
PeopleSoft Enterprise Candidate Gateway 9.0 PeopleBook

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.

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

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

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

Additional Resources

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Common Elements Used in PeopleBooks

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

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

PeopleSoft Enterprise Candidate Gateway Preface

This preface discusses:

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

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Candidate Gateway.

PeopleSoft Enterprise HRMS Application Fundamentals

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

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

PeopleBook Structure

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

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

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

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

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

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

CHAPTER 1

Getting Started with Candidate Gateway

This chapter discusses:

- Candidate Gateway overview.
- Candidate Gateway business processes.
- Candidate Gateway integrations.
- Candidate Gateway implementation.

Candidate Gateway Overview

Candidate Gateway enables internal applicants (employees and non-employees) and external applicants to:

- View information about current job openings in the organization.
- Search for job openings that match their interests.
- Save job search criteria.
- Save job openings.
- Use multiple resumes in the job application process.
- Submit job applications and resumes for specific job openings.
- Submit job applications and resumes without applying to a specific job opening.
- Submit employment references, cover letters, and other documents.
- Complete online screening questionnaires.
- View notifications from recruiters.
- View interview schedules.
- Maintain and update their personal profile information (external applicants only).

In addition, employees can use transactions located on the self-service navigation path to:

- Refer friends.
- Confirm and check the status of a referral.
- Complete interview evaluations.
- Review personal and team interview schedules.

You can use the text catalog to modify much of the text that appears on the applicant facing pages. The text catalog contains default text, but you can change the default text as needed. The text catalog enables you to change text for:

- Page titles
- Page instructions
- Group box labels
- Grid labels
- Field labels
- Link titles

See *PeopleSoft Enterprise HRMS 9.0 Application Fundamentals PeopleBook*, “Working with Common Components,” Configuring the Text Catalog.

Candidate Gateway Business Processes

Candidate Gateway provides these business processes:

- Search for jobs.
- Apply for jobs.
- Manage job application information.
- Manage personal profile information (external applicants only).

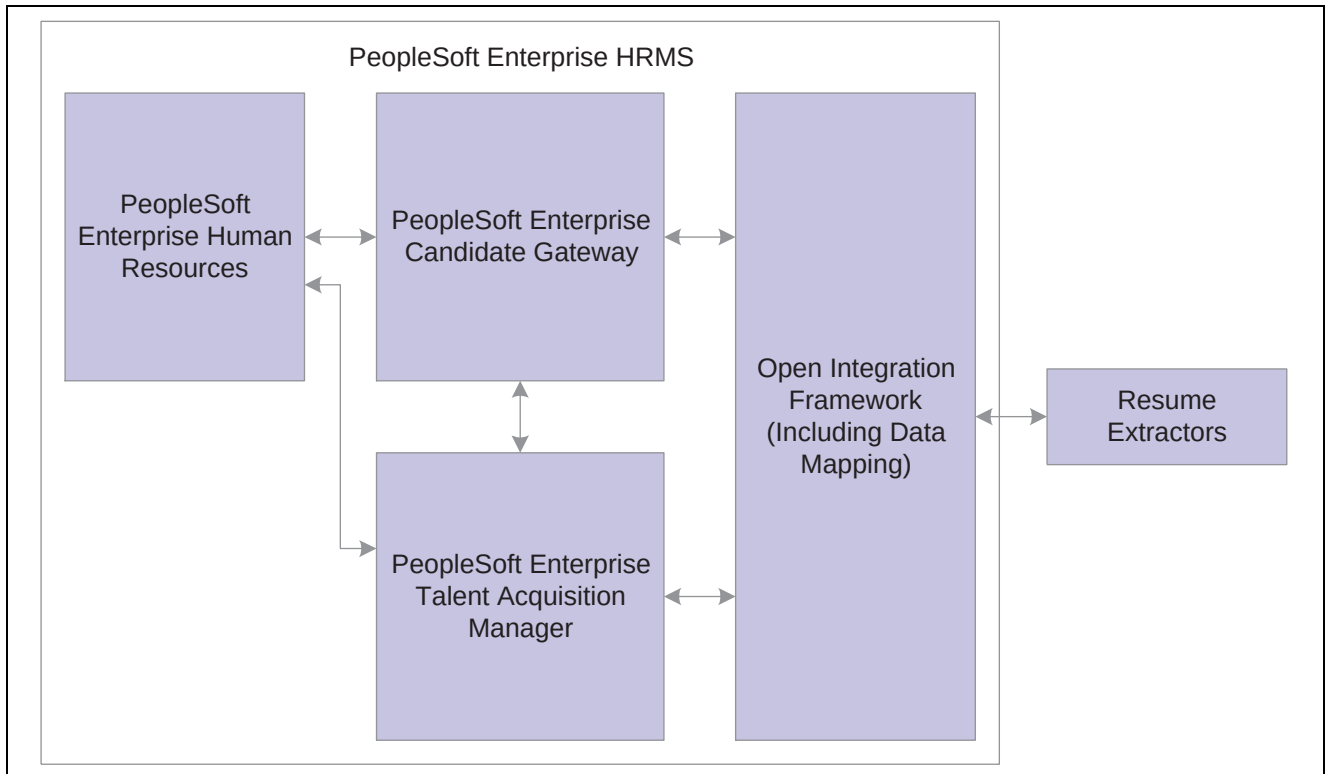
We discuss these business processes in the business process chapter in this PeopleBook.

See Also

Chapter 2, “Using Candidate Gateway,” page 5

Candidate Gateway Integrations

Candidate Gateway integrates with these PeopleSoft applications:



Candidate Gateway integration

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

Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, "Setting Up Recruiting Processes," Setting Up Sites.

Candidate Gateway Implementation

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.

CHAPTER 2

Using Candidate Gateway

This chapter discusses how to:

- Register online and sign in.
- Search for job openings.
- Email job openings to friends.
- Save job openings.
- Apply for job openings.
- Update profile information.
- Upload and view resumes.
- Submit attachments.
- View interview schedules.
- Enter references.

Registering Online and Signing In

This section provides an overview of online registration, prerequisites, and lists the pages used to register online and sign in.

Understanding Online Registration

External applicants must register online to perform many recruiting-related tasks. Internal applicants have access to all recruiting tasks and do not need to register. To register online, external applicants must create a user name and password. External applicants only need to register for an account once. They can use their user name and password to sign in to their account regardless of which site they use to access their account.

External applicants can change the password for their account by using the My Profile - Change Password page.

Before registering online, external applicants can:

- Search for job openings.
- View the latest job postings.
- View descriptions for the latest job postings.

After registering online, external applicants can:

- Search for job openings.
- Save job openings.

- Save search criteria and job agents.
- View notifications.
- Submit applications.
- Add attachments.
- View the latest job postings.
- View descriptions for the latest job postings.
- Apply to job openings.

See [Chapter 2, “Using Candidate Gateway,” Updating Profile Information, page 18.](#)

Obtaining Sign In Help

If applicants forget their user name or password, they can access the Login Help page. On the Login Help page, applicants can:

- Get a new password.

In the Forget your password group box, applicants enter their user name in the Enter your User Name field and click Get New Password. The system creates a new password and sends an email notification (HRS_APPLICANT_PASSWORD) to the applicant (provided there is an email address for the applicant in the system) that contains the new password. If the applicant has not provided an email address, a message appears stating that the applicant doesn't have an email address and must register for a new account.

- Find their user name.

In the Forget your User Name group box, applicants enter their email address in the Enter your Email Address field and click Find User Name. The system sends an email notification (HRS_APPLICANT_PASSWORD) to the applicant (provided there is an email address for the applicant in the system) that contains their user name. If the applicant has not provided an email address, a message appears stating that there is no record of the applicant's email address.

Prerequisite

Before applicants can apply online, set up the company's sites.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Setting Up Recruiting Processes,” Setting Up Sites.

Pages Used to Register Online and Sign In

Page Name	Object Name	Navigation	Usage
Careers	HRS_CE_HM_PRE	Careers, Careers	View the latest job postings, search for jobs, and sign in to an account. This is the page that appears to external applicants before signing in.
Register	HRS_CE_HM_REG	Click the Register Now links on the Careers page.	Register online. To register, applicants enter a user name and password, confirm the password, and click Register.
Login	HRS_APP_LOGIN_EXP	- Click Save Jobs or Apply Now on the Careers page. - Click Save Search, Save Jobs, or Apply Now on the Job Search page. - Click Save Job or Apply Now on the Job Description page.	Sign in to an existing account.
Login Help	HRS_APP_PSSWD_HLP	- Click the Login Help link on the Careers page. - Click the Login Help link on the Login page.	Change your password or find your user name for a current account.

Searching for Job Openings

This section provides an overview of job searches, lists prerequisites, and lists the pages used to search for job openings.

Understanding Job Searches

Applicants can perform:

- Basic searches.

Applicants can search for jobs that contain keyword that fall within specific posting dates. Applicants can perform basic searches on the Careers page, Welcome page, and from the Job Search page.

- Advanced searches.

Advanced searches enable applicants to enter additional search criteria to search for jobs. Internal and external applicants can search for jobs based on keyword, location, job family, job type (full-time, part-time, temporary, regular), desired pay, job opening ID, and posting dates. Internal applicants can also search for jobs based on recruiter or hiring manager. Applicants can perform advanced searches on the Job Search page.

Applicants can sort the search results by posting date, posting title, job opening number, job family, or location.

The system compares the search criteria to different types of job data, as described in this table:

Criterion Entered	Job Data Used for Comparison
Keyword	Posting title and job description.
Recruiting location	Job opening.
Job family	The job family that is associated with job code. Note. (USF) For U.S. federal government jobs, the system searches GVT_PATOCB_CD.
Full-time versus part-time	Job opening.
Regular versus temporary	Job opening.
Desired pay	Default salary range that is associated with the job code.
Job opening ID	Job opening.
Posting date	Job opening.

Applicants can view job postings that meet the following conditions:

- The current date must be within the job posting opening and closing dates.

After the closing date has passed, employees and applicants can no longer view the details of the job.

- The job opening must have an open status.

Job opening statuses are designated as open if the job opening is active. For example, the job opening status *Open* is an open status, but *Pending Approval* is not. You define which job openings statuses are open on the Status/Reason Definition page.

- The posting source must be a Company type recruitment source.
- For external applicants, the posting type must be *External*.
- For internal applicants, the posting type must be *Internal*.

Saving Search Criteria

Applicants can save their search criteria as a saved search or as a job agent. When applicants save search criteria as a job agent, the system checks for job openings that meet the saved search criteria each time you run the Job Agent Application Engine process (HRS_JOB_AGENT). If there are job openings that match the job agent search criteria, the system sends an email to the applicant that notifies them of the job openings. The email contains a link to the page in the Careers (HRS_CE) component where applicants can review the job agent search results. If the applicant applied online, the system also posts a notification in the Notifications group box on the Welcome page. Applicants can click the subject link for the notification to view the job agent search results. If the applicant has multiple job search agents, the system posts a separate notification for each job search agent in the Notifications group box.

Applicants can have an unlimited number of saved searches. The system limits the number of job agents an applicant can save based on the value that you enter in the Maximum Job Agents field on the Recruiting Installation - Installation Options page.

Applicants can view and run their saved searches and job agents from the My Saved Searches page without having to reenter their search criteria. To run their saved searches and job agents from the Job Search page, applicants select a saved search or job agent from the Use Saved Search field and click Search. Applicants can delete and edit their saved searches and job agents on the My Saved Searches page.

To save search criteria, applicants:

1. Click the Save Search button on the Job Search page.
The Save Search page appears.
2. Enter a name for the saved search in the Name your search field.
3. (Optional) Select the Use As Job Agent check box to save the search criteria as a job agent.
4. (Optional) Enter the email address, to which the job agent notifications will be sent, in the Send Job Agent notification to field.
5. Click Save.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook, “Managing Applicants,” Using the Job Search Agent

Prerequisites

Before applicants can search for jobs, you must:

- Define the number of days available for latest posting.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Setting Up Recruiting Processes,” Setting Up Implementation Defaults.

- Create job openings.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Creating Job Openings,” Creating Job Openings.

- Run the Verity Job Posting Index Build Application Engine process (HRS_JSCH_IDX) to build the job posting index.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Managing Job Openings,” Building the Job Index.

Pages Used to Search for Job Openings

Page Name	Object Name	Navigation	Usage
Careers	HRS_CE_HM_PRE	- Careers, Careers - Click the Logout link on the Welcome page.	View the latest job postings, search for jobs, and sign in to an account. This is the page that appears to external applicants before signing in.
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
Job Search	HRS_APP_SCHJOB	Click the Advanced Search link in the Basic Job Search group box on the Welcome page.	Search for jobs, review search results, and save jobs. The search criteria fields that appear on this page (basic or advanced) depend on the method the applicant uses to access the page. The Search Results group box doesn't appear until applicants search for jobs.
Save Search	HRS_APP_SAV_SCH	Click the Save Search button on the Job Search page.	Save search criteria and job agents.
My Saved Searches	HRS_APP_SEARCHES	- Click the My Saved Searches link on the Welcome, Job Search, My Saved Jobs, and My Career Tools pages. - Click the Save Changes button on the Edit Saved Search page.	View, edit, delete, and run saved searches and job agents.
Edit Saved Search	HRS_APP_SCHJOB	Click the Edit link for a saved search on the My Saved Searches page.	Edit a saved search.

Emailing Job Openings to Friends

This section provides an overview of how to email job openings to friends and lists the pages used to email job openings to friends.

Understanding How to Email Job Openings to Friends

When applicants find a job opening that might interest someone they know, they can email the job opening to that person. To send a job opening to a friend via email, applicants:

1. Access the Send Email page.
2. Enter the email addresses, of the friends to whom they want to send the job opening, in the To field.
3. Enter the applicant's name in the Your Name field.
4. Click Send.
5. The system sends the email notification (HRS_CE_EML_FRND) to all persons that applicants enter in the To field.

Pages Used to Email Job Openings to Friends

Page Name	Object Name	Navigation	Usage
Careers	HRS_CE_HM_PRE	• Self Service, Recruiting Activities, Careers, Welcome • Careers, Careers	View the latest job postings, search for jobs, and sign in to an account. This is the page that appears to external applicants before signing in.
Welcome	HRS_CE_HM_POST	Click the Signin button on the Careers page.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
Job Description	HRS_CE_JOB_DTL	Click a job posting title link on the Careers, Welcome, Job Search, My Saved Jobs, or Interview Details pages.	View the description of a job opening. Enter job opening descriptions on the Posting Information page when you create a job opening or on the Job Opening - Posting Information page when you update a job opening in PeopleSoft Enterprise Talent Acquisition Manager.
Send Email	HRS_JOB_EML_FRND	Click the Email to Friend button on the Job Description page.	Email jobs to friends.

Saving Job Openings

This section provides an overview of saved job openings and lists the pages used to save job openings.

Understanding Saved Job Openings

Applicants can select and save job openings that they are interested in and apply to these jobs at a later date. Applicants can save jobs on several pages in the Careers component and can view their saved jobs on the My Saved Jobs page.

There is no limit to the number of jobs that an applicant can save. The system does not automatically remove closed, cancelled, or on hold jobs from an applicant's saved jobs. However, the system does display the job opening status on the My Saved Jobs page. Applicants must manually delete saved job openings.

Pages Used to Save Job Openings

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
My Saved Jobs	HRS_APP_SVDJB_SEC	- Click the My Saved Jobs link on the Welcome, Job Search, My Saved Searches, and My Career Tools pages. - Select one or more jobs on the Welcome or Job Search page and click Save Jobs. - Click the Save Job button on the Job Description page.	View and delete saved jobs and apply to saved jobs.

Applying for Job Openings

This section provides an overview of the job application process, lists prerequisites, and lists the pages used to apply for job openings.

Understanding the Job Application Process

Applicants can apply for the same job more than once. If they do, a warning message appears to let them know that they have already applied for the job and asks if they want to apply again. When an applicant applies for a job opening online, the pages that the applicant sees and the information that they must complete depend on the resume template that the system selects.

To apply for a job, applicants:

1. Select the check box next to one or more jobs on the Welcome, Job Search, or My Saved Jobs page and click Apply Now.

External applicants must access the Careers page first and sign in. To sign in, external applicants must register online. Internal applicants do not need to register or sign in.

See [Chapter 2, “Using Candidate Gateway,” Registering Online and Signing In, page 5.](#)

2. (IRL) The Apply Now - Community Background Information page appears if you selected the Use Community Background option on the Country Specific page for the resume template that is associated with the job opening.

Applicants must select an option in the Select Community field and click Continue. Applicants are prompted to enter community background information each time they apply for a Northern Ireland job opening. If they have already entered community background information for a another job opening to which they applied, the system displays the value that they selected in the Select Community field. Applicants can select a new value if necessary.

3. The Apply Now - Choose Resume page appears.

The options that appear on this page depend on the sections that you assign to this page on the resume template. Applicants select a resume option and click Continue.

If you use a resume extractor, the system extracts data from the resume and populates data in fields on the Apply Now - Complete Application page.

See [Chapter 2, “Using Candidate Gateway,” Uploading and Viewing Resumes, page 20.](#)

If an applicant is applying to more than one job, the system merges the multiple resume templates together so that all possible sections are included in the new resume template and no sections are duplicated.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Setting Up Recruiting Templates,” Setting Up Resume Templates.

4. The My Profile page appears only for external applicants who have not entered a first and last name on the My Profile page.

At a minimum, external applicants must enter a first and last name and click Save, but they can also enter additional profile information.

5. The Apply Now - Complete Application page appears.

The format of this page depends on the resume template that the system uses. A link appears at the top of the Apply Now - Complete Application page for each page following pages one and two in the resume template. Sections on each page of the resume template appear as group boxes. Applicants can click the Previous and Next links to navigate between the pages or click the page links to go directly to a page.

If you select the Enforce Linear Application check box on the Template Sections page, only the first page link is active. When the user clicks Next, the second page link becomes active, and so on.

For internal applicants, the system uses existing employee information to populate data in fields on the Apply Now - Complete Application page. Internal applicants can review and update this information as needed.

If you use a resume extractor, external applicants can review the populated information and make changes as necessary.

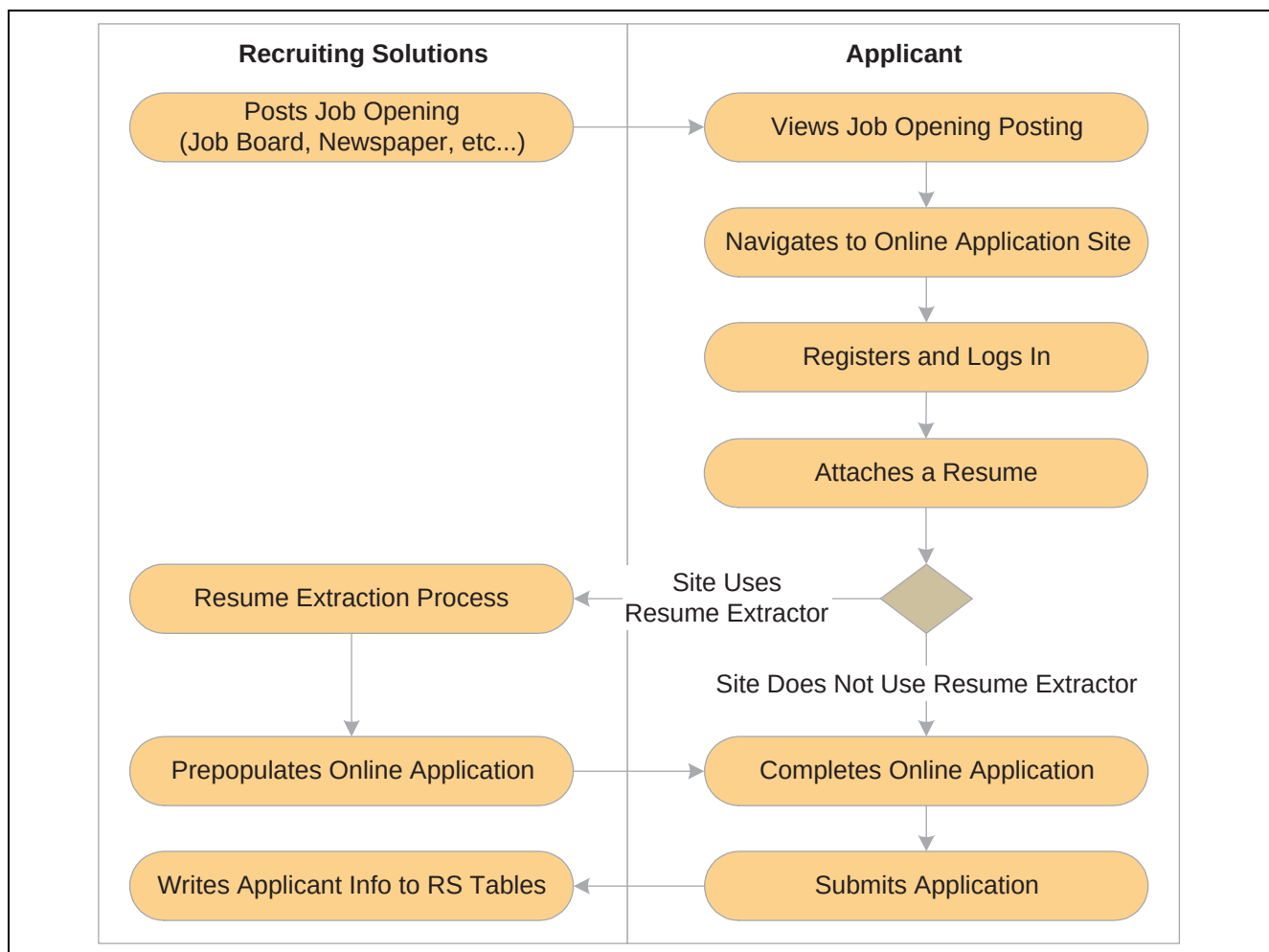
6. Click Submit on the Apply Now - Complete Application page to submit the job application.
7. The Submit Online Application page appears.

The Submit Online Application page displays an organization's employment terms. Organizations can add data privacy statements to the Terms & Agreements section or to the Careers page by using the text catalog. Applicants must agree to these terms and agreements to submit the application. Use the text catalog to change the default text that appears.

8. (USA) If the company that you specify on the job opening to which the applicant is applying is in the United States, and the applicant is an external applicant, the Self Identification Details group box appears on the Submit Online Application page.

Applicants can specify gender and ethnicity information or decline to provide the information. The information is used for Equal Employment Opportunity Commission (EEOC) reporting purposes. This group box is not used for internal applicants, and it is an optional part of the application process. The information that the applicant supplies is not used in the application or recruitment process, and access to the data is restricted.

This diagram shows the online job application process:



Candidate Gateway online application process

Viewing Submitted Job Applications

After applicants submit an application, they cannot make changes to it. However, users can apply for the same job more than once if they need to change their information. Applicants can view all of their job applications in the My Applications group box on the My Career Tools page. Applicants click a job application to view the application.

Saving Drafts

Applicants can save drafts of their online applications and submit the applications at a later time. To save a draft, applicants click the Save button on the Apply Now - Complete Application page. The job application appears in the My Applications group box on the My Career Tools page with a status of *Not Applied*. Applicants click a job application to access the application, make changes if needed, and save as a draft or submit.

Prerequisites

Before applicants can apply for jobs online, you must:

1. Create resume templates.
2. (Optional) Link resume templates to recruitment templates on the Recruitment Template Settings page.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Setting Up Recruiting Templates,” Setting Up Recruitment Templates.

3. Set up sites.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Setting Up Recruiting Processes,” Setting Up Sites.

4. (Optional) Set up resume extractors.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Setting Up Third Party Integrations,” Understanding Resume Extractor Setup.

5. Create job openings.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Creating Job Openings,” Creating Job Openings.

6. Run the Verity Job Posting Index Build Application Engine process (HRS_JSCH_IDX) to build the job posting index.

Pages Used to Apply for Job Openings

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
Apply Now - Community Background Information	HRS_APP_CB2	Select the check box for one or more job openings on the Welcome, Job Search, or My Saved Jobs page and click Apply Now.	(IRL) Enter community background information. This page appears only if you select the Use Community Background option on the Country Specific page when you set up the associated resume template.

Page Name	Object Name	Navigation	Usage
Apply Now - Choose Resume	HRS_RESUME_OPTION	• Select the check box for one or more job openings on the Welcome, Job Search, or My Saved Jobs page and click Apply Now. • Select an option in the Select Community field on the Apply Now - Community Background Information page and click Continue.	Choose a resume option. The options that appear on this page vary depending on the resume template that the system selects.
Apply Now - Enter Resume Text	HRS_APPLY_RESUME	Select Copy and Paste Resume Text on the Apply Now - Choose Resume page and click Continue.	Enter resume details. The options on this page vary depending on the resume option that the applicant selects on the Apply Now - Choose Resume page. If the applicant selects Upload a new resume, they must provide a title for the resume and select the language in which the resume is written. If the applicant selects Copy and paste resume text, they must enter a title for the resume, select the language in which the resume is written, and paste the resume text into the appropriate field.
My Profile	HRS_CE_PROFILE	• Click Continue on the Apply Now - Choose Resume page. • Click Save on the My Profile page. • Click Continue on the Apply Now - Enter Resume Text page. • Click the application in the My Applications group box on the My Career Tools page.	Complete an online application. The pages and sections that appear on this page vary depending on the resume template that the system selects.
Complete Application - Preferences	HRS_CE_PROFILE	Click the Save button on the My Profile page.	Enter job preference information.
Complete Application - Education and Work Experience	HRS_CE_PROFILE	Click the Education and Work Experience link on the Complete Application - Preferences page.	Enter accomplishments and competencies.

Page Name	Object Name	Navigation	Usage
Add Employment History	HRS_CE_D_WRK_EXP	Click Add Work Experience on the Apply Now - Complete Application page.	Enter work experience information.
Add Primary and Secondary Education	HRS_CE_D_PRIM_EDU	Click Add Primary and Secondary Education History on the Apply Now - Complete Application page.	Enter primary and secondary education information.
Add Post-Secondary Education	HRS_CE_D_SEC_EDU	Click Add Post-Secondary Education History on the Apply Now - Complete Application page.	Enter post-secondary education information.
Add Job Training	HRS_CE_D_TRAINING	Click Add Job Training on the Apply Now - Complete Application page.	Enter job training information.
Add License or Certificates	HRS_CE_D_LICENSES	Click Add Licenses and Certificates on the Apply Now - Complete Application page.	Enter license and certificate information.
Add Language	HRS_CE_D_LANGUAGES	Click Add Languages on the Apply Now - Complete Application page.	Enter language information.
Add Membership Information	HRS_CE_D_MEMBERSHP	Click Add Memberships on the Apply Now - Complete Application page.	Enter membership information.
Add Honors and Awards	HRS_CE_D_HON_AWD	Click Add Honors and Awards on the Apply Now - Complete Application page.	Enter honor and award information.
Add Priority Placement	HRS_CE_G_D_PP	Click Add Priority Placement on the Apply Now - Complete Application page.	Enter priority placement information.
Add Reference	HRS_CE_D_REFERENCE	- Click Add Reference on the Applicant References page. - Click Add Reference on the Apply Now - Complete Application page.	Enter information for a reference.
Submit Online Application	HRS_CE_SELF_IDENT	Click Submit on the Apply Now - Complete Application page.	Agree or disagree to a company's application and data privacy statement. (USA) Enter gender and ethnicity information in the Self Identification Details group box. This group box appears only for external applicant that apply for job openings in the United States.

Page Name	Object Name	Navigation	Usage
My Applications	HRS_APP_APLC	Click Submit on the Submit Online Application page.	Confirm that the application is completed and submitted correctly. View all submitted applications and statuses of each.
My Career Tools	HRS_CE_RESUME	- Click the My Careers Tools link on the Welcome, Job Search, My Saved Jobs, and My Saved Searches pages. - Click the Applications, Cover Letters and Attachments, and Saved Resumes links in the My Careers Tools group box on the Welcome page.	View submitted applications, resumes, and attachments.

Updating Profile Information

This section provides an overview of profile information and lists the pages used to update profile information.

Understanding Profile Information

External applicants use the My Profile page to enter their preferred contact method, name, address, email, and phone information. External applicants can update this information as often as needed. When external applicants update their profile information on the My Profile page, the system also updates the applicant's contact information in Talent Acquisition Manager pages. The system requires that external applicants enter a first and last name on the My Profile page before they can apply for jobs.

For internal applicants, the system populates the My Profile page with information from PeopleSoft Enterprise Human Resources. Internal applicants can only view their profile information; they cannot make updates.

The My Profile page is the second page in a resume template and is a required page. You cannot edit the sections that appear on the page or the order in which the page appears in the resume template. However, you can edit the page title by using the text catalog. When external applicants apply for jobs online, the My Profile page appears as the second page in the job application process if the applicant has not entered a first and last name on the My Profile page.

Pages Used to Update Profile Information

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
My Career Tools	HRS_CE_RESUME	- Click the My Careers Tools link on the Welcome, Job Search, My Saved Jobs, and My Saved Searches pages. - Click the Applications, Cover Letters and Attachments, and Saved Resumes links in the My Careers Tools group box on the Welcome page.	View submitted applications, resumes, and attachments.
My Profile	HRS_APP_PROFILEINFO	- Click the My Profile link in the My Career Tools group box on the Welcome page. - Click the Edit Profile link on the My Career Tools page. (external applicants only) - Click the Edit Profile link on the Apply Now - Complete Application page. (external applicants only) - Click the Continue button on the Apply Now - Choose Resume page. (external applicants only)	External applicants can view and update their preferred contact method, name, address, email, and phone information. Internal applicants can view their name, address, email, and phone information.
My Profile - Change Password	HRS_APP_PSSWD_HLP	Click the Change Password link on the My Profile page.	External applicants can change their password. To change the password, enter the new password, enter the new password again to confirm, and click Save. The Change Password link only appears on the My Profile page for external applicants.

Uploading and Viewing Resumes

This section provides an overview of resumes and lists the pages used to upload and view resumes.

Understanding Resumes

When applicants apply for jobs online, applicants can upload a new resume, copy and paste resume text, or select one of their uploaded resumes to use in the job application process, if you include these options in the resume template.

To upload a new resume, applicants select the Upload a new resume option and click Continue on the Apply Now - Choose Resume page. Applicants then browse for and select the resume that they want to upload. The Apply Now - Enter Resume Text page appears. Applicants enter a name for the resume in the Resume Title field, select the language in which the resume is written in the Language field, and click Continue.

To copy and paste resume text, applicants select the Copy and paste resume text option and click Continue on the Apply Now - Choose Resume page. The Apply Now - Enter Resume Text page appears. Applicants enter a name for the resume in the Title field, select the language in which the resume is written in the Language field, and paste their resume text in the Resume field.

To use an existing resume, applicants select the Use an existing resume option on the Apply Now - Choose Resume page. When they select this option, a Select Resume field appears that enables applicants to select the resume that they want to use. Applicants select a resume and click Continue. The Use an existing resume option appears on the page only if the applicant has already uploaded a resume.

Applicants can view all of their uploaded resumes in the Resumes grid on the My Career Tools page. After an applicant uploads a resume, they cannot make changes to it.

Resume Extraction Process

If you integrate with a resume extractor vendor, the system extracts data from the applicant's uploaded resume and populates fields on the Apply Now - Complete Application page automatically. This feature is available for new external applicants to save them time when entering information.

Here is how resume extraction works:

1. Applicants attach their resume files or paste resume text into a field.
2. The resume extractor extracts recognized applicant information from the resumes and populates fields on the Apply Now - Complete Application page.
3. When the extraction is complete, the system displays the Apply Now - Complete Application page to the applicant.
4. Applicants verify the information, update fields, and provide additional information, as required.

If contact information already exists for the applicant, the system doesn't override the contact information with information that is extracted from the resume. However, the system will update contact information if no contact information exists. For example, if an applicant does not have an email address, but the extraction process finds one, the system will update the email address information. The system will override all other applicant data—for example, work history, competencies, and accomplishments—with the data that is extracted from the resume. Applicants can view the information on the Apply Now - Complete Application page and make changes or add new information as needed.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook, “Managing Resumes,” Understanding the Resume Extraction Process

Pages Used to Upload and View Resumes

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
Apply Now - Choose Resume	HRS_RESUME_OPTION	Select the check box for one or more job openings on the Welcome, Job Search, or My Saved Jobs page and click Apply Now.	Select a resume option. The options that appear on this page vary depending on the resume template that the system selects.
Apply Now - Enter Resume Text	HRS_APPLY_RESUME	- Select Upload a New Resume on the Apply Now - Choose Resume page, click Continue, browse for, select, and upload a resume. - Select Copy and Paste Resume Text on the Apply Now - Choose Resume page and click Continue.	Enter resume details. The options on this page vary depending on the resume option that the applicant selects on the Apply Now - Choose Resume page. If the applicant selects Upload a new resume, they must provide a title for the resume and select the language in which the resume is written. If the applicant selects Copy and paste resume text, they must enter a title for the resume, select the language in which the resume is written, and paste the resume text into the appropriate field.
My Career Tools	HRS_CE_RESUME	- Click the My Careers Tools link on the Welcome, Job Search, My Saved Jobs, and My Saved Searches pages. - Click the Applications, Cover Letters and Attachments, and Saved Resumes links in the My Careers Tools group box on the Welcome page.	View submitted applications, resumes, and attachments.
Resume	HRS_APP_CE_RES_SEC	Click a link in the Resume Title column in the Resumes grid on the My Career Tools page.	View an uploaded resume.

Submitting Attachments

This section provides an overview of attachments, lists a prerequisite, and lists the pages used to submit attachments.

Understanding Attachments

Applicants sometimes need to submit additional documents such as:

- Cover letters
- References
- Certifications
- Transcripts
- Drug test results

Applicants can submit attachments by using the My Attachments and Cover Letters - Add Attachments page. To submit an attachment, applicants select an attachment type, enter an attachment purpose, click Add Attachment to browse for and upload the attachment, and then click Save & Return to save the attachment and return to the My Career Tools page.

Applicants can view all submitted attachments in the Cover Letters and Attachments grid on the My Career Tools page. Applicants can click an attachment file name to view the attachment. The system opens the attachment in a separate browser window. Applicants cannot edit the attachment in the browser window. Applicants can delete attachments on the My Career Tools page and edit the attachment type and purpose on the My Attachments and Cover Letters - Add Attachments page.

Prerequisite

Before you can submit attachments, you must define attachment types on the Attachment Type Setup page in Talent Acquisition Manager.

See *PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*, “Setting Up Recruiting Processes,” Setting Up Applications.

Pages Used to Submit Attachments

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
My Career Tools	HRS_CE_RESUME	- Click the My Careers Tools link on the Welcome, Job Search, My Saved Jobs, and My Saved Searches pages. - Click the Applications, Cover Letters and Attachments, and Saved Resumes links in the My Careers Tools group box on the Welcome page.	View submitted applications, resumes, and attachments.
My Attachments and Cover Letters - Add Attachments	HRS_APPL_ATTACH_NR	- Click the Add Attachment link on the My Career Tools page. - Click the Edit Attachment link on the My Career Tools page.	Submit attachments.

Entering References

This section provides an overview of references and lists the pages used to enter references.

Understanding References

Recruiters and hiring managers can click the Request References button on the Add New Applicant - Verification or Manage Applicant - Applicant Data: Verification pages in Talent Acquisition Manager to send an email notification (HRS_UPDATE_REFERENCES) to applicants (provided there is an email address for the applicant in the system) that notifies them to update their references. The email notification contains a link to the Welcome page. The system also posts a notification in the Notifications group box on the Welcome page. Applicants click the Please add your references link in the Notifications group box on the Welcome page to access the Applicant References page, where they can submit references.

If an applicant has not applied online, the email notification includes an auto-generated user name and password that enables the applicant to sign in and submit their references.

Pages Used to Enter References

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
Applicant References	HRS_CE_APP_REF	Click the Please add your references link in the Notifications group box on the Welcome page.	Add references.
Add New Application - Add Reference	HRS_CE_D_REFERENCE	- Click Add Reference on the Applicant References page. - Click Add Reference on the Apply Now - Complete Application page.	Enter information for a reference.

Viewing Interview Schedules and Evaluations

This section provides an overview of the different methods for viewing interview schedules and lists the pages used to view interview schedules.

Understanding Interview Schedules

Interview schedules can be viewed three ways:

- Applicants and employees view their scheduled interview appointment for a specific job opening
- Employees can view their interview schedule for job openings in which they are part of the interview team.
- Employees can view the entire interview teams schedule.

Viewing Scheduled Interview Appointments

Applicants use the Interview Details page to view their scheduled interview for a specific job opening. The interview schedule includes the date and time, the name of each interviewer, and location of the interview.

When you schedule an interview by using the Manage Applicant - Interview Schedule page in Talent Acquisition Manager, you can select the Notify Applicant option to notify the applicant. The system sends an email notification (HRS_INTVWSCHED_APPL) to the applicant (provided there is an email address for the applicant in the system), and if the applicant applied online, the system also posts a notification in the Notifications group box on the Welcome page. Applicants click the notification link in the Notifications group box to access the Interview Details page, where they can view the interview schedule. The email also contains the interview schedule for the applicant.

See Also

PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook, “Interviewing Applicants,” Scheduling Interviews

Pages Used to View Interview Schedules and Evaluations

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	- Self Service, Recruiting Activities, Careers, Welcome - Careers, Careers Enter a user name and password on the Careers page and click Login.	Search for jobs, access career tools, view received notifications, and view the latest job postings. This is the page that appears to external applicants after signing in. Internal applicants do not need to sign in to access this page.
Interview Details	HRS_APP_INT_DET_SB	Click an interview link in the Notifications group box on the Welcome page.	View the details for all scheduled interviews (start and end times, date, interviewer, location) for a specific job opening.
Interview Calendar	HRS_INT_CLNDR	Self Service, Recruiting Activities, Interviewer's Calendar	View the current week's interview schedule. Note. Employees can view interview schedules only if an administrator has entered their names on the Interview Schedule page or if a manager or recruiter has entered their names on the Schedule Interview page.
Schedule Notes	ER_INTCMNT_MON_SEC	Click the Notes link on the Interview Calendar page.	View comments entered by the person who scheduled an interview using the Interview Schedule page or the Schedule Interview page.
View Interview Team Schedule	HRS_SEL_TEAM_SCHED	Self Service, Recruiting Activities, Interviewer Team Schedule	View the schedule for the entire interview team. Note. Employees can view interview schedules only if an administrator has entered their names on the Interview Schedule page; if a manager or recruiter has entered their names on the Schedule Interview page; or if the employees are the originators, authorizers, or recruiters of the requisitions.
Interview Evaluations	HRS_INT_EVAL_LST	Self Service, Recruiting Activities, Interview Evaluations	View interview evaluations.

Referring Friends

This section provides an overview of the referral friends and the pages used by referrals.

Understanding the Referral Process

The referral process consists of three features:

- An employee refers a friend for a specific job opening.
- An applicant enters an employee's name as a referral source and the employee confirms they are a referral for the employee.
- The employee checks the status of a referral.

Employee Refers a Friend

Employees use the Welcome page to refer a friend. Applicants can be referred either with or without a job opening selected. Once the Refer Friend button is clicked, employees can submit the friend's resume and must enter basic contact information.

After submitting the contact information, the system create an applicant records with a status of *Not Applied* and sends an email to the friend containing a link to the asking them to update their information. The employee information is contained in the referral section of the application and the employee sees the referral in their self service referral information.

Note. If the employee makes the mistake of referring an external person to an internal job opening, the applicant will not be able to see the Job Opening since they cannot log on to the internal system. The system warns the employee on submission of an internal only job that the referral might not reach the person to which it is being sent, but no other action is taken.

Applicant Enters Employee as Referral Source

When an applicant completes an application and enters an employee's name as a reference, the system automatically sends a notification to the employee asking them to confirm the referral. The employee uses the Confirm Referral page to validate that they are a reference for the applicant.

Employee Checks Referral Status

When an employee as referred a friend, they can use the Review Referral Details page to see the status of the referral.

Pages Used in the Referral Process

Page Name	Object Name	Navigation	Usage
Welcome	HRS_CE_HM_POST	Self-Service, Recruiting Activities, Career	Initiate various Candidate Gateway tasks.
Refer Friend - Choose Resume	HRS_ERP_RES_OPTION	Click the Refer Friend button on the Welcome page.	Choice whether to submit friend's resume.
Refer Friend - Enter Resume Text	HRS_ERP_APPLY_RES	Select Copy and paste resume text. Click the Continue button on the Refer Friend - Choose Resume page.	Enter, download, or ignore resume.
Refer Friend - Contacts Details	HRS_ERP_APP_PROFILE	- Click the Continue button on the Refer Friend - Choose Resume page. - Click the Continue button on the Refer Friend - Enter Resume Text page.	Enter the friend's contact information.
My Referrals	HRS_ERP_APP_APLC	Click the Save & Submit button on the Refer Friend - Contacts Details page.	Validate applicant's referral name.
Review Referral	HRS_EE_REVW_SRCH	- Click the View Completed Referrals link on the My Referrals page. - Self-Service, Recruiting Activities, Check Referral Status	Select applicant.
Review Referral Details	HRS_EE_REVW_DTL	Click the referred applicant name link on the Review Referral page.	View the detailed information of the referral.

Glossary of PeopleSoft Enterprise Terms

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *inquiry access*.

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

yield by operation

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

zero-rated VAT

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

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