displayed list by entering a specific employee's name or selecting another option in the Show me: group box and clicking the Search button.

2. Click the Approve/Deny link next the request that is to be approved or denied.

The Location Change page appears with the employee or employees' current job row data.

3. Enter any appropriate comments, and click Approve or Deny.

A confirmation page appears and the approve or deny workflow is triggered. When the final approval is submitted, the last approve workflow is triggered.

Pages Used to Change Work Location

Page Name	Object Name	Navigation	Usage
Location Change – Select Employee (USF)	HR_DR_SELECT_EMPS	Manager Self Service, Job and Personal Information, Location Change (USF), Location Change – Select Employee	Select one or more employees requiring a change in their work location.
Location Change (USF)	FE_MGR_LOC_CHG	Click the Continue button on the Location Change – Select Employee page.	Submit the work-location change request.
Review Change Requests – Select a Request (USF)	FE_MGR_CHG_REQ_STA	Manager Self Service, Job and Personal Information, Review Change Requests (USF), Review Change Requests – Select a Request	Select an employee for whom you want to approve the request for a change in work location.
Location Change	FE_MGR_LOC_CHG	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny the request.

Promoting Employees

This section provides an overview of employee promotions and lists the pages that are used to promote employees.

Understanding Employee Promotions

Promoting employees is a two-step process:

1. Request a promotion.
2. Approve the promotion.

When the request has been submitted, managers can review the status of the change requests that they have submitted.

(USF) Requesting a Promotion

To request a promotion, managers:

1. Access the Promote Employee page.

2. Enter the date that the promotion goes into effect, and click Continue.
3. Click the name of the employee for whom the promotion is being requested.
The Promote Employee page appears and displays the employee's current job data.
4. Enter the information on the page, and click Submit.
When the Submit button is clicked, the system displays a confirmation page.

Approving a Promotion

To approve a promotion request, approving managers:

1. Access the Review Change Requests – Select a Request page.
A list of requests requiring the approving manager's attention appears.
2. Click the Approve/Deny link next to the request that is to be approved or denied.
The Promote Employee page appears and displays the employee's current job data.
3. Enter any appropriate comments, and click Approve or Deny.
A confirmation page appears and the approve or deny workflow is triggered. When the final approval is submitted, the last approve workflow is triggered.

Pages Used to Promote Employees

Page Name	Object Name	Navigation	Usage
Promote Employee – Select Employee (USF)	HR_DR_SELECT_EMPS	Manager Self Service, Job and Personal Information, Promote Employee (USF), Promote Employee – Select Employee	Select an employee for whom you want to request a promotion.
Promote Employee	FE_MGR_PROMOTE	Click the Continue button on the Promote Employee – Select Employee page.	Submit a promotion request.
Promote Employee	FE_PROMOTE_CONFIRM	Click the Submit button on the Promote Employee page.	Confirm that the request was submitted.
Promote Employee	FE_PROMOTE_APPROVE	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny the request.
Promote Employee (USF)	FE_PROMOTE_INQ	Click Approve or Deny on the Promote Employee page.	Confirm that the approval or denial was submitted.

Reassigning Employees

This section provides an overview of employee reassignments and lists the pages that are used to reassign employees.

Understanding Employee Reassignments

Reassigning employees is a two-step process:

1. Request a reassignment.
2. Approve the reassignment.

When the request has been submitted, managers can review the status of the change requests they have submitted.

Requesting a Reassignment

To reassign an employee, managers:

1. Access the Reassign Employee page.
2. Enter the effective date for the reassignment, and click Continue.
3. Select the employee for whom the reassignment is being requested, and click Continue.

The Reassign Employee page appears with the employee's current job data.

4. Enter the new position number, the reason for the reassignment, any comments, and click Submit.

When the Submit button is clicked, the system displays a confirmation page and triggers workflow.

Approving an Employee's Reassignment

To approve an employee's reassignment, approving managers:

1. Access the Review Change Requests – Select a Request page.

A list of requests requiring the approving manager's attention appears.

The manager can change the contents of the displayed list by entering a specific employee's name or selecting another option in the Show me: group box and clicking the Search button.

2. Click the Approve/Deny link next to the request that is to be approved or denied.

The Reassign Employee page appears with the employee's current job data.

3. Enter any appropriate comments, and click Approve or Deny.

A confirmation page appears, and the approve or deny workflow is triggered. When the final approval is submitted, the last approve workflow is triggered.

Pages Used to Reassign Employees

Page Name	Object Name	Navigation	Usage
Reassign Employee	FE_MGR_REASSIGN	Select an employee on the Reassign Employee – Select Employee page.	Submit a request for reassignment.
Reassign Employee	FE_REASSIGN_CONFRM	Click the Submit button on the Reassign Employee page.	Confirm that the request was submitted.
Reassign Employee	FE_REASSIGN_APPROV	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny the request.
Reassign Employee	FE_REASSIGN_INQ	Click Approve or Deny on the Reassign Employee page.	Confirm that the approval or denial was submitted.

Requesting Reporting Changes

This section provides an overview of reporting changes and lists the pages that are used to request reporting changes.

Understanding Reporting Changes

Changing who an employee reports to is a two-step process:

1. Request a change.
2. Approve the change.

When the request has been submitted, managers can review the status of the change requests they have submitted.

Requesting a Reporting Change

Requests can be made for an individual employee or a group of employees. To request a reporting change, managers:

1. Access the Reporting Change page.
2. Enter the date that the change in reporting structure goes into effect, and click Continue.
3. Select the employee or employees for whom a change in reporting structure is being requested, and click Continue.

The Reporting Change page appears with the employee or employees' current job data.

4. Enter the new reporting position, any relevant comments, and then click Submit.

When the Submit button is clicked, the system displays a confirmation page and triggers workflow.

Approving a Change in Reporting Structure

Approving or denying the request is always given on an individual employee basis. To approve a change in reporting structure, approving managers:

1. Access the Review Change Requests – Select a Request page.

A list of requests requiring the approving manager's attention appears.

The manager can change the contents of the displayed list by entering a specific employee's name or selecting another option in the Show me: group box and click the Search button.

2. Click the Approve/Deny link next to the request that is to be approved or denied.

The Reporting Change page appears with the employee or employees current job data.

3. Enter any appropriate comments and click Approve or Deny.

Once the final approval is submitted, a notification is sent to the self-service administrator for final processing.

Pages Used to Request Reporting Changes

Page Name	Object Name	Navigation	Usage
Reporting Change (USF)	FE_MGR_REPORT_CHNG	Click the Continue button on the Reporting Change – Select Employee page.	Submit the request for a reporting change.
Approve Reporting Change (USF)	FE_MGR_REPORT_CHNG	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny the request.
Reporting Change (USF)	FE_MGR_REPORT_CHNG	Click Approve or Deny on the Approve Reporting Change page.	Confirm the approval or denial that was submitted.

Retiring Employees

This section provides an overview of retiring employees and lists the pages that are used to retire employees.

Understanding Retiring Employees

Retiring employees is a two-step process:

1. Request the employee's retirement.
2. Approve the employee's retirement.

When the request has been submitted, managers can review the status of the change requests they have submitted.

Requesting an Employee's Retirement

To request an employee's retirement, managers:

1. Access the Retire Employee page.
2. Enter the effective date for the retirement, and click Continue.
3. Select the employee for whom the retirement is being requested, and click Continue.

The Retire Employee page appears with the employee's current job data.

4. In the Retirement Type field, select the reason for the retirement and click Submit.

When the Submit button is clicked, the system displays a confirmation page.

Approving an Employee's Retirement

To approve an employee's retirement, approving managers:

1. Access the Review Change Requests – Select a Request page.

A list of requests requiring the approving manager's attention appears.

The manager can change the contents of the displayed list by entering a specific employee's name or selecting another option in the Show me: group box and clicking the Search button.

2. Click the Approve/Deny link next to the request that is to be approved or denied.

The Retire Employee page appears with the employee's current job data.

3. Enter any appropriate comments, and click Approve or Deny.

A confirmation page appears, and the approve or deny workflow is triggered. When the final approval is submitted, the last approve workflow is triggered.

Pages Used to Retire Employees

Page Name	Object Name	Navigation	Usage
Retire Employee (USF)	FE_MGR_RETIRE	Click the employee name link on the Retire Employee – Select Employee page.	Submit the retirement request.
Retire Employee (USF)	FE_RETIRE_CONFIRM	Click the Submit button on the Retire Employee page.	Confirm that the request was submitted.
Retire Employee (USF)	FE_RETIRE_APPROVE	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny the request for retirement.
Retire Employee (USF)	FE_RETIRE_INQ	Click Approve or Deny on the Retire Employee page.	Confirm that the approval or denial to the request was submitted.

Separating Employees

This section provides an overview of separating employees and lists the pages that are used to separate employees.

Understanding Separating Employees

Separating employees is a two-step process:

1. Request a separation.

2. Approve the separation.

When the request has been submitted, managers can review the status of the change requests they have submitted.

Requesting an Employee's Separation

To request an employee's separation, managers:

1. Access the Separate Employee page.
2. Enter the effective date for the separation, and click Continue.
3. Select the employee for whom the separation is being requested, and click Continue.

The Separate Employee page appears with the employee's current job data.

4. Select the reason for the separation.

If Transfer to New Agency is selected as the reason for the separation, the Agency field appears.

5. If Transfer to New Agency was selected as the reason for the separation, select an agency.
6. Enter any relevant comments, and click Submit.

When the Submit button is clicked, the system displays a confirmation page and triggers workflow.

Approving an Employee's Separation

To approve an employee's separation, approving managers:

1. Access the Review Change Requests – Select a Request page.

A list of requests requiring the approving manager's attention appears.

The manager can change the contents of the displayed list by entering a specific employee's name or selecting another option in the Show me: group box and clicking the Search button.

2. Click the Approve/Deny link next to the request that is to be approved or denied.

The Separate Employee page appears with the employee's current job data.

3. Enter any appropriate comments, and click Approve or Deny.

A confirmation page appears and the approve or deny workflow is triggered. When the final approval is submitted, the last approve workflow is triggered.

Pages Used to Separate Employees

Page Name	Object Name	Navigation	Usage
Separate Employee – Select Employee	HR_DR_SELECT_EMPS	Manager Self Service, Job and Personal Information, Separate Employee (USF), Separate Employee – Select Employee	Select the employee to be separated.
Separate Employee	FE_MGR_SEPARATE	Click the employee name link on the Separate Employee – Select Employee page.	Submit a request for separation.
Separate Employee	FE_SEPARATE_CONFRM	Click the Submit button on the Separate Employee page.	Confirm that the request was submitted.
Separate Employee	FE_SEPARATE_APPRVE	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny the request.
Separate Employee	FE_SEPARATE_INQ	Click the Submit button on the Separate Employee page.	Confirm that the approval or denial was submitted.

Approving Change Requests

This section provides an overview of approving changes to direct reports' personal information and lists the pages that are used to approve change requests.

Understanding the Approving of Changes to Direct Reports' Personal Information

Approving changes to direct reports' personal information works in conjunction with eProfile self-service transactions. eProfile transactions enable employees to enter changes to their:

- Name.
- Home and mailing addresses.
- Marital status.

If the approval process is set up correctly, the manager of the employee who is submitting the change receives a notification that a change requiring his or her attention has occurred.

To approve an employee's change to his or her personal information, approving managers:

1. Access the Review Change Requests – Select a Request page.

A list of requests requiring the approving manager's attention appears.

To change the contents of the displayed list, enter a specific employee's name or select another option in the Show me: group box and click the Search button.

2. Click the Approve/Deny link next to the request that is to be approved or denied.

3. Enter any appropriate comments, and click Approve or Deny.

A confirmation page appears, and the approve or deny workflow is triggered. When the final approval is submitted, the last approve workflow is triggered.

See *PeopleSoft Enterprise eProfile 9.0 PeopleBook*, “Using eProfile,” (USF) Reviewing Change Requests.

Pages Used to Approve Change Requests

Page Name	Object Name	Navigation	Usage
Select a Request	FE_MGR_CHG_REQ_STAT	Manager Self Service, Job and Personal Information, Review Change Requests (USF)	List requests that manager submitted and ones requiring his or her attention.
Name Change	FE_EE_NAME	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny a change request.
Name Change	FE_EE_NAME_STS	Click the Submit button on the Name Change page.	Click Approve or Deny from the Name Change page.
Address Change	FE_ADDRESS_APPR	Click the Approve/Deny link on the Review Change Requests – Select a Request page	Approve or deny a change request.
Address Change	FE_ADDRESS_STS	Click Approve or Deny from the Address Change page.	Confirm that the approval or denial was submitted.
Marital Status Change	FE_MARITAL	Click the Approve/Deny link on the Review Change Requests – Select a Request page.	Approve or deny a change request.
Marital Status Change	FE_MARITAL_STS	Click Approve or Deny from the Marital Status Change page.	Confirm that the approval or denial was submitted.

APPENDIX A

Delivered Workflow for eProfile Manager Desktop

This appendix discusses the delivered workflow for:

- Changing work location.
- Changing part-time and full-time status.
- Retiring employees.
- Terminating employees.
- (USF) Requesting an address change.
- (USF) Requesting a name change.
- (USF) Requesting a marital status change.
- (USF) Requesting an employee status change.
- (USF) Requesting a work location change.
- (USF) Requesting a promotion.
- (USF) Reassigning employees.
- (USF) Reporting changes.
- (USF) Retiring employees.
- (USF) Requesting separation for an employee.

Changing Work Location

This section discusses requesting a work location change workflow.

Description

Event Description	Managers submit a request to change the work location of one of their direct report employees using the Change Location transaction.
Action Description	After completing the transaction, workflow routes an email and worklist entry to the authorized approvers for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	HR_MGR_LOCATION
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	Location Change
Business Process	Initiate Location Change
Business Activity	HR_LOCATION_CHANGE
Business Event	Change Location

Changing Part-Time or Full-Time Status

This section discusses requesting an employee status change workflow.

Description

Event Description	Managers submit a request to change an employee's status to full or part time using the Full/Part Time Status Change page.
Action Description	After submitting the request, workflow routes an email and worklist entry to authorized approvers for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	HR_MGR_FULL_PART
Workflow Action	Automatic
Role	Personnel Administrator
Email Template	Status Change
Business Process	Full Part Time Status Change
Business Activity	HR_MGR_FULLPART
Business Event	Status Change

Retiring Employees

This section discusses retiring employees workflow.

Description

Event Description	Managers use the Retire Employee page to initiate the employee retirement process. They can enter the reason for the retirement request and the effective date of the retirement.
Action Description	An email and worklist entry are routed to the authorized approvers for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	HR_RETIRE_EE
Workflow Action	Automatic
Role	Personnel Administrator and Roleuser By Roleuser Qry
Email Template	RETIRE_EMAIL, RETIRE_EE, Notify Originator, Retirement Email
Business Process	RETIRE_EE, Initiate Retirement
Business Activity	HR_RETIRE_EE, HR_SS_CI_ADMIN_ORIG
Business Event	RETIRE_EE, Notify Originator, Retirement CI Notify

Terminating Employees

This section discusses terminating an employee workflow.

Description

Event Description	Managers can use the Terminate Employee page to explain and submit their requests to terminate employees that report to them.
Action Description	Once the request is submitted, a confirmation message is displayed. The system creates a workflow email and worklist entry for the human resources department, notifying them to begin the termination process, as well as, an email back to notify the Originator that the transaction was sent to HR. Note. The sending of workflow is not contingent upon clicking OK on the Confirmation page, workflow is sent before the confirmation page is displayed.
Notification Type	Email and Worklist.

Workflow Objects

Event	HR_EE_TERMINATE
Workflow Action	Automatic
Role	Roleuser By Roleuser Qry and Personnel Administrator
Email Template	TERM_EMAIL
Business Process	TERMINATE_EE
Business Activity	HR_EE_TERMINATE
Business Event	Terminate Employee

(USF) Requesting an Address Change

This section discusses requesting an address change workflow.

Description

Event Description	Managers submit a request to change the address of one of their direct report employees using the Address Change transaction.
Action Description	After completing the transaction, workflow routes an email and worklist entry to the authorized manager for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_ADDRESS_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_ADDR_CHG_WL
Business Process	FE_EE_ADDR_CHG
Business Activity	FE_EE_ADDR_CHG
Business Event	Address Change

(USF) Requesting a Name Change

This section discusses requesting a name change workflow.

Description

Event Description	Managers submit a name change request to for one of their direct report employees with the Name Change transaction.
Action Description	An email and worklist entry are sent to the manager or authorized approvers for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_NAME_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_NAME_CHG_WL
Business Process	FE_EE_NAME_CHG
Business Activity	FE_EE_NAME_CHG
Business Event	Name Change

(USF) Requesting a Marital Status Change

This section discusses requesting a marital status change workflow.

Description

Event Description	A marital status change has been submitted for an employee.
Action Description	An email and worklist are sent to the authorized manager to approve or deny the employee marital status change request.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MARITAL_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_MAR_STAT_WL
Business Process	Marital Status Change
Business Activity	FE_EE_MAR_STATUS_CHG
Business Event	Marital Status Change

(USF) Requesting an Employee Status Change

This section discusses requesting an employee status change workflow.

Description

Event Description	Managers submit a request to change an employee's status to full or part time using the Full/Part Time Status Change page.
Action Description	After submitting the request, workflow routes an email and worklist entry to authorized manager for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MGR_FTPT_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_FTPT_CHG_WL
Business Process	Full Part Time Status Change
Business Activity	FE_MGR_CHG_EE_FTPT
Business Event	FTPT Status Change

(USF) Requesting a Work Location Change

This section discusses requesting a work location change workflow.

Description

Event Description	Managers submit a request to change the work location of one of their direct report employees using the Change Location transaction.
Action Description	After completing the transaction, workflow routes an email and worklist entry to the authorized manager for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MGR_LOC_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_LOC_CHG_WL
Business Process	Employee Location Change
Business Activity	FE_MGR_CHG_EE_LOC
Business Event	Change Location

(USF) Requesting a Promotion

This section discusses requesting a promotion workflow.

Description

Event Description	Managers submit a request to promote an employee.
Action Description	An email an worklist is sent to the Approver notifying them to review the Promotion request and approve or deny.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MGR_PROM_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_PROMOTE_WL
Business Process	PROMOTE_EE
Business Activity	FE_MGR_PROMOTE_EE
Business Event	Promote Employee

(USF) Reassigning Employees

This section discusses reassigning employees workflow.

Description

Event Description	Managers submit a Reassignment request.
Action Description	An email and worklist item are routed to approved authorizers for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MGR_REAS_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_REASSIGN_WL
Business Process	REASSIGN_EE
Business Activity	FE_MGR_REASSIGN_EE
Business Event	Reassign Employee

(USF) Reporting Changes

This section discusses reporting change workflow.

Description

Event Description	Managers submit a request for a reporting change for one of their direct reports.
Action Description	An email and worklist item are routed for approval.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MGR_REPORT_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_RPT_CHG_WL
Business Process	REPORTING_CHANGE_EE
Business Activity	FE_MGR_CHG_EE_RPTING
Business Event	Reporting Change

(USF) Retiring Employees

This section discusses retiring employees workflow.

Description

Event Description	Managers use the Retire Employee page to initiate the employee retirement process. They can enter the reason for the retirement request and the effective date of the retirement.
Action Description	An email and worklist entry are routed to the authorized approvers for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MGR_RETI_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_RETIRE_WL
Business Process	RETIRE_EE
Business Activity	FE_MGR_RETIRE_EE
Business Event	Retire Employee

(USF) Requesting Separation for an Employee

This section discusses requesting separation for an employee workflow.

Description

Event Description	Managers submit a Separation request for an employee.
Action Description	An email and worklist item are routed to approved authorizers for approval or denial.
Notification Type	Email and Worklist.

Workflow Objects

Event	FE_MGR_SEPA_APPR
Workflow Action	Automatic
Role	Role user By EMPLID
Email Template	FE_SEPARATE_WL
Business Process	SEPARATE_EE
Business Activity	FE_MGR_SEPARATE_EE
Business Event	Separate Employee

Glossary of PeopleSoft Enterprise Terms

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

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

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

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

catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

	3C access groups so that you can assign data-entry or view-only privileges across functions.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.

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

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

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

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	Enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	The conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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

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

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

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

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

yield by operation

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

zero-rated VAT

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

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