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# PeopleSoft Enterprise ePay 9.0 PeopleBook

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**December 2006**

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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.

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**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.

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## 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.

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## 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.

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## 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.

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**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.

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### See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](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](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                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Bold</b>                            | 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.<br><br>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)                          | <p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p> |

## 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.

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## 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](mailto:appsdoc@us.oracle.com).

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

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## Common Elements Used in PeopleBooks

|                       |                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>As of Date</b>     | The last date for which a report or process includes data.                                                                                                                                                                                                                                                                                           |
| <b>Business Unit</b>  | 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.                                                                                                                                                                          |
| <b>Description</b>    | Enter up to 30 characters of text.                                                                                                                                                                                                                                                                                                                   |
| <b>Effective Date</b> | 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. |

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Once, Always, and Don't Run</b> | <p>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.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Process Monitor</b>             | Click to access the Process List page, where you can view the status of submitted process requests.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Report Manager</b>              | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Request ID</b>                  | An ID that represents a set of selection criteria for a report or process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Run</b>                         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>SetID</b>                       | <p>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.</p> |
| <b>Short Description</b>           | Enter up to 15 characters of text.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>User ID</b>                     | An ID that represents the person who generates a transaction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |



# PeopleSoft Enterprise ePay Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

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## PeopleSoft Products

This PeopleBook refers to the following PeopleSoft products:

- PeopleSoft Enterprise ePay.
- PeopleSoft Enterprise Global Payroll.
- PeopleSoft Enterprise Global Payroll for Japan.
- PeopleSoft Enterprise Payroll for North America.
- PeopleSoft Enterprise Payroll Interface.

---

## 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.

### See Also

*PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*

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## 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                 | <p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> <li>• How to use the Application Fundamentals book.</li> <li>• How PeopleBooks are structured.</li> <li>• Common elements used in the PeopleBook, if necessary.</li> </ul>                                                                                                                                                                          |
| Getting Started With... | <p>This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> <li>• The business processes documented within the book.</li> <li>• Integrations between the product and other products.</li> <li>• 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.</li> </ul> |
| Navigation              | <p>(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.</p> <p><b>Note.</b> Not all applications have delivered custom navigation pages.</p>                                                          |
| Understanding...        | <p>(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.</p>                                                                                                                                                                                                                                                                                                                      |

| Chapters                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Setup and Implementation    | <p>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.</p> <p><b>Note.</b> 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.</p>                                                                                         |
| Business Process            | <p>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.</p> <p><b>Note.</b> 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.</p> |
| Appendixes                  | <p>(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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Delivered Workflow Appendix | <p>(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application.</p> <p><b>Note.</b> Not all applications have delivered workflows.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Reports Appendix            | <p>(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.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |



# CHAPTER 1

## Getting Started with ePay

This chapter provides an overview of ePay and discusses:

- ePay business processes.
- ePay integrations.
- ePay navigation.
- ePay roles and security.
- ePay implementation.

---

### ePay Overview

ePay interfaces with Global Payroll, Payroll for North America, and Payroll Interface to enable workers to review and in some cases update payroll information through self-service transactions.

This table lists the ePay transactions provided for each payroll application:

| Payroll Interface     | Payroll for North America | Global Payroll                 |
|-----------------------|---------------------------|--------------------------------|
| 3rd Party Pay Inquiry | View Paycheck             | View Payslip                   |
| Direct Deposit        | Direct Deposit            | (GBR) View Payslip GBR         |
| W-4 Tax Information   | W-4 Tax Information       | Personal Bank Accounts         |
| W-2 Reissue Request   | W-2 Reissue Request       | Pay Distribution Instructions  |
| Voluntary Deductions  | View Year-End Forms       | (JPN) Year-End Adjustment Data |
|                       | Voluntary Deductions      |                                |

---

### ePay Business Processes

ePay provides the following business processes:

- Manage pay information for Payroll Interface.
- Manage pay information for Payroll for North America.
- Manage pay information for Global Payroll.

- (JPN) Update year-end adjustment data.

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

### See Also

[Chapter 2, “Managing Pay Information for Payroll Interface,” page 5](#)

[Chapter 3, “Managing Pay Information for Payroll for North America,” page 9](#)

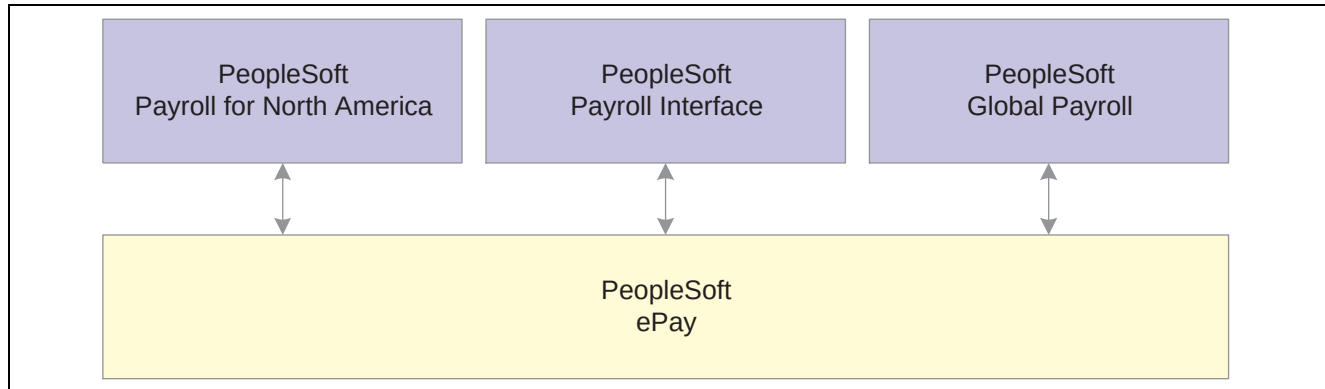
[Chapter 4, “Managing Pay Information for Global Payroll,” page 27](#)

[Chapter 5, “\(JPN\) Updating Year-End Adjustment Data,” page 43](#)

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## ePay Integrations

ePay integrates with the following PeopleSoft applications:



ePay integration flow with other PeopleSoft applications

We discuss integration considerations in the implementation chapters in this PeopleBook.

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## ePay Navigation

The standard menu driven navigation path through *Self Service, Payroll and Compensation* is the traditional PeopleSoft access method. Menu navigation is used throughout this PeopleBook to describe how to access a page.

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## ePay Roles and Security

User roles determine default access to transactions. Set up user roles on the Roles page in the User Profiles component (USERMAINT). Profiles are linked to permission lists. Permission lists identify the pages that users can access. To modify access to specific web pages for each role, modify the permission list. User profiles also control the data that each employee can access.

**See Also**

*PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up and Administering HRMS Security”

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## ePay 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 Pay Information for Payroll Interface

This chapter provides an overview of ePay transactions for Payroll Interface and discusses how to manage and view payroll information.

---

## Understanding ePay Transactions for Payroll Interface

You can use these ePay transactions if your organization licenses PeopleSoft Enterprise Payroll Interface:

- Direct Deposit (PY\_IC\_DIR\_DEP).

Employees can view, add, change, or discontinue direct deposit instructions.

- 3rd Party Pay Inquiry (PI\_IC\_CHK\_RVW).

Employees can review paycheck information for earnings, taxes, deductions, and net pay distribution.

- W-2 Reissue Request (PY\_IC\_W2).

Employees can request a duplicate W-2 to be sent to either their work or home addresses.

- W-4 Tax Information (PY\_IC\_W4).

Employees can enter or update tax withholding information. Workflow sends an email notification to the employee verifying the W-4 details.

---

**Note.** The W-4 Tax Information self-service transaction does not work when WWW\_AUTHENTICATION is used. With WWW\_AUTHENTICATION, the user receives a message at the final confirmation page that their password is invalid and is unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.

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- Voluntary Deductions (PY\_IC\_VOL\_DEDS).

Employees add, change, or stop (delete) voluntary deductions.

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## Managing and Viewing Payroll Information

This section lists the pages used to manage and view payroll information.

## Pages Used to Manage and View Payroll Information

| Page Name                                 | Object Name    | Navigation                                                            | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------|----------------|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Direct Deposit                            | PY_IC_DD_LIST  | Self Service, Payroll and Compensation, Direct Deposit                | View current direct deposit information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Add Direct Deposit, Change Direct Deposit | PY_IC_DD_DATA  | Click the Add Account or Edit button on the Direct Deposit page.      | Add or change direct deposit information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Delete Confirmation                       | EO_DEL_CONFIRM | Click the Delete button on the Direct Deposit page.                   | Delete direct deposit information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Pay Statement Print Option                | PY_IC_DD_SUPP  | Click the Pay Statement Print Option link on the Direct Deposit page. | Employees indicate whether they want a printed copy of the pay statement mailed to their home address. The default is set to yes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| (USA) W-4 Tax Information                 | PY_IC_W4_DATA  | Self Service, Payroll and Compensation, W-4 Tax Information           | <p>Change tax data. If you work for multiple companies, select the employer for whom you want to change tax information. There is workflow associated with this page that sends an email notification to the employee verifying the W-4 details.</p> <p><b>Note.</b> The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, users receive a message on the final confirmation page that their password is invalid and are unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.</p> |
| Pay Inquiry                               | PI_IC_CHK_DATA | Self Service, Payroll and Compensation, 3rd Party Pay Inquiry         | For Payroll Interface users only, employees view paycheck information for any confirmed pay period.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Page Name                                           | Object Name       | Navigation                                                                                                          | Usage                                                                                                                                                                          |
|-----------------------------------------------------|-------------------|---------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| (USA) W-2 Reissue Request                           | PY_IC_W2_DATA     | Self Service, Payroll and Compensation, W-2 Reissue Request, W-2 Reissue Request                                    | Employees request to have a new W-2 form sent to their home or work address. There is workflow associated with this page that generates an email confirmation to the employee. |
| Voluntary Deductions                                | PY_IC_DED_LIST    | Self Service, Payroll and Compensation, Voluntary Deductions                                                        | View a list of current voluntary deductions.                                                                                                                                   |
| Add Voluntary Deduction, Change Voluntary Deduction | PY_IC_DED_DATA    | Click the Add Deduction or Edit button on the Voluntary Deductions page.                                            | Add, change, or stop voluntary deductions.                                                                                                                                     |
| (USF) Distribution Information                      | W3_GVT_PY_ALOT_IC | Click the Distribution Information link on the Add Voluntary Deduction page or the Change Voluntary Deduction page. | Enter details of the account from which the voluntary deduction is taken.                                                                                                      |

## See Also

Chapter 3, “Managing Pay Information for Payroll for North America,” Viewing and Updating Voluntary Deductions, page 24



## CHAPTER 3

# Managing Pay Information for Payroll for North America

This chapter provides an overview of ePay transactions and discusses how to:

- Set up and view self-service paychecks.
- Manage consent for electronic year-end forms.
- View year-end forms.
- Set up and view direct deposit.
- View and update voluntary deductions.
- (USA) Manage W-4 and W-2 reissue.

---

## Understanding ePay Transactions for Payroll for North America

You can use these ePay transactions if your organization licenses PeopleSoft Enterprise Payroll for North America:

- View Paycheck (PY\_IC\_PAY\_INQ).  
Employees review paycheck information for earnings, taxes, deductions, and net pay distribution.
- Year End Form Consent (PY\_SS\_YE\_CONS\_USA) and (PY\_SS\_YE\_CONS\_CAN).  
Employees grant or withdraw consent to receive year-end forms or slips electronically rather than in paper. Workflow sends email confirmation of changes in consent status.
- Year End Forms (PY\_SS\_YE\_FORM\_USA) and (PY\_SS\_YE\_FORM\_CAN).  
Employees view and print year-end forms or slips. Workflow notifies employees by email when the forms are ready for viewing.
- Direct Deposit (PY\_IC\_DIR\_DEP).  
Employees display, add, change, or discontinue direct deposit instructions.
- Voluntary Deductions (PY\_IC\_VOL\_DEDS).  
Employees add, change, or stop (delete) voluntary deductions.
- W-2 Reissue Request (PY\_IC\_W2).  
Employees request a duplicate W-2 to be sent to either their work or home addresses.
- W-4 Tax Information (PY\_IC\_W4).

Employees enter or update tax withholding information. Workflow sends an email notification to the employee verifying the W-4 details.

---

## Setting Up and Viewing Self-Service Paychecks

This section provides an overview, lists prerequisites, and describes the pages used in the transaction.

### Understanding the View Paycheck Transaction

If you want to display self-service paychecks in PDF, you must use the XML Publisher (XMLP) PDF creation method of printing paychecks and direct deposit advices. To use the XMLP PDF creation processes, you must update the Paycheck Options table page in Payroll for North America to set up the options for displaying self-service paychecks in PDF. Options that you specify include:

- URL for the XML data to display self-service checks.
- Whether to display only PDF checks.
- Whether to display manual checks with \$0 or negative net amount in self-service.
- Days from check date that the paychecks should be available in self-service.

### PDF and Historical Paychecks

The ePay View Paycheck transaction displays paychecks and direct deposit advice forms that you create in Payroll for North America release 9.0 and later in PDF only. When you define self-service paycheck options on the Paycheck Options Table page, you must specify whether to display only the PDF paychecks or to display both the PDF paychecks and the historical paychecks.

### Paycheck Availability

On the Paycheck Options table, indicate the default timing of when paychecks should be available for viewing in the ePay self-service View Paycheck transaction. Indicate whether paychecks should be available on the check date or specify the number of days before or after the check date. You can override this value on the run control page when you run the check and advice PDF creation processes. You can specify paycheck availability differently for various company and pay group combinations.

---

**Note.** If you have enabled viewing of historical paychecks, the paycheck data from the current pay run is visible to employees in self service as soon as you run pay confirmation. Running the XMLP PDF creation process triggers the paycheck availability option for the PDF paycheck, after which the checks are not viewable until the availability date that you specify. For this reason, we recommend that you run the XMLP PDF creation process immediately after confirming the payroll.

---

### Self-Service Paycheck and Advice Templates

Payroll for North America delivers RTF templates for displaying the paychecks and advice forms as PDF documents in the self-service transaction. You can modify the templates if required.

### See Also

*PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, “Setting Up the Payroll Process,” Setting Up to Print and View Paychecks with XML Publisher (XMLP)

## Prerequisites

Before you can display PDF self-service paychecks, you must complete these setup steps:

- Configure Integration Broker and Report Manager.
- Update the XML Publisher form definitions with specifics for your implementation.
- Specify XML Publisher printing and self-service options.
- Complete payroll processing and run the PYCHKUSA, PYCHQCAN, PYDDAUSA, or PYDDACAN PSJob processes to create self-service checks and advices.

---

**Note.** We recommend running the XMLP PDF creation processes immediately after confirming the pay run.

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## See Also

*Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

*Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

*PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, “Setting Up the Payroll Process,” Setting Up to Print and View Paychecks with XML Publisher (XMLP)

*PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, “Working with Checks and Direct Deposit,” Printing Paychecks and Direct Deposit Advices

## Pages Used to View Self-Service Paychecks

| Page Name     | Object Name   | Navigation                                                                                | Usage                                                                                                                                                                                                                                                                                                |
|---------------|---------------|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Paycheck | PY_IC_PI_LIST | Self Service, Payroll and Compensation, View Paycheck                                     | Displays a list of paychecks by check date. Depending upon setup options, the page can list PDF paychecks and historical checks that are not in PDF format. By clicking the check date link, employees access PDF paychecks in a new window and view historical paychecks on the View Paycheck page. |
| View Paycheck | PY_IC_PI_DATA | Click a check date link for a non-PDF paycheck on the View Paycheck page (PY_IC_PI_LIST). | View historical paychecks that are not in PDF format.                                                                                                                                                                                                                                                |

| Page Name                   | Object Name                            | Navigation                                                                                                                                                                                                                                                                                                           | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Self Service Paycheck  | PY_SSP_ADMIN_VIEW,<br>PY_SSP_VIEW_DATA | <ul style="list-style-type: none"> <li>Payroll for North America, Payroll Processing USA, Produce Payroll, Review Self Service Paycheck, View Self Service Paycheck</li> <li>Payroll for North America, Payroll Processing USF, Produce Payroll, Review Self Service Paycheck, View Self Service Paycheck</li> </ul> | To resolve questions raised by employees about their paychecks, the payroll administrator can view employees' self service paychecks in an online view that replicates the employees' view. The list page lists both PDF paychecks and historical checks that are not in PDF format. Administrators can view all paychecks, regardless of the availability date specified for employee viewing of PDF checks. Clicking the check date link displays PDF paychecks in a new window and displays historical paychecks on another View Self Service Paycheck page.           |
| View Self Service Paycheque | PY_SSP_ADMIN_VIEW,<br>PY_SSP_VIEW_DATA | Payroll for North America, Payroll Processing CAN, Produce Payroll, Review Self Service Paycheque, View Self Service Paycheque                                                                                                                                                                                       | To resolve questions raised by employees about their paycheques, the payroll administrator can view employees' self service paycheques in an online view that replicates the employees' view. The list page lists both PDF paycheques and historical cheques that are not in PDF format. Administrators can view all paycheques, regardless of the availability date specified for employee viewing of PDF cheques. Clicking the cheque date link displays PDF paycheques in a new window and displays historical paycheques on another View Self Service Paycheque page. |

## Managing Consent for Electronic Year-End Forms

This section provides an overview of employee consent and discusses how to:

- Set up self-service viewing.
- Enable self-service consent and year-end forms.

- Set up consent and notification text.
- Monitor employee consent status.
- Reset consent status.

## Understanding Employee Consent

You must secure employee consent before you can provide self-service viewing and printing of electronic year-end forms or slips in place of printed forms. Among other requirements, you must also provide the opportunity for employees to withdraw their consent. If employees currently do not have a valid consent on file at the time of generating the year-end forms or slips, you must provide the document in paper format.

The Payroll for North America and ePay applications provide:

- Setup pages where administrators enable or disable self-service year-end form functionality, enter text for consent emails and notifications to employees, and specify forms and other options.
- Self-service pages where employees grant and withdraw consent to receive electronic year-end forms.
- Workflow email confirmation of an employee's current consent status after each online consent status update.
- An online page and a report that administrators use to monitor employee consent status.
- A reset process that enables administrators to reset consent status for all employees, selected companies, or selected employees.

For example, use this process to reset the consent status of terminated employees to ensure the printing of paper year-end forms.

- PDF year-end forms creation processes that generate year-end forms and slips.

---

**Note.** Payroll for North America uses XML Publisher to create year-end forms in PDF format for printing and to display the year-end forms in self-service. You must use the correct PDF year-end form creation process in conjunction with the ePay consent functionality. The processes print the forms only for employees who have not consented to electronic forms.

---

- Workflow email notification that year-end forms are ready for self-service viewing.

This table describes the availability of year-end forms in each country by employee consent status:

| Country | Consent Status                                        | Form Availability                                                                                                                                                            |
|---------|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| U.S.    | Consented                                             | The PDF year-end form creation process suppresses the printing of the employee's paper W-2 or W-2c.<br>The employee views and prints the year-end form through self service. |
| U.S.    | No Consent Received<br>Withdrawn<br>Reset by Employer | The PDF year-end form creation process prints the employee's paper Form W-2 or W-2c.<br>The employee can also view and print the year-end form through self service.         |

| Country | Consent Status                                        | Form Availability                                                                                                                                                          |
|---------|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Canada  | Consented                                             | The PDF year-end form creation process suppresses the printing of the employee's paper T4 or T4A.<br>The employee views and prints the year-end slip through self service. |
| Canada  | No Consent Received<br>Withdrawn<br>Reset by Employer | The PDF year-end form creation process prints the employee's paper T4 or T4A.<br>The employee cannot view or print the year-end slip through self service.                 |

**Note.** If the U.S. employee consents to receive an electronic Form W-2, you must also deliver any related Form W-2c electronically.

### Initial Employee Notification About Consent

After you set up the consent processing, you must use your normal method of employee notification to inform employees that they can enter the self-service consent page to grant consent. The ePay application does not provide functionality for the initial notification to employees.

### Consent Reset Due to Termination

The system does not automatically reset the consent status of terminated employees. The payroll administrator must run the Reset Form Consent process for terminated employees to ensure that paper forms will be printed at year end.

**Note.** The automatic notification of reset status is likely to be undeliverable to terminated employees. Use a standard procedure to notify the terminated employee of reset consent status, such as including the notification in the termination package.

### See Also

Year-end processing instructions issued with the tax update posted on Customer Connection in October of each year.

[Appendix A, "Delivered Workflows for ePay," page 53](#)

## Pages Used to Manage Consent for Self-Service Year-End Forms

| Page Name             | Object Name       | Navigation                                                                                                                                                                                                                                                              | Usage                                                                                                                                                       |
|-----------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tax Form XMLP Options | PY_YE_XMLP_OPTION | <ul style="list-style-type: none"> <li>Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Tax Form XMLP Options</li> <li>Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Tax Form XMLP Options</li> </ul> | Specify the tax year, the tax form, the report definitions, and the URL for the table in which the XML data is stored for producing the self-service forms. |

| Page Name                                                    | Object Name                             | Navigation                                                                                                                                                                                                                                                                                  | Usage                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------------------------------------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Year End Form Options                                        | PY_YE_OPTION_CAN,<br>PY_YE_OPTION_USA   | <ul style="list-style-type: none"> <li>Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Options</li> <li>Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Options</li> </ul>                     | Enable self-service year-end forms or slips. This step is required to enable employees to grant consent to receive electronic forms. Also specify the availability date for each form and tax year.                                                                                                                                                                    |
| Year End Form Text                                           | PY_YE_NOTES                             | <ul style="list-style-type: none"> <li>Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Text</li> <li>Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Text</li> </ul>                           | Set up consent and notification text to be used on the consent page or in email notifications sent to employees.                                                                                                                                                                                                                                                       |
| T4/T4A Consent, W-2/W-2c Consent                             | PY_SS_CONSENT_CAN,<br>PY_SS_CONSENT_USA | <ul style="list-style-type: none"> <li>Self Service, Payroll and Compensation, T4/T4A Consent</li> <li>Self Service, Payroll and Compensation, W-2/W-2c Consent</li> </ul>                                                                                                                  | Employees request or withdraw consent to receive electronic year-end slips or forms. Appropriate text appears on the page based on the employee's current status. After saving an update on the page, the employee must enter password verification. After verification, the system displays confirmation of the submit and triggers email confirmation of the change. |
| Review T4/T4A Consent Status, Review W-2/W-2c Consent Status | PY_FORM_STAT_CAN,<br>PY_FORM_STAT_USA   | <ul style="list-style-type: none"> <li>Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Review T4/T4A Consent Status</li> <li>Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Review W-2/W-2c Consent Status</li> </ul> | Monitor employee consent status. Review the history of each employee's consent and email notification status.                                                                                                                                                                                                                                                          |
| Year End Consent Status Report                               | RUNCTL_TAX900CS                         | Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Year End Consent Status Report                                                                                                                                                                            | Run the TAX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.                                                                                                                                                                              |

| Page Name                                             | Object Name                           | Navigation                                                                                                                                                                                                                                                                           | Usage                                                                                                                                                                                                               |
|-------------------------------------------------------|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Year End Consent Status Report                        | RUNCTL_CTX900CS                       | Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Year End Consent Status Report                                                                                                                                                                    | Run the CTX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.                           |
| Reset T4/T4A Consent Status, Reset W-2 Consent Status | PY_RC_RESCON_CAN,<br>PY_RC_RESCON_USA | <ul style="list-style-type: none"> <li>Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Reset T4/T4A Consent Status</li> <li>Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Reset W-2 Consent Status</li> </ul> | Reset consent status to <i>Reset Consent</i> for all employees, selected companies, or selected employees. Enter run parameters for the Reset Form Consent Application Engine process (PYYE_RESCAN or PYYE_RESUSA). |

## Setting Up Self-Service Viewing

Access the Tax Form XMLP Options page.

**Tax Form XMLP Options**

**Tax Year:** 2005

**Taxform Options** Find | View All First 1 of 10 Last

**\*Tax Form ID:** T4A Slip

**Report Definitions** Customize | Find | View All First 1-4 of 4 Last
 

| Report Name  | Description                    | Template ID    | Description         | Copy Type  | Burst?                              | Batch Size |   |   |
|--------------|--------------------------------|----------------|---------------------|------------|-------------------------------------|------------|---|---|
| PYT4A05N_CO  | T4A Company Print Form 2005    | PYT4A05N_CO_1  | T4A Company Copy    | Company    | <input type="checkbox"/>            |            | + | - |
| PYT4A05N_EE  | T4A Employee Print Form 2005   | PYT4A05N_EE_1  | T4A Employee Copy   | Employee   | <input type="checkbox"/>            |            | + | - |
| PYT4A05N_GVT | T4A Government Print Form 2005 | PYT4A05N_GVT_1 | T4A Government Copy | Government | <input type="checkbox"/>            |            | + | - |
| PYT4A05S_EE  | T4A Employee SS Form 2005      | PYT4A05S_EE_1  | T4A Employee Copy   | Employee   | <input checked="" type="checkbox"/> |            | + | - |

**XML Data Files**

**URL Identifier:** PY\_YE\_CAN\_XML\_DATA T4/T4A XML DATA

**Filing Instructions**

**URL Identifier:** PY\_YEAR\_END\_ATTACH Year End Filing Instructions

**Attached File:** PYT4A05\_INSTR.pdf

Add Attachment Delete Attachment View Attachment

**Last Update Date/Time** 06/01/2006 2:07:34PM **by** PS

Tax Form XMLP Options page

**Report Definitions**

Select the appropriate print and self-service form report definitions for the tax year and tax form specified. PeopleSoft delivers the necessary report definitions and filing instructions each year for each tax form.

**XML Data Files**

Enter the URL to the table in which you store the XML data for self-service viewing. We deliver a URL and associated table for this purpose. If you create a separate table and URL to store the data, enter your URL here.

**Batch Size**

Enter the number of employees that you want in each PDF print file for those employees who do not give consent to receive their forms through self service.

**See Also**

Year-end processing instructions issued with the tax update posted on Customer Connection in October of each year.

## Enabling Self Service Consent and Year-End Forms

Access the Year End Form Options page.

Year End Form Options

W-2 Reporting Company: GBI Global Business Institute 9999

Self Service Options

Find | View All First 1 of 1 Last

Tax Year: 2005

Electronic Forms Option

☒ Enable Electronic Year End Forms In Self Service

Taxform Options

Find | View All First 1 of 1 Last

Tax Form ID: W-2

Self Service Availability

Availability Date:  Availability Notification Date Notified:

Report Definitions

Customize | Find | View All First 1-4 of 4 Last

| Report Name | Description                   | Template ID   | Description        | W-2/W-2c Type   | Burst?                              | Batch Size |
|-------------|-------------------------------|---------------|--------------------|-----------------|-------------------------------------|------------|
| PYW205N_CO  | W2 Company Print Form 2005    | PYW205N_CO_1  | W2 Company Copy    | Company Copy    | <input type="checkbox"/>            |            |
| PYW205N_EE  | W2 Employee Print Form 2005   | PYW205N_EE_1  | W2 Employee Copy   | Employee Copy   | <input type="checkbox"/>            |            |
| PYW205N_GVT | W2 Government Print Form 2005 | PYW205N_GVT_1 | W2 Government Copy | Government Copy | <input type="checkbox"/>            |            |
| PYW205S_EE  | W2 Employee SS Form 2005      | PYW205S_EE_1  | W2 Employee Copy   | Employee Copy   | <input checked="" type="checkbox"/> |            |

Last Update Date/Time 05/25/2006 1:39:35PM by PS

Year End Form Options page

The Year End Form Options page configures printing of year end forms in XMLP PDF format for the company specified. The output files are determined by the tax year and tax form ID.

**Note.** (USA) Configuration is by W-2 company for the U.S.

|                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Tax Year</b>                                         | Create a new row each tax year.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Enable Electronic Year End Forms in Self Service</b> | <p>Select this check box to enable the W-2 company or T4/T4A company to provide XMLP PDF forms or slips in the ePay self-service transaction.</p> <p>If this check box is not selected, employees cannot enter or withdraw consent or view year end forms and slips.</p> <p>If you want to disable the feature after employees have granted consent, clear this check box and run the Reset T4/T4A Consent Status process or the Reset W-2 Consent Status process.</p> <hr/> <p><b>Note.</b> (USA) Self-service year-end form functionality is available only for companies set up with tax report type <i>W-2 or Territories</i> on the Company Table – Default Settings: Tax Details page.</p> <hr/> |
| <b>Tax Form ID</b>                                      | Enter all valid Tax Form IDs for the W-2 company or T4/T4A company.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Availability Date</b>                                | After generating the individual PDF forms, enter an availability date when employees can view the forms in self-service.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Availability Notification</b>                        | <p>After entering an availability date, click this button to trigger workflow to send email notification of form availability to employees who are eligible to receive the electronic form. Set up the email text on the Year End Form Text page.</p> <hr/> <p><b>Note.</b> Before you click this button, verify that the availability date in the email notification is correct.</p> <hr/>                                                                                                                                                                                                                                                                                                            |
| <b>Date Notified</b>                                    | After you click the Availability Notification button and trigger the workflow email notification, the system enters the current date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Report Definitions</b>                               | Displays a list of valid report definitions based on the Tax Year and Tax Form ID entered. This is for information only. Maintain this information on the Tax Form XMLP Options page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

## See Also

Year-end processing instructions issued with the tax update posted on Customer Connection in October of each year.

## Setting Up Consent and Notification Text

Access the Year End Form Text page.

**Year End Form Text**

**Text Type:** Consent Instructions

**Country:** USA United States

**Text Details** Find | View All First 1 of 1 Last

**Effective Date:** 01/01/1980

**Usage:** Page Text

**\*Description:** Consent Instructions

**Text:** You must complete this consent form to receive electronic W-2 or W-2c forms. If you do not submit a consent form or a withdrawal of consent form, the Payroll Department will process your year-end forms based on the information currently on file. After you submit your consent form, it will remain valid until you submit a withdrawal of consent form. The exception is when your employment is terminated or electronic access to forms is discontinued.

If you have any questions, please contact your Payroll Administrator.

Year End Form Text page

**Text Type**

When you enter the page, select the type of consent form or email text that you want to enter or update.

See Text type descriptions later in this section

**Usage**

Select *Page Text* for text types *Consent* or *Withdrawal*. Select *Email Text* for all other text types.

**Text**

Enter the exact wording of text to display in the email or consent form. Payroll for North America provides sample text for each text type for the U.S. and Canada. You can use the sample text as an example when you create your own text.

**Note.** Use the spell checking button or press Alt + 5 to check the spelling of your text.

**Text Types**

This table describes the text types:

| Text Type               | Description                                                                                                                                                        |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Consent Instructions    | Instructional text displayed on the W-2/W-2c Consent page or T4/T4A Consent page to request consent.                                                               |
| Withdrawal Instructions | Instructional text displayed on the W-2/W-2c Consent page or T4/T4A Consent page to withdraw consent.                                                              |
| Consent Confirmation    | Email to an employee to confirm that consent is granted. Workflow issues this email when the employee submits a consent request through self service.              |
| Withdrawn Confirmation  | Email to an employee to confirm that consent is withdrawn. Workflow issues this email when the employee submits a consent withdrawal request through self service. |

| Text Type                  | Description                                                                                                                                                                                                                                 |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Consent Reset Notification | Notification to employees that consent has been reset. Workflow issues this email when the payroll administrator resets an employee's consent status or runs a mass reset process.                                                          |
| Form Available             | Notification to employees that the W-2 or T4 is available for self-service viewing and printing. Workflow issues this email when the payroll administrator clicks the Availability Notification button on the Year End Form Options page.   |
| Correction Available       | Notification to employees that the W-2c or T4A is available for self-service viewing and printing. Workflow issues this email when the payroll administrator clicks the Availability Notification button on the Year End Form Options page. |

## Consent Instruction Requirements

The instructional page text that you create for consenting and withdrawing consent should include these details:

- Notification that a paper copy will be provided if consent is not given.
- The scope and duration of the consent.
- Post consent requests for paper statements.
- Option to withdraw consent.
- Conditions under which the employer will no longer furnish electronic statements.
- Procedures for updating information.
- Hardware and software requirements.

For example, inform employees that Adobe Reader is required to view the forms.

- Contact information.

## Monitoring Employee Consent Status

Access the Review W-2/W-2c Consent Status page or the Review T4/T4A Consent Status page.

Review W-2/W-2c Consent Status

Douglas Lewis

ID KU0001

Consent Information

Find | View All First 1 of 1 Last

Effective Date: 05/25/2006

Effective Sequence: 0

Last Update Date/Time 05/25/2006 1:43:47PM by

Consent Status

☐ No consent received. Print paper forms.
 ☐ Consent granted. Produce electronic forms.
 ☐ Consent withdrawn. Print paper forms.
 ☐ Consent reset by employer. Print paper forms.

Email Notification Status

☐ Consent Granted
 ☐ Consent Withdrawn
 ☐ Consent Reset
 ☐ W-2 Form Available
 ☐ W-2c Form Available

Review W-2/W-2c Consent Status page

**Note.** The Review T4/T4A Consent Status page is identical to the Review W-2/W-2c Consent Status page.

|                                  |                                                                                                                |
|----------------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Consent Status</b>            | Review the selected employee's consent status for each effective-dated row.                                    |
| <b>Email Notification Status</b> | Review the email notifications that have been sent to the employee by workflow for each row of consent status. |

**Note.** You can also generate the Year End Consent Status report to view a list of employees with the specified consent status values within a specified date range.

## Viewing Year-End Forms

This section lists prerequisites and describes the pages employees and administrators use to view year-end forms.

### Prerequisites

These steps are required before employees can view and print electronic year-end forms and slips in self-service:

1. Configure Integration Broker and Report Manager.
2. Specify tax form XMLP options.

See Year-end processing instructions issued with the tax update posted on Customer Connection in October of each year.

3. Specify the year-end form options.

On the Year End Form Options page, specify the tax year and the form availability date.

See Year-end processing instructions issued with the tax update posted on Customer Connection in October of each year.

4. Complete the employee consent process.

See [Chapter 3, “Managing Pay Information for Payroll for North America,” Managing Consent for Electronic Year-End Forms, page 12.](#)

5. Create year-end form data and then create the forms using the PDF year-end form creation processes.

---

**Note.** On the run control pages for the PDF year-end form creation processes, select the Final Print check box to enable employee self-service viewing as of the availability date specified on the Year End Form Options page. In Canada, self-service viewing is also subject to the consent status.

---

See Year-end processing instructions issued with the tax update posted on Customer Connection in October of each year.

## See Also

*Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker*

*Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*

## Pages Used to View Year-End Forms

| Page Name         | Object Name       | Navigation                                                                                                                                                                                                   | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View T4/T4A Slips | PY_SS_YE_FORM_CAN | <ul style="list-style-type: none"> <li>Self Service, Payroll and Compensation, View T4/T4A Slips</li> <li>Payroll for North America, Year-End Processing CAN, Create Slip Data, View T4/T4A Slips</li> </ul> | <p>Canadian employees who have consented to electronic slips can view and print year-end slips and filing instructions, listed by tax year. The slip and filing instructions open in separate windows when the employee clicks the corresponding document link.</p> <p>To resolve inquiries, the payroll administrator can view or reprint employees' self-service slips in an online Payroll for North America view that replicates the employees' self-service view.</p> <p>If the Final Print check box is selected, the employee can view the year-end form in self-service on or after the availability date if consent has been granted. If Final Print is not selected, only the payroll administrator can view the form.</p> |

| Page Name           | Object Name       | Navigation                                                                                                                                                                                                     | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View W-2/W-2c Forms | PY_SS_YE_FORM_USA | <ul style="list-style-type: none"> <li>Self Service, Payroll and Compensation, View W-2/W-2c Forms</li> <li>Payroll for North America, U.S. Annual Processing, Create W-2 Data, View W-2/W-2c Forms</li> </ul> | <p>U.S. employees can view and print year-end forms and filing instructions, listed by tax year. The form and filing instructions open in separate windows when the employee clicks the corresponding document link.</p> <p>To resolve inquiries, the payroll administrator can view or reprint employees' self-service forms in an online Payroll for North America view that replicates the employees' self-service view.</p> <p>If the Final Print check box is selected, the employee can view the year-end form in self-service on or after the availability date. If Final Print is not selected, only the payroll administrator can view the form.</p> |

## Setting Up and Viewing Direct Deposit

This section provides an overview of the direct deposit transaction and lists the pages used in the transaction.

### Understanding the Direct Deposit Transaction

To set up direct deposit, employees enter:

- Bank and account information.
- Deposit type (amount or percent) and the value.
- Deposit order for multiple deposits.

Employees can also update or cancel direct deposit instructions in the self-service transaction.

---

**Note.** (USA) In the U.S., prenotification may affect the timing of updates to direct deposit.

---

Upon saving data in the transaction, employees receive a message confirming the save and informing them that due to timing, the change might not be reflected on the very next pay.

## Pages Used to Set Up and View Direct Deposit

| Page Name                                 | Object Name    | Navigation                                                            | Usage                                                                                                              |
|-------------------------------------------|----------------|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Direct Deposit                            | PY_IC_DD_LIST  | Self Service, Payroll and Compensation, Direct Deposit                | Employees view current direct deposit information.                                                                 |
| Add Direct Deposit, Change Direct Deposit | PY_IC_DD_DATA  | Click the Add Account or Edit button on the Direct Deposit page.      | Employees add or change direct deposit information.                                                                |
| Delete Confirmation                       | EO_DEL_CONFIRM | Click the Delete button on the Direct Deposit page.                   | Employees delete direct deposit information.                                                                       |
| Pay Statement Print Option                | PY_IC_DD_SUPP  | Click the Pay Statement Print Option link on the Direct Deposit page. | Employees indicate whether they want a printed copy of the pay statement mailed to their home. The default is yes. |

---

## Viewing and Updating Voluntary Deductions

This section provides an overview of voluntary deductions, describes the prerequisite, and lists the pages used in the transaction.

### Understanding Voluntary Deductions

To control which general deductions employees can update using self service, use the Allow update via Emp Self Serv (allow update via employee self-service) option on the General Deduction Table page in the Payroll for North America application.

If you enable self-service updates for a deduction, employees can update their own voluntary deductions online. The employee's voluntary deduction changes in the ePay transaction directly update the Payroll for North America database tables.

### Prerequisite

To use this transaction, select the Allow update via Emp Self Serv (allow update via employee self service) option on the General Deduction Table page for each voluntary deduction that employees can update online.

See *PeopleSoft Enterprise Payroll for North America 9.0 PeopleBook*, "Defining Deductions," Defining General Deductions.

## Pages Used to Set Up and View Voluntary Deductions

| Page Name                                                                                              | Object Name                                                                                         | Navigation                                                                                                          | Usage                                                                     |
|--------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| Voluntary Deductions  | PY_IC_DED_LIST     | Self Service, Payroll and Compensation, Voluntary Deductions                                                        | View a list of current voluntary deductions.                              |
| Add Voluntary Deduction, Change Voluntary Deduction                                                    | PY_IC_DED_DATA                                                                                      | Click on Add Deduction or Edit button on the Voluntary Deductions page.                                             | Add, change, or stop voluntary deductions.                                |
| (USF) Distribution Information                                                                         | W3_GVT_PY_ALOT_IC  | Click the Distribution Information link on the Add Voluntary Deduction page or the Change Voluntary Deduction page. | Enter details of the account from which the voluntary deduction is taken. |

---

## (USA) Managing W-4 and W-2 Reissue

This section provides overviews of the W-4 and W-2c transactions and lists the pages used in these transactions.

### Understanding the W-4 Transaction

Employees can file a new Form W-4 through self service anytime their tax status changes.

Using the self-service transaction, employees can:

- Change their federal tax data.
- Select the company for which they need to change data if they work for multiple companies.
- Specify an additional withholding amount.

Users are asked to confirm their password after updating the W-4. This functions as an employee's electronic signature. Workflow generates an email to the employee confirming that the change was made.

---

**Note.** The W-4 Tax Information self-service transaction does not work when WWW\_AUTHENTICATION is used. With WWW\_AUTHENTICATION, users receive a message on the final confirmation page that their password is invalid and are unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.

---

### Understanding the W-2 Reissue Transaction

Employees can request a reissued W-2 form. Workflow associated with this transaction generates a worklist for the payroll administrator.

## Pages Used to Manage W-4 and Reissued W-2 Forms

| Page Name                 | Object Name   | Navigation                                                                       | Usage                                                             |
|---------------------------|---------------|----------------------------------------------------------------------------------|-------------------------------------------------------------------|
| (USA) W-4 Tax Information | PY_IC_W4_DATA | Self Service, Payroll and Compensation, W-4 Tax Information, W-4 Tax Information | Employees can change tax data.                                    |
| (USA) W-2 Reissue Request | PY_IC_W2_DATA | Self Service, Payroll and Compensation, W-2 Reissue Request, W-2 Reissue Request | Employees request a new W-2 form and select the delivery address. |

## CHAPTER 4

# Managing Pay Information for Global Payroll

This chapter provides an overview of ePay transactions and describes how to:

- Set up personal bank account information.
- Update personal bank account information.
- Set up payment instructions and distribution details.
- Enter payment instructions and distribution details.
- Set up View Payslip.
- View payslips online.
- (GBR) View payslips online.

---

## Understanding ePay Transactions for Global Payroll

You can use these ePay transactions if your organization has licensed PeopleSoft Enterprise Global Payroll:

- Personal Bank Accounts (GP\_SS\_EE\_BANK).  
Employees can enter and maintain their personal bank account information.
- Pay Distribution Instructions (GP\_SS\_EE\_NPD).  
Employees can define their net pay distribution requirements.
- View Payslip (GP\_SS\_EE\_PSLP).  
Employees can review paycheck information for earnings, taxes, deductions, and net pay distribution.
- (GBR) View Payslip GBR (GPGB\_PSLIP\_SS\_PNLG).  
Employees can review payslips (PeopleSoft Enterprise Global for the United Kingdom only).
- (JPN) Year-End Adjustment (YEA) Data (GPJP\_YEA\_SSERVICE).  
Employees can update their year-end adjustment data for YEA calculations (PeopleSoft Enterprise Global Payroll for Japan only).

---

## Setting Up Personal Bank Account Information

To define personal bank account information, use the Payee Bank Acct/Net Pay Dist (GP\_SS\_NPD\_CONFIG\_GBL) component.

This section provides an overview of how to define personal bank account information and discusses how to set up banking instructions.

## Understanding Personal Bank Account Information Setup

The steps for setting up and entering personal account data are:

1. Before employees can use the self-service pages to enter personal bank information, the payroll administrator must set up general bank and bank branch information by using the Bank Table and Branch Table pages in PeopleSoft Enterprise HRMS.
2. If you want to replace default instructions that appear in the Personal Bank Accounts component (GP\_SS\_EE\_BANK) with instructions that are specific to your company, define these instructions on the Banking Instructions page.

The new instructions appear in place of default messages from the Message Catalog.

---

**Note.** (GBR) If you are a United Kingdom user, specify additional instructions on the Banking Instructions page for employees that belong to building societies.

---

After general bank and bank branch information is set up, Global Payroll employees can enter personal bank information, such as bank locations and account types, bank and branch names, account names, account numbers, and currency codes. Employees enter this information by using the Personal Bank Accounts component.

---

**Note.** Any information that an employee enters in the Personal Bank Accounts component automatically updates the Maintain Bank Accounts page in the Global Payroll core application.

---

### See Also

Chapter 4, “Managing Pay Information for Global Payroll,” Updating Personal Bank Account Information, page 30

*PeopleSoft Enterprise Global Payroll 9.0 PeopleBook*, “Defining Banking Instructions”

*PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Setting Up Banks and Bank Branches”

## Pages Used to Define Personal Bank Account Information

| Page Name            | Object Name        | Navigation                                                                               | Usage                                                                                                                                                                         |
|----------------------|--------------------|------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bank Table           | BANK_EC            | Set Up HRMS, Common Definitions, Banking, Banks, Bank Table                              | Set up general bank information that is needed to enable employee self-service transactions.                                                                                  |
| Branch Table         | BANK_BRANCH_EC     | Set Up HRMS, Common Definitions, Banking, Banks, Branch Table                            | Set up general bank branch information that is needed to enable employee self-service transactions.                                                                           |
| Banking Instructions | GP_SS_NPD_CNF_INST | Set Up HRMS, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Banking Instructions | Create instructions that you want employees to see on pages in the Personal Bank Accounts component. These instructions override any default messages in the Message Catalog. |

## Setting Up Banking Instructions

Access the Banking Instructions page.

Banking Instructions page

### Bank Instructions

Enter a message that will appear directly above the list of banks from which a user can select on the self-service Select a Bank page.

### Branch Instructions

If you set up bank branches by using the Branch Table page, when employees select a bank on the Select a Bank page, the system displays a list of available branches. Employees then see any instructions that you define here.

---

**Note.** This field is not available if the country is *GBR* or *USA*.

---

### Building Society Instructions

(GBR) If an employee specifies *GBR* (Great Britain) in the Bank Location field and selects *Building Society Roll Number* in the Account Type field on

the Bank Location and Account Type page, the Select a Building Society field appears, and displays the instructions that you define here.

---

**Note.** This field is available only if the country is *GBR*.

---

## Updating Personal Bank Account Information

This section lists the pages used to update personal bank account information.

### Pages Used to Update Personal Bank Account Information

| Page Name                      | Object Name        | Navigation                                                             | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------|--------------------|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Personal Bank Accounts         | GP_SS_EE_BANK      | Self Service, Payroll and Compensation, Personal Bank Accounts         | <p>View any previously defined accounts and delete or edit earlier entries.</p> <p>After employees have defined their personal account information by using the Personal Bank Accounts component, they can click the Pay Distribution Instructions link. The system displays the Pay Distribution Instructions component (GP_SS_EE_NPD), where employees can define their net pay distribution.</p> <p><b>Note.</b> Any information that an employee enters in the Personal Bank Accounts component automatically updates the Maintain Bank Accounts page in the Global Payroll core application.</p> |
| Bank Location and Account Type | GP_SS_EE_BANK_CTRY | Click the Add a New Account button on the Personal Bank Accounts page. | Enter a bank location and an account type.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Select a Building Society      | GP_SS_EE_BANK_BRC  | Click the Continue button on the Bank Location and Account Type page.  | <p>(GBR) Select a building society.</p> <p><b>Note.</b> The system displays this page only when you select <i>GBR</i> in the Bank Location field and <i>Building Society Roll Number</i> in the Account Type field on the Bank Location and Account Type page. Otherwise, the Select a Bank page appears.</p>                                                                                                                                                                                                                                                                                         |

| Page Name            | Object Name        | Navigation                                                                                                                                                                                                                                                               | Usage                                                                                                                                                                                                                                                        |
|----------------------|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select a Bank        | GP_SS_EE_BANK_BNK  | Click the Continue button on the Bank Location and Account Type page.                                                                                                                                                                                                    | Select a bank.                                                                                                                                                                                                                                               |
| Select a Branch      | GP_SS_EE_BANK_BRC  | Select a bank for which branches have been defined on the Select a Bank page.                                                                                                                                                                                            | Select a bank branch.<br><b>Note.</b> If the bank that you select does not have any branches defined, the Add Account Details page appears instead of the Select a Branch page.                                                                              |
| Add Account Details  | GP_SS_EE_BANK_DET  | <ul style="list-style-type: none"> <li>Select a bank for which branches have not been defined on the Select a Bank page.</li> <li>Select a bank branch on the Select a Branch page.</li> <li>Select a building society on the Select a Building Society page.</li> </ul> | Add additional account details, such as the account name, account number, and currency code.<br><br>(GBR) Enter building society roll name and roll number.<br><br>(BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Enter the international bank account number. |
| Save Confirmation    | GP_SS_SAVE_CONFIRM | Click the Save button on the Add Account Details page.                                                                                                                                                                                                                   | Confirm that the personal bank account information is saved.                                                                                                                                                                                                 |
| Edit Account Details | GP_SS_EE_BANK_DET  | Click the Edit button on the Personal Bank Accounts page.                                                                                                                                                                                                                | Edit account details, such as the account name, account number, and currency code.                                                                                                                                                                           |
| Delete Confirmation  | GP_SS_DEL_CONFIRM  | Click the Delete button on the Personal Bank Accounts page.                                                                                                                                                                                                              | Delete a personal bank account.                                                                                                                                                                                                                              |

## Setting Up Payment Instructions and Distribution Details

To define payment instructions and distribution details, use the Payee Bank Acct/Net Pay Dist (GP\_SS\_NPD\_CONFIG\_GBL) component.

This section provides an overview of how to set up payment instructions and distribution details and discusses how to define run type information.

### Understanding How to Set Up Payment Instructions and Distribution Details

To set up payment instructions and distribution details, the payroll administrator must:

1. Set up general bank and bank branch information by using the Bank Table and Branch Table pages.

2. Determine whether employees can define separate payment instructions and distributions for different run types, such as expenses and bonuses.

If you configure the system so that users can specify different distributions for different run types, then users are required to select a run type before entering distribution details.

---

**Note.** If employees have more than one job, they must also select the job for which they are entering distribution details.

---

3. If the payroll administrator enables employees to define separate payment instructions and distributions for different run types, select a default election to use if the payee has no net distribution instructions for the run type.
4. Decide whether to lock net pay transactions so that employees cannot alter their distributions before or during a banking run.

The payroll administrator uses ePay's Run Types page to enter the decisions that are made in steps two through four.

## Pages Used to Define Payment Instructions and Distribution Details

| Page Name    | Object Name      | Navigation                                                                    | Usage                                                                                                                                  |
|--------------|------------------|-------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| Bank Table   | BANK_EC          | Set Up HRMS, Common Definitions, Banking, Banks, Bank Table                   | Set up general bank information that is needed to enable employee self-service transactions.                                           |
| Branch Table | BANK_BRANCH_EC   | Set Up HRMS, Common Definitions, Banking, Banks, Branch Table                 | Set up general bank branch information that is needed to enable employee self-service transactions.                                    |
| Run Types    | GP_SS_NPD_CONFIG | Set Up HRMS, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Run Types | Set up the net pay distribution options that are available to employees in the self-service Pay Distribution Instructions transaction. |

## Defining Run Type Information

Access the Run Types page.

Run Types

Banking Instructions

Country: GBR United Kingdom

Run Type Defaults

Customize | Find |  First 1-2 of 2 Last

| *Run Type                                                                                     | Description          | Default Election         | Net Pay Transaction Locked |   |   |
|-----------------------------------------------------------------------------------------------|----------------------|--------------------------|----------------------------|---|---|
| GXERBONUS  | Earnings Bonus Run   | <input type="checkbox"/> | <input type="checkbox"/>   | + | - |
| GXERREG    | Earnings Regular Run | <input type="checkbox"/> | <input type="checkbox"/>   | + | - |

Run Types page

**Run Type**

Select the run type for which you want to allow or prevent employees from entering distribution instructions.

Only run types with a calculation type of payroll are listed. The Global Payroll security settings determine whether you can select run types designated for all countries or only selected countries.

If you do not select run types on this page, employees see the following message when they access the Pay Distribution Instructions component: “There are no payroll types set up in the system which you can access. Please contact your Payroll Administrator.”

If you select only one run type, employees do not have to choose a run type before they define their distribution amounts and percentages.

If you select more than one run type, employees must select a run type before they enter distribution instructions.

**Default Election**

Enables you to define the distribution options that are selected by an employee for a particular run type as a default distribution. The default works as follows: When you run the banking process, the system looks at the run type that is defined on the pay calendar. It then tries to find the net distribution selections that the employee has made for that run type in the Pay Distribution Instructions component. If the current run type does not have distribution instructions defined for it, the system uses the distribution amounts and percentage corresponding to the row marked as default election.

If you choose a default run type, when employees go to the Payment Instruction Details page to enter their distribution amounts and percentages for that run type, the Use Payment Instructions for All Payroll Runs check box is selected. This lets employees know that the distributions that they make for that run type are used as the default election. Employees can override this default and set any other defaults that they want by clearing the check box.

**Net Pay Transaction Locked**

Select this check box if you want to temporarily prevent employees from entering distribution instructions for this run type. For example, you might want to select this option while you are running the banking process.

Doing so causes the following message to appear after the name of the run type in the Pay Distribution Instructions component: “Locked by Payroll Administrator – please try later.”

---

## Entering Payment Instructions and Distribution Details

This section provides an overview of how to enter payment instructions and distribution details and lists the pages used to enter payment instructions and distribution details.

### Understanding How to Enter Payment Instructions and Distribution Details

After the payroll administrator has set up payment instructions and distribution details, employees can enter their own bank account information, payment instructions, and distribution details.

To enter personal bank account information, payment instructions, and distribution details, the employee:

1. (Optional) Uses the Personal Bank Accounts component to enter personal bank account information, first selecting a bank, then a branch, and then entering the account name and account number.

The employee can select only those banks and branches that you have set up by using the Bank Table and Branch Table pages.

The accounts defined here are those to which employees distribute their net pay in step two. If the employee does not have bank account information when the employee uses the Pay Distribution Instructions component (GP\_SS\_EE\_NPD), the employee can add personal bank account information because the Personal Bank Accounts transaction is incorporated within the Pay Distribution Instructions transaction.

---

**Note.** Any information that the employee enters in this component automatically updates the Maintain Bank Accounts page in the Global Payroll core application. The Maintain Bank Accounts page is designed to enable payroll departments to enter employee bank account information, while the Personal Bank Accounts component is designed as part of a self-service application that enables employees to enter their own account information online. Regardless of which page is used to enter account information, both pages display the most up-to-date account data because both pages reference the same bank table (PYE\_BANKACCT).

---

2. Uses the Pay Distribution Instructions component to:

- Select bank transfer as the payment method and distribute electronic transfer payments between the various banks and accounts defined in step one.
- Select check, postal order, or cash as the payment method to receive some or all of their earnings.

Each user can specify one cash and one check distribution. The priority order determines the order of payment during processing.

- Specifies the priority order for each disbursement.

The priority order determines the order of payment during processing.

If you configure the system so that employees can specify different distributions for different run types, then employees are required to select a payroll type before entering distribution details. If employees have more than one job, they must also select the job for which they are entering distribution details.

---

**Note.** Any information that employees enter on these pages automatically updates the Net Distribution page in the Global Payroll core application. The Net Distribution page was designed to enable payroll departments to define net distribution details, while the Pay Distribution Instructions component was designed as part of a self-service application, enabling employees to set their own distribution amounts and percentages online. Regardless of which page is used to enter pay distribution information, both pages display the most up-to-date pay distribution data because both pages reference the same bank tables (GP\_NETDIST, GP\_NETDIST\_DT, and GP\_NETDIST\_DTL).

---

## Pages Used to Enter Payment Instructions and Distribution Details

| Page Name                                              | Object Name        | Navigation                                                                                                                                                                                                                                                                                                                                     | Usage                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------------------------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Select Job Title                                       | GP_SS_EE_NPD_JOB   | <ul style="list-style-type: none"> <li>Self Service, Payroll and Compensation, Pay Distribution Instructions</li> <li>Click the Pay Distribution Instructions link on the Personal Bank Accounts page.</li> </ul>                                                                                                                              | <p>Select a job for which you want to enter distribution and payment instructions.</p> <p><b>Note.</b> The system displays this page only if the employee has multiple jobs. If the employee has only one job, the system displays the Select Type of Payroll page or the Pay Distribution Instructions page.</p>                                               |
| Select Type of Payroll                                 | GP_SS_EE_NPD_RT    | <ul style="list-style-type: none"> <li>Self Service, Payroll and Compensation, Pay Distribution Instructions</li> <li>Select a job title on the Select Job Title page.</li> <li>Click the Pay Distribution Instructions link on the Personal Bank Accounts page.</li> </ul>                                                                    | <p>Select the run type for which you want to enter payment instructions and define distribution amounts and percentages.</p> <p><b>Note.</b> The system displays this page only if more than one run type is selected for distribution on the Run Types page. If only one run type is selected, the system displays the Pay Distribution Instructions page.</p> |
| Pay Distribution Instructions                          | GP_SS_EE_NPD       | <ul style="list-style-type: none"> <li>Self Service, Payroll and Compensation, Pay Distribution Instructions</li> <li>Select a job title on the Select Job Title page.</li> <li>Select a payroll type on the Select Type of Payroll page.</li> <li>Click the Pay Distribution Instructions link on the Personal Bank Accounts page.</li> </ul> | <p>View, delete, or edit any previously defined distributions and payment instructions, and add new distributions and payment instructions.</p>                                                                                                                                                                                                                 |
| Select Distribution Method                             | GP_SS_EE_NPD_PAY   | Click the Add a Distribution Instruction button on the Pay Distribution Instructions page.                                                                                                                                                                                                                                                     | Select a payment method for which you want to distribute amounts or percentages.                                                                                                                                                                                                                                                                                |
| Pay Distribution Instructions - Personal Bank Accounts | GP_SS_EE_BANK_SUMM | Select <i>Bank Transfer</i> in the Distribution Methods column on the Select Distribution Method page.                                                                                                                                                                                                                                         | Select a bank account for which you want to distribute amounts or percentages.                                                                                                                                                                                                                                                                                  |

| Page Name                        | Object Name       | Navigation                                                                                                                                                                                                                                                                                                                                                               | Usage                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Distribution Instruction Details | GP_SS_EE_NPD_DET  | <ul style="list-style-type: none"> <li>• Select <i>Cash</i>, <i>Check</i>, or <i>Postal Order</i> in the Distribution Methods column on the Select Distribution Method page.</li> <li>• Select a bank account on the Pay Distribution Instructions - Personal Bank Accounts page.</li> <li>• Click the Edit button on the Pay Distribution Instructions page.</li> </ul> | <p>Specify the priority and the amount or percentage of funds to be paid for the selected payment method.</p> <p>Distribution is processed in priority order. To change priority order when the priority has already been used, the original row with that priority must be changed first.</p> <p><b>Note.</b> Employees must specify an amount or a percentage, but cannot specify both. Employees can also leave both amount and percentage blank if they select the Use for any Remaining Pay check box. If Use for any Remaining Pay has been selected on a row, it cannot be selected on another row. The user would have to assign an amount or percentage to the original row before assigning remaining pay to another account.</p> |
| Delete Confirmation              | GP_SS_DEL_CONFIRM | Click the Delete button on the Pay Distribution Instructions page.                                                                                                                                                                                                                                                                                                       | Delete a payment instruction.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

## Setting Up View Payslip

To set up View Payslip, use the Self Service Payslip Options (GP\_SS\_PSLP\_OPTIONS\_GBL) component.

This section provides an overview of the View Payslip transaction setup, lists prerequisites, and discusses how to:

- Identify the FTP URL used for storing PDF files.
- Enable online payslip printing.

## Understanding the View Payslip Transaction Setup

You can make employees' payslips available in PDF format in the View Payslips transaction (GP\_SS\_EE\_PSLP). The system creates the PDF files when the Create Self Service Payslips Application Engine process (GP\_EPAY) runs. This process is included as part of the PS Job process that you run from each country extension's payslip creation page.

As part of the payslip generation process, the system launches a series of processes that:

- Gather information and create a temporary file.
- Create a PDF file that is used to print the payslips.
- Split the PDF file into individual PDF files for each employee.

These individual PDF files are stored on a secure server.

---

**Important!** When scheduling a process request for a payslip job, the following values can be used with ePay in the Type and Format fields on the Process Scheduler Request page: *None* and *None* (defaults to Web and PDF), *Web* and *PDF*, or *File* and *PDF*. If using *File* and *PDF*, DO NOT use a custom output destination on the Process Scheduler Request page.

---

To set up the View Payslip transaction:

1. Define the URL identifier for the server that will store the individual PDF files.

The Create Self Service Payslips process (GP\_EPAY) uses this URL to identify where the PDF files are to be stored.

You can use the default, GP\_SS\_PSLP\_FTP, or you can create your own URL identifier.

2. Define the parameters for the View Payslip transaction.

Using the Self Service Payslip Options page, you define:

- The default URL identifier.
- Whether to suppress printed payslips as a default.
- When payslip information is available for employees to view.
- Whether to override payslip information availability dates for one or more run types.

## Prerequisites

Before you can set up the View Payslips transaction, you must:

1. Set up a secure FTP server to store the individual PDF payslip files.
2. Obtain the FTP URL from your environments engineers.
3. Set up payslips.

Each country extension has instructions on how to set up payslips for that country.

## Pages Used to Set Up View Payslip

| Page Name                    | Object Name        | Navigation                                                                                     | Usage                                                                           |
|------------------------------|--------------------|------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| URL Maintenance              | URL_TABLE          | PeopleTools, Utilities, Administration, URLs, URL Maintenance                                  | Stores URL addresses.                                                           |
| Self Service Payslip Options | GP_SS_PSLP_OPTIONS | Set Up HRMS, Product Related, ePay, Self Service Payslip Options, Self Service Payslip Options | Enable online payslip printing using the View Payslip self-service transaction. |

## Identifying the FTP URL Used for Storing PDF Files

Access the URL Maintenance page.

### URL Maintenance

**URL Identifier:** GP\_SS\_PSLP\_FTP

**\*Description:** Payslip File attachments

**\*URL:** ftp://anonymous:anonymous@phas035.peoplesoft.com/PAYSLIPS

**Comments:** URL used to attach Payslip PDF Files for Self Service. Add your ftp location in the URL field. Example: ftp://<userid>:<password>@<machine name>/PAYSLIPS/

URL Maintenance page

**Important!** If you are creating your own URL identifier to use instead of GP\_SS\_PSLP\_FTP, you must update the Self Service Payslip Options page to reflect the new URL identifier.

### URL

Enter the address for the location of the stored individual PDF files. Your environments engineers can provide this address.

**Note.** The format of your URL may not match the format of the example provided in the Comments field. The format of the address is dependent on the operating system you are using. You should contact your system administrator for the exact format of the URL.

## Enabling Online Payslip Printing

Access the Self Service Payslip Options page.

### Self Service Payslip Options

**Country:** AUS Australia

**Default Payslip URL Identifier:** GP\_SS\_PSLP\_FTP Payslip File attachments

#### Default Payslip Print Options

☐ Suppress Printing of Payslips

#### ePay Availability Options

☐ Enable Option in Self Service

**Days after Payment Date:**

| Payslip Availability By Run Type |             |                         | View All | First | 1 of 1 | Last |
|----------------------------------|-------------|-------------------------|----------|-------|--------|------|
| Run Type                         | Description | Days after Payment Date |          |       |        |      |
|                                  |             |                         |          |       |        |      |

**Updated on:** 07/29/04 2:22:20PM **Updated By:** PSSTG

Self Service Payslip Options page

**Default Payslip URL Identifier**

Enter the URL identifier that contains the FTP URL where the PDF files for this country are stored.

The default URL identifier is GP\_SS\_PSLP\_FTP. If you created your own URL identifier, you must make sure to enter that URL identifier here.

**Default Payslip Print Options****Suppress Printing of Payslips**

Select this check box if you do not want payslips to be printed.

---

**Note.** If your country extension does not support the ability to suppress the printing of payslips, you should leave this check box cleared.

---

This check box serves as the default selection for your organization. It does not override existing individual payee settings.

**ePay Availability Options****Enable Option in Self Service**

Select this check box if you want employees to control whether they receive a printed copy of their payslip, overriding the default selection that you enter on this page. If selected, the Paper Payslip Instructions group box displays on the View Payslips page.

---

**Note.** If your country extension does not support the ability to suppress the printing of payslips on an individual payee basis, you should leave this check box cleared.

---

**Days after Payment Date**

Specify when the payslip is available for viewing using View Payslip. The date determined using this information is the earliest date that the payslip is available; once this date has passed, the payslip is always available. You can enter:

- Zero to indicate that the payslips are available on the payment date.
- A number greater than zero to indicate the number of days after the payment date that payslips are available.
- A negative number to indicate the number of days before the payment date that payslips are available.

**Payslip Availability By Run Type****Run Type and Days after Payment Date**

If you want a run type to have a different payslip availability date than the default that is specified in the ePay Availability Options group box, enter the run type and then specify the number of days before or after the payment date that you want payslips to be available.

---

## Viewing Payslips Online

This section provides an overview of online payslip views and discusses how the administrator reviews online payslips.

## Understanding Online Views of Payslips

Employees can view their payslips using the View Payslip transaction. When the employee accesses the View Payslips page, the system displays all payslips available, listed 10 at a time. To display the detailed payslip, the employee clicks the date link.

If the Enable Option in Self Service field is selected on the Self Service Payslip Options page, employees also have the option of indicating whether they want to receive a printed copy of their payslip.

To aid in resolving questions raised by employees about their payslips, the payroll administrator can view employees' self service payslips in an online view that replicates the employees' view.

## Pages Used to View Payslips Online

| Page Name                    | Object Name        | Navigation                                                                                            | Usage                                                                                                                                                                                                                                               |
|------------------------------|--------------------|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Payslips                | GP_SS_EE_PSLP      | Self Service, Payroll and Compensation, View Payslips, View Payslips                                  | The employee selects the paycheck date to display the payslip as a PDF file. The employee can also instruct payroll whether to print a hard copy of the payslip.                                                                                    |
| Review Self Service Payslips | GP_SS_PSLP_ADMINVW | Global Payroll and Absence Mgmt, Payslips, Review Self Service Payslips, Review Self Service Payslips | The payroll administrator reviews employee payslips to respond to employee questions. Select the employee by name or employee ID on the search page, then click the paycheck date to view the same payslip that the employee views in self service. |

## Reviewing Employee Payslips

Access the Review Self Service Payslips page.

Review Self Service Payslips

Samuel Brooks
Person ID: G1EE0001

Selection Criteria

Filter By: Payment Date

From Date: 05/30/2006

To Date: 03/01/2009

Select with Matching Criteria

Clear

Select Payslip

Customize | Find |
1-2 of 2

Payslip Content Details

Payslip File Details

| Payment Date             | Period Begin Date | Period End Date | Net Pay | Description  | Status                | Payslip ID                |
|--------------------------|-------------------|-----------------|---------|--------------|-----------------------|---------------------------|
| <a href="#">2/6/2009</a> | 01/26/2009        | 02/01/2009      | 929.60  | GP US Dept C | <span>Original</span> | G1_GRP_FEB09_SBW000000006 |
| <a href="#">1/2/2009</a> | 12/22/2008        | 12/28/2008      | 929.60  | GP US Dept C | <span>Original</span> | G1_GRP_JAN09_SBW000000006 |

Review Self Service Payslips page

## Selection Criteria

### Filter By

Specify whether you want to filter payslips by *Payment Data*, *Pay Period Begin Date*, or *Pay Period End Date*.

### From Date and To Date

Enter the date range for the payslips you want to view.

**Note.** You can specify an open date range by entering only a From Date or a To Date.

### Select with Matching Criteria

Click to generate a list of payslips based on the selection criteria you specify.

### Clear

Click to clear the From Date and To Date fields along with any results listed in the Select Payslip group box.

## Select Payslip

### Payment Date

Click a date in this column to view the corresponding payslip in PDF format.

### Status

Update the status for a payslip. Valid values are:

- *Original*: Indicates that this is the original payslip generated by the system.
- *Modified*: Indicates that the payslip was modified after it was originally generated.
- *Void-Hidden*: Indicates that the payslip has been voided and is not visible to the payee through self-service.
- *Void-Deleted*: Indicates that the payslip was invalid and has been deleted. It is not visible to the payee through self-service.
- *Void-Display*: Indicates that the payslip has been voided and is visible to the payee through self-service.

---

## (GBR) Viewing Payslips Online

For U.K. employers, there is a separate payslip provided in ePay. This section lists the prerequisites and page used to view payslips online.

### Prerequisites

Setup of the U.K. payslip is managed in Global Payroll for the U.K. This is discussed in the *PeopleSoft Enterprise Global Payroll for the United Kingdom 9.0 PeopleBook*.

Before employees can view their payslips, you must run the payslip process, which produces the payslips.

### See Also

*PeopleSoft Enterprise Global Payroll for the U.K. 9.0 PeopleBook*, “Setting Up Payslips”

*PeopleSoft Enterprise Global Payroll for the U.K. 9.0 PeopleBook*, “Generating and Viewing Payslips”

### Page Used to View Payslips Online

| Page Name  | Object Name   | Navigation                                                           | Usage                                                                           |
|------------|---------------|----------------------------------------------------------------------|---------------------------------------------------------------------------------|
| Pay Advice | GPGB_PSLIP_SS | Self Service, Payroll and Compensation, View Payslip GBR, Pay Advice | Employees use this page to view their payslips when payroll has been finalized. |

## CHAPTER 5

# (JPN) Updating Year-End Adjustment Data

This chapter provides an overview of the year-end adjustment (YEA) data self-service transaction and discusses how to:

- Set up the YEA data self-service transaction.
- Review and update YEA data.
- Review, approve, and load YEA self-service data.

### See Also

*PeopleSoft Enterprise Global Payroll for Japan 9.0 PeopleBook*, “Preparing Year-End Adjustment”

---

## Understanding the YEA Data Self-Service Transaction

This section discusses:

- YEA data self-service transaction.
- Status codes.

### YEA Data Self-Service Transaction

The YEA data self-service transaction provides updated data for the YEA calculations in Global Payroll for Japan. Employees can update YEA data including:

- Their personal information such as name and address (available if PeopleSoft Enterprise eProfile is licensed).
- Their own and dependents' tax data.
- Deduction data such as insurance deduction, spouse special deduction, dependent deductions, and special deduction for housing loan.

---

**Note.** Employees who are eligible for dependent deduction from secondary salaries cannot use the YEA data self-service transaction to enter their own tax data or dependent tax data.

---

Payroll administrators and employees perform the following tasks in this business process:

1. The payroll administrator specifies the time period during which employees can review and update data through the YEA data self-service transaction.  
The payroll administrator also specifies the date on which tax data and deduction data take effect.
2. Employees review and update their data on the YEA data self-service transaction pages.  
Employees must review all data before they can successfully submit data.

3. The payroll administrator reviews the employee's YEA data.  
Administrators can reject an employee's deduction data and request revision.  
Approval of each employee's deduction data before loading is an optional feature.
4. The payroll administrator loads updated deduction data including life and other insurance, spouse, dependent and housing loan deduction information to a Global Payroll for Japan table, where it is available for further review and processing.

## Status Codes

The system assigns a status to each employee's YEA data to enforce employees' complete review and to facilitate the administrator's review, optional approval, and data load to payroll. The system displays status codes on the YEA Information page that employees access. Payroll administrators can edit the status codes on the Review/Approve Self Service Data JPN page. The status codes *Submitted* and *Approved* are available as run control parameters when loading the data.

Following is a list of the status codes:

|                        |                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Open</b>            | The employee has not reviewed the data. This is the default status for each data section when the employee first accesses the YEA Information page.                                                                                                                                                                                                                                              |
| <b>Reviewed</b>        | The employee has accessed the data page and either clicked the Save button for updates or the Return to YEA Information link if data was unchanged. Employees can still access and update pages that have a reviewed status.                                                                                                                                                                     |
| <b>Submitted</b>       | The employee has successfully submitted deduction data. The employee cannot change deduction data once this status is assigned. This status is available as a run control parameter when loading data to records.                                                                                                                                                                                |
| <b>Approved</b>        | The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the organization requires approval of deduction data before loading. The employee cannot update the page once this status is assigned. This status is available as a run control parameter when loading data to records.                                                                          |
| <b>Rejected</b>        | The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the employee is required to again review some of the deduction data. The administrator must notify the employee separately to change the data. The system changes the status of all data back to reviewed if one section has the rejected status, so that the employee can review all data again. |
| <b>Sent to Payroll</b> | The system sets this status after the payroll administrator runs the Load YEA Self Service Application Engine process (GPJP_YEASSLD) to load the deduction data into the corresponding records. The employee cannot access the update page once this status is assigned.                                                                                                                         |

---

## Setting Up the YEA Data Self-Service Transaction

To set up the YEA data self-service transaction, use the YEA Self Service Setup JPN (GPJP\_YEA\_SETUP\_GBL) component.

This section discusses how to specify control dates for YEA data.

## Page Used to Set Up the YEA Data Self-Service Transaction

| Page Name                              | Object Name    | Navigation                                                                                                        | Usage                                                                                                                                                                                     |
|----------------------------------------|----------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Year End Adjustment Self Service Setup | GPJP_YEA_SETUP | Set Up HRMS, Common Definitions, Self Service, YEA Self Service Setup JPN, Year End Adjustment Self Service Setup | Specify the period during which the YEA data self-service transaction is available to employees and specify the effective date of tax and deduction data entered through the transaction. |

## Specifying Control Dates for YEA Data

Access the Year End Adjustment Self Service Setup page.

**Year End Adjustment Self Service Setup**

**Object Year:** 2006

**\*As Of Date:**  

**\*From:**   **\*Through:**  

Year End Adjustment Self Service Setup page

|                         |                                                                                                                                                                                                 |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Object Year</b>      | The year that is being adjusted.                                                                                                                                                                |
| <b>As Of Date</b>       | The system uses this date when retrieving current information from effective-dated tables. The system also uses this date as the effective date when loading YEA self-service data into tables. |
| <b>From and Through</b> | Enter the begin and end dates of the period that employees can access the YEA data self-service transaction.                                                                                    |

## Reviewing and Updating YEA Data

This section provides an overview of how to review and update YEA data and lists the pages used to review and update YEA data.

### Understanding How to Review and Update YEA Data

Through the YEA Information page, employees access other pages to review and update YEA information. Current data is displayed on each page when first accessed. Employees click the links to access the corresponding pages, where they can view and modify existing data. The current status of the data in the section is displayed to the right of each link. Employees can access the corresponding page only if the status is *Open*, *Reviewed*, or *Rejected*.

Employees must review every page that is accessible from the main page before they can successfully submit their data. The system presents an error message if the employee tries to submit when there is still a status of open or rejected. To set a section's status to reviewed, employees click the Save button if they have updated data or the Return to YEA information link if they have only reviewed the data.

**See Also**

Chapter 5, “(JPN) Updating Year-End Adjustment Data,” Status Codes, page 44

## Pages Used to Review and Update YEA Data

| Page Name                          | Object Name       | Navigation                                                                     | Usage                                                                                                                                                                                                                                                               |
|------------------------------------|-------------------|--------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| YEA Information                    | GPJP_YEA_SSERVICE | Self Service, Payroll and Compensation, Year End Adjustment Info JPN           | Employees access individual transactions to review and update YEA data.                                                                                                                                                                                             |
| Employee Tax Information           | GPJP_YEA_EETAX    | Click the Employee Tax Information link on the YEA Information page.           | Employees review and update tax information such as relationship to head of household and disability information.                                                                                                                                                   |
| Personal Information               | HR_EE_PERS_INFO   | Click the Employee Personal Information link on the YEA Information page.      | Employees review and update name, address, and other personal data information. This page is not available if you do not license eProfile.<br><br><b>Note.</b> The Employee Personal Information link is available only if the organization also licenses eProfile. |
| Dependent Tax Information          | GPJP_YEA_DEPTAX   | Click the Dependent Tax Information link on the YEA Information page.          | Employees review dependent relationship, type, and disability type information. They also access a page for editing dependent information.                                                                                                                          |
| Edit Dependent Tax Information     | GPJP_YEA_DEPTX_2  | Click the Edit button on the Dependent Tax Information page.                   | Employees edit dependent information. They cannot add or delete a dependent on this page.                                                                                                                                                                           |
| Life Insurance                     | GPJP_YEA_LIFE     | Click the Life Insurance link on the YEA Information page.                     | Employees review and update life insurance and personal pension insurance information.                                                                                                                                                                              |
| Other Insurance                    | GPJP_YEA_NONLIFE  | Click the Other Insurance link on the YEA Information page.                    | Employees review and update nonlife insurance information, including social insurance and small enterprise mutual aid.                                                                                                                                              |
| Spouse Special Deduction           | GPJP_YEA_SPOUSE   | Click the Spouse Special Deduction link on the YEA Information page.           | Employees review and update spouse special deduction data.                                                                                                                                                                                                          |
| Special Deduction for Housing Loan | GPJP_YEA_HOUSE    | Click the Special Deduction for Housing Loan link on the YEA Information page. | Employees review and update information relative to the special deduction for housing loan.                                                                                                                                                                         |

## Reviewing, Approving, and Loading Self-Service YEA Data

This section discusses how to:

- Review and approve employee YEA data.
- Load YEA self-service deduction data.

### Pages Used to Review, Approve, and Load Employee YEA Data

| Page Name                            | Object Name        | Navigation                                                                                                               | Usage                                                                                                                                                                                                                                                                                        |
|--------------------------------------|--------------------|--------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Review/Approve Self Service Data JPN | GPJP_YEA_PAYADM    | Global Payroll & Absence Mgmt, Year-End Processing, Rvw/Appr Self Service Data JPN, Review/Approve Self Service Data JPN | Payroll administrators view a summary and details of employee YEA data, edit status, and approve if required. Administrators cannot edit employee data.                                                                                                                                      |
| Load YEA Self Service                | GPJP_RC_YEALOAD_SS | Global Payroll & Absence Mgmt, Year-End Processing, Load YEA Self Service Data JPN, Load YEA Self Service                | Run the Load YEA Self Service process to load updated self-service employee personal data, dependent deduction data, life and nonlife insurance, and spouse and housing loan deduction information into the Global Payroll for Japan YEA table and the corresponding page (GPJP_YEA_PYEADJ). |
| Payee List                           | GPJP_RC_YEA_SEC    | Click the Payee List link on the Load YEA Self Service page.                                                             | Select individual employees to load their data.                                                                                                                                                                                                                                              |

### See Also

Chapter 5, “(JPN) Updating Year-End Adjustment Data,” Reviewing and Updating YEA Data, page 45

## Reviewing and Approving Employee YEA Data

Access the Review/Approve Self Service Data JPN page.

**Review/Approve Self Service Data JPN**

Search ID: jpn

Object Year: 2006

**Selection Criteria**

\*Tax/Ins Establishment: KJI000000001 Carrot Soft Corp.

Pay Entity: KJPE01 Tokyo Headquarters

Business Unit: JCS01 CarrotSoft

Department: J110

Location Code: J001

EmplID: GJ0101

**YEA Status**

☐ Submitted

☐ Reviewed

☐ Approved

☐ Rejected

☐ Open

☐ Sent to Payroll

[Get YEA Information](#)

**YEA Review Status** Customize | Find | View All | First 1 of 1 Last

| EmpID | Name | EE Tax | Dependent Tax | Dep Tax | Life Ins Status | Life Ins | Non Life Ins Status | Non Life Ins | Spouse Spec Ded Stat | Spouse Spec Ded | Housing Loan Status | Housing Loan | Ap |
|-------|------|--------|---------------|---------|-----------------|----------|---------------------|--------------|----------------------|-----------------|---------------------|--------------|----|
| 1     |      |        |               |         |                 |          |                     |              |                      |                 |                     |              |    |

Review/Approve Self Service Data JPN page

## Selection Criteria

Use the fields in this group box to define the group of employees to display in the YEA Review Status group box. Use the optional Pay Entity, Business Unit, Department, Location Code, and EmplID fields to restrict the list as desired.

### YEA Status

Select status codes; the system displays employees whose status codes match the selections.

### Get YEA Information

Click to load the data that matches the parameters that you defined in the YEA Status group box.

## Tax Tab

This group box displays the current status of each employee's YEA data. To view details of the employee's data, click the corresponding button, which takes you to the self-service page on which the employee entered data. Administrators cannot edit employee data on the self-service pages.

You can reject dependent deductions, employee life insurance, nonlife insurance, spouse special deduction, or housing loan special deduction data by changing the status for that data to *Rejected*. If you reject any employee data, notify the employee to correct and resubmit it.

**Note.** The system changes the status of all data back to *Reviewed* if one section has the *Rejected* status, so that the employee can review all data again. When this happens, the following message appears: "If you change the Status to *Rejected*, all other nonrejected status codes change to *Reviewed*."

### Approve

Approval is optional. Click this button for each employee if the organization requires approval before loading the data. The status of all data for the employee becomes *Approved*.

## Personal Tab

Select the Personal tab to view the employee's home and mailing address, phone, or birthday information.

## See Also

Chapter 5, "(JPN) Updating Year-End Adjustment Data," Status Codes, page 44

## Loading YEA Self-Service Deduction Data

Access the Load YEA Self Service page.

**Load YEA Self Service**

Run Control ID: 01 [Report Manager](#) [Process Monitor](#) [Run](#)

**Process Request Parameter(s)**

\*Tax Establishment: KJI000000001 Carrot Soft Corp.

\*Object Year: 2006

Pay Entity: KJPE01 Tokyo Headquarters

Business Unit: JCS01 CarrotSoft

Location Code: J001 Headquarters

Department:

Load Year End Adjustment information with status: ☒ Submitted ☐ Approved

☐ Payee List

Go To: [Payee List](#)

Load YEA Self Service page

## Process Request Parameter(s)

Use the optional Pay Entity, Business Unit, Location Code, and Department fields to restrict the load to a group of employees as desired. You can use the fields on the Payee List page to identify individual employees.

### Business Unit

This is a required field if you select a location code or department.

### Submitted and Approved

Records that meet the other criteria (including the criteria that you indicate on the Payee List page) and that have the selected status are loaded. You can select both check boxes.

### Payee List

Click to access the Payee List page, where you can select any number of individual employees for the process run.

When you return to the Load YEA Self Service page, this check box is selected.

**See Also**

*PeopleSoft Enterprise Global Payroll for Japan 9.0 PeopleBook*, “Preparing Year-End Adjustment,” Entering Deduction Data for the Year-End Adjustment (YEA)



## APPENDIX A

# Delivered Workflows for ePay

This appendix discusses delivered workflows for ePay.

### See Also

*Enterprise PeopleTools PeopleBook: Workflow Technology*

*Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications*

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## Delivered Workflows for ePay

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

### W-2 Reissue Request

This section discusses the W-2 reissue request workflow.

#### Description

|                            |                                                                                                                                                                   |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | An employee uses the W-2 Reissue Request page to request a new W-2 be sent to their home or work location.                                                        |
| <b>Action Description</b>  | When the page is submitted, a workflow worklist item is routed to the Payroll Administrator to indicate that this request for a duplicate W-2 has been generated. |
| <b>Notification Method</b> | Worklist                                                                                                                                                          |

#### Workflow Objects

|                          |                       |
|--------------------------|-----------------------|
| <b>Event</b>             | PY_IC_W2              |
| <b>Workflow Action</b>   | Manual                |
| <b>Role</b>              | Payroll Administrator |
| <b>Email Template</b>    | W2 Request Worklist   |
| <b>Business Process</b>  | SELF_SERVICE_PAYROLL  |
| <b>Business Activity</b> | W2Request             |
| <b>Business Event</b>    | Save W2               |

## W-4 Tax Information

This section discusses the W-4 tax information workflow.

### Description

|                            |                                                                                              |
|----------------------------|----------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | An employee uses ePay to change W-4 information.                                             |
| <b>Action Description</b>  | An email notification is sent to the employee upon completion that verifies the W-4 details. |
| <b>Notification Method</b> | Email                                                                                        |

### Workflow Objects

|                          |                           |
|--------------------------|---------------------------|
| <b>Event</b>             | PY_IC_W4                  |
| <b>Workflow Action</b>   | Manual                    |
| <b>Role</b>              | Roleuser by Opid Qry      |
| <b>Email Template</b>    | Send E-mail to employee   |
| <b>Business Process</b>  | SELF_SERVICE_PAYROLL      |
| <b>Business Activity</b> | ReviewChangeFederalW4Info |
| <b>Business Event</b>    | Save changes              |

## Year End Form Consent Confirmation

This section discusses the year-end form consent confirmation workflow.

### Description

|                            |                                                                                                                          |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | An employee uses ePay to grant consent to receive year-end forms (W-2, W-2c, T4, or T4A) electronically in self service. |
| <b>Action Description</b>  | Upon confirmation of submittal of consent, an email notification is sent to the employee that confirms the consent.      |
| <b>Notification Method</b> | Email                                                                                                                    |

## Workflow Objects

|                          |                                                         |
|--------------------------|---------------------------------------------------------|
| <b>Event</b>             | PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN             |
| <b>Workflow Action</b>   | Automatic                                               |
| <b>Role</b>              | Roleuser by Opid Qry                                    |
| <b>Email Template</b>    | Send E-mail to employee; text type Consent Confirmation |
| <b>Business Process</b>  | NA                                                      |
| <b>Business Activity</b> | NA                                                      |
| <b>Business Event</b>    | Notify Employee                                         |

## Year End Form Consent Withdrawn Confirmation

This section discusses the year-end form consent withdrawn confirmation workflow.

### Description

|                            |                                                                                                                                 |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | An employee uses ePay to withdraw consent to receive year-end forms (W-2, W-2c, T4, or T4A) electronically in self service.     |
| <b>Action Description</b>  | Upon confirmation of withdrawal of consent, an email notification is sent to the employee that confirms the consent withdrawal. |
| <b>Notification Method</b> | Email                                                                                                                           |

## Workflow Objects

|                          |                                                           |
|--------------------------|-----------------------------------------------------------|
| <b>Event</b>             | PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN               |
| <b>Workflow Action</b>   | Automatic                                                 |
| <b>Role</b>              | Roleuser by Opid Qry                                      |
| <b>Email Template</b>    | Send E-mail to employee; text type Withdrawn Confirmation |
| <b>Business Process</b>  | NA                                                        |
| <b>Business Activity</b> | NA                                                        |
| <b>Business Event</b>    | Notify Employee                                           |

## Year End Form Consent Reset

This section discusses the year-end form consent reset workflow.

## Description

|                            |                                                                                                                                                                                            |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | Payroll administrator resets the status of employee consent to receive year-end forms (W-2, W-2c, T4, or T4A) electronically in self service.                                              |
| <b>Action Description</b>  | When the payroll administrator runs the Reset Form Consent Application Engine process, an email notification is sent to each processed employee that confirms the reset of consent status. |
| <b>Notification Method</b> | Email                                                                                                                                                                                      |

## Workflow Objects

|                          |                                                               |
|--------------------------|---------------------------------------------------------------|
| <b>Event</b>             | PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN                   |
| <b>Workflow Action</b>   | Automatic                                                     |
| <b>Role</b>              | Payroll administrator                                         |
| <b>Email Template</b>    | Send E-mail to employee; text type Consent Reset Notification |
| <b>Business Process</b>  | NA                                                            |
| <b>Business Activity</b> | NA                                                            |
| <b>Business Event</b>    | Notify Employee                                               |

## Year End Form Available

This section discusses the year-end form available workflow.

## Description

|                            |                                                                                                                                                                                                                                      |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | Payroll administrator notifies employees that year-end forms (W-2 or T4) are available for viewing in self service.                                                                                                                  |
| <b>Action Description</b>  | When the payroll administrator clicks the Availability Notification button on the Year End Form Options page, an email notification is sent to each consenting employee notifying that forms are available for viewing and printing. |
| <b>Notification Method</b> | Email                                                                                                                                                                                                                                |

## Workflow Objects

|                          |                                                            |
|--------------------------|------------------------------------------------------------|
| <b>Event</b>             | PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN                |
| <b>Workflow Action</b>   | Manual                                                     |
| <b>Role</b>              | Payroll administrator                                      |
| <b>Email Template</b>    | Send E-mail to employee; text type Form Available          |
| <b>Business Process</b>  | Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can |
| <b>Business Activity</b> | Send W2 Notification and Send T4 Notification              |
| <b>Business Event</b>    | Notify Employee                                            |

## Year End Form Correction Available

This section discusses the year-end form correction available workflow.

### Description

|                            |                                                                                                                                                                                                                            |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Event Description</b>   | Payroll administrator notifies employees that corrected year-end forms (W-2c or T4A) are available for viewing in self service.                                                                                            |
| <b>Action Description</b>  | When the payroll administrator clicks the Availability Notification button on the Year End Form Options page, an email notification is sent to the employee notifying that the form is available for viewing and printing. |
| <b>Notification Method</b> | Email                                                                                                                                                                                                                      |

## Workflow Objects

|                          |                                                            |
|--------------------------|------------------------------------------------------------|
| <b>Event</b>             | PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN                |
| <b>Workflow Action</b>   | Manual                                                     |
| <b>Role</b>              | Payroll administrator                                      |
| <b>Email Template</b>    | Send E-mail to employee; text type Correction Available    |
| <b>Business Process</b>  | Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can |
| <b>Business Activity</b> | Send W2 Notification and Send T4 Notification              |
| <b>Business Event</b>    | Notify Employee                                            |



# Glossary of PeopleSoft Enterprise Terms

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>absence entitlement</b>   | 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.                                                                                                                                                                                                                                               |
| <b>absence take</b>          | This element defines the conditions that must be met before a payee is entitled to take paid time off.                                                                                                                                                                                                                                                                                                                                                                      |
| <b>academic career</b>       | 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). |
| <b>academic institution</b>  | 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.                                                                                                                                                                                                                                                                              |
| <b>academic organization</b> | 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.                                                                                                                                                                                   |
| <b>academic plan</b>         | 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.                                                                                                                                                                                                                                                                                                            |
| <b>academic program</b>      | In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.                                                                                                                                                                                                                                                                                                                                      |
| <b>accounting class</b>      | 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.                                                                  |
| <b>accounting date</b>       | 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. |
| <b>accounting split</b>      | The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.                                                                                                                                                                                                                                                                                                                                               |
| <b>accumulator</b>           | 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.                                                                                              |
| <b>action reason</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>action template</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>activity</b>                | <p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p> |
| <b>address usage</b>           | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>adjustment calendar</b>     | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>administrative function</b> | 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.                                                                                                                                                                                                                                                                                                                                        |
| <b>admit type</b>              | In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>agreement</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>allocation rule</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>alternate account</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>analysis database</b>       | 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.                                                                                                           |
| <b>Application Messaging</b>  | 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. |
| <b>AR specialist</b>          | Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.                                                                                                                                              |
| <b>arbitration plan</b>       | 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.                                                                                                                                             |
| <b>assessment rule</b>        | 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.                                                                                                |
| <b>asset class</b>            | An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.                                                                                                                                                                           |
| <b>attribute/value pair</b>   | In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.                                                                                                                                                                                    |
| <b>auction event</b>          | In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.                                                                                                                                                                   |
| <b>audience</b>               | 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.             |
| <b>authentication server</b>  | A server that is set up to verify users of the system.                                                                                                                                                                                                                                                      |
| <b>base time period</b>       | In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.                                                                                                                                                                                                                     |
| <b>benchmark job</b>          | 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.                                                                                                                               |
| <b>bid response</b>           | In PeopleSoft Strategic Sourcing, the response by a bidder to an event.                                                                                                                                                                                                                                     |
| <b>billing career</b>         | 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.                                                                                                                             |
| <b>bio bit or bio brief</b>   | 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.                                                                                                                      |
| <b>book</b>                   | In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.                                                                                                                                    |
| <b>branch</b>                 | A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.                                                                                                                                                                                                        |
| <b>budgetary account only</b> | 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."                                                                                                                 |

|                                  |                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>budget check</b>              | In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.                                                                                                                                                                                                                                                              |
| <b>budget control</b>            | 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. |
| <b>budget period</b>             | 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.                                                                                                                                                |
| <b>business activity</b>         | 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.                                                                                                                                                                                                                                                           |
| <b>business event</b>            | <p>In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.</p> <p>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).</p>                                              |
| <b>business process</b>          | <p>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.</p> <p>See also <i>detailed business process</i>.</p>         |
| <b>business unit constraints</b> | 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.                                                                                                                                                                                                    |
| <b>business task</b>             | The name of the specific function depicted in one of the business processes.                                                                                                                                                                                                                                                                                                                                 |
| <b>business unit</b>             | A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.                                                                                                                                                                                                                                                                               |
| <b>buyer</b>                     | 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.                                                                                                                                                                        |
| <b>buy event</b>                 | 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.                                                                                                                                                                                       |
| <b>campus</b>                    | 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.                                                                                                          |
| <b>cash drawer</b>               | A repository for monies and payments taken locally.                                                                                                                                                                                                                                                                                                                                                          |
| <b>catalog item</b>              | 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.                                       |
| <b>catalog map</b>               | In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.                                                                                                                                                                                                                                                                          |

|                                    |                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>catalog partner</b>             | In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.                                                                                                                                                                                            |
| <b>categorization</b>              | Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.                                                                                                                                                                                                                            |
| <b>category</b>                    | 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.                                                                   |
| <b>channel</b>                     | In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.                                                                                                                                                                                                               |
| <b>ChartField</b>                  | 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.                                                                                                                         |
| <b>ChartField balancing</b>        | You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.                                                                                                                                                                                                                      |
| <b>ChartField combination edit</b> | The process of editing journal lines for valid ChartField combinations based on user-defined rules.                                                                                                                                                                                                                                |
| <b>ChartKey</b>                    | 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.                                                                                                                                                                                  |
| <b>checkbook</b>                   | 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.                                                                                                                                                  |
| <b>checklist code</b>              | 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.                                                                                        |
| <b>claimback</b>                   | 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.                                                                                                     |
| <b>class</b>                       | In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.<br><br>See also <i>course</i> .                                                                                                                                                                                      |
| <b>Class ChartField</b>            | 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> .                                                                                                                     |
| <b>clearance</b>                   | 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. |
| <b>clone</b>                       | 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.                                                                                                                                     |
| <b>cohort</b>                      | 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.<br><br>See also <i>population</i> and <i>division</i> .                      |

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| <b>collection</b>                      | 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. |
| <b>collection rule</b>                 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>comm key</b>                        | See <i>communication key</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>communication key</b>               | 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.                                                                                                                                                                                                                                             |
| <b>compensation object</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>compensation structure</b>          | In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>component interface</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>condition</b>                       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>configuration parameter catalog</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>configuration plan</b>              | 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.                                                                                                                                                                                                                                                                                                                                                        |
| <b>constituents</b>                    | 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).                                                                                                                                                                                                               |
| <b>constraint</b>                      | A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>content reference</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                               |
| <b>context</b>                         | 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.<br><br>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                                                                                                                                                                                                                                                      |

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|                                | 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.                                                                                                                                |
| <b>control table</b>           | 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.                                                                                                                   |
| <b>cost plus contract line</b> | 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.                                                                                                                                              |
| <b>cost plus pricing</b>       | In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.                                                                                                                                                                                                                                                          |
| <b>cost profile</b>            | 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.                                                                                                     |
| <b>cost row</b>                | A cost transaction and amount for a set of ChartFields.                                                                                                                                                                                                                                                                                                 |
| <b>counter sale</b>            | 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.                                                                  |
| <b>course</b>                  | 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.<br><br>See also <i>class</i> . |
| <b>course share set</b>        | 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.                                                                                                                                                              |
| <b>current learning</b>        | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.                                                                                                                                                                                                            |
| <b>data acquisition</b>        | 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).                                                                                                                                                              |
| <b>data cube</b>               | 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.         |
| <b>data elements</b>           | Data elements, at their simplest level, define a subset of data and the rules by which to group them.<br><br>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.                                                                                                               |
| <b>dataset</b>                 | 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.                                                              |

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| <b>delivery method</b>            | <p>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.</p> <p>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.</p> |
| <b>delivery method type</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>detailed business process</b>  | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>dimension</b>                  | <p>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.</p>                                                                                                                          |
| <b>direct receipt</b>             | Items shipped from a warehouse or vendor to another warehouse.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>direct ship</b>                | Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i> ).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>directory information tree</b> | In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>division</b>                   | <p>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.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>                                                                                                                                                                                                                                                                                                                                                  |
| <b>document sequencing</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>dynamic detail tree</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>edit table</b>                 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>effective date</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>EIM ledger</b>                 | 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.                                                                                                                                                                                                                                                                                                                                                                        |

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| <b>elimination set</b>           | In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.                                                                                                                                                                                                                                                                                                                                         |
| <b>entry event</b>               | 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.                                                                                                                                                                                                                    |
| <b>equitization</b>              | 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.                                                                                                                                                                                       |
| <b>equity item limit</b>         | 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.                            |
| <b>event</b>                     | <p>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.</p> <p>In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.</p>                               |
| <b>event constraints</b>         | In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.                                                                                                                                                                                                                                                                                                                     |
| <b>event propagation process</b> | 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.        |
| <b>exception</b>                 | In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.                                                                                                                                                                                                                                                                                                                                                                         |
| <b>exclusive pricing</b>         | 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.                                                                                                                                                                                                                                                                                           |
| <b>fact</b>                      | 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.                                                                                                                                                            |
| <b>financial aid term</b>        | 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.                                                                                                                                                          |
| <b>financial sanctions</b>       | <p>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.</p> <p>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).</p> |
| <b>forecast item</b>             | 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.                                                                                                                                                   |

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| <b>fund</b>                 | 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.                                                                                                                                                                                                                                                                                                         |
| <b>gap</b>                  | 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.                                                                                                                                                                        |
| <b>generic process type</b> | 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.                                                                                                                                                                                                                                                                                                            |
| <b>gift table</b>           | 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.                                                                                                                          |
| <b>GDS</b>                  | Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.                                                                                                                                                                                                                                                                                                                                                                       |
| <b>GL business unit</b>     | 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.<br><br>See also <i>business unit</i> .                                                                                                                                                                                                                                                                                      |
| <b>GL entry template</b>    | 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.                                                    |
| <b>GL Interface process</b> | 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.                                                                                                                                       |
| <b>global constraints</b>   | 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.                                                                                                                                                                                                                                                                                                       |
| <b>group</b>                | In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).<br><br>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. |
| <b>ideal response</b>       | 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.                                                                                                                                                                                                                             |
| <b>incentive object</b>     | 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.                                                                                                                                                                                                                                                   |

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| <b>incentive rule</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>incur</b>               | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>initiative</b>          | 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.                                                                                                                                                                                                                                                           |
| <b>inquiry access</b>      | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.<br><br>See also <i>update access</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>institution</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>integration</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>integration point</b>   | An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>integration set</b>     | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>item</b>                | In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).<br><br>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.<br><br>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. |
| <b>item shuffle</b>        | In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>itinerary</b>           | 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> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>joint communication</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

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| <b>keyword</b>              | 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.                                                                                                                                                                                                                                                                                                                  |
| <b>KPI</b>                  | 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.                                                                                                                                                                                                                                                                                                                                                                |
| <b>KVI</b>                  | Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>landlord</b>             | In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>LDIF file</b>            | Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>learner group</b>        | 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.                                                                                                                                                                                             |
| <b>learning components</b>  | 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.                                                                                                                                                                                                                                                                |
| <b>learning environment</b> | 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.                                                                                                                                                                               |
| <b>learning history</b>     | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>lease</b>                | 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.                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>lease abstract</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>ledger mapping</b>       | 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. |
| <b>library section</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>line</b>                 | In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

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| <b>linked section</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>linked variable</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>LMS</b>                    | 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.                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>load</b>                   | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>local functionality</b>    | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>location</b>               | 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.                                                                                                                                                                                                                                                                                                                                               |
| <b>logistical task</b>        | 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. |
| <b>market template</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>mass change</b>            | 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.<br><br>See also <i>3C engine</i> .                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>match group</b>            | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>MCF server</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>merchandising activity</b> | 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.                                                                                                                                                                                                                                                                                                                                                                      |

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| <b>meta-SQL</b>            | 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.                                                                                                                                                                   |
| <b>metastring</b>          | 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.                                                                                                                |
| <b>multibook</b>           | 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).                                                                                                            |
| <b>multicurrency</b>       | The ability to process transactions in a currency other than the business unit's base currency.                                                                                                                                                                                                                                                                                 |
| <b>national allowance</b>  | 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.                                                                                                                                      |
| <b>NDP</b>                 | Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.                                                                                                                                                                                                                                   |
| <b>need</b>                | 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> . |
| <b>node-oriented tree</b>  | A tree that is based on a detail structure, but the detail values are not used.                                                                                                                                                                                                                                                                                                 |
| <b>Optimization Engine</b> | 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.                                                                                                                              |
| <b>pagelet</b>             | 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.                                                                                               |
| <b>participant</b>         | In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.                                                                                                                                                                                                                                                   |
| <b>participant object</b>  | Each participant object may be related to one or more compensation objects.<br>See also <i>compensation object</i> .                                                                                                                                                                                                                                                            |
| <b>partner</b>             | A company that supplies products or services that are resold or purchased by the enterprise.                                                                                                                                                                                                                                                                                    |
| <b>pay cycle</b>           | In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.                                                                                                                                                                                                                                   |
| <b>payment shuffle</b>     | 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.                                                                                                                          |
| <b>pending item</b>        | 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.                                                                                                                                                                                   |

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| <b>PeopleCode</b>                            | 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.                                                                                                                                                                                                                                                                               |
| <b>PeopleCode event</b>                      | See <i>event</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>PeopleSoft Pure Internet Architecture</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>performance measurement</b>               | 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.                                                                                                                                                                                                                                                                        |
| <b>period context</b>                        | 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.                                                                                                                                                                                                                                    |
| <b>person of interest</b>                    | A person about whom the organization maintains information but who is not part of the workforce.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>personal portfolio</b>                    | In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>phase</b>                                 | A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>pickup quantity</b>                       | The product quantity that the customer is taking with them from the counter sales environment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>plan</b>                                  | 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.                                                                                                                                                                                                                                                                                                                                                                           |
| <b>plan context</b>                          | 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. |
| <b>plan template</b>                         | 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.                                                                                                                                                                                                                                                                                                              |
| <b>planned learning</b>                      | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>planning instance</b>                     | In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>population</b>                            | In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

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|                              | Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.<br><br>See also <i>division</i> and <i>cohort</i> .                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>portal registry</b>       | 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.                                                                                                                                                                                                                                   |
| <b>predecessor task</b>      | A task that you must complete before you start another task.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>price breaks</b>          | In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>price components</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>price list</b>            | 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.                                                                                                                                                                                                        |
| <b>price rule</b>            | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>price rule conditions</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>price rule key</b>        | The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>primacy number</b>        | 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. |
| <b>primary name type</b>     | 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.                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>process category</b>      | In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>process group</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>process definition</b>    | Process definitions define each run request.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>process instance</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>process job</b>           | 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.                                                                                                                                                                                                                                                                                                                                                                                            |

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| <b>process request</b>     | 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.                                                                                                                                                                                                                                                             |
| <b>process run control</b> | 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.                                                                                                       |
| <b>product</b>             | 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.                                                           |
| <b>product adds</b>        | The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i> ).                                                                                                                                                                                                                                                                                                      |
| <b>product bidding</b>     | 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.                                                                                                                                                                                                                                                               |
| <b>product category</b>    | 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.                                                                                                                                                                            |
| <b>product family</b>      | 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.                                                                                                                                                                            |
| <b>product line</b>        | 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.                                                                                                                                                                                                                                   |
| <b>programs</b>            | 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.                                                                                                                                                                        |
| <b>progress log</b>        | 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. |
| <b>project transaction</b> | In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.                                                                                                                                                                                                                                                                                                 |
| <b>promotion</b>           | 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.                                                                                                                                                                                                                                                    |
| <b>prospects</b>           | In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.<br><br>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.                                                                                                                             |
| <b>proxy bidding</b>       | 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.                                                                                                                                                                                                                                                               |

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| <b>publishing</b>              | In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>rating components</b>       | In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>record group</b>            | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>record input VAT flag</b>   | 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. |
| <b>record output VAT flag</b>  | Abbreviation for <i>record output value-added tax flag</i> .<br>See <i>record input VAT flag</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>recname</b>                 | The name of a record that is used to determine the associated field to match a value or set of values.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>recognition</b>             | 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.                                                                                                                                                                                                                                                                                                                                                                |
| <b>reference data</b>          | In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>reference object</b>        | 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).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>reference transaction</b>   | 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.                                                                                                                                   |
| <b>regional sourcing</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>relationship object</b>     | In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>remote data source data</b> | Data that is extracted from a separate database and migrated into the local database.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

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| <b>REN server</b>           | Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.                                                                                                                                                                                                                                                                     |
| <b>requester</b>            | In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.                                                                                                                                                                                             |
| <b>reservations</b>         | In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.                                                                                                                                                                                                                                                                             |
| <b>reversal indicator</b>   | In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.                                                                                                                                                                                                              |
| <b>RFI event</b>            | In PeopleSoft Strategic Sourcing, a request for information.                                                                                                                                                                                                                                                                                                          |
| <b>RFx event</b>            | 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.                                                                                                                                                               |
| <b>role</b>                 | 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.                                                                                                                                            |
| <b>role user</b>            | 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. |
| <b>roll up</b>              | In a tree, to roll up is to total sums based on the information hierarchy.                                                                                                                                                                                                                                                                                            |
| <b>run control</b>          | 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.                                                                                                                                                                             |
| <b>run control ID</b>       | A unique ID to associate each user with his or her own run control table entries.                                                                                                                                                                                                                                                                                     |
| <b>run-level context</b>    | 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.                                                 |
| <b>saved bid</b>            | In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.                                                                                                                                                                                                                                          |
| <b>score</b>                | In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.                                                                                                                                                                                                             |
| <b>SCP SCBM XML message</b> | 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.                                                                                                                                                       |
| <b>search query</b>         | 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.                                                                                                                                                                                          |
| <b>search/match</b>         | 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.                                                                                                                                                                    |
| <b>seasonal address</b>     | 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.                                                                                                                                                                                                           |

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| <b>section</b>                 | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>security event</b>          | In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>sell event</b>              | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>serial genealogy</b>        | In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>serial in production</b>    | In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>service impact</b>          | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>service indicator</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>session</b>                 | <p>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.</p> <p>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.</p> |
| <b>session template</b>        | 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.                                                                                                                                                                                                                                                                                                                                                 |
| <b>setup relationship</b>      | In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>share driver expression</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>short-term customer</b>     | A customer not in the system who is entered during sales order entry using a template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

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| <b>single signon</b>         | 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.                                                                                                                                                                                                                                                                                                   |
| <b>source key process</b>    | 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.                                                                                                                                                                                                                                                                                                    |
| <b>source transaction</b>    | 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.                                                                                                                                                                             |
| <b>sourcing objective</b>    | For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>speed key</b>             | See <i>communication key</i> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>SpeedChart</b>            | 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.                                                                                                                                                                                                                                                                                                                            |
| <b>SpeedType</b>             | A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.                                                                                                                                                                                                                                                                                                                                                                               |
| <b>staging</b>               | A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>standard letter code</b>  | 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.                                                                                                                                                                                                                                                                   |
| <b>statutory account</b>     | Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.                                                                                                                                                                                                                                                                                                                      |
| <b>step</b>                  | In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.                                                                                                                                                                                                                                                                                                                                                                   |
| <b>storage level</b>         | 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.                                                                                                                                                                                                                                                                            |
| <b>subcustomer qualifier</b> | A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Summary ChartField</b>    | 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).                                                                                                                                                                      |
| <b>summary ledger</b>        | 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. |
| <b>summary time period</b>   | 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.                                                                                                                                                                                                                                                                        |

|                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>summary tree</b>     | 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.                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>syndicate</b>        | To distribute a production version of the enterprise catalog to partners.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>system function</b>  | In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>system source</b>    | <p>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).</p> <p>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).</p> |
| <b>TableSet</b>         | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>TableSet sharing</b> | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>target currency</b>  | The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>task</b>             | A deliverable item on the detailed sourcing plan.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>tax authority</b>    | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>template</b>         | 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.                                                                                                                                                                                                                                                                                                                                                        |
| <b>tenant</b>           | In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>territory</b>        | In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>third party</b>      | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>tiered pricing</b>   | Enables different portions of a schedule to be priced differently from one another.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>time span</b>        | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>total cost</b>       | 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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

|                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
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| <b>travel group</b>                | 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.                                                                                                                                                       |
| <b>travel partner</b>              | In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>3C engine</b>                   | 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. |
| <b>3C group</b>                    | 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.                                                                                                             |
| <b>trace usage</b>                 | 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.                                                                                                                                                                                                                                                     |
| <b>transaction allocation</b>      | 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.                                                                                                                                                                                                           |
| <b>transaction state</b>           | 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.                                                                                                 |
| <b>Translate table</b>             | 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.                                                                                                                                                                                                                                                                                                                        |
| <b>tree</b>                        | 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.                                                                                                                                                                                                                                                |
| <b>tuition lock</b>                | 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.                                                                                                                           |
| <b>unclaimed transaction</b>       | 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.                                                                                                                                                                |
| <b>universal navigation header</b> | 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.                                                                                                                       |
| <b>update access</b>               | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.                                                                                                                                                                                                                                                                                                                                                                     |

See also *inquiry access*.

|                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>user interaction object</b> | 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). |
| <b>variable</b>                | 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.                                                                                                                  |
| <b>VAT exception</b>           | 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.                                                                                                                                                                                                                                           |
| <b>VAT exempt</b>              | 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.                                                                                                                                                                                   |
| <b>VAT exoneration</b>         | 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.                                                                                                                                                                                                                                                                         |
| <b>VAT suspension</b>          | Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.                                                                                                                                                                                                                                                                                                                 |
| <b>warehouse</b>               | A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.                                                                                                                                                                                                                                                                                                                      |
| <b>weight or weighting</b>     | 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.                                                                                                                                                                                                                                   |
| <b>work order</b>              | 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.                                                                                                                         |
| <b>worker</b>                  | A person who is part of the workforce; an employee or a contingent worker.                                                                                                                                                                                                                                                                                                                                                                        |
| <b>workset</b>                 | 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.                                                                                                                                                                                                                           |
| <b>worksheet</b>               | 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.                                                                                                                                                                                                                                            |
| <b>worklist</b>                | 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.                                                                                                                                                                                                                                            |
| <b>XML link</b>                | The XML Linking language enables you to insert elements into XML documents to create a links between resources.                                                                                                                                                                                                                                                                                                                                   |
| <b>XML schema</b>              | An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.                                                                                                                                                                                                                                                                                                                     |
| <b>XPI</b>                     | 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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