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# PeopleSoft Enterprise HRMS Portal Pack 9.0 PeopleBook

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**December 2006**

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# About This PeopleBook Preface

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

This preface discusses:

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

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

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## PeopleSoft Enterprise Application Prerequisites

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

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

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

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

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## Application Fundamentals

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

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

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

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## Documentation Updates and Printed Documentation

This section discusses how to:

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

### Obtaining Documentation Updates

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

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

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### See Also

Oracle's PeopleSoft Customer Connection, [http://www.oracle.com/support/support\\_peoplesoft.html](http://www.oracle.com/support/support_peoplesoft.html)

### Downloading and Ordering Printed Documentation

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

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

#### Downloading PDF Files

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

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

#### Ordering Printed, Bound Volumes

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

See Oracle Store, [http://oraclestore.oracle.com/OA\\_HTML/ibeCCtpSctDspRte.jsp?section=14021](http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021)

## Additional Resources

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

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

## Typographical Conventions and Visual Cues

This section discusses:

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

### Typographical Conventions

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

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

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

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

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

---

**Note.** Example of a note.

---

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

---

**Important!** Example of an important note.

---

### Warnings

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

---

**Warning!** Example of a warning.

---

### Cross-References

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

## Country, Region, and Industry Identifiers

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

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

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

### Country Identifiers

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

## Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

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

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

## Currency Codes

Monetary amounts are identified by the ISO currency code.

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## Comments and Suggestions

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

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

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## Common Elements Used in PeopleBooks

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

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



# PeopleSoft Enterprise HRMS Portal Pack Preface

This preface discusses:

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

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## PeopleSoft Applications

This PeopleBook refers to the following PeopleSoft application: PeopleSoft Enterprise HRMS Portal Pack.

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## 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 line of applications has its own version of this documentation.

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

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### See Also

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

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## PeopleBook Structure

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

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

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

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

| Chapters                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Preface                  | <p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> <li>• How to use the Application Fundamentals book.</li> <li>• How PeopleBooks are structured.</li> <li>• Common elements used in the PeopleBook, if necessary.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                              |
| Getting Started with...  | <p>This chapter discusses application implementation guidelines. It explains:</p> <ul style="list-style-type: none"> <li>• The business processes documented within the book.</li> <li>• Integrations between the application and other applications.</li> <li>• A high-level description on how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.</li> </ul>                                                                                                                                                                                                           |
| Navigation               | <p>(Optional) Some PeopleSoft applications provide modified navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains modified navigation pages, this chapter provides basic navigation information for these pages.</p> <p><b>Note.</b> Not all applications have delivered modified navigation pages.</p>                                                                                                                                                                                                                                                                        |
| Understanding...         | <p>(Optional) This is an introductory chapter that broadly explains the application and the functionality within the application.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Setup and Implementation | <p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of an application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality.</p> <p><b>Note.</b> There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.</p> |

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



# CHAPTER 1

## Getting Started with HRMS Portal Pack

This chapter discusses:

- HRMS Portal Pack pagelets.
- HRMS Portal Pack integrations.
- HRMS Portal Pack implementation.

---

### HRMS Portal Pack Pagelets

PeopleSoft Enterprise HRMS Portal Pack pagelets include:

- Birthday Alerts pagelet.
- Anniversary Alerts pagelet.
- Workforce Availability pagelet.
- Time Management Alerts pagelet.
- Open Positions pagelet.
- Manager Expiring Licenses pagelet.
- Schedule Training pagelet.
- Employee Performance pagelet.
- Company Directory pagelet.
- Manager Leave Summary pagelet.
- Direct Reports pagelet.
- Direct Reports Phones pagelet.
- Employee Expiring Licenses pagelet.
- Upcoming Training pagelet.
- Employee Leave Summary pagelet.
- Stock Options pagelet.
- View Payslip pagelet.
- Recruiter Alerts pagelet.
- My Job Openings pagelet.
- Find Job Openings pagelet.

- My Applicants pagelet.
- Job Openings pagelet.
- Quick Search pagelet.

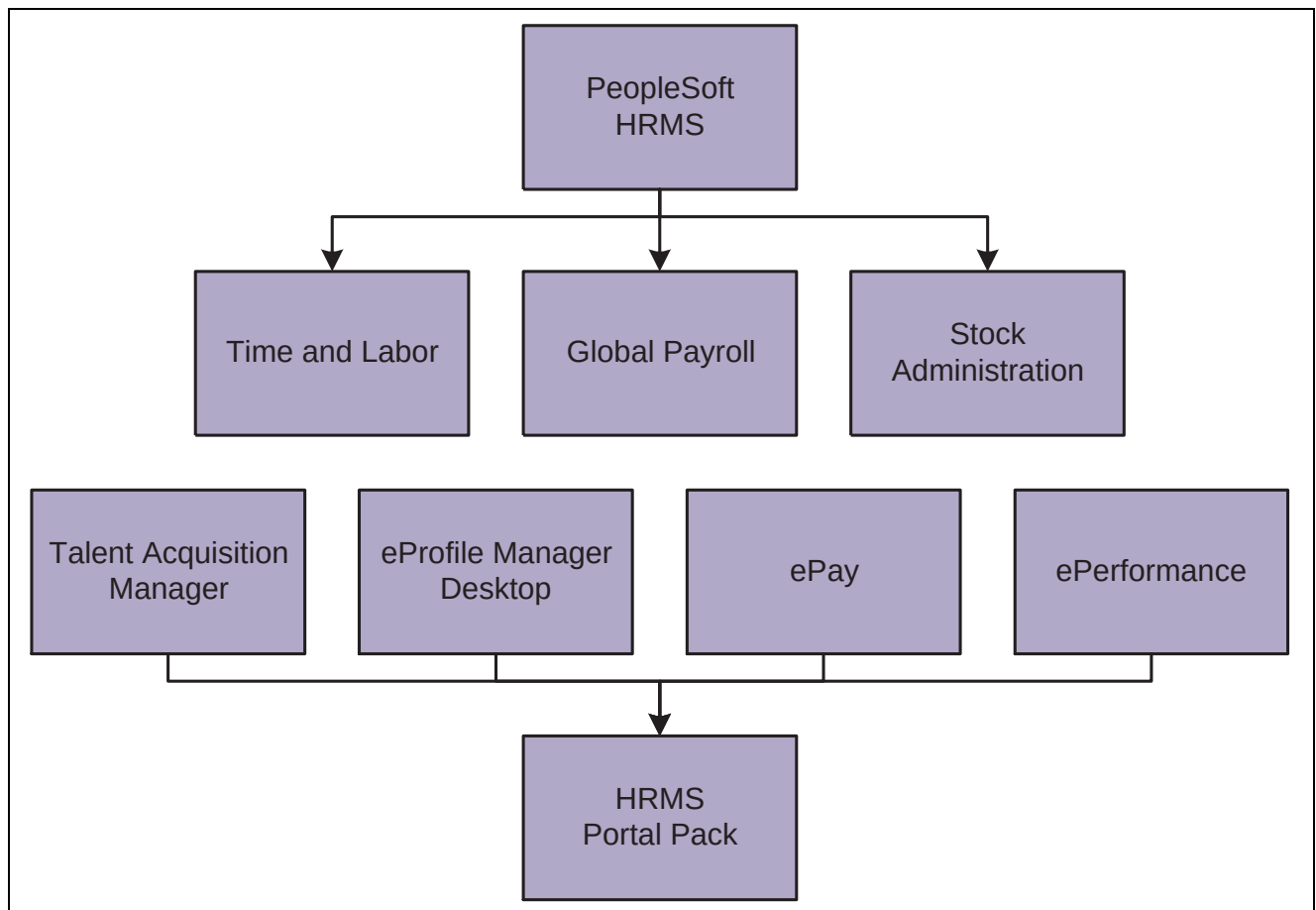
**See Also**

Chapter 4, “Using HRMS Portal Pack Pagelets,” page 15

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## HRMS Portal Pack Integrations

The HRMS Portal Pack includes portal pagelets that provide access to key data from your PeopleSoft HRMS system. The portal pack is intended to supplement the core business applications with pagelets for your portal’s homepage.



PeopleSoft Enterprise HRMS Portal Pack integrations

This documentation discusses integration considerations in the implementation chapters in this PeopleBook.

---

## HRMS Portal Pack Implementation

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

### Other Sources of Information

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

### See Also

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

*Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager*



## CHAPTER 2

# Understanding HRMS Portal Pack

This chapter discusses:

- HRMS Portal Pack overview.
- PeopleSoft pagelet activation and personalization.
- HRMS Portal Pack pagelets.

---

## HRMS Portal Pack Overview

The PeopleSoft Enterprise HRMS Portal Pack provides a collection of pagelets that you can individually select to appear on a corporate intranet or extranet homepage. The individual pagelets provide information gathered from various PeopleSoft HRMS applications.

---

## PeopleSoft Pagelet Activation and Personalization

HRMS Portal Pack includes portal pagelets that provide at-a-glance access to essential data from your system. The portal pack supplements other PeopleSoft HRMS applications that provide the underlying data.

When you install HRMS Portal Pack, users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

Users can configure their portal homepages with three narrow columns or one narrow and one wide column. What appears to the user is determined by the pagelets dynamically.

See [Chapter 4, “Using HRMS Portal Pack Pagelets,” Displaying Portal Pagelets, page 15](#).

---

**Note.** Each pagelet can be configured to use any of the HRMS access types. PeopleSoft recommends using the same access type for each pagelet. This ensures consistency when managers of direct reports view the different pagelets to help improve performance. To set up the access type, access the Direct Reports Setup component by selecting Set Up HRMS, Common Definitions, Direct Reports for Managers, Direct Reports Setup.

---



Some pagelets support personalization that enables individual users to configure content displayed in their pagelet; the Customize button in the pagelet title bar alerts you to this capability. Click the button to access the Personalization page.

## See Also

[Chapter 4, “Using HRMS Portal Pack Pagelets,” Personalizing Pagelets, page 17](#)

## HRMS Portal Pack Pagelets

This section lists the pagelets that make up HRMS Portal Pack and identifies:

- The name and object name of the pagelets.
- The audience for the pagelet: employees, customers, or suppliers.
- The functional role of the person who uses the pagelet.

These are business process functional roles not delivered as such by Enterprise PeopleTools user security roles.

- The pagelet’s enabling application.

The enabling application provides the data that appears in the pagelet. If the enabling application has not been licensed, the pagelet won’t work.

This table lists the pagelets and their enabling applications:

| <b>Pagelet Name and Object Name</b>             | <b>Audience</b> | <b>Functional Role</b> | <b>Enabling Applications</b>                                                                                   |
|-------------------------------------------------|-----------------|------------------------|----------------------------------------------------------------------------------------------------------------|
| Manager Expiring Licenses<br>CO_PE_EXP_LIC      | Employees       | Manager                | PeopleSoft Enterprise Human Resources                                                                          |
| Employee Expiring Licenses<br>CO_PE_EXP_LIC_EMP | Employees       | Employee               | Human Resources                                                                                                |
| Workforce Availability<br>TL_PE_MGR_WRKFRM      | Employees       | Manager                | Human Resources<br>PeopleSoft Enterprise Time and Labor<br>(optional) PeopleSoft Enterprise Absence Management |
| Time Management Alerts<br>TL_PE_MGR_TMMGT       | Employees       | Manager                | Human Resources<br>Time and Labor<br>(optional) Absence Management                                             |
| Open Positions<br>CO_PE_VACPOS                  | Employees       | Manager                | Human Resources<br>(optional functionality) PeopleSoft Talent Acquisition Manager Solutions                    |

| <b>Pagelet Name and Object Name</b>             | <b>Audience</b> | <b>Functional Role</b> | <b>Enabling Applications</b>                                                     |
|-------------------------------------------------|-----------------|------------------------|----------------------------------------------------------------------------------|
| Direct Reports<br>CO_PE_MGRRPTS_<br>COMP        | Employees       | Manager                | Human Resources<br>PeopleSoft Enterprise eProfile Manager Desktop                |
| Upcoming Training<br>CO_PE_EMP_TRAINING         | Employees       | Manager                | Human Resources                                                                  |
| Scheduled Training<br>CO_PE_MGR_TRAINING        | Employees       | Employee               | Human Resources                                                                  |
| Direct Reports Phones<br>CO_PE_EMPLPHN_<br>COMP | Employees       | Manager                | Human Resources<br>eProfile Manager Desktop                                      |
| Anniversary Alerts<br>CO_PE_MGR_HIREDT          | Employees       | Manager                | Human Resources<br>eProfile Manager Desktop                                      |
| Birthday Alerts<br>CO_PE_MGR_<br>BIRTHDAY       | Employees       | Manager                | Human Resources<br>eProfile Manager Desktop                                      |
| Company Directory<br>EO_PE_CDCOMPDIR            | Employees       | Employee               | Human Resources                                                                  |
| Employee Leave Summary<br>HR_PE_EMPL_LEAVE      | Employees       | Employee               | Human Resources<br>PeopleSoft Enterprise Global Payroll or<br>Absence Management |
| Manager Leave Summary<br>HR_PE_MGR_LEAVE        | Employees       | Manager                | Human Resources<br>Global Payroll or Absence Management                          |
| Stock Options<br>ST_PE_OPTION                   | Employees       | Employee               | Human Resources<br>PeopleSoft Enterprise Stock Administration                    |

| <b>Pagelet Name and Object Name</b> | <b>Audience</b> | <b>Functional Role</b> | <b>Enabling Applications</b>                                                                     |
|-------------------------------------|-----------------|------------------------|--------------------------------------------------------------------------------------------------|
| View Payslip<br>PY_PE_PAYCHECK      | Employees       | Employee               | Human Resources<br>PeopleSoft Enterprise Payroll for North America<br>PeopleSoft Enterprise ePay |
| Employee Performance<br>EP_PE_ALERT | Employees       | Manager                | Human Resources<br>PeopleSoft Enterprise ePerformance                                            |
| Recruiter Alerts<br>HRS_PE_ALERTS   | Employees       | Recruiter              | Human Resources<br>Talent Acquisition Manager                                                    |
| My Job Openings<br>HRS_PE_MY_JO     | Employees       | Recruiter              | Human Resources<br>Talent Acquisition Manager                                                    |
| Find Job Openings<br>HRS_PE_JO_SRCH | Employees       | Recruiter              | Human Resources<br>Talent Acquisition Manager                                                    |
| My Applicants<br>HRS_PE_APP_SRCH    | Employees       | Recruiter              | Human Resources<br>Talent Acquisition Manager                                                    |
| Job Openings<br>HRS_PE_JO_APP_ALL   | Employees       | Recruiter              | Human Resources<br>Talent Acquisition Manager                                                    |
| Quick Search<br>HRS_PE_SRCH         | Employees       | Recruiter              | Human Resources<br>Talent Acquisition Manager                                                    |

**See Also**

Chapter 4, “Using HRMS Portal Pack Pagelets,” page 15

## CHAPTER 3

# Setting Up HRMS Portal Pack

This chapter discusses how to:

- Define default settings for the Employee Performance Alerts pagelet.
- Define default settings for the Open Positions pagelet.

---

## Defining Default Settings for the Employee Performance Alerts Pagelet

To define default settings for the Employee Performance Alerts Settings page, use the Employee Performance Alerts Setup (EP\_ALERT\_SETUP) component.

This section discusses how to:

- Activate the Employee Performance pagelet.
- Define settings for the Employee Performance Alerts pagelet personalizations.

### See Also

[Chapter 4, “Using HRMS Portal Pack Pagelets,” Viewing the Employee Performance Pagelet, page 33](#)

## Page Used to Define Default Settings for the Employee Performance Alert Pagelet

| Page Name                         | Object Name    | Navigation                                                 | Usage                                                           |
|-----------------------------------|----------------|------------------------------------------------------------|-----------------------------------------------------------------|
| Employee Performance Alerts Setup | EP_ALERT_SETUP | Set Up HRMS, Product Related, ePerformance, Pagelet Alerts | Define settings for the Employee Performance Alerts Setup page. |

## Activating the Employee Performance Pagelet

The Employee Performance pagelet is a self-service pagelet that managers can use to quickly check the status of the performance documents for which they are responsible. For a given document type, the pagelet lists each employee's name, the due date, and a color-coded button that identifies if the document is complete, on schedule, behind schedule, or cancelled.

To enable managers to use the pagelet, you must:

1. Activate the Employee Performance pagelet.

2. Define the default rules for the pagelet.

## See Also

Chapter 2, “Understanding HRMS Portal Pack,” PeopleSoft Pagelet Activation and Personalization, page 5

## Defining Settings for the Employee Performance Alerts Settings Page

Access the Employee Performance Alerts Setup page.

**Employee Performance Alerts Setup**

\*Doc Type:

\*Period End Date >=

\*Employees to display:

| Self Service Edits                                                 |  | Display Alert Levels                                   |  |
|--------------------------------------------------------------------|--|--------------------------------------------------------|--|
| <input checked="" type="checkbox"/> Allow changes to Type          |  | <input checked="" type="checkbox"/> Complete (✓)       |  |
| <input checked="" type="checkbox"/> Allow changes to Date Range    |  | <input checked="" type="checkbox"/> On Schedule (◇)    |  |
| <input checked="" type="checkbox"/> Allow changes to Alert Levels  |  | <input checked="" type="checkbox"/> Standard Alert (▽) |  |
| <input checked="" type="checkbox"/> Allow changes to Alert Days    |  | <input checked="" type="checkbox"/> Critical Alert (■) |  |
| <input checked="" type="checkbox"/> Allow changes to Nbr Employees |  | <input checked="" type="checkbox"/> Cancelled (✕)      |  |

| Alert Days Before Due Date |                      |                 |                 |  |  |
|----------------------------|----------------------|-----------------|-----------------|--|--|
| Sequence                   | Document Status      | Critical Alerts | Standard Alerts |  |  |
| 10                         | Acknowledged         | 5               | 15              |  |  |
| 20                         | Review Held          | 10              | 20              |  |  |
| 30                         | Available for Review | 15              | 25              |  |  |
| 40                         | In Progress          | 20              | 60              |  |  |

\* Required Field

Employee Performance Alerts Setup page

**Doc Type** (document type) Select the type of document to list on the Employee Performance pagelet. You define document types on the Document Types page.

See *PeopleSoft Enterprise ePerformance 9.0 PeopleBook*, “Setting Up Document Templates,” Defining Document Types.

**Period End Date** >= (period end greater than or equal to) Select the end date for the performance period for which documents are to be listed. The system lists documents with the same period end date or later.

**Employees to display** Enter the number of employees to list on the pagelet. If the number of employees with documents exceeds this number, the pagelet automatically includes a More link that enables the manager to list all employees with the selected document type.

## Self Service Edits

Use this group box to define how much control managers can have over the appearance of their Employee Performance pagelet. If you select any of the check boxes here, the manager can change the selected default settings. To change the settings on the Employee Performance pagelet, click the Customize button on the pagelet to access the Employee Performance Alerts Settings page.

See [Chapter 3, “Setting Up HRMS Portal Pack,” Defining Default Settings for the Employee Performance Alerts Pagelet, page 9.](#)

|                                                                              |                                                                                                                        |
|------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| <b>Allow changes to Type</b>                                                 | Select to enable managers to pick a document type other than the one you selected in the Type field.                   |
| <b>Allow changes to Date Range</b>                                           | Select to enable managers to enter a different date range.                                                             |
| <b>Allow changes to Alert Levels</b>                                         | Select to enable managers to determine which alerts should appear on the pagelet.                                      |
| <b>Allow changes to Alert Days</b>                                           | Select to enable managers to change the number of days before the due date that triggers the alerts.                   |
| <b>Allow changes to Nbr Employees</b> (allow changes to number of employees) | Select to enable managers to change the number of employees that are listed on the pagelet when the pagelet is opened. |

## Display Alert Levels

Use this group box to select the types of alerts that should appear. Select the corresponding check box for each alert to display.

## Alert Days Before Due Date

Use this group box to select the statuses that are to trigger alerts and the number of days prior to the due date that an alert is to be considered standard versus critical.

|                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sequence</b>                            | Enter the order in which this document status is to appear on the Employee Performance Alerts Personalization page.<br><br>See <a href="#">Chapter 3, “Setting Up HRMS Portal Pack,” Defining Default Settings for the Employee Performance Alerts Pagelet, page 9.</a>                                                                                                                                                                                                                                                                                                  |
| <b>Document Status</b>                     | Select the status to trigger an alert. Values are: <i>Acknowledged, Available for Review, Cancelled, Completed, In Progress, Not Started and Review Held.</i><br><br>See <i>PeopleSoft Enterprise ePerformance 9.0 PeopleBook</i> , “Using Inquiry Pages”.                                                                                                                                                                                                                                                                                                               |
| <b>Critical Alerts and Standard Alerts</b> | These fields apply only if you select Critical Alert and Standard Alert in the Display Alert Levels group box.<br><br>Enter the number of days before a document’s due date that a critical alert button or a standard alert button is to appear if the document is still in the selected status.<br><br>For example, suppose that you select the status <i>In Progress</i> , and enter <i>30</i> in the Critical Alerts field and <i>60</i> in the Standard Alerts field. This causes the standard alert button to appear on the pagelet when a document is in progress |

from 31 to 60 days before its due date. The critical alert button appears if the document is still in progress 30 days or less before the due date.

### See Also

[Chapter 3, “Setting Up HRMS Portal Pack,” Defining Default Settings for the Employee Performance Alerts Pagelet, page 9](#)

[Chapter 4, “Using HRMS Portal Pack Pagelets,” Personalizing the Employee Performance Alerts Pagelet, page 22](#)

---

## Defining Default Settings for the Open Positions Pagelet

To set default settings for the Open Positions pagelet, use the Open Positions Setup (CO\_PE\_VACPOS\_SETUP) component.

This section discusses how to:

- Activate the Open Positions pagelet.
- Define default rules for the Open Positions pagelet.

### See Also

[Chapter 4, “Using HRMS Portal Pack Pagelets,” Personalizing the Open Positions Pagelet, page 20](#)

## Page Used to Define Default Settings for the Open Positions Pagelet

| Page Name      | Object Name        | Navigation                                                           | Usage                                                                        |
|----------------|--------------------|----------------------------------------------------------------------|------------------------------------------------------------------------------|
| Open Positions | CO_PE_VACPOS_SETUP | Set Up HRMS, Product Related, HRMS Portal Pack, Setup Open Positions | Define default rules for the Open Positions pagelet personalization options. |

## Activating the Open Positions Pagelet

The Open Positions pagelet is a self-service pagelet that managers can use to quickly check the status of open positions. The pagelet displays position information and links to other related position pages.

To enable managers to use the pagelet, you must:

1. Activate the Open Positions pagelet.
2. Define the default settings for the pagelet.

### See Also

[Chapter 2, “Understanding HRMS Portal Pack,” PeopleSoft Pagelet Activation and Personalization, page 5](#)

## Defining Default Settings for the Open Positions Pagelet

Access the Open Positions page.

The screenshot shows the 'Open Positions' pagelet administration interface. It features a title bar 'Pagelet Administration' and a main heading 'Open Positions'. Below the heading, there are two sections: 'Detailed Position Description' and 'Create/View Job Requisitions'. Each section has a checkbox for displaying links, both of which are checked. A 'Save' button is located at the bottom of the form.

Open Positions page

### Display Position Description Link

Select to display the Position Description link. This link provides access to the Position Description page where you can view the position description.

### Display/Create Job Req and Review Job Req links (display/create job requisitions and review job requisitions links)

Select to display the job requisition links. This link provides access to the Job Requisition page where you can review existing job requisitions or create a new one.

### See Also

Chapter 4, “Using HRMS Portal Pack Pagelets,” Personalizing the Open Positions Pagelet, page 20



# CHAPTER 4

## Using HRMS Portal Pack Pagelets

This chapter lists common elements and discusses how to:

- Display portal pagelets.
- Personalize pagelets.
- View manager pagelets.
- View employee pagelets.
- View Talent Acquisition Manager pagelets.

---

### Common Elements Used in This Chapter

|                                                                                     |                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Number of Rows (1 to 99)</b>                                                     | Enter the number of rows to display on the page.                                                                                                                                         |
| <b>Days to view in the future</b>                                                   | Enter the number of days in the future that the system should use to display upcoming events.                                                                                            |
| <b>Days to view in the past</b>                                                     | Enter the number of days in the past that the system should use to display past events.                                                                                                  |
| <b>Maximum displayed rows</b>                                                       | Enter the maximum number of rows that should appear on the page. This only limits the number of rows that appear and does not limit the amount of information that the system retrieves. |
| <b>More</b>                                                                         | Click this link to view more information.                                                                                                                                                |
|  | Indicates that an approaching date is within the defined alert limit.                                                                                                                    |
|  | Click the Customize button to define the number of rows and columns you want to display on a pagelet. Not all pagelets can be personalized.                                              |

---

### Displaying Portal Pagelets

You can control the pagelet selection and, optionally the layout, for your users by using the Portal homepage feature in PeopleTools. To make pagelets available for selection and display:

1. Select PeopleTools, Portal, Structure and Content.
2. Select the Portal Objects link on the Structure and Content page.

3. Select the Homepage link.
4. Select the Tabs link.
5. Select the Edit link for My Page in the Content References grid.
6. Select the Tab Content tab to access the Tab Content page.
7. Use the Tab Content page to select pagelets and define their behavior. Select *Required* or *Req-Fix* to make the pagelets always appear on users' home pages. Using *Req-Fix* also prevents pagelets from being moved on the home page.
8. Use the Tab Layout page to arrange any required pagelets.

**Note.** Access to pagelets is also controlled by the standard PeopleTools component security. Even with the pagelet selected using the previous procedure, you cannot see the pagelet as a content choice unless you also have the PeopleTools security to access the component through your role and its permission lists.

See *Enterprise PeopleTools PeopleBook: Internet Technology*, “Administering Portal Homepages and Pagelets.”

The next example displays a personalized homepage using PeopleSoft HRMS portal pagelets. After defining portal objects in PeopleTools, individual users can click the Content link in the upper left-hand corner to define pagelets for their homepage, and click the Layout link to arrange their homepage elements. The example uses a three-column layout.

By default, portal pagelets display action bars in the upper right-hand corner that, depending on the pagelet properties, enable you to minimize, personalize, or remove the pagelet from the homepage.

Personalize [Content](#) | [Layout](#)

**Menu**

Search:

- My Favorites
- Self Service
- Manager Self Service
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Stock
- Time and Labor
- Payroll for North America
- Global Payroll & Absence Mgmt
- Payroll Interface
- Workforce Development
- Organizational Development
- Enterprise Learning
- Workforce Monitoring
- Pension
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advising
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools
- Packaging

**Birthday Alerts**

| Birthday | Name                              |
|----------|-----------------------------------|
| 4/15     | <a href="#">Kasey Elders</a>      |
| 4/16     | <a href="#">Angela McKay</a>      |
| 4/16     | <a href="#">Vicki Zinn</a>        |
| 4/22     | <a href="#">Andrew Pierce</a>     |
| 4/29     | <a href="#">Francesca Fierros</a> |

[More...](#)

**Stock Options**

Global Business Institute 9999

| Grant Number               | Grant Date | Type | Price       |
|----------------------------|------------|------|-------------|
| <a href="#">0000000402</a> | 12/30/1999 | ISO  | \$21.750000 |
| <a href="#">0000000372</a> | 12/31/1998 | ISO  | \$27.500000 |
| <a href="#">0000000346</a> | 12/31/1997 | ISO  | \$22.125000 |
| <a href="#">0000000313</a> | 12/31/1996 | ISO  | \$23.125000 |
| <a href="#">0000000289</a> | 12/29/1995 | ISO  | \$19.000000 |
| <a href="#">0000000262</a> | 12/31/1994 | ISO  | \$10.375000 |

[More...](#)

**Time Management Alerts**

| Alerts                                         | Occurrences |
|------------------------------------------------|-------------|
| Overtime Limit Reached                         | 0           |
| Overtime Approval Required                     | 0           |
| <a href="#">Payable Time Approval Required</a> | 24          |
| <a href="#">Exceptions to Review</a>           | 24          |
| Absence Approval Required                      | 0           |

**Direct Reports Phones**

| Name                             | Business | Extension |
|----------------------------------|----------|-----------|
| <a href="#">Adland Chu</a>       |          |           |
| <a href="#">Andrea Ashford</a>   |          |           |
| <a href="#">Andrew Pierce</a>    |          |           |
| <a href="#">Angela McKay</a>     |          |           |
| <a href="#">Angelica Alvarez</a> |          |           |

[More...](#)

Portal pagelet example

## See Also

*Enterprise PeopleTools PeopleBook: Internet Technology, “Administering Portal Homepages and Pagelets”*

## Personalizing Pagelets

Each individual user can personalize the content for their pagelets by clicking the Customize (pencil) button on the pagelet headers. This section discusses how to:

- Personalize the Workforce Availability pagelet.
- Personalize the Time Management Alerts pagelet.
- Personalize the Open Positions pagelet.
- Personalize the Scheduled Training pagelet.
- Personalize the Upcoming Training pagelet.
- Personalize the Employee Performance pagelet.
- Personalize the Stock Options pagelet.
- Personalize the Manager Leave Summary pagelet.
- Personalize the Employee Leave Summary pagelet.
- Personalize the Direct Reports pagelet.
- Personalize the Phone Numbers pagelet.
- Personalize the Recruiter Alerts pagelet.
- Personalize the My Job Openings pagelet.

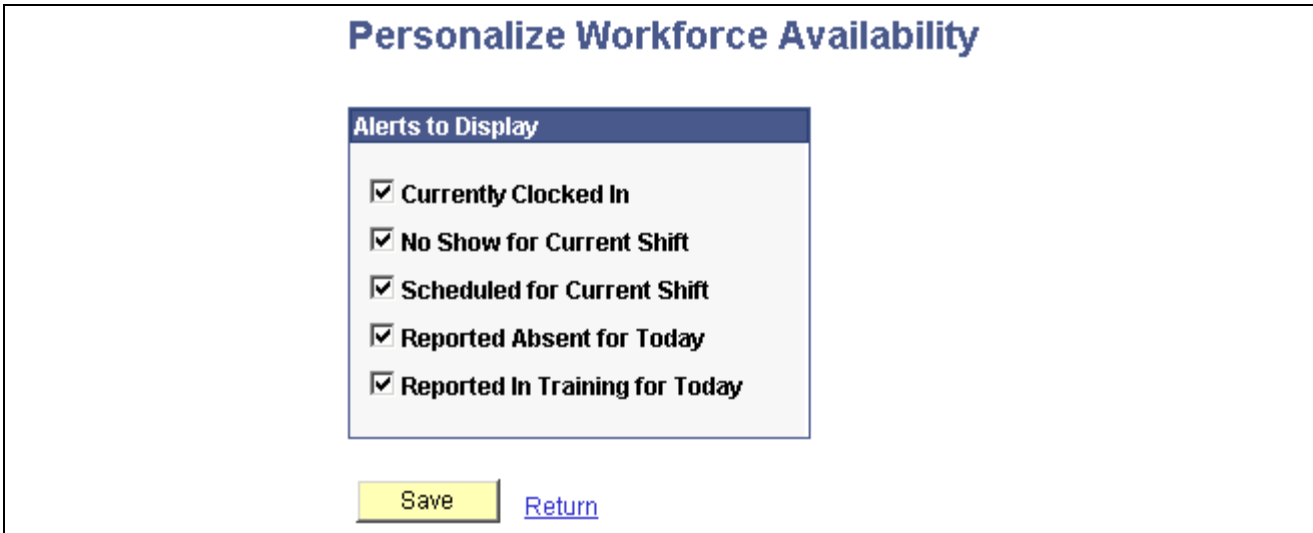
## Pages Used to Personalize Pagelets

| Page Name                          | Object Name                                                                              | Navigation                                                                                                                                                                                                                                                                                                                                                                                                                                   | Usage                                                                                                                                                                                                                                                                                                                                                                        |
|------------------------------------|------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Personalize Alerts                 | CO_PE_OPR_BIRTH_PG,<br>CO_PE_OPR_ANNIV_PG,<br>CO_PEOPRLIC_EMP_PG,<br>CO_PE_OPREXPPLIC_PG | <ul style="list-style-type: none"> <li>•  Click the Customize button on the Birthday Alerts pagelet.</li> <li>• Click the Customize button on the Anniversary Alerts pagelet.</li> <li>• Click the Customize button on the Employee Expiring Licenses pagelet.</li> <li>• Click the Customize button on the Manager Expiring Licenses pagelet.</li> </ul> | Define default display preferences. You can define the number of days to view in the future and in the past and the maximum number of rows to display on the pagelet. The pagelets include: <ul style="list-style-type: none"> <li>• Birthday Alerts.</li> <li>• Anniversary Alerts.</li> <li>• Employee Expiring Licenses.</li> <li>• Manager Expiring Licenses.</li> </ul> |
| Personalize Workforce Availability | TL_PE_MGR_WRKFRM_P                                                                       | Click the Customize button on the Workforce Availability pagelet.                                                                                                                                                                                                                                                                                                                                                                            | Personalize the Workforce Availability pagelet.                                                                                                                                                                                                                                                                                                                              |

| Page Name                            | Object Name        | Navigation                                                                                                                                                                                    | Usage                                                                                                                                                                                                                                                                                        |
|--------------------------------------|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Personalize Time Management Alerts   | TL_PE_MGR_TMMGT_P  | Click the Customize button on the Time Management Alerts pagelet.                                                                                                                             | Personalize the Time Management Alerts pagelet.                                                                                                                                                                                                                                              |
| Personalize Open Positions           | CO_PE_VACPOS_CUST  | Click the Customize button on the Open Positions pagelet.                                                                                                                                     | Personalize the Open Positions pagelet. System administrators define additional default display settings on the Pagelet Administration - Open Positions page.<br><br><u>See Chapter 3, “Setting Up HRMS Portal Pack,” Defining Default Settings for the Open Positions Pagelet, page 12.</u> |
| Personalize Scheduled Training       | CO_PE_TRN_MGR_PG   | Click the Customize button on the Scheduled Training pagelet.                                                                                                                                 | Personalize the Scheduled Training pagelet.                                                                                                                                                                                                                                                  |
| Personalize Upcoming Training        | CO_PE_TRN_MGR_N    | Click the Customize button on the Upcoming Training pagelet.                                                                                                                                  | Personalize the Upcoming Training pagelet.                                                                                                                                                                                                                                                   |
| Employee Performance Alerts Settings | EP_PE_OPR_ALERT    | Click the Customize button on the Employee Performance pagelet.                                                                                                                               | Personalize the Employee Performance pagelet.                                                                                                                                                                                                                                                |
| Personalize Stock Options            | ST_PE_OPTION_PREF  | Click the Customize button on the Stock Options pagelet.                                                                                                                                      | Personalize the Stock Options pagelet.                                                                                                                                                                                                                                                       |
| Select Job Title                     | HR_PE_EMPL_LV_EXT  | <ul style="list-style-type: none"> <li>Click the Customize button on the Manager Leave Summary pagelet.</li> <li>Click the Customize button on the Employee Leave Summary pagelet.</li> </ul> | Personalize the Manager Leave Summary page and the Employee Leave Summary page.                                                                                                                                                                                                              |
| Personalize Direct Reports           | CO_PE_OPR_DIRPT_PG | Click the Customize button on the Direct Reports pagelet.                                                                                                                                     | Personalize the Direct Reports pagelet.                                                                                                                                                                                                                                                      |
| Personalize Phones                   | CO_PE_OPR_PHN_PG   | Click the Customize button on the Direct Reports Phones pagelet.                                                                                                                              | Personalize the Direct Reports Phones pagelet.                                                                                                                                                                                                                                               |
| Personalize Alerts                   | HRS_PE_OPR_ALERT   | Click the Customize button on the Recruiter Alerts pagelet.                                                                                                                                   | Personalize the Recruiter Alerts pagelet.                                                                                                                                                                                                                                                    |
| Personalize My Job Openings          | HRS_PE_OPR_JOS     | Click the Customize button on the My Job Openings pagelet.                                                                                                                                    | Personalize the My Job Openings pagelet.                                                                                                                                                                                                                                                     |

## Personalizing the Workforce Availability Pagelet

Access the Personalize Workforce Availability page.



Personalize Workforce Availability page

Use this page to select which workforce availability alerts you want to make available on the Workforce Availability pagelet.

|                                       |                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Currently Clocked In</b>           | Select to display employees who are currently clocked in for the current punch shift.                                                                                                                                                                                                                                                                                                       |
| <b>No Show for Current Shift</b>      | Select to display employees who are scheduled for the current punch shift but have not clocked in.                                                                                                                                                                                                                                                                                          |
| <b>Scheduled for Current Shift</b>    | Select to display employees who are scheduled for the current punch shift.                                                                                                                                                                                                                                                                                                                  |
| <b>Reported Absent for Today</b>      | Select to display employees who are reported as absent.<br><br>If PeopleSoft Enterprise Global Payroll is installed, the system determines if any absences are reported in the absence pages. In addition, the system detects any leave time reporting codes (TRCs) in the PeopleSoft Enterprise Time and Labor application's reported elapsed time, which is not a Global Payroll absence. |
| <b>Reported In Training for Today</b> | Select to display employees who have scheduled, approved training for the day.<br><br>This count will include the attendance statuses from the Training Administration business process of currently attending, completed, enrolled, approved and authorized.                                                                                                                               |

## Personalizing the Time Management Alerts Pagelet

Access the Personalize Time Management Alerts page.

### Personalize Time Management Alerts

Alerts to Display

☒ **Overtime Limit Reached**  
☒ **Overtime Approval Required**  
☒ **Payable Time Approval Required**  
☒ **Exceptions to Review**  
☒ **Absence Approval Required**

Save
[Return](#)

Personalize Time Management Alerts page

Use this page to select which time management alerts you want to make available on the Time Management Alert pagelet.

|                                       |                                                                                  |
|---------------------------------------|----------------------------------------------------------------------------------|
| <b>Overtime Limit Reached</b>         | Select to display those employees who have reached the overtime limit.           |
| <b>Overtime Approval Required</b>     | Select to display those employees who have requested overtime approval.          |
| <b>Payable Time Approval Required</b> | Select to display those employees who have payable time which requires approval. |
| <b>Exceptions to Review</b>           | Select to display time reporting exceptions that require review.                 |
| <b>Absence Approval Required</b>      | Select to display requested Global Payroll absences which require approval.      |

### See Also

*PeopleSoft Enterprise Time and Labor 9.0 PeopleBook, “Managing Time”*

## Personalizing the Open Positions Pagelet

Access the Personalize Open Positions page.

### Personalize Open Positions

Specify the number of open positions you would like to see on the home page.

Display Preferences

**\*Number of Rows (1 to 99):**

\* Required Field

Save
[Return](#)

Personalize Open Positions page

Enter the number of positions that you want to display at once on the Open Positions pagelet.

## Personalizing the Scheduled Training Pagelet

Access the Personalize Scheduled Training page.

### Personalize Scheduled Training

Indicate the maximum number of courses to display on the home page. Also, specify the number of days in the future you would like to see courses for.

**Display Preferences**

**\*Maximum displayed rows:**

**\*Days to view in the future:**

\* Required Field

Save

[Return](#)

Personalize Scheduled Training page

**Maximum displayed rows** Enter the number of rows of training information you want to display on the Scheduled Training pagelet.

**Days to view in the future** Enter the number of days into the future for which you want to see scheduled training.

## Personalizing the Upcoming Training Pagelet

Access the Personalize Upcoming Training Page.

### Personalize Upcoming Training

Indicate the maximum number of courses to display on the home page. Also, specify the number of days in the future you would like to see courses for.

**Display Preferences**

**\*Maximum displayed rows:**

**\*Days to view in the future:**

\* Required Field

Save

[Return](#)

Personalize Upcoming Training page

**Maximum displayed rows** Enter the number of rows of training information you want to display on the Upcoming Training pagelet.

**Days to view in the future** Enter the number of days into the future for which you want to see upcoming training.

## Personalizing the Employee Performance Alerts Pagelet

Access the Employee Performance Alerts Settings page.

### Employee Performance Alerts Settings

Display Preferences

**Document Type:** Annual Review ▼

**Period End Date >=** 01/01/2007 31

**Employees to display:** 5

Alert Levels to Include

☒ **Complete** ( ✓ )

☒ **On Schedule** ( ◆ )

☒ **Standard Alert** ( ▼ )

☒ **Critical Alert** ( ■ )

☒ **Cancelled** ( ✕ )

Alert Days Before Due Date

|                             | Critical Alerts                                                         | Standard Alerts                                                         |
|-----------------------------|-------------------------------------------------------------------------|-------------------------------------------------------------------------|
| <b>Acknowledged</b>         | <span style="border: 1px solid #ccc; padding: 2px 20px;">5</span> Days  | <span style="border: 1px solid #ccc; padding: 2px 20px;">15</span> Days |
| <b>Review Held</b>          | <span style="border: 1px solid #ccc; padding: 2px 20px;">10</span> Days | <span style="border: 1px solid #ccc; padding: 2px 20px;">20</span> Days |
| <b>Available for Review</b> | <span style="border: 1px solid #ccc; padding: 2px 20px;">15</span> Days | <span style="border: 1px solid #ccc; padding: 2px 20px;">25</span> Days |
| <b>In Progress</b>          | <span style="border: 1px solid #ccc; padding: 2px 20px;">20</span> Days | <span style="border: 1px solid #ccc; padding: 2px 20px;">60</span> Days |

Save
Return

Employee Performance Alerts Settings page

**Document Type** Select the type of document that you want to appear. You define document types on the Document Types page.

**Period End Date >=** Select the end date of the performance period for which documents are to be listed. The system lists documents with the same date or later than the date entered here.

**Employees to display** Enter the number of employees to list on the pagelet.

---

**Note.** Fields that display on this page are defined on the Employee Performance Alerts Setup page and may vary depending on the setup defined there.

---

### Alert Levels to Include

Select the desired alert levels to include on the Employee Performance page.

## Alert Days Before Due Date

For each document status type (*Acknowledged*, *Review Held*, *Available for Review*, *In Progress*, *Cancelled* and *Complete*), define the number of days before a document's due date that a critical or standard alert appears.

## See Also

Chapter 3, "Setting Up HRMS Portal Pack," Defining Default Settings for the Employee Performance Alerts Pagelet, page 9

PeopleSoft Enterprise ePerformance 9.0 PeopleBook, "Setting Up Document Templates," Defining Document Types

## Personalizing the Stock Options Pagelet

Access the Personalize Stock Options page.

**Personalize Stock Options**

Use this page to specify the default values used in displaying your stock options.

**Display Preferences**

Default Company Stock: Global Business Institute 9999

\*Max Number of Displayed Rows: 05

Sort By: Grant Number

**Display Fields- Select up to 4**

☒ Grant Number

☒ Grant Date

☒ Option Type

☒ Grant Price

☐ Shares Granted

☐ Shares Exercisable

-----Or-----

☐ Last Vesting Date

Save Return Home

Personalize Stock Options page

|                                                                        |                                                                                                                                                                                            |
|------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Default Company Stock</b>                                           | Select the company for which you want to display stock option information.                                                                                                                 |
| <b>Max Number of Displayed Rows</b> (maximum number of displayed rows) | For multiple stock option grants, select the number of rows to appear on the pagelet. If the number of grants exceeds the number of rows, the system automatically displays the More link. |
| <b>Sort By</b>                                                         | Define how the information is sorted. Values are: <i>Grant Date</i> , <i>Grant Number</i> , <i>Grant Price</i> , and <i>Option Type</i> .                                                  |

## Display Fields - Select up to 4

Each check box that you select appears on the pagelet. You can select up to four fields from this list. Selecting Last Vesting Date overrides all of the other display options.

|                           |                                                                                                                    |
|---------------------------|--------------------------------------------------------------------------------------------------------------------|
| <b>Grant Number</b>       | Displays the grant issue number.                                                                                   |
| <b>Grant Date</b>         | Displays the issue date of each grant listed.                                                                      |
| <b>Option Type</b>        | Displays the type of option for each grant.                                                                        |
| <b>Grant Price</b>        | Displays the issue price for each grant.                                                                           |
| <b>Shares Granted</b>     | Displays the number of shares granted for each grant.                                                              |
| <b>Shares Exercisable</b> | Displays the number of shares currently exercisable for each grant listed.                                         |
| <b>Last Vesting Date</b>  | Displays only the last date that options vested and does not display any additional information about the options. |

## Personalizing the Manager Leave Summary Pagelet

Access the Select Job Title page.

### Select Job Title

| Job Information                  |            |                 |
|----------------------------------|------------|-----------------|
| Job Title                        | Department | Supervisor Name |
| <a href="#">Director-Finance</a> | Finance    |                 |

**View Absences for the last:**  **weeks**

**View Absences for the next:**  **weeks**

[Return](#)

Select Job Title page

**View Absences for the last** and **View Absences for the next** Enter the number of weeks in the past and in advance for which you want to display absence information.

---

**Note.** This page is similar to the page used to personalize the Employee Leave pagelet.

---

## Personalizing the Employee Leave Summary Pagelet

Access the Select Job Title page.

This pagelet is similar to the Manager Leave Summary pagelet.

### See Also

Chapter 4, “Using HRMS Portal Pack Pagelets,” Personalizing the Manager Leave Summary Pagelet, page 24

## Personalizing the Direct Reports Pagelet

Access the Personalize Direct Reports page.

Personalize Direct Reports page

### Display Additional Information

Values include:

- *Employee ID*
- *Job Title*
- *Location*
- *Phone*

## Personalizing the Phone Numbers Pagelet

Access the Personalize Phones page.

Personalize Phones page

### Personalize Phones

Select the column order for each of the phone types that you want to appear.

---

**Note.** Only the wide version of this Direct Reports Phones pagelet displays multiple columns. The narrow version displays one phone number using the first choice from the personalize page.

---

## Personalizing the Recruiter Alerts Pagelet

Access the Personalize Alerts page.

**Personalize Alerts**

Specify the number of alerts you would like to see on your pagelet.

**Display Preferences**

☒ **New Applicants**      \*Applied Within: 020 - Yesterday ▼

☐ **Auto Match Results**

☒ **Interviews Today**

☒ **Interview Evaluations**

☒ **Prepare Job Offer**

☒ **Approve Job Offer**

☒ **Prepare for New Hire**

☒ **Approve Job Opening**

**Save**      [Return to Previous Page](#)

Personalize Alerts page

Use this page to select the alerts that you want to display on the Recruiter Alerts pagelet.

|                              |                                                                                                                                                                                                                                                     |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New Applicants</b>        | Select to display the number of new applicants that have applied to your job openings within a certain number of days.                                                                                                                              |
| <b>Applied Within</b>        | Select a default setting for monitoring new applicants. The system displays the number of applicants that have applied within the selected number of days. For example, you can select to view applicants that have applied within the last 30 days |
| <b>Auto Match Results</b>    | Select to display the number of applicants currently in the Auto Match results.                                                                                                                                                                     |
| <b>Interviews Today</b>      | Select to display the number of interviews scheduled for the user.                                                                                                                                                                                  |
| <b>Interview Evaluations</b> | Select to displays the number of interview evaluations assigned to the user.                                                                                                                                                                        |
| <b>Prepare Job Offer</b>     | Select to display the number of applicants in the Prepare Job Offer queue.                                                                                                                                                                          |
| <b>Approve Job Offer</b>     | Select to display the number of applicants in the Approve Job Offer queue.                                                                                                                                                                          |
| <b>Prepare for New Hire</b>  | Select to display the number of new hire proceedings for applicants that have accepted job offers.                                                                                                                                                  |
| <b>Approve Job Opening</b>   | Select to display the number of job openings waiting for approval.                                                                                                                                                                                  |

## See Also

*PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*

## Personalizing the My Job Openings Pagelet

Access the Personalize My Job Openings page.

### Personalize My Job Openings

Select the information that should display on the pagelet. The values selected for Status Code and Created Within are the criteria that determine which Openings display on the pagelet. The selected values in the Additional Columns list determine which columns are displayed on the pagelet. The Job Opening column is preselected and will always display.

#### My Job Openings

|                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>With Status of:</b>               | <div style="border: 1px solid #ccc; padding: 2px;">006 Pending Approval</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Created Within:</b>               | <div style="border: 1px solid #ccc; padding: 2px;">040 - Last Week</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Maximum displayed rows:</b>       | <div style="border: 1px solid #ccc; padding: 2px; width: 40px; text-align: center;">5</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Additional Columns (max. = 5)</b> | <div style="margin-bottom: 5px;"><input checked="" type="checkbox"/> Job Opening</div> <div style="margin-bottom: 5px;"><input checked="" type="checkbox"/> Job Opening Title</div> <div style="margin-bottom: 5px;"><input type="checkbox"/> Location</div> <div style="margin-bottom: 5px;"><input checked="" type="checkbox"/> Hiring Manager</div> <div style="margin-bottom: 5px;"><input type="checkbox"/> Status</div> <div style="margin-bottom: 5px;"><input type="checkbox"/> # Days Open (Since Approval)</div> <div style="margin-bottom: 5px;"><input type="checkbox"/> # of Openings</div> <div style="margin-bottom: 5px;"><input type="checkbox"/> # of Filled Openings</div> <div style="margin-bottom: 5px;"><input type="checkbox"/> # of Applicants</div> <div style="margin-bottom: 5px;"><input type="checkbox"/> Job Opening Activity Hyperlink</div> <div style="margin-bottom: 5px;"><input checked="" type="checkbox"/> Actions</div> |

Save

[Return to Previous Page](#)

Personalize My Job Openings page

Use this page to define what information displays on the My Job Opening pagelet. Use the fields in the upper portion of the page to place parameters on the type of information you select in the lower portion of the page. To include a type of information on the pagelet, select the corresponding check box. The Job Opening check box is selected as a default, and you can select four more types of information to display on the pagelet.

### With Status of

Select a specific status for which you want to view job openings. If you do not make a selection, job openings in all statuses that meet other criteria you specify on this page will be available using the My Job Opening pagelet.

### Created Within

Select a point in time from which you want to view job openings. For example, select *Last Month* to display your job openings for the last 30 days or *Last Week* to see your openings for the last seven days. If you do not make a selection, the system does not display any results on the My Job Opening pagelet.

**Maximum displayed rows** Enter the number of rows you want to display on the My Job Opening pagelet. You can enter up to 99 rows; however, the system will only display the number of job openings that meet the criteria you specify.

### See Also

Chapter 4, “Using HRMS Portal Pack Pagelets,” Viewing the My Job Openings Pagelet, page 40

*PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*

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## Viewing HRMS Manager Pagelets

This section discusses:

- Viewing the Birthday Alerts pagelet.
- Viewing the Anniversary Alerts pagelet.
- Viewing the Workforce Availability pagelet.
- Viewing the Time Management Alerts pagelet.
- Viewing the Open Positions pagelet.
- Viewing the Manager Expiring Licenses pagelet.
- Viewing the Scheduled Training pagelet.
- Viewing the Employee Performance pagelet.
- Viewing the Company Directory pagelet.
- Viewing the Manager Leave Summary pagelet.
- Viewing the Direct Reports pagelet.
- Viewing the Direct Reports Phones pagelet.

---

**Note.** You can personalize these pagelets, so they can appear differently in the application than described in this chapter.

---

### See Also

Chapter 4, “Using HRMS Portal Pack Pagelets,” Personalizing Pagelets, page 17

## Viewing the Birthday Alerts Pagelet

Displays upcoming employee birthdays.

| Birthday Alerts         |   |                                   |
|-------------------------|---|-----------------------------------|
| Birthday                |   | Name                              |
| 4/15                    | ! | <a href="#">Kasey Elders</a>      |
| 4/16                    | ! | <a href="#">Angela McKay</a>      |
| 4/16                    | ! | <a href="#">Vicki Zinn</a>        |
| 4/22                    |   | <a href="#">Andrew Pierce</a>     |
| 4/29                    |   | <a href="#">Francesca Fierros</a> |
| <a href="#">More...</a> |   |                                   |

Birthday Alerts pagelet

Managers use this pagelet to view the birth date for their direct reports.

Click an employee name to access the Employee Information page in PeopleSoft Enterprise eProfile where you can view additional information about a specific employee and access links to pages with more specific employee information.

Click More to view all employee birthdays.

## Viewing the Anniversary Alerts Pagelet

Displays upcoming employee job anniversaries.

| Anniversary Alerts      |   |                                  |       |
|-------------------------|---|----------------------------------|-------|
| First Start Date        |   | Name                             | Years |
| 04/13/1990              | ! | <a href="#">Calvin Konig</a>     | 16    |
| 04/16/1998              | ! | <a href="#">Cynthia Thompson</a> | 8     |
| 05/10/1987              |   | <a href="#">Julie Dyer</a>       | 19    |
| 04/26/1997              |   | <a href="#">Wendy Kwan</a>       | 9     |
| <a href="#">More...</a> |   |                                  |       |

Anniversary Alerts pagelet

Managers use this pagelet to view the hire date for their direct reports.

Click an employee name to access the Employee Information page where you can view additional information about a specific employee and access links to pages with more specific employee information.

This pagelet uses time and labor group security or defaults to department security to determine the employees reporting to a manager. The reporting structure also depends on the association to the manager's row security permission list.

The date that appears in the First Start Date column is the current date, unless the time and labor date is enabled on the Time and Labor Permission List page for the manager's row security permission list.

## Viewing the Workforce Availability Pagelet

Displays summarized current availability and general absence information.

| Workforce Availability               |                |
|--------------------------------------|----------------|
| Employee Status                      | Employee Count |
| Currently Clocked In                 | 1              |
| No Show for Current Shift            | 9              |
| Scheduled for Current Shift          | 9              |
| Reported Absent for Today            | 0              |
| Reported In Training for Today       | 0              |
| <a href="#">Daily Time Calendar</a>  |                |
| <a href="#">Weekly Time Calendar</a> |                |

Workforce Availability pagelet

Click the Customize button in the upper right-hand corner to define which statuses display in the Employee Status column.

To populate the Employee Count field for the Reported Absent for Today status, the system checks for any absences reported in PeopleSoft Enterprise Absence Management whether they are designated for PeopleSoft Enterprise Payroll for North America or for Global Payroll.

The system uses data from the PeopleSoft Enterprise Learning Management application to update the Employee Count field for the Reported in Training for Today status. However, you must enable the application to retrieve the data. To send the training data, the system uses the Scheduled Time Fullsync and Scheduled Time Sync messages. Training data is stored in the PS\_SCH\_EXT\_DTL record.

#### Daily Time Calendar and Weekly Time Calendar

Click to access the Daily Time Calendar and Weekly Time Calendar pages to view current time-related information on employees. These time calendars provide more detailed information regarding availability details.

### See Also

Chapter 4, “Using HRMS Portal Pack Pagelets,” Personalizing the Workforce Availability Pagelet, page 19

## Viewing the Time Management Alerts Pagelet

Displays time related events and occurrences alerts.

| Time Management Alerts                         |             |
|------------------------------------------------|-------------|
| Alerts                                         | Occurrences |
| Overtime Limit Reached                         | 0           |
| Overtime Approval Required                     | 0           |
| <a href="#">Payable Time Approval Required</a> | 24          |
| <a href="#">Exceptions to Review</a>           | 24          |
| Absence Approval Required                      | 0           |

Time Management Alerts pagelet

Alert links on this pagelet are active only if there are occurrences to report and action to be taken.

The pagelet uses time and labor group security or defaults to department security to determine employees reporting to a manager, depending on the association to the manager's row security permission list. In addition, the date is determined as the current date, unless the time and labor system date is enabled on the Time and Labor Permission List page for the manager's row security permission list.

---

**Note.** This page requires implementation of Time and Labor.

---

|                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Overtime Limit Reached</b>         | <p>Click to access the View Overtime Balances page where you can view detailed information regarding overtime limits reached by employees.</p> <p>Click Get My Employees or Get Employees in Group on the View Overtime Balances page to view the overtime limits and balances.</p> <p>The occurrences equal the count of the employees that are shown to have exceeded their overtime limit when you view overtime balances.</p> |
| <b>Overtime Approval Required</b>     | <p>Click to access the Approve Overtime Requests page where you can view and approve overtime requests for employees.</p> <p>The occurrences indicate the number of requests to be approved. This value equals the count of the employees that appear on the Select an Employee Request page.</p>                                                                                                                                 |
| <b>Payable Time Approval Required</b> | <p>Click to access the Approve Payable Time page where you can view and approve reported payable time.</p> <p>The occurrences indicate the number of rows of payable time to be approved.</p>                                                                                                                                                                                                                                     |
| <b>Exceptions to Review</b>           | <p>Click to access the Manage Time Exceptions page where you can view time reporting exceptions generated through time reporting.</p> <p>The occurrences indicate the number of exceptions to review.</p>                                                                                                                                                                                                                         |
| <b>Absence Approval Required</b>      | <p>Click to view and approve Global Payroll absence requests for employees.</p> <p>This link only displays if Global Payroll is installed. The occurrences indicate the number of absence requests to be approved.</p>                                                                                                                                                                                                            |

### See Also

*PeopleSoft Enterprise Time and Labor 9.0 PeopleBook*, "Managing Time," Managing Exceptions

## Viewing the Open Positions Pagelet

Displays information on positions currently open.



| Position                                       | Position Headcount |
|------------------------------------------------|--------------------|
| <a href="#">Manager- Compensation/Benefits</a> | 1                  |
| <a href="#">Benefits Specialist</a>            | 2                  |
| <a href="#">HRIS Specialist</a>                | 2                  |
| <a href="#">Labor Relations Specialist</a>     | 1                  |
| <a href="#">Administrative Assistant</a>       | 3                  |
| <a href="#">More</a>                           |                    |

Open Positions pagelet

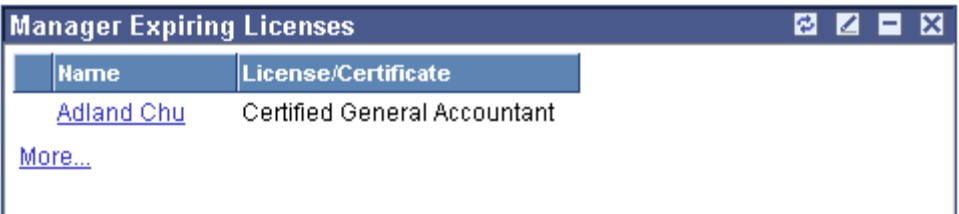
|                           |                                                                       |
|---------------------------|-----------------------------------------------------------------------|
| <b>Position</b>           | Displays the position title.                                          |
| <b>Position Headcount</b> | Displays the number of open positions for the corresponding position. |
| <b>More</b>               | Click to access the complete list of open positions.                  |

**See Also**

Chapter 3, “Setting Up HRMS Portal Pack,” Defining Default Settings for the Open Positions Pagelet, page 12

**Viewing the Manager Expiring Licenses Pagelet**

Displays employee information on licenses and certificates which employees hold related to their jobs.



| Name                       | License/Certificate          |
|----------------------------|------------------------------|
| <a href="#">Adland Chu</a> | Certified General Accountant |
| <a href="#">More...</a>    |                              |

Manager Expiring Licenses pagelet

An asterisk next to the employee name implies that the license is being renewed. Click an employee name link to access the License/Certificate Detail page to view details of a selected employee’s license or certificate.

**Viewing the Scheduled Training Pagelet**

Displays employee training that has been scheduled. The page also displays the course start date and the enrollment status.

Click an employee name link to access the Training Summary page where you can view details regarding the selected employee’s training. The Training Summary page provides detailed information on training including internal and external training and courses that have been completed.

Click the More link to access the Scheduled Training page.

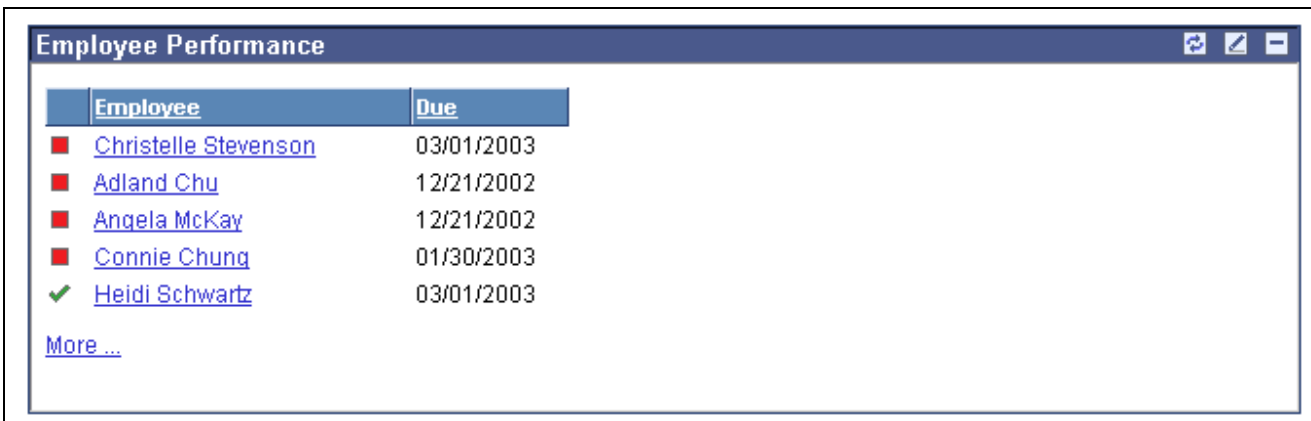
### See Also

*PeopleSoft Enterprise eDevelopment 9.0 PeopleBook*, “Requesting Employee Training,” Reviewing Training History Information

*PeopleSoft Enterprise eDevelopment 9.0 PeopleBook*, “Requesting Employee Training”

## Viewing the Employee Performance Pagelet

Displays summarized employee performance information.



|                          | Employee                             | Due        |
|--------------------------|--------------------------------------|------------|
| ■                        | <a href="#">Christelle Stevenson</a> | 03/01/2003 |
| ■                        | <a href="#">Adland Chu</a>           | 12/21/2002 |
| ■                        | <a href="#">Angela McKay</a>         | 12/21/2002 |
| ■                        | <a href="#">Connie Chung</a>         | 01/30/2003 |
| ✓                        | <a href="#">Heidi Schwartz</a>       | 03/01/2003 |
| <a href="#">More ...</a> |                                      |            |

Employee Performance pagelet

Managers use this pagelet to check the status of the performance document for which they are responsible. The pagelet lists the employees with performance documents, the dues dates, and an indicator that shows whether a document is complete, on schedule, behind schedule, or cancelled.

Click an employee name link to access the Maintain Performance Document page. The type of document that appears on the Maintain Performance Document page depends on the document types that you set up on the Employee Performance Alerts Settings page.

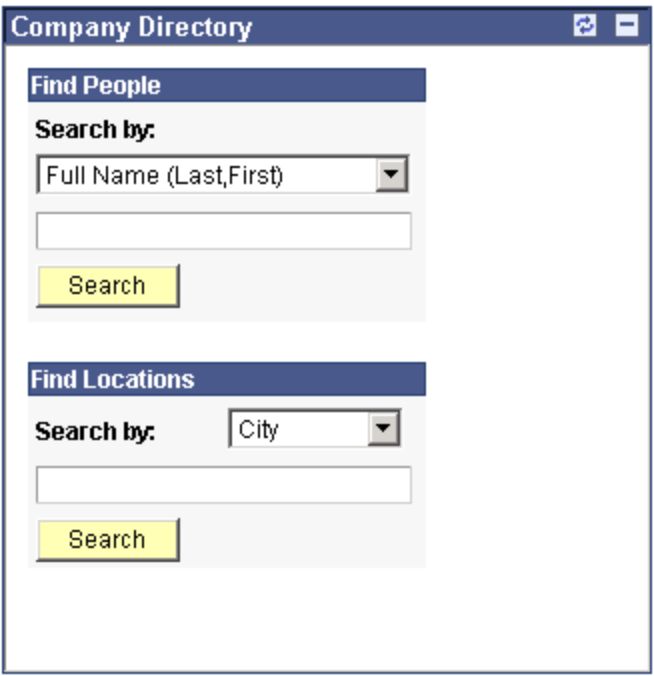
Click the More link to access performance information for additional employees.

### See Also

Chapter 3, “Setting Up HRMS Portal Pack,” Defining Default Settings for the Employee Performance Alerts Pagelet, page 9

## Viewing the Company Directory Pagelet

Displays search fields to locate employees by name and or location.



The screenshot shows a 'Company Directory' window with two search sections. The 'Find People' section has a 'Search by:' dropdown menu set to 'Full Name (Last,First)', a text input field, and a yellow 'Search' button. The 'Find Locations' section has a 'Search by:' dropdown menu set to 'City', a text input field, and a yellow 'Search' button.

Company Directory pagelet

Employees use this pagelet to search for people or locations.

## Viewing the Manager Leave Summary Pagelet

Displays information about absence requests from employees.



The screenshot shows a 'Manager Leave Summary' window. It contains a section titled 'Your Employee's Absence Request' with a list of links. The links are: 'Danilo Travantti Sick Push Back on 2004-09-21', 'Danilo Travantti Sick Push Back on 2004-09-21', 'Danilo Travantti Injury Submitted on 2004-09-21', 'Owen Wills Sick Submitted on 2004-09-21', and 'Owen Wills Vacations Submitted on 2004-09-21'. Below the list is a 'More' link.

Manager Leave Summary page

This pagelet displays information for absence requests. Select a value in the Your Employee's Absence Request to access Absence Requests page. You use the page to review absence requests by status and to access absence requests details.

Click the More link to view additional requests if they exist.

## Viewing the Direct Reports Pagelet

Displays information on direct reports.

| Direct Reports                                             |             |            |            |                     |            |                       |                          |
|------------------------------------------------------------|-------------|------------|------------|---------------------|------------|-----------------------|--------------------------|
| Name                                                       | Employee ID | Job Title  | Department | Location            | Work Phone |                       |                          |
| <a href="#">Adland Chu</a>                                 | KU0065      | SrPyrl Clk | Finance    | Delaware Operations |            | <a href="#">Skill</a> | <a href="#">Training</a> |
| <a href="#">Andrea Ashford</a>                             | 0022        | GenAuditor | Finance    | CA                  |            | <a href="#">Skill</a> | <a href="#">Training</a> |
| <a href="#">Andrew Pierce</a>                              | K0MTX006    | Clerk III  | Finance    | Delaware Operations |            | <a href="#">Skill</a> | <a href="#">Training</a> |
| <a href="#">Angela McKay</a>                               | KU0069      | GenAuditor | Finance    | Delaware Operations |            | <a href="#">Skill</a> | <a href="#">Training</a> |
| <a href="#">Angelica Alvarez</a>                           | KUZ100      | SrFinAnlst | Finance    | Delaware Operations |            | <a href="#">Skill</a> | <a href="#">Training</a> |
| <a href="#">More...</a><br><a href="#">Employee Search</a> |             |            |            |                     |            |                       |                          |

Direct Reports pagelet

Managers use this pagelet to view a list of their direct reports.

Click a link in the Name column to access the Employee Information page in eProfile where you can view additional details for a specific employee. This page also contains links to related employee data pages.

**Note.** To view all the columns available for the Direct Reports pagelet, make sure you are using a two-column layout. Click the Layout link to make change the setting.

|                        |                                                                                                                                                |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Skill</b>           | Click to access the Competencies page where you can view detailed information regarding the skills of a selected employee.                     |
| <b>Training</b>        | Click to access the Training Summary page where you can view detailed information regarding training for a specific employee.                  |
| <b>More</b>            | Click to access additional direct reports. You can view the same information for each additional employees as you can view using this pagelet. |
| <b>Employee Search</b> | Click to access the Employee Search page where you can define search criteria to find a specific employee.                                     |

## Viewing the Direct Reports Phones Pagelet

Displays employee phone contact information.

| Direct Reports Phones            |              |           |              |           |              |           |
|----------------------------------|--------------|-----------|--------------|-----------|--------------|-----------|
| Name                             | Business     | Extension | Home         | Extension | Mobile       | Extension |
| <a href="#">Adland Chu</a>       | 925/694-7969 |           | 925/693-3205 |           | 925/487-8009 |           |
| <a href="#">Andrea Ashford</a>   | 555/555-1234 |           | 555/652-1344 |           |              |           |
| <a href="#">Andrew Pierce</a>    | 925/694-5662 |           | 926/422-2344 |           | 926/422-3487 |           |
| <a href="#">Angela McKay</a>     |              |           | 925/694-7969 |           |              |           |
| <a href="#">Angelica Alvarez</a> |              |           | 926/423-5381 |           |              |           |
| <a href="#">More...</a>          |              |           |              |           |              |           |

Direct Reports Phones pagelet

Click a value in the Name column to see more details about the direct report. To change column headings, click the Customize button in the upper right-hand corner.

To see additional numbers, click the More link.

## Viewing HRMS Employee Pagelets

This section discusses:

- Viewing the Employee Expiring Licenses pagelet.
- Viewing the Upcoming Training pagelet.
- Viewing the Employee Leave Summary pagelet.
- Viewing the Stock Options pagelet.
- Viewing the View Payslip pagelet.

**Note.** All of these pagelets can be personalized and can appear differently in the application than they do in this chapter.

## Viewing the Employee Expiring Licenses Pagelet

Displays information on employee licenses that are nearing expiration.

| Employee Expiring Licenses                      |                 |
|-------------------------------------------------|-----------------|
| License/Certificate                             | Expiration Date |
| * <a href="#">Cardiovascular Technology</a>     | 10/31/2004      |
| <a href="#">Hazardous Materials Certificate</a> | 11/20/2004      |
| * Renewal in Process                            |                 |
| <a href="#">More...</a>                         |                 |

Employee Expiring Licenses pagelet

Click a license or certificate link to access the License/Certificate Detail page to view more details regarding a specific license or certificate that is expiring. If the renewal has been applied for, an asterisk appears at the left of the link.

## Viewing the Upcoming Training Pagelet

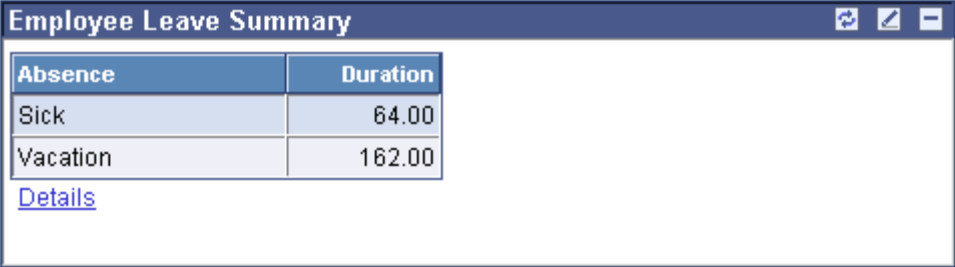
Displays upcoming scheduled training, including the course name, start date, and enrollment status.

Click a course name link to access the Training Summary Course Details page where you can view more details about a specific training course.

Click the More link to access the Upcoming Training page. Click the Training Summary link to access the Training Summary page.

## Viewing the Employee Leave Summary Pagelet

Displays absence summary information for the employee.



| Absence  | Duration |
|----------|----------|
| Sick     | 64.00    |
| Vacation | 162.00   |

[Details](#)

Employee Leave Summary pagelet

This pagelet displays absence summary information for an employee.

For Global Payroll users, payees can review absence history, review absence balances, enter requests for absences, and forecast absence balances as of a particular date.

For Payroll for North America users: Payees can view their leave balances.

**Details** Click to access detailed information regarding absences.

## Viewing the Stock Options Pagelet

Displays stock option grant information for an employee.



| Stock Options                  |            |      |             |
|--------------------------------|------------|------|-------------|
| Global Business Institute 9999 |            |      |             |
| Grant Number                   | Grant Date | Type | Price       |
| <a href="#">0000000402</a>     | 12/30/1999 | ISO  | \$21.750000 |
| <a href="#">0000000372</a>     | 12/31/1998 | ISO  | \$27.500000 |
| <a href="#">0000000346</a>     | 12/31/1997 | ISO  | \$22.125000 |
| <a href="#">0000000313</a>     | 12/31/1996 | ISO  | \$23.125000 |
| <a href="#">0000000289</a>     | 12/29/1995 | ISO  | \$19.000000 |
| <a href="#">0000000262</a>     | 12/31/1994 | ISO  | \$10.375000 |
| <a href="#">More...</a>        |            |      |             |

Stock Options pagelet

Employees use this pagelet to review detailed information about their stock options.

|                          |                                                                                                                    |
|--------------------------|--------------------------------------------------------------------------------------------------------------------|
| <b>Grant Number</b>      | Click to access the Stock Option Information page where you can view more details about a selected grant.          |
| <b>Grant Date</b>        | Displays when the stock was granted.                                                                               |
| <b>Type</b>              | Displays the type of stock plan.                                                                                   |
| <b>Price</b>             | Displays the granted stock option price.                                                                           |
| <b>Granted</b>           | Displays the number of shares that have been granted.                                                              |
| <b>Exercisable</b>       | Displays the number of shares currently exercisable for each grant listed.                                         |
| <b>Last Vesting Date</b> | Displays only the last date that options vested and does not display any additional information about the options. |

## See Also

*PeopleSoft Enterprise Stock Administration 9.0 PeopleBook*, “Administering Grants”

*PeopleSoft Enterprise Stock Administration 9.0 PeopleBook*, “Understanding Stock Purchase Plans”

## Viewing the View Payslip Pagelet

Displays a link to the current payslip.



| View Payslip                      |  |
|-----------------------------------|--|
| Click dates to view latest check. |  |
| <a href="#">2000-04-21</a>        |  |
| <a href="#">More</a>              |  |

View Payslip pagelet

Click a date link to access the View Paycheck page where you can view the corresponding payslip. Click More to access links to previous pay period payslips.

---

## Viewing Talent Acquisition Manager Pagelets

This section discusses:

- Viewing the Recruiter Alerts pagelet.
- Viewing the My Job Openings pagelet.
- Viewing the Find Job Openings pagelet.
- Viewing the My Applicants pagelet.
- Viewing the Job Openings pagelet.
- Viewing the Quick Search pagelet.

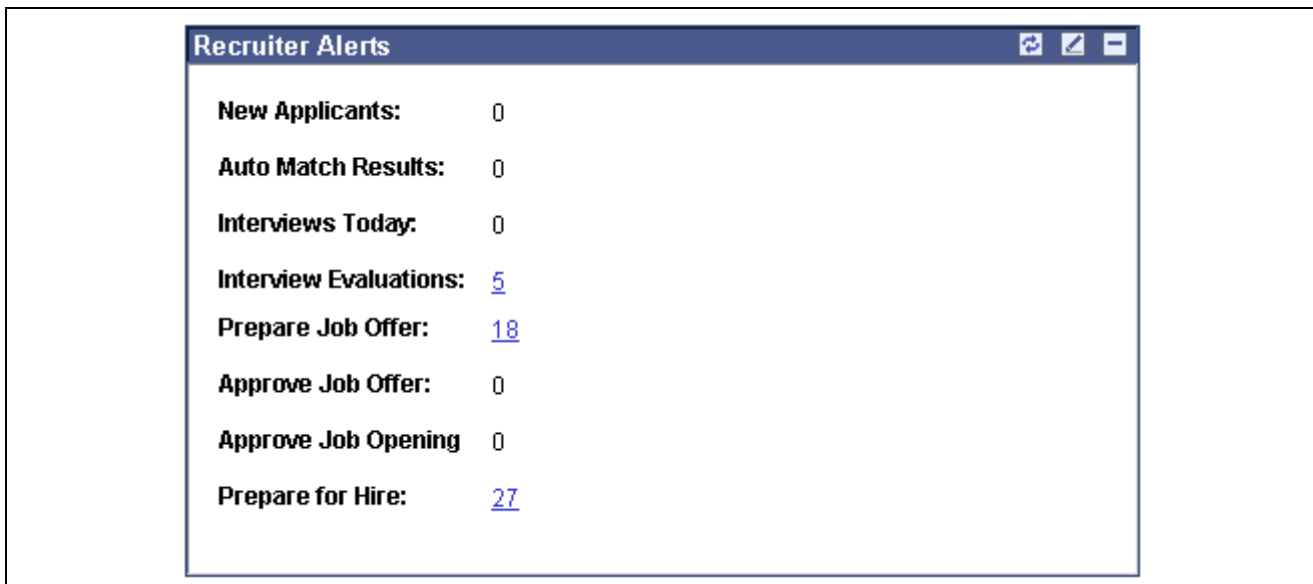
### See Also

*PeopleSoft Enterprise Talent Acquisition Manager 9.0 PeopleBook*

*PeopleSoft Enterprise Candidate Gateway 9.0 PeopleBook*

## Viewing the Recruiter Alerts Pagelet

Displays recruiter alerts.



Recruiter Alerts pagelet

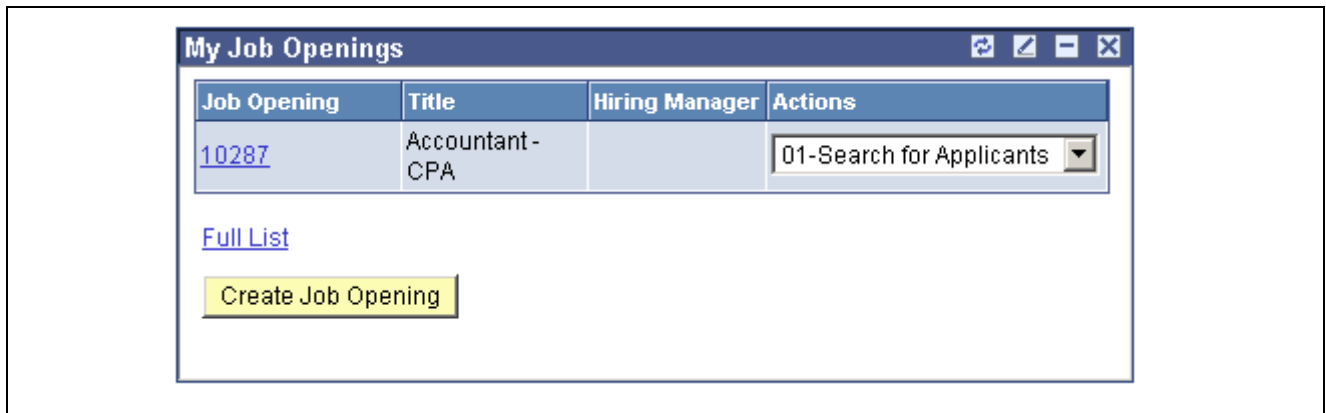
Use this pagelet to review notifications of items or transactions requiring an action. For each alert item, the system displays the number of associated occurrences. To personalize which alerts appear on this page, click the Customize button in the upper right-hand corner.

**Note.** If you have an alert, the system provides a link next to that alert that you can use to access results of the alert.

|                              |                                                                                                                                                                                                                                                                                                                             |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>New Applicants</b>        | Displays the number of new applicants that have applied to your job openings within a certain number of days. You define the default setting for monitoring new applicants using the Applied Within field when you personalize recruiter alerts. Select the link to access the Find Applicants page with populated results. |
| <b>Auto Match Results</b>    | Displays the number of applicants currently in the Auto Match Results queue. Select the link to view the results.                                                                                                                                                                                                           |
| <b>Interviews Today</b>      | Displays the number of interviews scheduled for the user on that specific day. Select the link to view a list of interviews.                                                                                                                                                                                                |
| <b>Interview Evaluations</b> | Displays the number of interview evaluations assigned to the user. Select the link to access the Interview Evaluation Summary page where you can view details about the interview.                                                                                                                                          |
| <b>Prepare Job Offer</b>     | Displays the number of applicants that are ready to have job offers made to them. Select the link to access the Prepare Job Offer page where you can view and process job offers.                                                                                                                                           |
| <b>Approve Job Offer</b>     | Displays the number of applicants in the Approve Job Offer queue. Select the link to access the Pending Approvals page. You use the page to review who sent you the approval, a list of offers waiting for your approval actions you can take with the job offer.                                                           |
| <b>Approve Job Opening</b>   | Displays the number of job openings waiting for approval. Pending Approvals page. Select the link to access the Pending Approvals page. You use the page to review who sent you the approval, a list of offers waiting for your approval actions you can take with the job offer.                                           |
| <b>Prepare for New Hire</b>  | Displays the number of new hire proceedings for applicants that have accepted job offers. Select the link to access the Find Applicants page where you can continue searching for applicants.                                                                                                                               |

## Viewing the My Job Openings Pagelet

Displays job openings for a specific user.



My Job Openings pagelet

Use this pagelet to view job openings for a specific user. To personalize the pagelet, click the Customize button in the upper right-hand corner.

---

**Note.** If you have personalized the My Job Openings pagelet, it is possible that there are no job openings that meet the criteria you selected. If this is the case, the page displays: No results found for the search criteria specified.

---

|                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Opening</b>                                          | Select a link for the job opening you want to view or maintain. You access the Job Opening page with details about the specific opening you selected. This column is the only default value for the pagelet.                                                                                                                                                                                                                                                                                                                                                           |
| <b>Title</b>                                                | Displays the name of the position for the job opening. Select the Job Opening Title check box on the Personalize My Job Openings page to display this value.                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Location</b>                                             | Displays the location code associated with the job opening. This might not necessarily be the location of the job.                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Hiring Manager</b>                                       | Displays the manager responsible for the job opening.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Status Code</b>                                          | Displays the current state of the job opening. Statuses include: <ul style="list-style-type: none"> <li>• <i>Cancelled</i></li> <li>• <i>Closed</i></li> <li>• <i>Denied</i></li> <li>• <i>Draft</i></li> <li>• <i>Hold</i></li> <li>• <i>Open</i></li> <li>• <i>Pending</i></li> </ul>                                                                                                                                                                                                                                                                                |
| <b>Days Open</b>                                            | Displays the number of days since the job opening has been approved.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b># of Openings</b> (number of openings)                   | Displays the number of openings for this job opening.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>% of Filled Openings</b> (percentage of filled openings) | Displays the number of openings that have been filled for this job opening.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b># of Applicants</b> (number of applicants)               | Displays the number of applicants attached to this job opening.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Activity</b>                                             | Click the Activity link for the job opening you want to view to access the Job Openings where you can work with applicant information.                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Actions</b>                                              | Select an action to be applied to the job opening and the system will launch the appropriate page for the action and selected job opening. Select one of the following options: <ul style="list-style-type: none"> <li>• <i>Search for Applicants</i>: Select to access the Find Applicants page where you can enter specific details about the search. The applicants are those linked to this job opening.</li> <li>• <i>Post Job Openings</i>: Select to access the Manage External Postings page where you can enter specific details about the search.</li> </ul> |

- *View Job Postings*: Select to access the Find Job Postings page where you can enter specific details about searching for job postings.
- *Clone Job Openings*: Select to access the Job Opening page where you can copy a job opening to create a new opening.
- *View Status History*: Select to access the Job Opening page where you can view the job opening status.
- *Manage Applicants*: Select to access the Job Opening page where you can manage job opening details.

**Full List**

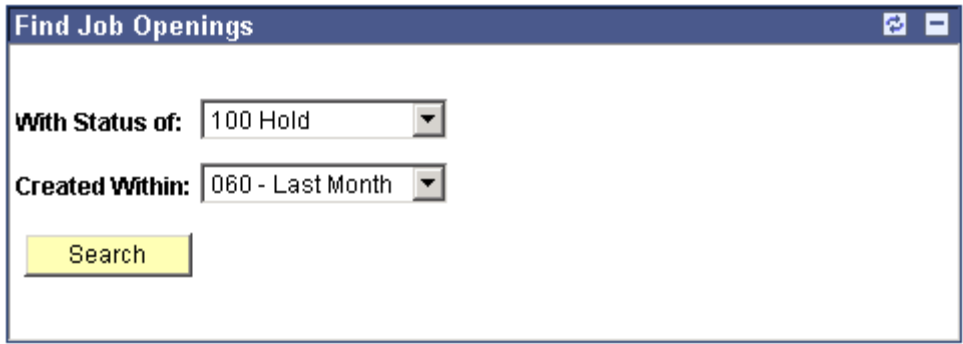
Select to access the Browse Job Openings page where you can view all job openings.

**Create Job Opening**

Select to access the Enter Primary Job Opening Information page where you can create a job opening.

## Viewing the Find Job Openings Pagelet

Displays search options for finding job openings.



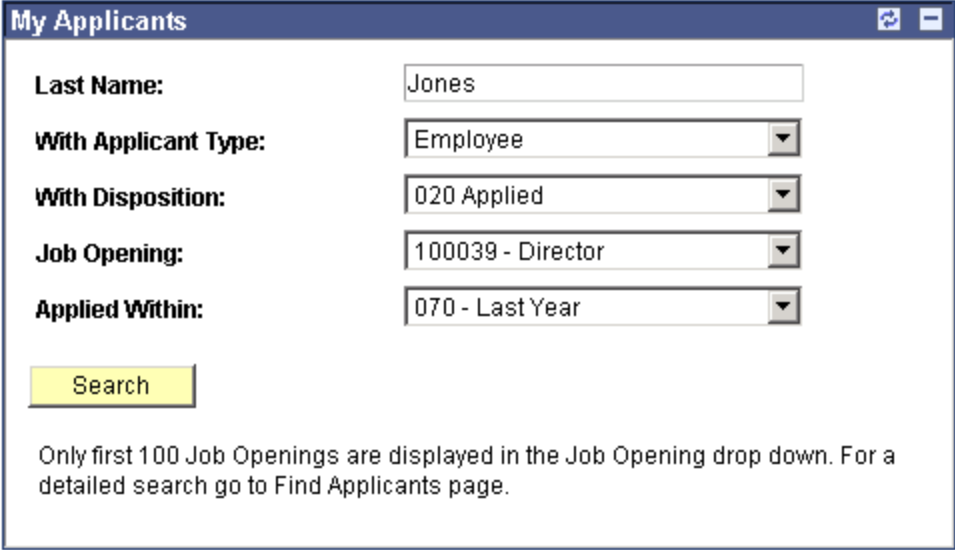
Find Job Openings pagelet

Use this pagelet to find job openings based on the job opening's status and when the opening was created. Select a value in the With Status of field to use status as a search option and use the Created Within field to use the date the opening was created.

You can reduce search results by using both fields. For example, you might contain the search to openings that have been cancelled in the last two weeks.

## Viewing the My Applicants Pagelet

Displays search options for applicants.



**My Applicants**

**Last Name:**

**With Applicant Type:**

**With Disposition:**

**Job Opening:**

**Applied Within:**

**Search**

Only first 100 Job Openings are displayed in the Job Opening drop down. For a detailed search go to Find Applicants page.

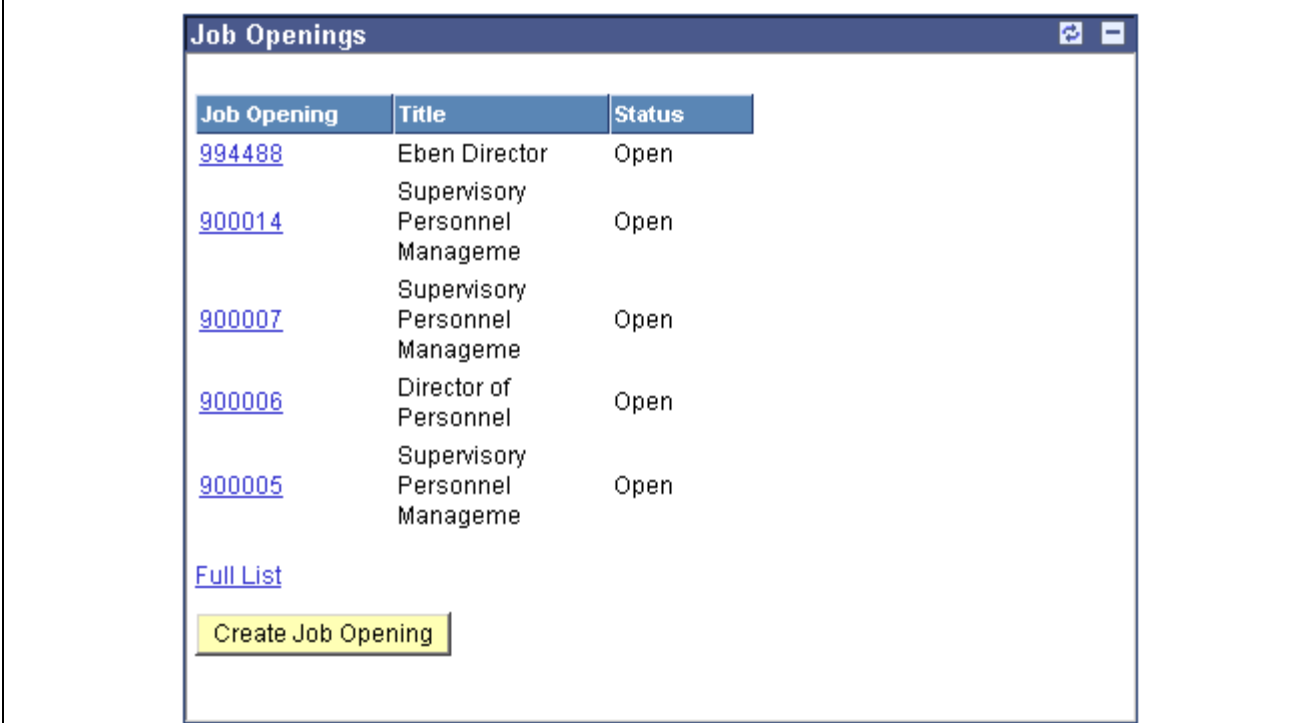
My Applicants pagelet

Use this pagelet to find applicants for a specific user by using various search methods. You can use a single method or combine them to reduce the number of search results.

|                            |                                                                                                                                                                |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Last Name</b>           | Enter a last name on which you to search for an applicant.                                                                                                     |
| <b>With Applicant Type</b> | Select an applicant type on which to search. Types include <i>Employee</i> , <i>External Applicant</i> , and <i>Non-Employee</i> .                             |
| <b>With Disposition</b>    | Select to search for an applicant with a specific disposition. Disposition include, for example, <i>Offer Accepted</i> , <i>Hired</i> , and <i>Withdrawn</i> . |
| <b>Job Opening</b>         | Select to search for an applicant by using a job opening ID.                                                                                                   |
| <b>Applied Within</b>      | Select to search for an applicant based on the date the applicant applied for a position.                                                                      |

## Viewing the Job Openings Pagelet

Displays job openings for all positions.



| Job Opening            | Title                                | Status |
|------------------------|--------------------------------------|--------|
| <a href="#">994488</a> | Eben Director                        | Open   |
| <a href="#">900014</a> | Supervisory<br>Personnel<br>Manageme | Open   |
| <a href="#">900007</a> | Supervisory<br>Personnel<br>Manageme | Open   |
| <a href="#">900006</a> | Director of<br>Personnel             | Open   |
| <a href="#">900005</a> | Supervisory<br>Personnel<br>Manageme | Open   |

[Full List](#)

Create Job Opening

Job Openings pagelet

Use this pagelet to view and update job openings.

## See Also

Chapter 4, “Using HRMS Portal Pack Pagelets,” Viewing the My Job Openings Pagelet, page 40

## Viewing the Quick Search Pagelet

Displays the Quick Search pagelet.



Quick Search

Applicant (Last,First Name)

Johnson,Robert

Search

Quick Search pagelet

Use this pagelet to initiate a search for information about applicants and job openings. Select a search option, then enter a corresponding value in the lower field and click Search. Search options include:

- *Applicant (Last, First Name)*: Enter the applicant’s last name and then first name to access the Find Applicants page where you can continue the applicant search.
- *Hiring Mgr (Name)*(hiring manager name): Enter the hiring manager’s first and last name to access the My Job Openings page where you can view and update your job openings.

- *Job Opening Number:* Enter the number of the job opening to access the My Job Openings page where you can view and update a specific job opening.
- *Search Resume Text:* Enter text that you want to search for in a resume.



# Glossary of PeopleSoft Enterprise Terms

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *inquiry access*.

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

**yield by operation**

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

**zero-rated VAT**

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



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