
Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Setup Manager

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Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Setup Manager
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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

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

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

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

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

Additional Resources

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Common Elements Used in PeopleBooks

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

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

Setup Manager Preface

This preface discusses Setup Manager.

Setup Manager

Setup Manager enables your organization to quickly identify the products your organization will implement and the setup required to support your implementation. Furthermore, Setup Manager brings together the list of tasks required to support your implementation and the relevant documentation by providing PeopleBooks documentation links.

CHAPTER 1

Getting Started with Setup Manager

This chapter discusses:

- Basic requirements for implementers
- Setup Manager setup

Setup Manager Overview

Setup Manager is a tool that helps you implement PeopleSoft applications by using a project and predefined tasks to produce a setup task list that is specific to your implementation project.

The setup task list identifies the setup tasks required to support your specific implementation and presents those tasks in the sequence in which they must be completed. The list contains the related navigation path to the setup component and provides a direct link to that setup component. For each task, the system identifies a suggested load method and provides links to PeopleBook documentation so that you can view documentation for the associated setup component.

Implementation Project Management

An implementation project is a list of the features that you have selected to implement. It is organized either by business process or by product suite and product. Setup Manager enables you to alternate between views to refine the effect of one selection method upon the other.

As you create your implementation projects, you see that the information presented on the pages is specific to your installed PeopleSoft products. When you select a particular product to implement, the list of features that appears is specific to that product. This helps guide you through the selection process and enables you to create an implementation project that is tailored to your licensed and installed PeopleSoft applications.

Setup Task List Generation

The Setup Manager feature enables you to generate a step-by-step list of tasks that are necessary for you to successfully set up your PeopleSoft system. An Application Engine process produces a sequenced list of tasks that must be completed to support the features that you are implementing.

Setup Tasks

After you've generated the list of setup tasks, you use the list to guide you through the implementation process. The setup list pages display an ordered list of tasks to be completed and links to associated PeopleBooks that contain setup information.

Basic Requirements for Implementers

PeopleSoft applications support a broad range of configurations that accommodate the way in which you do business. As with any implementation, you are asked to make business decisions during this process to ensure that the final configuration reflects your company's business needs.

The implementation team must consider whether your company will alter your existing business processes to fit within the PeopleSoft system's delivered functionality or whether you will modify the PeopleSoft system to match your existing business processes. These decisions require a thorough understanding of how your business operates, and should be based on a solid knowledge of PeopleSoft functionality.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, PeopleTools documentation, and the PeopleBooks that are specific to your applications.

The Setup Manager is designed to assist you with your implementation of recently purchased PeopleSoft products. Alternatively, you may use Setup Manager to implement new products that are now available to you because of a recent upgrade.

Setup Manager Setup

Several activities must be completed before you use the setup task list that will guide you through the implementation of your PeopleSoft applications.

- The implementation team must make business decisions regarding what functionality you need to configure within your PeopleSoft applications.
- You must install your PeopleSoft database and define security access.

The PTLT_PROJECT_MGR and PTLT_IMPLEMENTER roles contain the permissions lists necessary to access the relevant Setup Manager pages contained within a PeopleSoft database. (PTLT_IMPLEMENTER allows you only to view implementation project options).

- You must acquire a user profile that provides access to the setup components and processes that you use during the implementation.

Additionally, you must ensure that a Process Scheduler server is configured and running on the database that you are working on so that the Application Engine processes can be run.

You can use Setup Manager with the PeopleSoft products for which you are licensed (and which have been installed on the database). Setup Manager resides in one database and enables you to perform the implementation in only that database.

Setup Manager supports the implementation of one or more products within a single PeopleSoft database. If your implementation requires multiple PeopleSoft databases, you use one setup task list for each database.

Enabling PeopleBooks Help

PeopleBooks are the documentation delivered with every PeopleSoft application. The Setup Manager provides a link to PeopleBooks for each setup task identified by Setup Manager in your setup task list. This link accesses the section in the applicable PeopleBook that explains the fields and pages of the setup components with which you are working.

To view the documentation from Setup Manager, you must install and configure PeopleBooks so that you can deploy the PeopleSoft documentation at your site. You can install PeopleBooks to a dedicated web server machine or to a separate web server machine. Regardless of where you install PeopleBooks, you must first install the web server software.

CHAPTER 2

Managing Implementation Projects

This chapter provides an overview of implementation projects, lists common elements, and discusses how to:

- Manage implementation projects
- Implement by products
- Implement by business processes
- Save implementation projects
- Generate setup task lists

Understanding Implementation Projects

Implementation projects comprise PeopleSoft product suites or business processes and their underlying products and features that you have chosen through the Manage Implementation Projects pages.

Regardless of whether you choose to make your implementation projects selections from a business process or a product perspective, Setup Manager displays the supporting data to the feature level. Only installed products and their related business processes are displayed on the page for selection.

You begin by selecting an implementation method—either by business process or by product—that influences how the underlying features are presented to you. The strategy of selecting an implementation method is determined by the way in which you’ve structured your implementation project team or your implementation project. For example, consider whether you are replacing or improving a specific business process such as Order to Cash, or planning to implement specific PeopleSoft modules. You and your implementation team need to assess your company’s needs and choose the implementation method accordingly.

From the Product Summary page or the Business Process Summary page, you can see your feature selections displayed relative to the products or business processes that they support. For example, if you are implementing a group of PeopleSoft product suites or products, you can check the Business Process Summary page to see what business processes you are supporting based on your feature selections. At that point, you might determine that you have a business process partially implemented, which might influence whether you elect to implement the entire business process using Setup Manager.

After you select the products and business processes for the implementation projects, save it with a unique name.

Multiple Projects

You might want to generate more than one implementation project to support various implementation scenarios. For example, to perform a phased implementation, you can create a implementation project for each implementation phase. Or, you might also want to create different implementation projects to investigate the effect of selecting a particular set of features. You can also create different implementation projects to support different teams working concurrently on different functional areas. For example, you might have a team working on modules such as General Ledger and Accounts Payable while another team works on Order Management and Billing.

In summary, you can create multiple implementation projects that reflect different implementation scenarios. For example, you can create implementation projects that are specific to different phases of an implementation, or you might want to examine the effect of implementing different combinations of products and business processes.

Common Elements Used in This Chapter

Select All	Click to select all check boxes in the grid.
Clear All	Click to clear all check boxes in the grid.
Additional Configuration	Displays activities that must be performed before or after a particular setup task.
Business Process	Displays one of the delivered business process models maintained by the PeopleSoft system.
Implementation Options	Displays the PeopleSoft application features that you have selected for implementation. The list of features is available to be edited or viewed by either product suite and product or by the associated business process.
Detailed Business Process	Identifies a second-level subsection of the delivered business process.
Feature	Identifies an aspect of PeopleSoft functionality that requires one or more setup elements to be defined before it can be used. For example, Journal Generation, Travel Authorizations, and Commitment Control are all delivered features that can be selected by the user to implement. Features can be associated with more than one product, and more than one feature can be associated with one product. Additionally, features can be associated with one or more business processes.
Product	Identifies a module of PeopleSoft software that is licensed to you. For example, PeopleSoft General Ledger, PeopleSoft Benefits Administration, and PeopleSoft Help Desk are all PeopleSoft products. Products can be associated with more than one product suite, and more than one product can be associated with one product suite.
Product Suite	Identifies a grouping of products that exist either within a product line or across product lines. For example, PeopleSoft Customer Relationship Management and PeopleSoft Human Capital Management are both product suites.
Setup Task	Identifies a step or unit of work in the task list.
Setup Task List	Identifies the setup tasks that must be configured to support the defined implementation projects.

Product Name	Displays the product name as a link to the Product Features page, on which you can select underlying features for the product.
Selected Features	Displays the number of features that support the particular product and how many of those features have been selected for implementation.
View Summary	Click to display the summary page of features that you have selected to implement based on either product or business process. You must select at least one feature to be able to view the summary page.
Expand All	Maximizes the collapsible section of the page to show the underlying business process or product name, the associated features, and a description of each feature.
Collapse All	Minimizes the collapsible section of the page to hide the underlying business process or product name, the associated features, and a description of each feature.
Continue	Displays the next page in the process.
Save	Click to save the information on the page.
Select All	Marks all check boxes on the page as selected.
Clear All	Clears all selected check boxes on the page.
	In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.
	Click to return the expanded grid to its tabbed state.
	Click to download the contents of a grid to a Microsoft Excel spreadsheet.

Managing Implementation Projects

Access the Manage Implementation Projects page.

Manage Implementation Projects

Manage Existing Project							
				Find View All	First	1-5 of 5	Last
Project Name	Description	Task List	Updated on	Export	Delete		
AM_AP_AR	Asset Mgmt, Payables, Receivables	View	09/21/04 4:28:00PM PDT				
ASSET_MGMNT	All Asset Management Features	Failed	09/21/04 4:46:51PM PDT				
BILLING	All Billing Features	View	09/17/04 3:23:43PM PDT				
DEPRECIATION	Asset Management Depreciation	View	09/17/04 3:07:08PM PDT				
PORTAL_PACKS	ESA and FIN Portal Packs	View	09/17/04 3:25:46PM PDT				

Create New Project By		
Products	Business Processes	Project Import

Manage Implementation Projects page

You can create implementation projects based on products and features or based on business processes and features.

In the Create New Project By group box, click **Products** to select from a list of different products and related features for your implementation. Click **Business Processes** to select from a list of business processes and their associated underlying features.

After you have saved an implementation project, you can retrieve it by using the Manage Existing Projects grid on the page. If you select a saved implementation project, Setup Manager retrieves and displays a page showing the product summary and the business process summary for that project.



Click to export an implementation project, including its setup task list if it exists. The Export page appears and prompts you for a save location.



Click to delete the selected project, and if it exists, the project's setup task list.

Project Import

Click to import a project. The system prompts you to enter the location of an implementation project XML file. You cannot import projects that already exist or that are from a different version of your installed product line. The system uses the filename of the XML file as your project name.

Implementing by Products

This section discusses how to:

- Select products
- Select features
- View the product summary

Selecting Products

If you implement your system based on products, select the products that your company wants to implement, or navigate to the underlying features and select them for implementation. Only those products licensed to you and marked as installed on the PS_INSTALLATION table are available for you to select.

Access the Product List page.

The Product List page comprises several collapsible grids that are labeled with the names of the PeopleSoft product suites. The collapsible grid label also shows the number of products that have been selected for implementation out of the total number of products that you installed relative to that product suite. The default appearance of the Product List page is expanded to show all of the product suites. When expanded, each collapsible grid shows a list of products within the particular product suite. To collapse the product lists that you don't want to view, click the arrow that precedes the name of the PeopleSoft product suite.

To select all products associated with a particular product suite, select the check box to the left of the product suite name. As a default, no products are selected for implementation.

If a product belongs to more than one product suite and you select it for implementation, that product is automatically selected for all product suites in your system. For example, if you select Grants Management as a product suite, it includes the *Billing* product. Any other product suite that has Billing in it is also selected by the system.

Selecting Features

Access the Product Features page by clicking the product name link.

Product Features

Product Suite Name Customer Fulfillment Management

Product Name Receivables

Feature List			
Customize Find View All  First 1-10 of 36 Last			
Select	Feature Name	Required	Description
☒	Banking General		Setup common elements for Banks.
☒	Customers and Contacts		Model your customer's structure and contact relationships.
☒	General Ledger General		Setup common elements for General Ledger including Business Units, users, security, ledgers, calendars, periods, etc.
☒	Receivables General		Setup common elements for Receivables including customers, Business Units, accounting rules, etc.
☒	Action Lists		Maintain action lists.
☒	Aging		Execute the batch Aging process.
☒	Automatic Maintenance		Execute the batch Automatic Maintenance process.
☒	ChartField Configuration		Configure ChartFields and define ChartField values, combinations, etc.
☒	Collections Management		Manage collection items.
☒	Commitment Control		Configure commitment control budget setup, security authorization, and budget closing rules.

Product Features page

Products comprise *features* that support individual products. This page displays the list of features that support the product that you've selected and enables you to select one or more of those features to include in the implementation. Select the check box for the features that you want to implement. The system automatically selects all required features for that product after at least one feature is selected.

The Select All and Deselect All links enable you to edit the list more efficiently.

Required Features

Some of the features listed on pages are identified as required features. A required feature contains the basic components without which a particular product could not be implemented; therefore required feature must be set up for the product to function correctly. All required features appear at the top of the feature list by default. The system automatically selects all required features when you select any of the features for the product. If you clear one of the required features, Setup Manager clears all other features for that product.

If a required feature belongs to more than one product or product suite and you select it for implementation, that feature is automatically selected for all products or product suites in your system. In addition, Setup Manager selects any additional required features that support the other products and product suites.

Viewing the Product Summary

Access the Product Summary page.

Product Summary

Business Process Summary

Customize | Find | View All | 

First  1-10 of 34  Last

Product Suite Name	Product Name	Selected Features	Feature Name	Delete
Financial Management	Asset Management	17 of 17	Asset Management General	
			General Ledger General	
			Asset Capital Planning	
			Asset Classification	
			Asset Depreciation Allocation	
			Asset Disposal Worksheet	
			Asset Maintenance	
			Asset Taxation	
			Billing General	
			ChartField Configuration	

Implementation Project

ASSET_MGMNT

All Asset Management Features

Add/Remove Features

[By Product](#)

[By Business Process](#)

	Setup Task List	Last Update Date/Time	Last Generated Date/Time	Delete
	View Setup Task List	09/17/04 3:24:20PM	09/17/04 3:20:46PM	

Product Summary page

The names of the product suites and products on this page are links to the Product List page and the Product Features page, on which you can view and edit the list of features that you want to implement.

Product Suite Name	Click the name of the product suite to view the Product List page.
Product Name	Click the name of the product to view the Product Features page.
Selected Features	Displays the number of features selected for implementation out of the total possible features for that product.
Feature Name	Displays the name of the feature as defined by PeopleSoft development.
Required	A red star appears in this column if the feature is required for this product.
Delete	Click to delete this feature from the implementation project. This action is enabled only for nonrequired features. Any feature that you delete from the Product Summary page is also deleted from the Business Process Summary page.
Implementation Project	Displays the name of the implementation project. This field is not populated until you save the implementation project.
Add/Remove Features	Click the By Product link to display the Product List page, on which you can add and remove features.

Click the By Business Process link to display the Business Process List page, on which you can add and remove features.

Save and Regenerate

Click to start the process that creates the setup task list. This button is not available for selection until the implementation projects has been saved.

Note. If you remove a feature from this page, the system also removes the feature from the Business Process page.

Implementing by Business Processes

This section discusses how to:

- Select business processes
- Select business process features.
- View the business process summary.

If you implement your system based on business processes, you select the delivered business process that your company wants to implement, navigate to the underlying features, and select them for implementation. The PeopleSoft system delivers a list of business processes that are specific to your installed products. Only those business processes related to at least one installed product in the particular PeopleSoft database are available for you to select, and only those features associated with those products can be selected.

Note. Setup Manager focuses on key business processes based on installed products that PeopleSoft delivers to customers. These business processes are stored as system metadata and are delivered with Setup Manager in the same way that the product and product suite information are delivered.

Selecting Business Processes

Access the Business Process List page.

Business Process List

Select Business Processes to implement or drill down to edit Features.

View Summary

Select

[Expand All](#)
[Collapse All](#)

☐ **▼ Cash Management (0 of 4)**

Select	Detailed Business Process	Selected Features	Description
☐	Analyze Risk	0 of 2	Analyze cash flow and determine exposure to risk; perform valuation and analysis of portfolio; assess risk profile and determine hedging strategies
☐	Determine Cash Position	0 of 12	Load and reconcile bank statements; forecast cash position; compare actual cash position to forecast; adjust forecast if necessary or determine action to be taken

Business Process List

Business processes comprise two categories: high-level business processes and detailed business processes. High-level business processes comprise several detailed business processes. Detailed business processes comprise groups of features that support the detailed business process and, in turn, roll up into the high-level business process.

The Business Process List page comprises several collapsible grids that are labeled with the names of a high-level business process. The grid label also shows the number of detailed business processes that have been selected for implementation out of the total number of detailed business processes supported by one or more of your installed products. The default appearance of the Business Process List page shows all business processes expanded, where each collapsible grid is a list of detailed business processes within the high-level business process. To collapse the high-level business process lists that you don't want to view, click the arrow that precedes the name of the PeopleSoft high-level business process.

If you choose to implement your system based on business processes, select the detailed business process that your company wants to implement, navigate to the underlying features, and select them for implementation. Only those business processes licensed to you and supported by products marked as installed on the PS_INSTALLATION table are available for you to select.

To select all detailed business processes associated with a high-level business process, select the check box to the left of the high-level business process name. As a default, no business processes are selected for implementation. You can select a subset of the features that support an individual detailed business process by clicking the detailed business process name link.

If a selected feature also supports other detailed business processes, the feature is automatically selected for the other detailed business processes where it is referenced. Additionally, the features that you selected on the business process side are also marked as selected for that product when viewing it from within a product suite.

Selecting Business Process Features

Access the Business Process Features page.

Business Process Features

Business Process Cash Management

Detailed Business Process Analyze Risk

Description Analyze cash flow and determine exposure to risk; perform valuation and analysis of portfolio; assess risk profile and determine hedging strategies

Feature List				
Select	Product Name	Feature Name	Required	Description
☐	Risk Management	Risk Management General		General Requirements for Installing Risk Management.
☐	Risk Management	Hedging		Hedge creation and processing.

Business Process Features page

This page displays the list of product and feature pairs that support the detailed business process that you've selected and enables you to select one or more of those features to include in the implementation. Select the check box for each feature that you want to implement. The system automatically selects all required features for the same product after at least one feature for the product is selected.

Required Features

A required feature must be set up for the product that supports the business process to function correctly. All required features appear at the top of the feature list by default. The system automatically selects all required features relative to a particular product when you select any of the features associated with that same product within the business process.

If you clear one of the required features, Setup Manager clears all other features associated with the same product that the required feature was associated with for that business process.

If a required feature belongs to more than one detailed business process and you select it for implementation, that feature is automatically selected for all detailed business processes in your system where it was assigned. In addition, Setup Manager selects any additional required features that support the same product that the originally selected required feature was associated with; Setup Manager does this for any detailed business processes where these features are assigned.

Viewing the Business Process Summary

Access the Business Process Summary page.

Product Summary

Business Process Summary

Customize Find View All First 1-10 of 17 Last					
Business Process	Detailed Business Process	Selected Features	Feature Name	Product Name	Delete
Financial Control and Reporting	Capture Transactions	16 of 16	Asset Management General	Asset Management	
			General Ledger General	Asset Management	
			Asset Capital Planning	Asset Management	
			Asset Classification	Asset Management	
			Asset Depreciation Allocation	Asset Management	
			Asset Disposal Worksheet	Asset Management	
			Asset Maintenance	Asset Management	
			Asset Taxation	Asset Management	
			ChartField Configuration	Asset Management	
			Inter/Intra Unit	Asset Management	
Implementation Project		ASSET_MGMNT		All Asset Management Features	
Add/Remove Features		By Product By Business Process			

Business Process Summary page

The names of the high-level business processes and detailed business processes on this page are links to the Business Process List page and the Business Process Features page, on which you can view and edit the list of features that you want to implement.

Additionally, features are listed on this page that don't directly support a business process, but that are required to support the business process. These features are identified as *Business Process Independent*.

Delete	Click the icon in this column to delete this feature from the implementation project. This action is enabled only for nonrequired features. Any feature that you delete from the Business Process Summary page is also deleted from the Product Summary page.
Add/Remove Features	Click the By Product link to display the Product List page, on which you can add and remove features. Click the link By Business Process to display the Business Process List page, on which you can add and remove features.
Generate Setup Tasks	Click this button to start the process that creates the setup task list. This button is not available for selection until you save the implementation projects.

Note. If you delete a business process from this page, the system also deletes the related features from the Product Summary page.

Saving Implementation Projects

To save the implementation projects, enter a unique name and a description for the implementation project that you've created. This name is used to retrieve an implementation project in the future and appears on the setup task list after it has been generated. Each time that you change an implementation project and save it, it is saved with the existing implementation project name.

Generating Setup Task Lists

This section discusses how to generate setup task lists and review setup task generation.

When you click Generate Setup Tasks on the Product Summary or Business Process Summary pages, the system starts the process that creates a list of setup tasks. The list is based upon the selections that you have made.

Click Generate Setup Tasks on the Product Summary or Business Process Summary page.

Reviewing Setup Task Generation

The Review Setup Task Generation page displays the status of the process that generates a list of step-by-step setup tasks for the implementation project that you specify. Each time that you run this process for a specific implementation project, it overwrites the existing setup task list for that specific implementation project. Additionally, if you select an implementation project that is currently undergoing processing, the system displays a message informing you that the implementation project is unavailable until the process has completed.

To view any processes that are currently running, select Review Setup Task Generation from the Portal navigation, and select the implementation project name. After the processes are complete, the Setup Task Generation Status page indicates that the process is complete, and you can then view the View Setup Tasks button to see the setup task list.

Setup Task Generation Status

Process Details

Run Status	Queued	Refresh
Project Name	ASSET_MGMNT	
Run Control ID	ASSET_MGMNT	
Process Instance	4033	

☒ Refresh status every 15 seconds
☐ Launch Setup Tasks when completed

[Process Monitor](#)
View Setup Tasks

 Return to Search

Setup Task Generation Status page

Refresh status every 15 seconds

Select to have the system automatically refresh the page every 15 seconds. If you do not select this check box, click the Refresh button on the page to manually refresh the page and determine the status of the process.

Launch Setup Tasks when completed

Select to have the system automatically display the Setup Task List page when the process has finished. This check box is not available until you have selected the check box to refresh the status of the page automatically.

View Setup Tasks

Click this button to display the Manage Setup Tasks page. This button is available after the process has run successfully.

CHAPTER 3

Performing Setup Tasks

This chapter provides an overview of the setup task list and discusses how to:

- Review the setup tasks.
- Complete tasks in parallel.
- Track setup tasks.
- View setup task details.
- Generate Excel to CI (Component interface) templates.
- Generate Data Mover scripts.
- Test the implementation.

Understanding the Setup Task List

The Setup Tasks List identifies the setup tasks that are required to complete your implementation based on the feature selections that you made in your implementation projects. Setup tasks appear in sequence in which they must be completed. The system indicates how each setup task relates to a specific PeopleSoft setup component.

Common Elements Used in This Section

Seq (sequence)

Displays the sequence number in which the setup tasks must be completed. Tasks that have the same sequence number can be performed in parallel.



Click to access the PeopleBook help for the identified task. This icon appears only for component-based setup tasks.

Setup Task

Displays the name of the task that must be completed. This name is also a link to the first page of the component if the task is a component-based task.

Pages Used to Manage Setup Tasks

Page Name	Object Name	Navigation	Usage
Manage Setup Tasks	PTLT_TASK_LIST	PeopleTools, Setup Manager, Manage Implementation Projects, View	View individual setup tasks, navigate to any additional tasks that must be completed, track implementation progress, and view load methods.
Discussion	PTLT_DISCUSSION	Click the Discussion icon on the Manage Setup Tasks page.	Enter information and discussion about the progress of this setup task.
Generate Data Mover Scripts	PTLT_PROJ_RECS	Click the Generate Data Mover Scripts link on the Manage Setup Tasks page.	Create and save a Data Mover script to migrate data for selected setup tasks.
Generate Excel to CI Template	PTLT_PROJ_CI	Click the Generate Excel to CI Template link on the Manage Setup Tasks page.	Create and save an component interface template for selected setup tasks.

Reviewing the Setup Tasks

Access the Manage Setup Tasks page.

Manage Setup Tasks

ProjectAM_AP_ARAsset Mgmt, Payables, Receivables

View By ProductAMAsset Management

Setup Tasks

Customize | Find | View 100 | First 1-20 of 173 Last

SummaryTrackingTask Details

Seq	Status		Setup Task	Description	Navigation	Products Affected	Features Affected
1.001			Installation Options	Specify installed PeopleSoft products and other installation options.	Set Up Financials/Supply Chain > Install > Installation Options	AM, AP, AR, AUC, BI, EG, EPO, EX, ...More	Payables General , Strategic Sourcing General , Billing General , ...More
2.001			Country		Set Up Financials/Supply Chain > Common Definitions > Location > Country	AM, AUC, CM, EPO, EX, IN, OM, PC, ...More	Asset Management General , Strategic Sourcing General , Cash Management General , ...More
3.001			State	Add or review a state or province code.	Set Up Financials/Supply Chain > Common Definitions > Location > State	AM, AUC, EPO, EX, IN, MG, OM, PO, ...More	Asset Management General , Strategic Sourcing General , Expenses General , ...More

Manage Setup Tasks page, Summary tab

The summary shows the step-by-step sequenced list of setup tasks and reflects the order in which the setup components must be configured.

Status	Displays the status of the task. Move the cursor over the icon. Values are <i>Not Started</i> , <i>In Progress</i> , and <i>Complete</i> .
Setup Task and Description	Displays the task, in bold, that must be completed. The content of this field also contains the portal hover text, defined for the component associated with this setup task. This text provides you with information about the purpose of the task.
Navigation	Displays the portal navigation for the setup component-based tasks and navigation path to non-component-based setup tasks.
Features Affected	Displays the features that are associated with the task.
Products Affected	Displays the products that are associated with the task.

Completing Tasks in Parallel

The setup tasks are ordered and displayed in the sequence that they need to be performed. The setup tasks that share the same main sequence number can be performed in parallel. For example, setup tasks 1.001, 1.002, and 1.005 could be performed in parallel; however, they must all be performed before any setup tasks at level 2. Tasks that share the same main sequence number still appear in the order that they should be performed if they are not done in parallel.

Tracking Setup Tasks

Access the Manage Setup Tasks page; select Tracking tab.

Manage Setup Tasks

Project AM_AP_AR Asset Mgmt, Payables, Receivables

View By Feature

Setup Tasks								
Summary		Tracking	Task Details	Customize Find View 100 First 1-20 of 373 Last				
Seq	Status		Setup Task	Assigned To	Start Date	End Date	Discussion	Percent Complete
1.001			Installation Options		31	31		
2.001			Country		31	31		
3.001			State		31	31		50
4.001					31	31		
5.001			Market Rate Index	Impl1	09/21/2004 31	09/22/2004 31		100

Manage Setup Tasks page, Tracking tab

Use the Tracking tab to manage the process and personnel associated with completing the setup tasks. The fields on this page are only informational and can be used by the project team and project manager to track the progress of the setup tasks.

Assigned To	Enter an owner for this setup task. This is a free-form edit box, so you can enter multiple names or the role of the individual who owns this task.
Start Date	Enter the start date for this setup task.
End Date	Enter an end date for this setup task.
Percent Complete	Enter the percentage of the task that has been completed. When you enter 100 percent, the Status field indicates Complete.

Viewing Setup Task Details

Access the Manage Setup Tasks page; select the Task Details tab.

Manage Setup Tasks

ProjectAM_AP_ARAsset Mgmt, Payables, Receivables

View By Feature

Setup Tasks

Customize | Find | View 100 | First 1-20 of 373 Last

SummaryTrackingTask Details

Seq	Status		Setup Task	Task Code	Cross Database	Load Method	Method Name
1.001		?	Installation Options	INSTALLATION.GBL	No	Online	
2.001		?	Country	COUNTRY_TABLE.GBL	No	Online	
3.001		?	State	STATE_DEFN.GBL	No	Online	
4.001				CURRENCY_CD_TABLE.GBL	No	Component Interface	CURRENCY
5.001		?	Market Rate Index	MARKET_RATE_INDEX.GBL	No	Online	Link
6.001		?	Market Rate Type	RT_TYPE_TBL.GBL	No	Online	
7.001		?	Market Rate Definition	MARKET_RATE_DEF.GBL	No	Online	

Manage Setup Tasks page, Task Details tab

The Task Details page displays the setup task, task code, whether a cross-database impact exists, and the load method that you can use to load the data for the component during the implementation.

Task Code	Displays the system-assigned code that identifies this task.
Cross Database	Identifies whether the setup task has a cross-database impact.
Load Method	Displays details about the load methods available for a given task. Values are: <i>Component Interface</i> , <i>ETL</i> , <i>Other</i> , and <i>Online</i> .
Method Name	Depending on the type of load method, displays the name of the component interface, ELT, or other load program.

Load Methods

For any component task, multiple methods exist by which to load the component with application data. Methods available for a given task display in the Load Method column. Examples of the methods are:

- Online pages might be used to enter application data manually.
- A component interface could be invoked using the Excel to Component Interface utility to load the component.
- A custom load program could be used to load application data.

Viewing Associated Products

Select a product code or Associated Products in the Products Affected column to view associated products.

Setup Task's Products

Project Name AM_AP_AR Asset Mgmt, Payables, Receivables
Seq 1.001
Task Installation Options

Setup Task Specific Products	
Product Code	Product Name
AM	Asset Management
AP	Payables
AR	Receivables
AUC	Strategic Sourcing
BI	Billing
EG	Engineering
EPO	eProcurement
EX	Expenses
GL	General Ledger
IN	Inventory

[Customize](#) | [Find](#) | [View All](#) | First 1-10 of 19 Last

[Return](#)

Setup Task Products page

Generating Excel to CI Templates

Access the Generate Excel to CI Templates page.

Generate Excel to CI Templates

Project Name AM_AP_AR Asset Mgmt, Payables, Receivables

Tasks with Component Interfaces				
Seq	Task Name	Task Code	CI Name	Select
4.001		CURRENCY_CD_TABLE.GBL	CURRENCY	☒
54.001	Location	LOCATION_TBL.GBL	LOCATION_TBL_CI	☐
57.001		DEPARTMENT.GBL	DEPT_CF	☐
59.001		ALTACCT.GBL	ALTACCT_CF	☐
60.001		BD_SCENARIO.GBL	BUDGET_SCENARIO	☐

Customize | Find | View All | First 1-5 of 45 Last

Generate Excel to CI Templates
[Select All](#) [Clear All](#)

▼ Template Generation Properties

***Web Server Machine**

Site Name

Language

***Portal Name**

***Port**

***Protocol**

***Node Name**

File Directory

***User ID**

***Password**

Generate Excel to CI Templates page

The fields on this page are part of the component interface connection parameters. However, note the following two fields:

Language Identifies the language used by the component interface (and thus from the database) and determines which Excel to CI base template is used. For example, if you select French from the dropdown list, the system uses the FRA subdirectory for the Excel to CI template.

File Directory Identifies the location to which the template is generated. The system administrator should provide a path local to the Process Scheduler to which the user can map a drive.

Generating Data Mover Scripts

Access the Generate Data Mover Scripts page.

Generate Data Mover Scripts

Project Name AM_AP_AR Asset Mgmt, Payables, Receivables

Some Tasks cannot be selected because by design, their underlying records do not allow the use of Data Mover. These Tasks will appear in the grid below with the "Select" box disabled. Please refer to PeopleBooks for the proper method of exporting and importing the records behind these Tasks.

Seq	Task Name	Task Code	Select
1.001	Installation Options	INSTALLATION.GBL	☒
2.001	Country	COUNTRY_TABLE.GBL	☐
3.001	State	STATE_DEFN.GBL	☐
4.001		CURRENCY_CD_TABLE.GBL	☐
5.001	Market Rate Index	MARKET_RATE_INDEX.GBL	☐

Customize | Find | View 100 | First 1-5 of 370 Last

[Generate Data Mover Script](#) [Select All](#) [Clear All](#)

Generate Data Mover Script page (1 of 2)

Data Mover Script

View ☒ Export ☐ Import

--NOTE: If a setup table is identified within the script more than once, the subsequent duplicate records will appear commented out.

```
SET NO TRACE;
SET LOG EXPORT_AM_AP_AR.log;
SET OUTPUT AM_AP_AR.dat;
/
```

File Name

[Save Export File](#)

[Save](#) [Return to Search](#)

Generate Data Mover Script page (2 of 2)

This page enables you to select the components for a specific task and generate Data Mover scripts that export and import your setup data to another database. This assists with the migration of application setup data from one environment to another. You can use the Data Mover scripts to populate other databases with setup data that you've entered in another environment.

Note. Some component-based tasks cannot be exported or imported by using Data Mover; these do not appear as selections.

After you select the component-based tasks and click the Generate Data Move Scripts button, an additional section of the page appears, showing the text of the Data Mover script and fields to enter a name for the scripts. The script includes a sequenced list of the tables that support the selected tasks. Where a table is identified within the script more than once, the duplicate references are commented out.

Note. Setup Manager identifies the primary tables that support the setup components that you select to migrate. Other tables, such as prompt edit tables that are defined on the component, are not identified by Setup Manager but might be necessary for the component to function in the new environment. You should identify these tables ahead of time when planning your implementation.

Generate Data Mover Script

Click to display an additional area of the page that displays the text of the Data Mover script as well as the directory where the script will be saved and filename of the script.

Note. This button is not available for selection until you have selected the check box for at least one setup task.

Export

Select to view the Data Mover export script.

Import

Select to view the Data Mover import script.

File Name

Enter the file name for the Data Mover script. No directory separators are allowed in the filename edit.

Save Export File

Click to save the file to the default output directory.

The PeopleSoft default directory is \$PSHOME\appserv\files, where \$PSHOME is the home PS directory.

Your system administrator might have specified other locations for the output directory including:

- The directory for the environment variable \$PS_FILEDIR that is defined during installation of the application server.
- The directory for the environment variable \$PS_SERVDIR that is defined during installation of the application server.

Testing the Implementation

When the tasks in the Setup Task List have been completed, the implementation team should verify that the application functions as designed and supports the business scenarios that the implementation was based on. The approach to verifying that the setup is complete is based on the team's implementation methodology.

After you have finished testing the implementation and are using the software in a live environment, you can use Setup Manager when you implement new releases, products, features, or business processes.

Tasks associated with testing the implementation might include:

- Testing individual online transactions and batch processes.
- Verifying whether you can access any existing data and enter new data successfully.
- Performing the steps of business processes end-to-end.

Glossary of PeopleSoft Enterprise Terms

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *inquiry access*.

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

yield by operation

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

zero-rated VAT

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

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