
Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications

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Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications
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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.

Using PeopleSoft Applications Preface

This preface provides a general overview of the contents of Using PeopleSoft Applications.

Using PeopleSoft Applications

This PeopleBook introduces you to the various elements of the PeopleSoft Pure Internet Architecture and explains how to perform basic functions as you navigate through the system using the navigation hierarchy, components, and pages. While your application or implementation may differ in some cases, the topics in this book provide general knowledge of the use of PeopleSoft applications.

CHAPTER 1

Working With Browser-Based Applications

This chapter provides an overview of browser-based applications and discusses how to:

- Sign in to PeopleSoft applications.
- Use PeopleSoft Pure Internet Architecture navigation.
- Use the universal navigation header.
- Use the pagebar.
- Process components.
- Use buttons and links.
- Use keyboard shortcuts.
- Use accessibility features.

Understanding Browser-Based Applications

You use PeopleSoft applications in a purely internet environment, called *PeopleSoft Pure Internet Architecture*. PeopleSoft Pure Internet Architecture is a server-centric architecture that requires only that a web browser be installed on individual user machines.

The PeopleSoft Pure Internet Architecture is your "window" to PeopleSoft applications as well as other web-based applications and content. Within your browser, sign in to the PeopleSoft Pure Internet Architecture as you would when opening a website. The PeopleSoft Pure Internet Architecture uses a dynamic menu pagelet for navigation and a *universal navigation header* that includes the following navigational tools: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. This navigation header appears at the top of every page as long as you are logged in.

PeopleSoft delivers your PeopleSoft application with a demonstration database that includes sample data to help you see how the system works. You can also use the demonstration database to experiment with specific PeopleSoft applications. The PeopleBooks for the various applications frequently refer to the demonstration information to clarify concepts and provide a common frame of reference for examples.

See [Chapter 1, "Working With Browser-Based Applications," Understanding the Universal Navigation Header, page 5.](#)

PeopleSoft Pure Internet Architecture Terminology

PeopleSoft applications are made up of a navigational structure, components (groups of pages), and pages. Using these elements, you can enter new data or change, delete, and modify the existing data in your application. Using the PeopleSoft Pure Internet Architecture is similar to browsing web pages; it provides a simple, intuitive way of working with your database.

Here are some of the basic elements used in PeopleSoft Pure Internet Architecture:

Menu pagelet	The PeopleSoft navigation structure, located on the left side of your screen. The menu pagelet contains links to content references, which enable you to access transaction pages, from which you can carry out actions and modify your data. Links display in a hierarchical format, some leading directly to transaction pages and some leading to other links. Menu items can expand or contract, depending on their content.
Content Reference	A link in the menu pagelet that accesses a transaction page. A content reference is a reference to a uniform resource locator (URL) for the transaction page.
Keys	The display-only fields that uniquely identify your data. To display a page, you perform a search using the key fields, such as Empl ID (employee identification).
Page	The individual display and data-entry screens for each part of your PeopleSoft application. Pages appear in the browser window.

See [Chapter 3, “Using Keys and Search Pages,” page 35](#).

Signing In to PeopleSoft Applications

Signing in to a PeopleSoft application is like opening a secured page on a website.

To sign in to a PeopleSoft application:

1. Open your default browser window.
2. Enter the URL for your application, or select the bookmark for the page where you want to work.
The Sign In page appears.
3. Select the language in which you want your transaction pages to appear.
4. Enter your user ID and password.

Your user ID and password are case sensitive. For security reasons, passwords always appear as asterisks in the display as you enter them.

5. Press TAB and ENTER, or click the Sign In button to sign in.

The PeopleSoft online system validates your user ID and password. If either the user ID or password is invalid, the system displays an error message below the Sign In button. You must reenter your user ID and password, or contact your security administrator for assistance.

After you sign in, the mouse pointer turns into a small hourglass, signifying that the online system is initiating your request. Whenever the system accesses data in the database, the hourglass appears on your desktop. If you entered valid sign in information, the system displays the homepage for your PeopleSoft system.

PeopleSoft Pure Internet Architecture structure provides "single signon" access, which allows you to work in multiple PeopleSoft applications and databases without having to sign in to each application. If your site has not implemented single signon, the system prompts you to enter a user ID and password each time that you access a different PeopleSoft application.

For security purposes, your PeopleSoft system logs you out of your application after a period of inactivity determined by your security administrator. Prior to your session timeout, the system might provide a warning that your browser session is about to expire. You can continue with your current session by clicking the OK button in the warning message. If you do not respond within two minutes, the session ends and the expired connection page opens. To return to your application, click the Sign in to PeopleSoft link. The Sign In page appears, and you can once again sign in to your application.

Important! To ensure data security in environments where multiple users have access to the same workstation, users should close the browser after logging out of PeopleSoft.

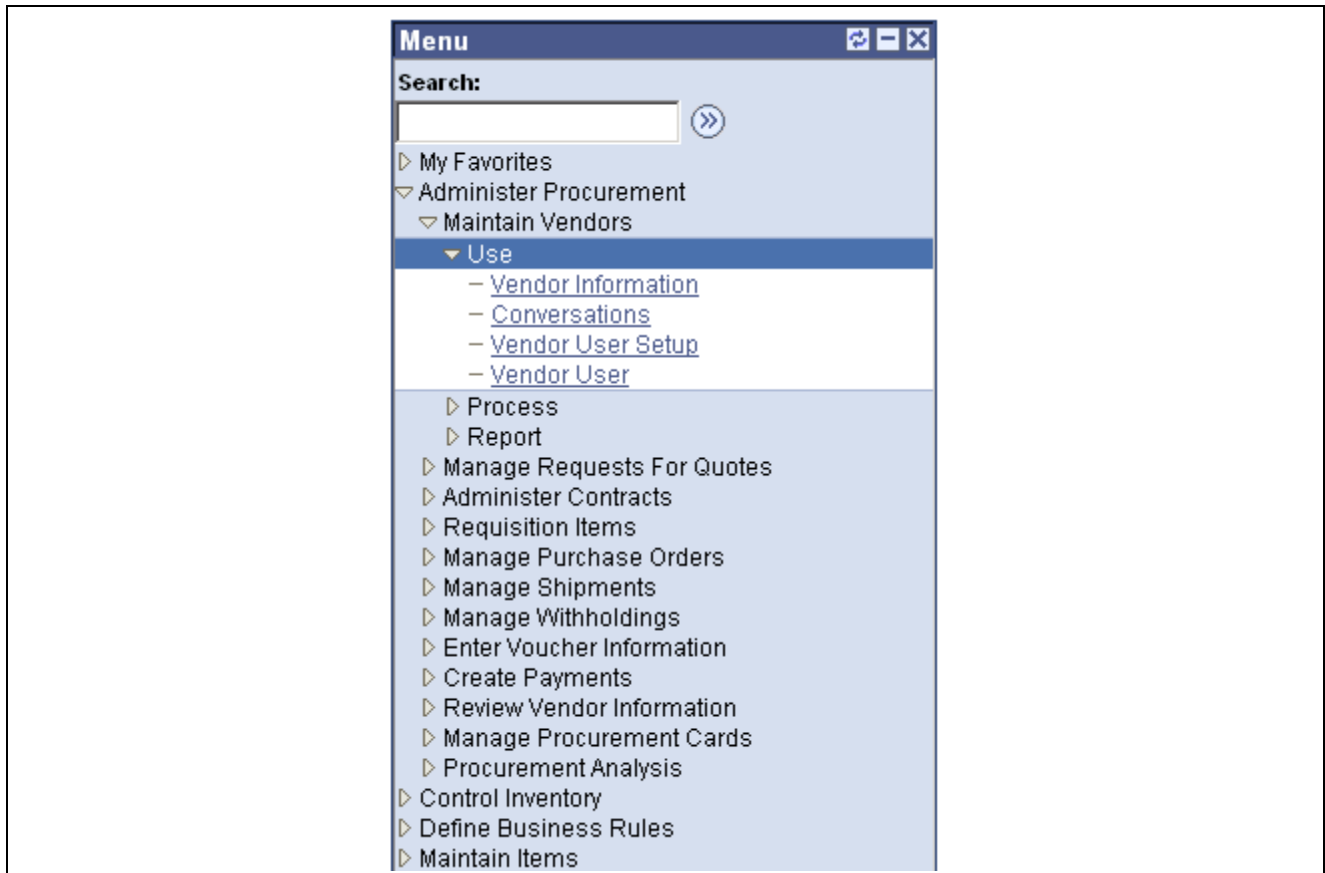
Using PeopleSoft Pure Internet Architecture Navigation

PeopleSoft's browser-based interface provides two means of accessing data in your database. This section discusses how to:

- Use the menu pagelet.
- Use navigation pages.

Using the Menu Pagelet

The PeopleSoft browser-based interface provides an intuitive way of updating or viewing data in your database. The menu pagelet consists of a hierarchy of folders and content references. Expanding and collapsing these folders, and selecting content references from within them, is the primary means of navigating within PeopleSoft applications.



Menu Pagelet

The main level, also known as Home, contains a general list of the areas to which you can link in that application. From this point you can expand any folder to access additional folders or content references that open transaction pages.

Use the buttons at the top of the menu to refresh, minimize, or close the menu pagelet. The refresh button returns the menu to its default state. If you close the menu pagelet, you can reopen it from the Personalize Content page.

Using the Menu Pagelet Search Feature

Use the Search field to search for a registered content reference within the system. Enter the name of the page you want to find and press ENTER or click the search button. This action opens the Search page displaying the results. If your search produces a large number of results, modify your search criteria, select the Search Within Results option, and then select Find to narrow your search further. Use the Customize Settings link to hide or show summaries of each search result and to control the number of search results that appear on each page.

Note. For the system to display search results, your system administrator must create a search index in PeopleTools. If you consistently do not get any search results, contact your system administrator for more information.

Using Navigation Pages

PeopleSoft applications may include navigation pages that serve as alternatives to the menu pagelet, providing task-driven pages that offer intuitive access to pages needed to complete your business processes. These navigation pages may incorporate icons to make it even easier for you to navigate your application.

You access navigation pages by clicking a folder in the menu pagelet. Elements embedded in the folder, including content references and other folders, are arranged in a graphical format on a navigation page displayed to the right of the menu pagelet. For example, clicking the Portal Utilities folder in the menu pagelet displays the Portal Utilities navigation page as shown here:

Important! Navigation pages are available starting with the 8.9 application release and with selected 8.8 applications.



PeopleTools Utilities standard navigation page

Using the Universal Navigation Header

This section provides an overview of the universal navigation header and discusses how to:

- Add favorites
- Edit favorites

Understanding the Universal Navigation Header

The universal navigation header is located at the top of your PeopleSoft Pure Internet Architecture page and remains static as you navigate through the pages. The universal navigation header contains these links:

Home	Click to return to your homepage.
Worklist	Click to access the Worklist page, which provides summary information about all items on your personal worklist. This page also provides links enabling you to view additional details about the work, perform the indicated work, and reassign work items. See Chapter 6, “Using Workflow,” Working with Received Notifications, page 86 .
MultiChannel Console	If you are defined as an agent in PeopleSoft MultiChannel Framework, click to access and manage tasks assigned to you. This is an optional setting that your system administrator enables. If you do not have access to this feature, the system displays a warning message to that effect.

Performance Trace	Click to monitor the performance of a business process that you typically complete. Because this is an optional setting that your system administrator enables using PeopleTools Security, it may not display to all users.
Add to Favorites	Click to add the current page to your favorites list for easy accessibility. The favorites list is like your own list of bookmarks to components and transaction pages that you use frequently. Once you add a favorite, it appears under the My Favorites folder in the menu. You can return to the page by expanding the My Favorites folder and clicking the link for the page that you want to view.
Sign out	Click to sign out of the application and return to the Sign In page. Important! For security purposes it is important that you sign out when you are finished with your PeopleSoft session rather than simply closing the browser window. Other users could potentially access your cached homepage from another portal if you do not sign out properly.

Note. Guest accounts do not have access to My Favorites or Add to Favorites. You must have the proper security before you can access favorites.

Adding Favorites

To add favorites:

1. Open the page that you want to designate as a favorite.
2. Click Add to Favorites in the universal navigation header.

The Add to Favorites page appears, with the page name as the default in the Description field.

3. If you like, update the description for the favorite.
4. Click OK.

The favorite is saved and displayed in the My Favorites folder.

Note. If pages are not registered in the portal registry, you cannot add them to the My Favorites folder. See your portal administrator for assistance.

Editing Favorites

On the Edit Favorites page you can relabel favorites, delete favorites, or modify the sequence in which they appear on your menu pagelet.

To edit favorites:

1. Expand the My Favorites folder in the menu pagelet.
2. Click Edit Favorites.

The Edit Favorites page appears, displaying a grid with the favorites that you selected and their sequence numbers. If there are no favorites currently saved, a message indicates this in place of the Favorites grid.

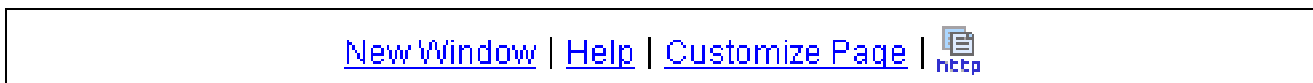
3. Locate the favorite that you want to modify, and make your changes.

To relabel a favorite, type a new name in the text box. To delete a favorite, press the Delete button associated with it. To reorder favorites, type an appropriate number in the Sequence number box.

4. Save your changes.

Using the Pagebar

Just below the universal navigation header sits the pagebar—a series of links and buttons that appear when you are on a transaction page. The availability of these options is controlled by the application developer. All options may not be available for each component.



Pagebar

New Window

Opens a new browser window.

See [Chapter 1, “Working With Browser-Based Applications,” Opening New Windows, page 9.](#)

Help

Opens the online PeopleBooks help for the displayed transaction page.

Customize Page

Enables you to control the initial page display. Opens the Page Customization page, where you can:

- Select the initial page in the component to be displayed.
- Save the state of the expanded and collapsed sections.
- Save the state of the View All settings on the page for grids and scroll areas.
- Customize the page field tabbing order.
 - Clear Tabbing Order. Removes the existing tabbing order.
 - Restore Default. Restores the default tabbing order.
 - Include In Tabbing Order. Click this option and then click a tabbed item to include it in the tabbing order.
 - Remove From Order. Click this option and then click a tabbed item to remove it from the tabbing order.
 - Move Up In Order. Click this option and then click a tabbed item to move it up in the tabbing order.
 - Move Down In Order. Click this option and then click a tabbed item to move it down in the tabbing order.

You can also elect to copy and share the settings that you have saved for the customized page.

See [Chapter 2, “Setting User Preferences,” Customizing Pages, page 21.](#)



Copies the current page URL to the clipboard so that it is available for pasting in emails or other applications. The copied URL includes page, action, and search key information to display in the context of the portal, if you are using

the portal. If you did not pass through the portal, the system displays the page only without the portal frames.

See *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*, “Administering Portals,” Defining Content References.

Processing Components

This section discusses how to:

- Access pages or components.
- Link to related pages.
- Open new windows.
- Save pages.

Accessing Pages or Components

Components typically consist of several related pages within the same window, however, some components only contain one page. Typically, significant pages such as those containing required fields come early in the page order. As you finish with one page, you can select the folder tab of another page to open it. You can think of this as leafing through several pages of a single form.

In addition to selecting tabs, you can click the links at the bottom of each page in the component to move to other pages within the component. Alternatively, you can press the corresponding access keys.

See Chapter 1, “Working With Browser-Based Applications,” Using Access Keys, page 14.

The screenshot shows the 'General' tab of a user management form for the user 'PTTOOLS'. The form includes sections for 'Logon Information' (Symbolic ID: SYSADM1, Password, Confirm Password, User ID Alias, Account Locked Out checkbox, Password Expired checkbox), 'General Attributes' (Language Code: English, Currency Code, Default Mobile Page, Enable Expert Entry checkbox), and 'Permission Lists' (Navigator, Homepage, Process Profile, Primary, Row Security, all set to QEPAGES with 'Explain' links). The 'Edit Email Addresses' link is also visible.

Sample component

To access a component:

1. Select the content reference from the menu pagelet or navigation page that relates to your page.
2. On the search page, enter search criteria to identify the row of data that you want to retrieve from the database.
3. Click Search to perform the search.

If your search returns multiple results, they appear in a grid from which you can select the data you want to view. If your search returns only one result, the system automatically displays that result in a page on the browser.

See [Chapter 3, “Using Keys and Search Pages,” Entering and Saving Search Criteria, page 36](#).

All pages in a group have the same search record, so the prompt in the initial search dialog box is the same regardless of which page you access first. You will not be prompted to enter new search criteria as you move from page to page in the component.

Likewise, during a save, pages in a component are treated as a single entity. When you click Save, the data on the pages is committed to the database. If you have not completed all required fields, the system prompts you to enter additional data.

Linking to Related Pages

Some pages, in addition to having links to other pages within the component, have links to related components or pages. The related links appear at the bottom of the transaction area above the toolbar. You can click any of these links to move easily to related transactions for the same key field so you can enter data without going through the search process again.

When you click a component link, the new transaction contains the same component links, enabling you to return to the original transaction. The component or page in which you are working appears in black text and is not underlined. Some applications may identify these related links in another way. For example, you might see the phrase "Go to:" along with the related links at the bottom of a page. You might also see a drop-down list box with "...More," which contains several more related transaction links.

Opening New Windows

The New Window link in the pagebar opens a new browser window or child window that displays the search page for the current component. From this window, you can view or enter new data. You can open as many child windows as needed by clicking the New Window link. Do *not* select File, New, Window from the browser menu. Doing so copies the current HTML from the parent window, instead of opening a new PeopleSoft-maintained window session.

When entering or viewing data in two different languages, use two separate instances of your browser program and sign in to each PeopleSoft session under the same user ID and password.

Important! When you open a window from within an application and then log out from there, PeopleSoft must log out from the application for security reasons. To remain logged into the application, you can just close the new window.

See Also

[Chapter 3, “Using Keys and Search Pages,” Using Search Pages to Retrieve Data, page 36](#)

Saving Pages

After modifying the data on a page, you *must* click the Save button to commit your changes to the database. If you attempt to leave the page without saving—by clicking another content reference from the menu pagelet or by clicking a different toolbar button such as Next in List,—you see save warning appears. Click OK to return to the page to save your changes. Click Cancel to exit the page without saving.

There are, however, other ways to exit a page. In these cases, the system issues no save warning:

- Clicking the Back button in the browser menu.

In some browsers you can return to the page with your edits intact by clicking the Forward button.

- Closing the browser session.

Using Buttons and Links

This section provides an overview of buttons and links and discusses how to:

- Use processing buttons.
- Use toolbar buttons.
- Use pop-up menus.

Understanding Buttons and Links

PeopleSoft Pure Internet Architecture provides buttons and links to help you navigate and process transactions. In general, if the action is related to navigation, it appears as a link. If the action is truly an action, such as *save* or *process*, it appears as a button. Click the button or link to carry out the command.

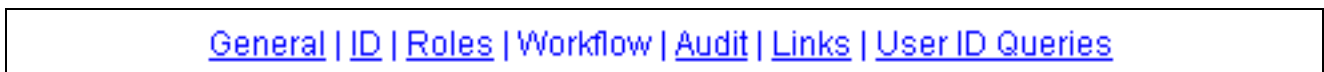
If a button appears grayed out, that action is currently not available. For example, when working in a transaction for the first dataset from a search list, you might see the following:



Active and inactive buttons

Your only option in this case is to click the Next in List button. Once you click Next in List, however, Previous in List will become available.

Similarly, links at the bottom of the page often enable you to move to another of the component's pages. In the following example, you can use the ID, Roles, and so on links to navigate to other pages. Notice that Workflow is not actually a link—it is not underlined—because it is the current page:



Page links in a component

Tool Tips

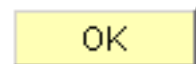
Tool tips are pop-up text messages that appear when your mouse pointer hovers over a button or link. Sometimes called hover text, tool tips display additional information about the action that the button or link performs. Typically, tool tips display what a button or link will do and may list its keyboard hot key, if applicable.

Using Processing Buttons

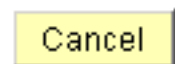
The following buttons process transactions.



Click to apply the data input without returning to the main page, in case you want to perform additional searches. Usually found on a page that you open by clicking a prompt button.



Click to accept the data input made on an auxiliary page and return to the main page.

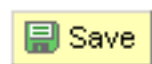


Click to clear the page and any data that you may have entered or changed without saving. When you click Cancel, the system does not warn you to save changes. Click Cancel if you entered data incorrectly and want to begin again.

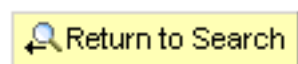
Using Toolbar Buttons

The toolbar appears at the bottom of most pages. It can include search list navigation buttons, page navigation buttons, and page action buttons; it changes depending on the type of page that is active or the settings that the developer has put into place for a particular transaction. Not all buttons shown in the following table appear on every page. Likewise, some buttons may be unavailable for selection.

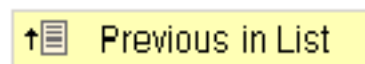
Note. In some cases, you may see different representations of a button, but the action is the same.



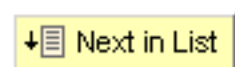
Click to send the information that you have entered on the page to the database. You generally save when you come to the end of a component. The Save button updates the data for all pages in a component. When activated, the system displays the saved message in the upper-right corner of the page.



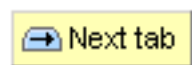
Click to return to the search page.



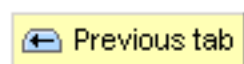
Displays the data for the previous data row in your search results grid. This button is unavailable if you did not select the data row from the search results grid, if there was only one row in the grid, or if the data that appears is the first row in the grid.



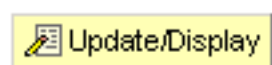
Displays the information for the next data row in your search results grid. This button is unavailable if you did not select the data row from a search results grid, if there was only one row in the grid, or if the data that appears is the last row in the grid.



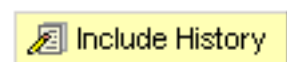
Displays the next page in the current component. If you are in the last page of the component, this button is unavailable.



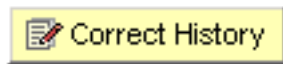
Displays the previous page in the current component. If you are in the first page of the component, this button is unavailable.



Click to access existing rows of data in the database. If data is effective-dated, only current and future rows appear.

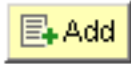


Click to display all rows of data: current, future, and history.



Click to access existing rows of data in the database and display all effective-dated rows. Enables you to update all rows, including history rows.

Note. This button is available only if you have the proper permission.

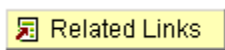


Click to add a row of data to the database for the current transaction.

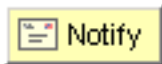


Click to force a trip to the server, validating any data that has been entered and processing any deferred PeopleCode changes.

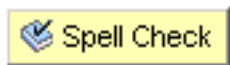
Note. This button is displayed only for components that are enabled for deferred mode processing.



Displays when several pages are related to the current page. Click to access a new page containing a list of related page links.



Click to open the Send Notification page, where you can specify names, email addresses, or worklists to which to send notifications.



Click to activate the spell check for all spell check enabled fields on the page. Each field is checked individually. As each field is checked, processing continues to the next field, displaying the spell check page if there are errors. If there are no errors, the *No misspellings found* message appears.

See [Chapter 4, “Working With Pages,” Using Spell Check, page 66](#).

Using Pop-Up Menus

Pop-up menu buttons appear next to fields on a page.



Click to access a new page to select among the menu items listed.

Appears if the pop-up menu contains more than one item.



Click to access the new transaction page directly.

Appears if the pop-up menu contains only one menu item.

Using Keyboard Shortcuts

This section provides an overview of keyboard shortcuts and discusses how to:

- Use hot keys.
- Use access keys.

Understanding Keyboard Shortcuts

Working in a browser-based environment can often be mouse intensive. However, PeopleSoft offers keyboard navigation alternatives to using the mouse. These shortcuts are classified into two categories: hot keys and access keys.

To view a printable list of these shortcuts while online, press CTRL+K while on a search or transaction page.

Note. Certain browsers may treat access keys and hot keys differently. See “Troubleshooting Browser Limitations” on Customer Connection for more specific information on browser differences.

Using Hot Keys

Hot keys perform immediate actions. When you press one, the designated action occurs. Note that several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page.

ALT+1	Saves a page in a transaction. Moves to the Search or Add button on a search or look up page. Moves to the OK button on a secondary page.
ALT+2	Returns to the search page from the transaction page.
ALT+3	View the next row in the list when the button is active.
ALT+4	View the previous row the in list when the button is active.
ALT+5	Accesses the Look Up page. Opens the calendar prompt.
ALT+6	Opens the pop-up window on a page.
ALT+7	Inserts a row in a grid or scroll area.
ALT+8	Deletes a row in a grid or scroll area.
ALT+0	When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.
ALT+ .	View the next set of rows in a grid or scroll area.
ALT+ ,	View a previous set of rows in a grid or scroll area.
ALT+ /	Finds data in a grid or scroll area.
ALT+ ‘	View all rows of data in a grid, scroll area, or search page results list.
ALT+ \	Toggles between Add a New Value and Find an Existing Value on a search page.
CTRL+ J	Displays the system information page.
CTRL+ K	When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.
CTRL+ Y	Toggles the menu pagelet between collapse and expand.
CTRL+TAB	Toggles the focus through the frame set.
ENTER	Activates the OK button, where appropriate. On a search page, activates the Search button. On a look up page, activates the lookup button.

ESC Activates the Cancel button, where appropriate.

Using Access Keys

Access keys move the focus of your cursor to a particular button on a page, at which point you can press ENTER to carry out the command. This is equivalent to clicking the appropriate button.

The following table outlines the shortcuts that you can use in place of clicking the equivalent action button. After pressing the desired key combination, you must press ENTER to carry out the action. For example, to save a page press ALT+1 followed by ENTER. Note that some access keys have multiple actions assigned to them, and the usage depends on the currently active page.

You can also use access keys for page tabs to help you move between pages in a component. Identify these access keys by noting the underlined letter in the page tab name. To access a page, press ALT plus the underlined letter, and then press ENTER.

ALT+9	Accesses the Help line.
ALT+ \	Toggles between Update/Display, Include History, and Correct History action modes on the toolbar on a transaction page.
CTRL+Z	Accesses the menu search box.

Menu Pagelet Access Keys

Navigate between menus by pressing CTRL+Z, which moves the focus of your cursor to the menu pagelet. From the menu, press TAB (or SHIFT+TAB for reverse direction) to navigate through the menu.

Using Accessibility Features

This section provides an overview of accessibility features and discusses how to enable accessibility features.

Understanding Accessibility Features

PeopleSoft applications include several accessibility features to help people with disabilities. These features support the use of assistive technologies, such as screen readers for blind users.

PeopleSoft accessibility features include the following:

- Alternate text for images, group boxes, buttons, navigation buttons for grids and scroll areas, collapsible section icons, hide and expand grid tabs, prompt buttons, and scroll left or right buttons.
- Additional links and anchors that enable screen reader software to bypass navigation content, such as page tabs.
- The removal of page links from the bottom of pages to reduce redundancy when using screen reader software.
- A feature that presents the elements on the body of a page in a linear format (for blind users operating a screen reader only).

Your system administrator grants access to the Accessibility Features option in PeopleTools. However, you can turn this option on or off in My Personalizations.

In accessibility mode, all pages except the home page include invisible links that can help you skip repetitive links in the content frame:

- "Skip over navigation links," the first link in the content frame, lets you skip the content navigation links—such as New Window or Customize Page—that appear on all pages. You can access this link quickly with a screen reader by skipping to the content frame, in which case the link is the first one in the frame. You can also use a window listing all the links on the page, in which case you use can type "J" and look for "Jump over navigation links."
- "Go to navigation links," located after the content navigation link, sends you back to the "Jump over navigation links " link located before the content navigation links.

Note. If the Accessibility Features option does not appear on the Personalizations page, contact your system administrator to enable this feature.

Enabling Accessibility Features

To enable accessibility features:

1. Click the My Personalizations content reference in the menu pagelet.
The Personalizations page appears.
2. In Personalization Categories, click the Personalize Option button that is next to the General Options description.
The Option Category: General Options page appears.
3. Select one of the following options from the Accessibility Features the drop-down list box:
 - a. Select *Use accessible layout mode* to alter the display of a page for maximum efficiency.
 - b. Select *Use standard layout mode* to use the standard page layout.
 - c. Select *Accessibility features off* option to disable the accessibility features.
This option is selected by default.
4. Click OK to save your changes.

To verify that your accessibility settings are in place, sign out of the system and sign in again.

CHAPTER 2

Setting User Preferences

You can define several settings to customize your homepage and data entry experience.

This chapter discusses how to:

- Personalize your homepage.
- Customize pages.
- Change your password.
- Set user personalizations.

Personalizing Your Homepage

With the PeopleSoft Portal and other licensed PeopleSoft portals, you can define and store your own portal homepages and specify preferences for their layout and content. The first time that you sign in to a PeopleSoft portal, you see the default homepage for that portal until you define a personal homepage.

This section discusses how to:

- Personalize content
- Personalize layout

See Also

Enterprise PeopleTools 8.49 PeopleBook: Internet Technology, “Administering Portal Homepages and Pagelets,” Creating Tabbed Homepages

Pages Used to Personalize Your Homepage

Page Name	Object Name	Navigation	Usage
Personalize Content	PORTAL_HPCOMP	Click the Content link on the homepage.	Personalize content by selecting the pagelets that you want to appear on your homepage.
Personalize Layout	PORTAL_HPLAYOUT	Click the Layout link on the homepage.	Personalize and organize the layout of the pagelets on your homepage.

Personalizing Content

Access the Personalize Content page.

Personalize Content

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

Welcome Message:

PeopleSoft Applications ☐ Main Menu ☒ Menu ☐ My Reports Products ☒ Availability ☐ Product Alternates ☐ Product Notes ☒ Product Search ☐ Current Product Summary ☐ Product Specifications	Cross-Financials ☒ Media Sources ☒ Operational Threshold Chart ☐ Operational Threshold Alert ☐ Business Development Manager ☐ Contract/Billing Administrator ☐ Department Manager ☐ Practice Manager ☒ Project Accountant ☒ Project Manager ☐ Services Employee/Resource	Customers ☐ Customer Account Balances ☐ Customer Aging ☒ Customer Conversations ☒ Customer Notes ☐ Customer Search Customer Contracts ☐ Most Recent Contracts ☒ Top Five Contracts ☐ Contract Milestone Metric ☐ Contract Product Group Metric
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Personalize Content page (representative example)

To personalize content on your personal homepage:

1. (Optional). Enter a welcome message.

This appears in the header on your homepage when you sign in to the portal.

2. Select check boxes to select the pagelets that you want to appear on your personalized homepage.

The portal administrator presets the available selection of pagelets. You can preview each pagelet by clicking the pagelet name, which opens a pagelet preview in a smaller window. If a pagelet is not available to you, text in the pagelet indicates this. Any links in the pagelet are disabled.

3. Click the Save button.

Note. You can click Personalize Layout from here to immediately begin laying out how the pagelets appear on your homepage.

Personalizing Layout

Access the Personalize Layout page.

Personalize Layout

Basic Layout: ☐  ☒ 

2 columns **3 columns**

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)

= Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:	Center Column:	Right Column:
Menu Media Sources Operational Threshold Chart Project Accountant Project Manager Product Search	Customer Notes Customer Conversations Availability	Top Five Contracts



Delete Pagelet

Personalize Layout page (representative example)

Basic Layout

Select to display the pagelets in either two or three columns on the homepage.

A two-column layout results in one narrow column on the left side of your homepage and one wider column to the right. A three-column layout results in three narrow columns of equal width. If you place a wide pagelet in a narrow column, the column stretches to accommodate the wider pagelet.

Note. The system moves required pagelets (indicated by the * sign) from the third to the second column when you switch from a three-column to a two-column layout.

Columns

The pagelets selected on the Content page are listed in the column sections.

If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns.

Note. # indicates a required fixed position pagelet. * indicates a required moveable pagelet.

For example, #Signon indicates that the Signon pagelet cannot be moved to a different location on the homepage.

You cannot assign required fixed pagelets to the right column in a 3-column layout.



Use to position the pagelets. Highlight the desired pagelet, and then click the arrows to move the selected pagelet above a pagelet, below a pagelet, to the next column on the right, or to the next column on the left.

Delete Pagelet

Highlight the desired pagelet and then click to delete it from the homepage.

Return to Home

Click to view your new choices.

From the homepage you can choose to minimize a pagelet or remove it altogether. Use the minimize and remove buttons in the pagelet header to do so. When you minimize a pagelet, the minimize button is replaced with the restore button. Click the restore button to fully open the pagelet again. Clicking the remove button opens the Removal Confirmation page for that pagelet. Select Yes-Remove or No-Do Not Remove.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Internet Technology, “Modifying the Portal Interface”

Personalizing Pagelets

You can personalize many of the pagelets on your homepage to show only the information that you want to see. Each pagelet that allows personalization has different personalization options that are based on the type of information displayed in the pagelet. For example, on the Company News pagelet you can use personalization options to show specific news categories from the list of those that are available or limit the pagelet to a specific number of articles. In the Tasks pagelet, you can choose to see all tasks, only personal tasks, only worklist tasks, and so on. These changes will appear in your pagelet only.

Note. Not all pagelets allow personalization. Your system administrator can disable the pagelet personalization feature.



Access the Pagelet Personalization page by clicking the Customize button on the pagelet title bar of a pagelet that supports personalization.

Personalize Company News

Select from the available option(s) to personalize the display of this pagelet.

*Number of Articles to Display:	3
*Show Human Resources News:	No
*Show Information Technology Ne:	No
*Show Events:	No

[Return to Home](#)

Example of a Personalization page

See Also

Enterprise PeopleTools 8.49 PeopleBook: Internet Technology, “Using Pagelet Wizard”

PeopleSoft Enterprise Portal Solutions 9 PeopleBook: Enterprise Portal Pagelets

Customizing Pages

This section provides an overview of page customization and discusses how to:

- Control initial page display.
- Change the tabbing order.
- Copy, share, and delete page customization settings.

Understanding Page Customization

The page customization feature helps you tailor your transactions to specific business processes and to your personal data entry style. The Customize Page option in the pagebar located just below the navigation header is available for most PeopleSoft pages.

Note. Page customizations may be superseded if the order of the grids in the underlying page definition is changed in Application Designer.

[New Window](#) | [Help](#) | [Customize Page](#) | 

Pagebar

Select the Customize Page link to open the Page Customization page for the current page.

[Copy Settings](#)

Page Customization

☐ Put this page in front (the current tab) when I come into this component.
☒ Save tabbing order customized below.

To define new tabbing order, select Clear Tabbing Order, then click items to include in desired sequence.
 To rearrange tabbing order, select Remove from order, Move up in order, or Move down in order, then click appropriate items to rearrange.

☐ Include In Tabbing Order
 ☒ Remove From Order
 ☐ Move Up In Order
 ☐ Move Down In Order

23

33

4

General

ID

Roles

Workflow

Audit

Links

User ID Queries

User ID: PSADMIN

Description: PeopleSoft Administrator

☒ Account Locked Out?

Logon Information

Symbolic ID:

Password:
☒ Password Expired?

Confirm Password:

User ID Alias:

[Edit Email Addresses](#)

General Attributes

Language Code:
☒ Enable Expert Entry

Currency Code:

Default Mobile Page:

Permission Lists

Navigator: [Explain](#)

Homepage: [Explain](#)

Process Profile: [Explain](#)

Primary: [Explain](#)

Row Security: [Explain](#)

General

ID

Roles

Workflow

Audit

Links

User ID Queries

[Copy Settings](#)

Customizing a page

Note. Your system administrator can disable the page customization feature. This may be necessary if there are concerns about database growth.

Controlling Initial Page Display

The Page Customization page includes four settings that enable you to control how the current page is initially displayed when you open it:

Put this page in front (the current tab) when I come into this component.

Defines the current page as the initial default page for the component. Only one page within a component can be set as the "front" page. Search pages and secondary pages cannot be identified as "front" pages.

This option displays only if the current component for the page contains more than one page based on your security profile. This option is cleared by default.

Save the state of the expanded/collapsed sections on this page.

Enables you to personalize the initial display of collapsible sections on the current page. Before selecting Customize Page and then selecting this option, ensure that the collapsible sections on the page display exactly as desired. This option takes a "snapshot" of the current state of the collapsible sections on the page.

You can also preserve the initial display of nested collapsible sections whether or not the parent collapsible section is expanded.

This option is cleared by default. When it is disabled, the application determines the initial display of all collapsible sections, unless this option was defined previously.

This option only displays if the current page contains page elements that you can expand or collapse.

Save the state of the View All settings on this page.

Enables you to personalize the initial View All display of scroll areas and grids. This option takes a "snapshot" of the current View All status of the grids and scroll areas on the page.

This option is cleared by default. When it is disabled, the application determines the initial View All display, unless the option was defined previously.

This option only displays if the current page contains a grid or scroll area with a View All setting.

Save tabbing order customized below.

Saves the tabbing order that you designate on the current page. You can modify the existing field tabbing order as well as remove page elements from the tabbing order so that the cursor skips those fields as you tab through the page.

Changing the Tabbing Order

The tabbing order is simply the order in which you move from page element to page element when you press the TAB key. You can change and save a page's default tabbing order from the Page Customization page, which displays an image of the current page with tabbing order numbers in the upper-left corner of each page element that you can change. (Page elements with smaller numbers come before page elements with larger numbers in the tabbing order.) You can modify collapsible section buttons and page elements within collapsed sections, as long as the collapsed section is expanded when you select the Customize Page option.

Note. This numbering may not begin with "one" and may appear to have gaps for page elements that are not currently visible.

Clear Tabbing Order

Click this button to define a completely new tabbing order. This clears the current tabbing order, replacing the numbers for each relevant element (any element that you can tab to) with an X. The X indicates that no tab sequence number is applied for that field. You can then assign new tabbing orders to the page elements by using the Include In Tabbing Order, Remove From Order, Move Up In Order, and Move Down In Order buttons described below.

Restore Default	Removes all tabbing order customizations defined for the page and restores the original tabbing order.
------------------------	--

The radio buttons Include In Tabbing Order, Remove From Order, Move Up In Order, and Move Down In Order enable you to control the tabbing order; you click the appropriate radio button and then click the page element you want to change.

To change the tabbing order:

1. Select the Clear Tabbing Order button to remove all tabbing order settings for the page.
The system replaces each tabbing order number with an X indicating that the page element is no longer included in the tabbing order.
2. Select the Include In Tabbing Order radio button.
3. Select the page elements in the tabbing order you want.
The system numbers each field you select sequentially beginning with one.
4. (Optional) If necessary, select the Move Up In Order or Move Down In Order radio buttons and click on the page elements as needed to adjust the tab order you just set.
These options either promote or demote a page element one step in the tabbing order sequence. The system automatically adjusts all other page element tabbing order numbers accordingly.

To remove specific fields from the current tabbing order:

1. Select the Remove From Order radio button.
2. Click each page element that you want to remove from the tabbing order.
The tabbing order number for each element that you click is replaced with an X. At runtime, the system skips this page element as you tab through the page.

To save the new tabbing order:

1. Make sure the Save tabbing order customized below option is selected.
2. Click the OK button.

The original page displays again with your new tabbing order and other customizations applied.

Tabbing Order Exclusions

Tabbing order customization applies only to elements within the page, such as edit boxes, grids, drop-down list boxes, push buttons, and so on. You cannot customize the tabbing order for these elements:

- Header icons.
- Browser elements.
- Page and related page links.
- HTML areas.
- Charts.
- Grid columns that you have hidden using the grid customization feature.

If you unhide a column after you have set the tabbing order customization, you must customize the page again to include that field in the tabbing order.

Collapsible Sections

You must expand all collapsible sections on a page before clicking the Customize Page link for page elements in those sections to be available for tab ordering.

You can customize the tabbing order of any allowed page elements within a collapsible area. However, if you then collapse this section, the system skips the page elements contained in the collapsed area. In other words, collapsing an area effectively removes any of its page elements from the tabbing order.

Grids and Scroll Areas

Page elements within a grid are treated as a group at runtime, even if they are not numbered consecutively. For example, if there are four fields on a page, two of which are in a grid, the tabbing sequence will keep the grid fields together, regardless of the tabbing order you specify. If fields A and B are outside the grid, fields C and D are inside the grid, and you set the tabbing order to be A, C, B, and D, the system will automatically revert to an A, C, D and then B tabbing order to keep the items within the grid (C and D) together.

Note. If you select View All from the navigation bar when there are multiple levels of scroll areas, the page tabbing order may not behave as you would expect after tabbing through the page for the first time.

Grid and scroll area navigation bar elements, such as First, Previous, View All, and so on, are included for tabbing order customization.

Copying, Sharing, and Deleting Page Customization Settings

Access the Page Customization page by clicking the Customize Page link on the page you want to customize. The page customization toolbar at the top and bottom of the Page Customization page enables you to save, cancel, copy, share, and delete your page customization settings. The share and delete options display only after you have customized and saved the page.



Page customization toolbar

Copy Settings

Opens the Copy Settings secondary page, where you can copy the public profiles from other users. A lookup button enables you to search all available public profiles for that page.

Selecting the OK button on the Copy Settings page copies the settings and returns you to the Page Customization page.

Note. You may need to adjust the tab order numbering if page elements based on your security profile are different from the public profile you are copying.

Share Settings

Opens the Share Settings secondary page, where you can publicly share the page customization settings you created. You can make your profile Public or Private. The default setting is Private. If you make the customization settings of one page in a component public, all customization settings for all pages in that component will be public.

The Name field is only required if you choose to make your customization settings public, in which case you must have a unique profile name. The profile name you enter is the same for all pages and shared grid customizations across all components. If you modify the profile name, it will be modified for all pages and grid customization settings across all components. Once you

save the first profile name, the Name field is prepopulated when you open the Share Settings page for other pages or grids.

The Name field can be of any string of up to 30 characters long—for example OSC_16AR. Alphabetical characters are automatically converted to uppercase.

Delete Settings

Opens the Delete Settings secondary page, where you can delete all page customization settings for the page or component. Click the Delete button to delete the settings for the current page only. Select the Delete Settings for All Pages within Component check box and click Delete to remove all customized settings for the entire component.

Note. If you make changes to any of these pages, you must also click the Save button on the Page Customization page for your changes to take affect.

Changing Your Password

This section discusses how to:

- Change your password.
- Set up forgotten password help.

Pages Used to Change Your Password

Page Name	Object Name	Navigation	Usage
Change Password	CHANGE_PASSWORD	Change My Password .	Change your current password.
Change Password	USER_CHANGE_PSWD	My System Profile, Change password	Change your current password.
Change or set up forgotten password help	USER_PSWDHINT	Click the My System Profile link in the menu pagelet to open the General Profile Information page. Click the Change or set up forgotten password help link under the Password heading.	Set up password help to enable the system to email you a new password if you forget your original one.

Changing Your Password

Use 1 to 32 characters to create your password. Your administrator may implement additional password requirements.

To change your password:

1. Access the Change Password page.
2. Enter the current password in the Current Password edit box.
3. Enter a new password in the New Password edit box.
Remember that passwords are case sensitive.
4. Enter the new password again in the Confirm Password edit box.

5. Click OK.

Setting Up Forgotten Password Help

If your system administrator has set up forgotten password help in PeopleTools Security, you can select a predefined question to answer for security purposes. The system then sends a new password to your email address automatically. .

To set up password help:

1. Access the General Profile Information page.
2. Select Change or set up forgotten password help.
3. Select a question from the drop-down list box or password hint set by your system administrator.
4. Enter the appropriate response to your question.
5. Click OK to save your entry.

Setting User Personalizations

This section provides an overview of user personalizations and discusses how to:

- Define your user personalizations.
- Set up your system profile.
- Add words to your personal dictionary.

Understanding User Personalizations

PeopleSoft enables you to personalize your application based on your daily needs, style of work, language preference, preference for the mouse or the keyboard, and so on. Users of PeopleSoft applications include casual users and power users. Casual users work with PeopleSoft applications only occasionally, because these applications are not an integral part of their daily tasks. For example, casual users might use the PeopleSoft self-service applications only occasionally to maintain their employee information, to enroll in benefits, and so on. Power users, on the other hand, use the PeopleSoft system as a part of their daily job. They do a great deal of data entry—moving quickly from one transaction page to the next, entering data as they go. A power user might be an accounts payable clerk, a human resources benefits manager, a purchasing manager, or an order entry clerk.

Pages Used to Set User Personalizations

Page Name	Object Name	Navigation	Usage
Personalizations	PSUSERPRSNLCAT	Select My Personalizations from the menu pagelet.	Personalize your application environment using the personalization options available from this page.
Option Category	PSUSERSELFPRSNL	Click the Personalize Option button on the Personalizations page.	Modify the personalization options for the personalization category you select.
Personalization Explanation	PSUSEROPTNEXPLN	Click the Explain link on the Option Category page.	Displays details for the selected option.
General Profile Information	USER_SELF_SERVICE	Select My System Profile from the menu pagelet.	Change your password, set language preferences, edit your email address, identify an alternate user, and modify workflow attributes.
Spell Check Personal Dictionary	SCPERSONALDICTLANG	Select My Dictionary from the menu pagelet.	Add words or acronyms to your personal dictionary.

Defining Your User Personalizations

The Personalizations page provides the following option categories for which you can personalize your system. To gain access to these categories, click the appropriate Personalize Option button.

General Options

Offers options for user accessibility features, Excel 97 grid download, the length of time the system holds a page in cache, multi language settings, and the spell check dictionary. If you require support for assistive technologies, such as screen readers, you can change the accessibility options. For Multi Language Entry, on pages where multiple language entry is available, you can choose to enter data in the language that you specify in the Data Language drop-down list box. On this page you can also reset your foreign language dictionary to use a different language for your spell checker.

See [Chapter 4, “Working With Pages,” Using Spell Check, page 66](#).

Regional Settings

Select to personalize your date, time, and number formats. Select settings for afternoon and morning designators (AM/PM or am/pm), date format (MMDDYY, DDMMYY, or YYMMDD), a local time zone, and so on.

System & Application Messages

Lets you control the display of various system messages. When you are familiar with your application, you can disable these messages. Options include a Save Warning and a Save Confirmation message.

Navigation Personalizations

Allows you to tab over certain unused fields on a page. If you frequently use the TAB key to navigate, you can skip page elements that you know you will not need to access. For example, suppose you always prefer to type the date into a date field and then press TAB to move quickly to the next field rather than opening the calendar prompt, selecting the date, and then closing the prompt. If you select Tab over Calendar Button, when you navigate with the TAB key, your cursor focus never rests on a calendar button.

Note. You must log off and log back on for changes to Personalization settings to take effect.

Personalize Options

Access the Option Category page for the desired personalization category.

Option Category: Navigation Personalizations

Personalizations			Find	First	1-10 of 10	Last
Personalization Option	Default Value	Override Value				
Automatic menu collapse	No		Explain			
Tab over Calendar Button	No		Explain			
Tab over Grid Tabs	No		Explain			
Tab over Header Icons	No		Explain			
Tab over Lookup Button	No		Explain			
Tab over Navigation Bar	No		Explain			
Tab over Browser Elements	No		Explain			
Tab over Page Links	No		Explain			
Tab over Related Page Links	No		Explain			
Tab over Toolbar	No		Explain			

Sample Navigation Personalizations page

Each of the personalization pages lists the personalization option, the default value for that option, and an Override Value drop-down list box from which you can select a new value to replace the default. Click the Explain link at the end of each row for an explanation of the corresponding option.

Personalization Explanations

The Personalization Explanation page offers the details for that particular setting. You can select the override value on this page or restore the option to its default value.

Personalization Explanation

Accessibility Features

Default Value Accessibility features off

Override Value

Explanation

Provides better support for assistive technologies.

Use accessible mode layout - This option is for use with screen readers. Page elements (fields, links, buttons, etc.) are presented linearly to assistive software.

Use standard mode layout - This option supports assistive technologies without altering the page design.

Accessibility Features disabled - This option is the default.

Image:

Personalization Explanation page

Setting Up Your System Profile

Access the General Profile Information page.

General Profile Information

QE User

Password

[Change password](#)
[Change or set up forgotten password help](#)

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English 

Currency Code: 

Default Mobile Page: 

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID: 

From Date:  (example: 12/31/2000)

To Date:  (example: 12/31/2000)

Workflow Attributes

☒ Email User ☒ Worklist User

[Miscellaneous User Links](#)

Email			Customize Find 	First  1 of 1  Last
Primary Email Account	Email Type	Email Address		
☒	Business 			

General Profile Information page

Password

Click one of the following links, which are self-service options related to passwords:

- [Change password.](#)
- [Change or set up forgotten password help.](#)

See [Chapter 2, "Setting User Preferences," Changing Your Password, page 26.](#)

Personalizations

This area lists your current language preference for web pages, and your preferred language for reports and email. You can change the language setting for your reports and email on this page.

You can also select the currency code for the currency symbol to display on pages when you enter currency values.

Note. The decimal placement is a property of the currency code; typically, two decimal places is standard.

Select the mobile homepage that should appear after you sign on to a mobile device.

Note. For more personalizations options, open the My Personalizations page.

Alternate User

If you are going to be on vacation or some other type of temporary leave, you can add the user ID of a colleague who is looking after your tasks in your absence. Select the alternate user ID and enter the dates during which you want the alternate ID to be active. After that time has passed, your tasks are automatically routed back to you.

Note. When applying an alternate user ID in your workflow settings, make note of the fact that the system only sends workflow routings to the immediate alternate user ID. The system does not send routings down multiple levels of alternate user IDs. For example, assume user A specifies user B as the alternate user ID while user A is out of the office. Also assume that user B happens to be out of the office at a time during user A's absence, and user B specifies user C as an alternate user ID. In this case, the system does not send workflow routings originally intended for user A to user C.

Workflow Attributes

Select one or more check boxes. (The available options are determined by the workflow setup at your site.) These settings affect how you receive "ad hoc" workflow routings through your workflow system. An email user receives notifications through email while a worklist user receives notifications through worklists.

Miscellaneous User Links

Follow this link to view other security links. These links are controlled by your system's security configuration. Contact your system administrator for more information.

Email

Use the Email grid to edit your current email address or enter additional email types, such as home or Blackberry. You can enter one address of each Email Type.

Adding Words to Your Personal Dictionary

Select My Dictionary from the menu pagelet to access the Spell Check Personal Dictionary page.

Spell Check Personal Dictionary			
Customize Find View All [Grid Icon] First 1-3 of 3 Last			
	Spell Check Language	Spell Check Word	
1	US and UK	PeopleTools	[+] [-]
2	Spanish	PeopleTools	[+] [-]
3	Session	PeopleSoft	[+] [-]

Spell Check Personal Dictionary page

As you use spell check, you might need to add certain words or acronyms to your personal dictionary so that spell check does not continually attempt to correct them. You can add these words directly from the Spell Check page or you can add several at once by using the Spell Check Personal Dictionary page. This page enables you to add, update, and delete words, as well as add words by language. The words that you enter in your personal dictionary are attached to your user ID, so your personal dictionary is available to you no matter where you access it.

Spell Check Language

Select the language dictionary to which you want to add the word. To enter the same word in multiple languages, make an entry for each language.

Select *Session* to add a word for your current session's spell check dictionary. After saving this word, the Spell Check Language field refreshes to the current spell check language.

Spell Check Word

Enter the word or abbreviation that you want added to your personal dictionary. Entries must be 40 characters or less.

The words that you add to your personal dictionary are case sensitive. The case determines how spell check validates correct spelling. The system applies the following case-sensitive rules:

- If the added word is all lowercase, such as *worklist*, the following are valid:
 - Exact match, all lowercase (*worklist*).
 - All uppercase (*WORKLIST*).
 - Initial capitals (*Worklist*), regardless of the word's position in the sentence.
 Mixed case (*WorkList*) is incorrect.
 - If the added word is all uppercase, such as *CRM*, only an exact match is valid. Lowercase and mixed case are not valid.
 - If the added word is in initial capitals, such as *California*, only an exact match (*California*) and all uppercase (*CALIFORNIA*) are valid.
 - If the added word contains an embedded capital letter, such as *PeopleSoft*, only an exact match is valid.
- In other words, if case is not relevant to the validity of the word, enter the word into your dictionary in all lowercase.

CHAPTER 3

Using Keys and Search Pages

This chapter provides an overview of keys and search pages and discusses how to use search pages to retrieve data.

Understanding Keys

A field or a combination of fields uniquely identifies every table in your PeopleSoft database. For example, the employee ID field uniquely identifies your employee records. As another example, when employees enroll in training classes, the combination of employee ID, course code, and course start date uniquely identifies enrollment requests.

The fields that uniquely identify your data are called *keys* or *key fields*. To display a page, you enter the keys to search for on the search page, so that the system can retrieve the correct row of data. For example, to retrieve the personal data page for Jim Smith, you must specify the key data in the search record for that employee.

A search record is the list of defined search keys that help you locate data. The search keys are the fields that you are prompted for on a search page. If you run Search by exactly specifying the key fields, the system will always return only one (or no) result. Most transaction pages or components have search records associated with them. If you select other pages that have a common search record, such as pages within a component or an associated link, you are not prompted to enter search criteria again. You are prompted for new search keys only when you select a new page outside of the component with a different search record.

Understanding Search Pages

There are two types of search pages: basic search pages and advanced search pages. When you select a page, the system often displays a Find an Existing Value tab (or something similar) that enables you to do a basic search and also provides an Advanced Search link

A basic search page enables you to search by just one field at a time, and then only using the “begins with” operator. To designate the search field, if more than one is available, select the desired field from the Search by drop-down list box and then click the Search button to display the results of your search. You can perform a partial search by first entering part of a name or description in the begins with text box. For instance, if you want to find all fields beginning with the letters *PS*, you would type *PS* in the begins with text box before clicking Search.

See [Chapter 3, “Using Keys and Search Pages,” Entering and Saving Search Criteria, page 36](#).

On the advanced search page, you can narrow your search, both by searching based on more than one field at a time and by using a variety of search operators.

In some cases, search pages may include the Include History and Correct History options. In addition, search pages contain the Case Sensitive check box to enable you to perform case-sensitive searches.

Using Search Page Buttons

The following search-related buttons appear on search pages of all types.



Click to process the search. You can select search by criteria and enter characters in the begins with edit box to limit your search (ALT+1).



(Appears only for advanced searches.) Click to clear entered text from all fields on the page (without saving) so that you can enter new criteria. If the search key is binary, such as Yes or No, the search field may show as a check box. In that case the Clear button unchecks the check box.

Using Search Pages to Retrieve Data

This section discusses how to:

- Enter and save search criteria.
- Use wildcards to find information.

See Also

[Chapter 4, “Working With Pages,” Using Effective Dates, page 41](#)

Entering and Saving Search Criteria

This section discusses how to:

- Enter search criteria.
- Use operators.
- Save search criteria.

Entering Search Criteria

When specifying search criteria, you can enter a full or partial value for any key field. Based on what you enter, the system uses the search record to present a list of possible matches or, if there is only one match, the page that you requested. Often, however, you do not have all of the information that you need. For example, you may want to find all administrator user profiles. If you enter the word *Administrator* in the Description field, the system narrows the search by displaying all courses that contain *Administrator* in the description. With this information, you may be able to determine which user profiles you want based on the results in the Search Results grid. To access a user profile, click any of the links in the Search Results grid.

User Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

User ID:

begins with

Description:

contains

Administrator

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

Search Results

[View All](#)
[First](#)

1-7 of 7

[Last](#)

User ID	Description
QE_CEADMIN	CE Administrator role
PTCDBADMIN	Dashboard Administrator
QEMDADM	Mobile Directory Administrator
PSADMIN	PeopleSoft Administrator
PTPORTAL	Portal Administrator
QEADMIN	QE Administrator
PTSECADM	Security Administrator

[Find an Existing Value](#)
[Add a New Value](#)

Example of a search results list

By default, the search function can retrieve up to 300 entries from the database, displaying a number of results at one time in the Search Results grid. (For certain applications, the default may be something other than 300.) Use your browser's scroll bar to view all listings on the current page. If not all results are displayed at once, you can click the Show Next Row button (the right arrow) above the grid to view the next set of rows, and you can click the Show Previous Row button (the left arrow) to see previous sets of rows. You can also click the First and Last links to display the first and last sets of rows of search results. In addition, you may be able to click a View All or View x button—to view all records at once or to view a designated number of records. (The value of x will have been set by the application developer.)

If your search retrieves more than the maximum 300 listings, the Search Results grid displays the number of results in the grid header. Attempt to narrow your search in another way if you cannot retrieve the data that you need on the first attempt.

When you access a page, notice that the key fields from the search page appear as the display-only fields in the upper-left corner of the page, usually just below the page tab.

Using Operators

When performing an advanced search, you can use a variety of operators to narrow your searches—hunting for customers by a particular first letter, by values that are less than or greater than a specified amount, and so on. You can use the following operators:

Operator	Field Use
begins with	Character fields.
contains	Character fields.
=	All field types.
not=	All field types.
<	All field types.
<=	All field types.
>	All field types.
>=	All field types.
between	All field types.
in	All field types.

Note. If you use the IN operator to search for multiple items, separated by commas, and you enter a space after the comma, the search automatically strips out that space. (For example, if you search for *1000, 1001*, the search assumes that you are searching for *1000,1001*. If you actually do want to search for a character string that contains a space, include that string within double quotes, like this: *1000," 1001"*.)

You can use an operator for more than one field to make your search even more specific. For example, you could narrow your search for courses with the word *orientation* in the name by selecting the "=" operator for the Internal/External field and selecting *Internal* from the drop-down list box, as shown in the previous example. This search will find only courses that meet both criteria: internal courses that include the word *orientation*.

Saving Search Criteria

If you are conducting an advanced search, you can click the Save Search Criteria link to name and save the specifics of your search. If you have saved one or more searches, you can use the Use Saved Search drop-down list box to select a saved search. Once you save a search, you can use that specific search record in other search pages that use the same search record. You can remove any saved searches by clicking the Delete Saved Search link.

Using Wildcards to Find Information

PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcards to track down the exact information that you need.

Note. Wildcards only work with the begins with and contains operators.

Note. Certain applications support wildcards specific only to that application. See your application PeopleBook for details.

Here are the supported standard wildcard characters:

Wildcard	Definition
% (percent symbol)	Match one or more characters.
_ (underscore)	Match any single character.
\ (backslash)	Escape character—do not treat the next character as a wildcard.

For example, if you enter *Q%sdmin*, as the User ID, the system returns a list of user IDs that begin with *Q* and end with *00*, as you can see here.

User Profiles

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

User ID:

Description:

[Basic Search](#)

[Save Search Criteria](#)

Search Results

View All First 1-3 of 3 Last

User ID	Description
QAS_Admin	QAS administrative user
QEADMIN	QE Administrator
QE_CEADMIN	CE Administrator role

[Find an Existing Value](#) | [Add a New Value](#)

Using wildcards in a search page

CHAPTER 4

Working With Pages

This chapter provides an overview of pages and discusses how to:

- Use effective dates.
- Work with page elements.
- Use data-entry fields.
- Use grid and scroll area controls.
- Use spell check.
- Work with HTML trees.
- Work with field-level prompts and validation.

Understanding Pages

Pages are the primary graphical interface by which you view and alter data in your PeopleSoft system. In many cases, these pages are representations of rows of data in your database tables. You use them to view, enter, and update data stored in application tables. Each page also provides features in the form of buttons or links to help you navigate through the system. As you change or add information to your database, you need to be familiar with effective-dating logic and the various page action options as you work with historic, current, and future data. PeopleSoft uses many different types of elements to organize information on pages and to enable you to enter data, including data-entry, functional, and data processing elements.

Many PeopleSoft components run in deferred processing mode to reduce interaction with the server thereby providing better performance. This means that, when using some pages in the browser, you can input data with minimal interaction with the server. Each trip to the server for data processing refreshes the page on the browser, which may cause the display to flicker and may also slow down your application. If deferred processing mode is specified for a component, a page within that component or a field on a page within the component also performs processing in deferred mode.

Note. Interactive mode is the opposite of deferred mode processing.

Using Effective Dates

This section provides an overview of effective dates and discusses page action options and effective dates.

Understanding Effective Dates

PeopleSoft's effective-dating logic enables you to maintain an accurate history of information in the database. Effective dating allows you to store historical data, see changes in your data over time, and enter future data. For example, you may want to track several events in the career of Tom Sawyer: when he was hired, transferred, and promoted. By inserting rows of data based on his employee ID, and significant dates, you can build a job history.

When you enter new information that is related to existing data (in this case about an employee), such as a transfer or pay rate change, you do not want to lose or overwrite the data already stored in the database. To retain history, add a data row identified by the date when the information goes into effect: the *effective date*. You can use the information to look at what has happened up to now and plan for the future. The PeopleSoft system categorizes effective-dated rows into the following basic types:

Current	The data row with the date closest to—but not greater than—the system date. Only one row can be the current row.
History	Data rows that have effective dates earlier than the current data row.
Future	Data rows that have effective dates later than the system date.

Describing Page Action Options and Effective Dates

The types of actions that you can perform on rows of data depend on the data row type. When you retrieve, modify, or insert rows in a table, the Update/Display, Include History, and Correct History actions apply specific rules based on the effective date:

Note. Not all tables are effective-dated. The Include History and Correct History options only appear on pages that access effective-dated tables.

Action	Rule
Update/Display	Retrieves only current and future rows. You can change future rows but not current rows. You can also add a new current row.
Include History	Retrieves all rows. However, you can modify future rows only. You can also add a new current row.
Correct History	Retrieves all rows and allows you to change or correct any row and insert new rows regardless of the effective date or sequence number. Note. This option is available only to users with the proper permission.

To see how these actions work together, take a look at four possible events in the career of employee Tom Sawyer, listed by effective date. Assume that today is February 1, 2005:

Effective Date	History	Current	Future
Hired: January 1, 1994	X	—	—
Transferred: January 1, 1996	X	—	—
Promoted: August 1, 2001	—	X	—
Expected termination: January 1, 2006	—	—	X

The action type that you select dictates whether you can access certain fields and what you can do with each type of row:

Action Mode	View	Change	Insert New Rows
Update/Display	Current, Future	Future only	Effective date greater than or equal to current row.
Include History	History, Current, Future	Future only	Effective date greater than or equal to current row.
Correct History	History, Current, Future	All existing rows	No effective date restrictions.

The page action buttons appear in the toolbar in the lower-right corner of any relevant pages. A shaded button indicates that the page is currently in that mode. For example, the CTI Agent Configuration page is currently in Correct History mode.

CTI Agent Configuration
Phone Book
Personalization

User ID:PTPORTAL

Agent InformationFind | View AllFirst1 of 1Last

Effective Date:05/12/2004

*Agent ID:PORTAL

Agent Password:*****

Queue:

*Configuration ID:001CISCO SYSTEMS

*Application User Name:CISCO

Application User Password:*****

CTI Client Signature:

*Trace Level:0 - None

SaveReturn to SearchNotifyAddUpdate/DisplayCorrect History

CTI Agent Configuration | Phone Book | Personalization

Sample page in Correct History mode

Update/Display Mode

When you select Update/Display, you can access only current and future rows; you cannot access history. Using the example, you can view only the current data, which is effective-dated August 1, 2001, and the future data, which is effective-dated January 1, 2006 (the employee's promotion and then the employee's termination).

You can also:

- Insert new rows with an effective date later than the date on the current row—after August 1, 2001.
- Change the future-dated row, effective-dated January 1, 2006, and change any additional rows that you insert with a date later than today, February 1, 2005 (assumed to be today's date).

If you insert rows with effective dates between August 1, 2001, and February 1, 2005, you cannot change them if you return to the page in Update/Display mode.

Include History Mode

Select Include History to view any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. However, as with Update/Display, you can update only future-dated rows, effective-dated February 2, 2005, and on. You can also insert new rows with an effective date later than the current row—that is, any date after August 1, 2001.

Correct History Mode

Select Correct History to access all data rows. This mode enables you to view, change, and insert rows of data, regardless of the effective date. You can view and edit any of Tom Sawyer's job data, from his hire date to the day on which he will be fired. You can also insert new rows with any effective date.

Note. As you move between the Update/Display, Include History, and Correct History modes, the system prompts you to save your changes if necessary.

Working With Page Elements

This section provides an overview of PeopleSoft page element types and discusses how to use certain data-entry fields.

Understanding PeopleSoft Page Elements

PeopleSoft applications include three types of page elements: aesthetic, functional, and data-entry fields. Although you should be aware of all page element types, you interact mostly with data-entry fields as you work in your application.

Aesthetic Page Elements

Aesthetic elements help organize or emphasize different fields or information on the page. These elements are not used to update data in the database; they are purely visual. Aesthetic elements include:

Element	Definition
Frame	Display-only box that groups a set of fields on a page.
Group box	Display-only box, with text labels, that groups and identifies related fields, such as options.
Horizontal rule	Display-only horizontal line that separates fields or other elements on a page.
Static image	Unchanging graphic, such as your company logo or another visual element.
Static text	Display-only alphanumeric field that describes a page, field, or group of fields.

Functional Page Elements

Functional elements are controls, such as buttons and links, that perform a specific function. Aside from the standard toolbar buttons at the bottom of the page, your transaction page may include other buttons and links that are not associated with a grid or scroll area. For example, a button next to a field may perform a calculation based on a value that you just entered. You can activate this button by clicking it or by pressing the ENTER key while the element has the focus. You can also activate links by pressing the ENTER key.

Data-Entry Fields

Pages can include several types of data-entry fields, each designed to provide a simple way to enter and update data in your tables. Understanding the various types of data-entry field helps you use the system more efficiently.

Data-entry fields, which are always associated with specific database fields, include:

Check boxes and Radio buttons

Selecting a check box or radio button enables an option. Typically, you select one by clicking within it or pressing the space bar when the box is highlighted. Click it again or press the space bar to disable the option.

Check boxes correspond to fields with only two valid values. You can often select more than one check box in a related set. In contrast, a related set of radio buttons represents a group of mutually exclusive options; typically, you can only select one radio button within a related set.

Edit boxes

Enter characters or numbers into edit boxes. The character limit is determined by the length of the database field. Edit boxes for fields with prompt tables have a lookup button to the right. Edit boxes with spell check enabled have a spell check button to the right.

See [Chapter 4, “Working With Pages,” Using Edit Boxes, page 47.](#)

Long edit boxes

Enter longer strings of data, such as comments, into long edit boxes. These boxes store free-form text fields. If you type more lines than you can see at one time, use the scroll bar on the right to move through text. Long edit boxes with spell check enabled have a spell check button in the upper-right corner.

Drop-down list boxes

Select a value from a predefined list. Drop-down list boxes look like a data-entry field with a prompt button at one end. Click the prompt button to display a list of valid values from which you can select a single option.

Images

Insert photos or other images into your PeopleSoft Application. The format of the image that you insert must match the image format defined for that field by the application developer. Acceptable formats include JPG, BMP, GIF, or DIB. For example, on the Employee Photo page, you can only insert JPG images into the employee photo field. If you try to upload an image of another format, the system displays an error message.

Grids and scroll areas

Serve as containers or organizers for multifield data entry. Grids display as a minispreadsheet within a page. Scroll areas are like grids except that the fields are arranged in a freeform manner. Both contain rows of data that may include Add, Multi-Row Insert, or Delete buttons. Most include a navigation bar or footer with multiple control and configuration options.

You can think of all of the fields in each of these controls as belonging to one table in your database. Each time that you add a new row, you are actually adding a new row of data to the database table, each of which shares the same high-level key. For example, for employee records, you may have more than one emergency contact listed for each employee. If you have two emergency contacts listed for an employee, each of those contacts has that employee's ID number as a key field. If you insert a new row, the system automatically copies the shared key data into the new row.

See [Chapter 4, “Working With Pages,” Using Grid and Scroll Area Controls, page 49.](#)

Moving Among Fields

To move among the data-entry fields on a page, press the TAB key or click the field once. Pressing TAB moves you one field at a time in a sequence determined in the page definition. Pressing TAB also rests on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar, you can press ENTER. Or, to get to the next field, press TAB again. Press SHIFT+TAB to move backward rather than forward in the tabbing order.

Note. Pressing TAB may yield different results if you have modified page tabbing behavior on the My Personalizations page.

Required Fields

In most applications, required fields are marked with an asterisk. You must enter data into that field to continue on to the next field or save the page. When the developer has set deferred processing mode for the page, you may not be informed that a field is required until you attempt to save or leave the page. If you save the page without entering required data, the field turns red and an error message appears on the page. Click OK within the error message, and then enter the correct data in that field. Required fields are often drop-down list boxes or are accompanied by a prompt button to help you enter the correct data.

Using Data-Entry Fields

This section discusses how to:

- Use edit boxes.
- Use drop-down list boxes.
- Work with images.

Using Edit Boxes

Move to and highlight an edit box by pressing the TAB key or by double-clicking and highlighting the text. You can type over existing highlighted text. If the text is not highlighted, you are inserting rather than replacing text.

This example shows an edit box:

Title:	
---------------	----------------------

Edit box

Some edit boxes are associated with database fields that have formatting attributes assigned to them. For example, most name fields are defined with a name format that requires you to enter data in the following way:

LastName,FirstName Initial

This format is case sensitive. Also, note that there is no space between the comma after the last name and the first name. If a field is not case sensitive, the system converts what you type to uppercase before writing it to the database.

Other types of formatting include:

- Social security, social insurance, or other government ID numbers.
- Dates.
- ZIP codes or other postal codes.
- International phone numbers.

For these types of formats, you generally type only the characters; the system inserts the appropriate dashes and slashes for you. For dates, enter the standard six-digit date format, such as mm/dd/yy (include zeros); the system automatically changes the display to show a four-digit year.

Note. Number formatting may perform differently for users who have personalized their systems.

In interactive mode, if you enter a field value incorrectly, the system highlights the field in which an invalid value was added, and a warning message appears with an explanation of the problem.

Using Drop-Down List Boxes

To select a single item from the list, click the down arrow to display the list, scroll through the list until your choice is visible, and then click the desired list item. The list closes and the selected value appears in the list box. You can also type the first letter of an item to select it. If there is more than one choice for a letter, type the letter repeatedly to cycle through the list. In the following example, first click the down arrow, then, if you want to select Greek, type the letter G twice. Alternatively, press the DOWN ARROW key to select the field entry that you want. Once your choice is highlighted, press ENTER.

This example shows a drop-down list box:



Drop-down list box

Working With Images

You can insert or update images in your PeopleSoft system. For example, the Employee Photo page enables you to store and maintain photos of your employees in your PeopleSoft database.

This section discusses how to:

- Insert an image.
- Delete an image.

Inserting an Image

You can insert photos into your PeopleSoft database. For example, you may want to store employee photos for company identification badges, or pictures of products for inventory purposes.

To insert an image at runtime:

1. Open the page in which you want to insert the photo.
2. Click the Add button.

A search page appears enabling you to search for the image that you want to insert. You can browse for the image from your desktop, your hard drive, or the network.

3. Click the Browse button to search for and select the image you want to insert.
4. Click the Upload button.

The upload page closes and your newly inserted image appears on the page.

Deleting an Image

To delete an image at runtime:

1. Open the page from which you want to delete the image.
2. Click the Delete button.

The system automatically deletes the image on the page without posting a warning message prior to deletion. However, if you exit the page without saving, the system does not delete the image from the database, and the image is present when you reopen the page.

Using Grid and Scroll Area Controls

This section discusses how to:

- Navigate through data.
- Work with grids.
- Use scroll areas.
- Use effective-dated scroll areas and grids.
- Use multiple scroll areas and grids on a page.

Navigating Through Data

Grids and scroll areas contain the same type of navigation structure. Instead of using a scroll bar to scroll through the rows of data, PeopleSoft uses navigation buttons and links. These buttons or links appear in the navigation header, within the row itself, or to the right of the tabs in a tabbed grid, as appropriate. Certain options, such as Customize and the download to spreadsheet icon, appear only on grids.

Note. Don't confuse the navigation header for a grid or scroll area with the universal navigation header that appears in the upper-right corner of the page.

This section discusses how to:

- Navigate with buttons and links.
- Add rows.
- Delete rows.
- Select rows.

- Find data.

Navigating With Buttons and Links

The following table describes the buttons and links that might appear on your grid or scroll area.

 	Click to insert a new row after the current row.
	Click to insert multiple rows. Specify the number of rows (1 to 99).
 	Click to delete the current row of data.
	(Show Next Row) Click to display the next row or set of rows of data.
Note. The Show Next Row and Show Previous Row buttons are disabled if you are viewing all rows of data.	
	(Show Previous Row) Click to display the previous row or set of rows of data.
	(Show All Columns) In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.
	(Show Tabs) In a tabbed grid only, click to return the expanded grid to its tabbed state.
Customize	Click to access the customization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns.
	(Download) Click to display a new browser window, showing the contents of the grid in a spreadsheet-like format.
View All	Click to display the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link morphs to read View x so that you can return to the original setting. The value of x can change, and is set by the application developer.
Find	Click to find a row of data containing a specified search string.
First	Click to access the first row or set of rows of data.
Note. The First and Last links are not available if you are viewing all rows at once, in which case you scroll to see your data.	
Last	Click to access the last row or set of rows of data.

There are also keyboard shortcuts for all of the above buttons and links.

See [Chapter 1, “Working With Browser-Based Applications,” Using Hot Keys, page 13.](#)

In addition to these links and buttons, there is a numbering system for the rows. For example, if a grid or scroll area were set to view only one row at a time, the navigation header might read *1 of 2* or *1 of 20*, depending on how many entries there were. If the grid or scroll area were set to view three rows of data at a time, it might read *1-3 of 20*. Click the arrows to view the next or previous series of rows. In the Message Log scroll area, for example, you can see that it contains 560 total rows of data, displaying just one row at a time. Select View 100 to see the rows in groups of 100 at a time.

The screenshot shows a window titled "Messages" with a navigation bar at the top containing "Find | View 100", "First", "4 of 560", and "Last". Below the navigation bar, the "Last Update Timestamp" is "06/04/1999 8:25AM". The main content area displays message details for message number 4, with severity "Error" and text "Invalid use of &.". An "Explanation" box below provides context: "The ampersand symbol (&) can only be used as a token within PeopleCode as part of a temporary variable name. The characters following the ampersand do not comprise a valid ID." There are scroll bars on the right side of the explanation box.

Sample scroll area

Adding Rows

You can click the Add or + button to add an empty row after the current row

Note. If you do not insert a new row, any data that you enter overwrites the existing data in the current row. However, the changes that you make do not take effect until you save the page. If you exit the page without saving, the original data remains intact. You can only type over existing data in the effective-dated table in Correction mode.

In some cases, you can add several rows at once to your grid or scroll area by clicking the +... (multi-row insert) button. When you click this button, the system prompts you to specify the number of rows needed. You can add up to 99 rows at once. This option is not always available.

Deleting Rows

You can also delete rows of data from a grid or scroll area. To delete a row of data, select the row by using the navigation header or by clicking a field in the row. Then click the Delete or – button. The system confirms the deletion by asking if you want to proceed. It also reminds you that the row will not be deleted from the database until you save the transaction; however, the row is automatically removed from the grid or scroll area. To retrieve the row, click the Back button in your browser or close the transaction without saving your changes; the system does not save any other changes that you made to the page.

Selecting Rows

For certain grids and scroll areas, you can select a single row or multiple rows in case you need to batch a number of processes. Single-row selection is available when the system displays a radio button to the left of each grid row or in the upper-left corner of a scroll area. Select a row by selecting one of the radio buttons in front of the row. Multiple-row selection is available when the system displays a check box to the left of each grid row and in the upper-left corner of a scroll area. Select as many rows as you need by selecting each check box.

Finding Data

The find feature on a grid or scroll area enables you to locate specific data, which is particularly useful if your table contains hundreds of rows. Note that this feature allows you to search the data within the grid or scroll area only. It does not search for any data outside the control. The find feature looks for matches in edit boxes, display-only fields, disabled or shaded fields, dynamic links, and text in long edit boxes. It does not find column headings, field labels, text values on icons, static links, and hidden fields. Find searches from the left-most visible object of the current row down, based on the text that you enter in the search prompt.

The Find link represents the find feature in the navigation bar of your grid or scroll area. Clicking this link displays a dialog box prompting you to enter your search string. The find feature searches through all rows of data in the buffer and brings the first occurrence in your search string to the top of the row list in the grid. If you are in a scroll area that displays only one row of data at a time, the find feature opens that row of data. To find the next occurrence, click the Find link and enter your search string again.

If your search string does not appear in the currently visible rows, the find feature opens a new display of rows so that the row containing the search string appears in the grid. Note that on tabbed grids, the find feature searches only the active tab.

When there are grid areas within a scroll area, the find feature searches only the current scroll level; it does not search the grid data. Each control, if it is set up to perform a find, has a separate Find link in the navigation header of that control.

Note. Your browser may also contain a find feature. This tool, however, does not search through data in your PeopleSoft database. It searches the HTML code for what appears on the current open page only. Thus, it searches field headings, read-only text, and headings in grids, group boxes, and scroll areas only.

Working With Grids

Grids offer several functional benefits that scroll areas do not. This section discusses how to:

- Select tabs for multiple views of a grid.
- Collapse grids.
- Customize grids.
- Manipulate grid column sort order.
- Download grid data.

Selecting Tabs for Multiple Views of a Grid

Tabbed grids enable you to view multiple columns of information without scrolling to the right. By clicking the Show All Columns button just below the grid's navigation header, you can view the remaining columns of grid data. To restore the grid to its original state, you can then click the Show Tabs button. Alternatively, some grids may have an Expand All button to the right of the tabs, which enables you to expand the grid columns to the right so that no tabs appear.

Collapsing Grids

You may also encounter grids that can be collapsed or expanded. Click the right-pointing triangle in front of the grid heading to expand a grid that is hidden from view (collapsed).

These examples show both the collapsed and expanded states of the Component Interfaces grid.



Collapsed grid example

Component Interfaces		
Customize Find 		First  1-3 of 3  Last
Name	Edit	
CURRENCY_CD_CI	Edit	 
PROCESSREQUEST	Edit	 
QE_MB_COMP_LVO_CI	Edit	 

Expanded grid example

Customizing Grids

For most grids, including some analytic grids, you can customize the order of the columns, the sort order, which columns are frozen, and which columns are hidden. You can also share your grid customizations with other users or copy another users' settings. You control these settings on the Personalize Column and Sort Order page, which you open by clicking the [Customize](#) link in the grid's navigation header. Any personalizations that you make to a grid remain in place until you change them.

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab Initial (column 2)
- Initial Node
- Transaction Type
- Request Message Name
- Effective Date**
- Status (column 8)
- Tab Result
- Result Node
- Transaction Type
- Request Message Name
- SeqNum

☐ Hidden
☐ Frozen

Sort Order

- Effective Date**

☐ Descending

[Copy Settings](#)

Personalize grid page example

Note. If there are grid tabs, they remain active so that you can view all sample data.

Use the following toolbar buttons to personalize your grid:

- | | |
|----------------------|---|
| OK | Click to save your personalizations and return to the transaction page with the changes in effect. |
| Cancel | Click to cancel any personalization settings you have and return to the transaction page. |
| Preview | Click to preview any personalization settings that you make. |
| Copy Settings | Opens the Copy Settings secondary page, enabling you to copy the public profiles from other users. You can use the lookup button to search all available public profiles for that grid. |

Share Settings

Selecting the OK button on the Copy Settings page copies the settings for the selected profile and returns you to the Personalize Column and Sort Order page.

Available if you have created and saved grid customizations. Opens the Share Settings secondary page where you can allow public sharing of the grid customization settings you created by making your profile Public. (The default setting is Private.) If you make the customization settings of your grid public, all customization settings for all components will be public.

The Name field is only required if you make your customization settings public. Each user who shares customization settings must have a unique profile name. The profile name you enter is the same for all pages and shared grid customizations across all components. If you modify the profile name, it is modified for all pages and grid customization settings across all components. Once you save the first profile name, the Name field is prepopulated when you open the Share Settings page for other pages or grids.

The Name field can be any string of up to 30 characters long—for example OSC_16AR. Alphabetical characters are automatically converted to uppercase.

Delete Settings

Available if you have created and saved grid customizations. Opens the Delete Settings secondary page where you can delete all grid customization settings for the current grid. Select the Delete button to delete the settings for the current grid only and restore the default grid settings. Select the Cancel button to retain your settings and return to the grid customization page.

Hidden

Select a column and click this check box to hide the column in question.

Frozen

Select a column and click this check box to freeze the column in question. When you freeze a column, the column appears in all tabs within the grid.

Descending

Select a row from the Sort Order list and click this check box to sort the row in descending rather than the default ascending order.

To change the column order:

1. Under Column Order on the Personalize Column and Sort Order page, select the column that you want to move.

To select multiple adjacent columns, hold down the SHIFT key as you select additional column names. To select multiple nonadjacent columns, hold down the CTRL key as you select additional column names.

If your grid contains tabs, the system displays the tab separators in the Column Order list. You can move the tab separator just as you would a regular column, thus altering the number of columns that the system displays on a particular tab at once.

2. Click the up or down arrow buttons to move the column up or down in the list.

If you move a frozen column below an unfrozen column, the system disables the frozen setting.

3. Repeat steps one and two to move any additional columns.
4. Click OK to save your changes and return to the transaction page.

To hide a column:

1. Under Column Order, select the column that you want to hide.

To select multiple adjacent columns, hold down the SHIFT key as you select additional column names. To select multiple nonadjacent columns, hold down the CTRL key as you select additional column names.

2. Select the Hidden check box.

Note. When you use the find feature in the grid, the system will not search any columns that you set as hidden.

3. Click OK to save your changes and return to the transaction page.

To freeze a column:

1. Under Column Order, select the column that you want to freeze.

Note. Any columns that the developer already defined as frozen appear with the Frozen check box selected. You can override this setting by clearing the check box.

2. Select the Frozen check box.

The system automatically freezes the selected column and all columns above it. If you move a frozen column after an unfrozen column, the system disables the frozen setting.

3. Click OK to save your changes and return to the transaction page.

Frozen columns appear on all the tabs within the grid.

Manipulating Grid Column Sort Order

Under Sort Order on the Personalize Column and Sort Order page, you can alter the grid column sort order. Any sort order changes that you save remain in place until you change them again.

To specify a persistent sort order for a grid:

1. Under Column Order, select the column on which you want to sort.

Note that you can sort hidden columns; however, you cannot select the following column types for sorting:

- Tab separators.
- Images.
- Buttons or links.
- HTML areas.

2. Click the right arrow to display that column under Sort Order.

To select multiple adjacent columns, hold down the SHIFT key as you select additional column names. To select multiple nonadjacent columns, hold down the CTRL key as you select additional column names.

3. If you have moved more than one column to Sort Order, you can select a column and click the up and down arrow button to alter the sort hierarchy.

You can sort multiple columns at once. The system considers the first column in the list the primary sort, the second the secondary sort, and so on.

4. To sort columns in descending order (instead of the default ascending order), select the Descending check box for the highlighted column.

The system applies the (*desc*) text next to the column name to indicate which columns are sorted in descending sort order.

5. Click OK to save your changes and return to the transaction page.

The system saves your sort settings until you change them again or until you click the Restore Defaults button in the Personalization page.

You can override the sort order of a column in a grid directly in the transaction page without altering the personalization settings. To do so, click the column heading link (not underlined) for the column that you want to sort. This sorts the column in ascending order. You can toggle between ascending and descending order by repeatedly clicking the column heading link. The last column heading link that you click becomes the primary sort for the grid. Note that this type of sorting is only temporary. When you exit the transaction, the system does not save the sort order that you just performed.

Downloading Grid Data

Some grids enable you to download grid data to a Microsoft Excel spreadsheet. The download feature extracts all active, unhidden rows, regardless of whether the rows are visible on your screen.

To download grid data:

1. Click the Download button in the grid's navigation bar.
A new browser window opens, showing the data in a spreadsheet-like format.
2. Select File, Save As and save the data as a Microsoft Excel (.xls) file.

Note. The system downloads all field types (columns) with the exception of images. Hyperlinks and buttons are downloaded as quoted text of the field labels, even though the labels may contain numeric values. If any numeric calculations are to be performed based on hyperlink or button labels, the text strings must be converted to numeric values after downloading.

Using Scroll Areas

A scroll area behaves like a grid, in that each occurrence represents one row of data in the database. However, within a scroll area the fields are randomly arranged rather than set up like a spreadsheet. These field groupings, although not physically displayed in a row, should still be considered as rows of data in the database.

A scroll area looks like a group box with navigation tools in the navigation header. It does not actually contain a scroll bar that you would use to scroll up and down between the various rows. Instead, use the buttons and links in the navigation header to scroll through the data rows. Insert a new row into the scroll area to insert a new row into the database table.

Example scroll area

Using Effective-Dated Scroll Areas and Grids

Many scroll areas and grids are controlled by an effective date and an effective-dated status. These scrolls can have two values: active and inactive. The active and inactive values enable you to keep a complete history of data for every value that you add. In most cases, you never want to delete a value; you only make it inactive. Thus, you can retain a complete history of all your data and table values—whether you changed them two years ago or want them to go into effect in two months—for trend analysis and other historical reports.

With all this information at your fingertips, you can "roll back" your system to a particular point from which you can perform analyses or projections for your company. You can also maintain all data on your employees as it changes over time.

For example, when going through the employee review process, it is important to maintain records of past reviews so that you can refer back to see how an employee has improved over time. Then, as employee review time arrives again, you simply add a new row of data to the table by clicking the Add button rather than by typing over the existing row. When you add a new row, the Eff Date (effective date) field automatically populates with the system date, which is usually today's date. You can keep this date or change it to a future date if the information that you are entering does not take effect until later.

Because the system date is at or after the new effective-dated row that you created, the new information becomes the current row and the previous row is now historical information. If you returned to this page and clicked the Update/Display button, which displays only current and future rows, you would see only the last data row that you entered. If you also wanted to see older data rows, you would have to click the Include History button.

To correct incorrect data already in the system, click the Correct History button. (You should take this approach rather than inserting a row with corrected data.)

See Also

[Chapter 4, "Working With Pages," Using Effective Dates, page 41](#)

Using Multiple Scroll Areas and Grids on a Page

Some PeopleSoft applications include pages that contain multiple scroll areas and grids. These scroll areas and grids may be one on top of the other, side by side, or contained within each other (nested). The fields controlled by one scroll area or grid are associated with only one database table. Pages with multiple scroll areas or grids contain fields that write to multiple tables.

The Competency Assignment page in the following example contains two grids side by side. With this format, you can transfer data from one grid to the other. In the example, you select a value from the Category and Type drop-down list boxes to populate the Source Competencies grid. To select the descriptions that you want to appear on Tom Green's evaluation, select the appropriate check boxes under the Description field in the Source Competencies grid. Then click the double left arrow button to move those descriptions to the Assigned Competencies grid.

[Competency Evaluation](#)
[Competency Assignment](#)
[Competency Rating](#)
[Competency Verification](#)

Green, Tom
Employee
EmpID: XC3031
[Link to Career Planning](#)

Competency Assignment
[Find](#) | [View All](#)
First 1 of 1 Last

Evaluation ID/Type: 01

Populate from Job

Assigned Competencies
[Customize](#) | [Find](#) | [View All](#)
First 1-10 of 15 Last

Description	Short Name
PS General Ledger	Skill
PS Accounts Payable	Skill
PS Accounts Receivable	Skill
PS nVision Reporting	Skill
PS Query	Skill
Crystal Reporting	Skill
Payroll Experience	Knowledge
Financial Accounting	Skill
General Accounting	Skill
Financial Analysis	Skill

Search by:
Category: Ability
Type: Communicate

Source Competencies
[Customize](#) | [Find](#) | [View All](#)
First 1-4 of 4 Last

Description
☐ Debates issues unabrasively
☐ Informs Superiors
☐ Communication Skills
☐ Strong customer service ethic

Side by side grids

Once you have assigned the competencies to the evaluation, you can evaluate Tom using the Competency Rating page. The Competency Rating page in the following example contains the Assigned Competencies grid nested within the Competency Evaluation scroll area.

[Competency Evaluation](#)
[Competency Assignment](#)
[Competency Rating](#)
[Competency Verification](#)

Green,Tom Employee EmpID: XC3031

Competency Evaluation [Find](#) | [View All](#) First 1 of 1 Last

Evaluation ID/Type: 01

Assigned Competencies [Customize](#) | [Find](#) | [View All](#) | [First](#) 9-15 of 15 [Last](#)

Competency	Effective Date	Proficiency	Interest Level	Detail		
General Accounting	10/17/2002	4-Very Good	2-No Preference	Detail	+	-
Financial Analysis	10/17/2002	3-Good	4-Very desirable	Detail	+	-
Tax Accountant	10/17/2002	4-Very Good	2-No Preference	Detail	+	-
Financial Planning	10/17/2002	5-Expert	4-Very desirable	Detail	+	-
Forecasting	10/17/2002	5-Expert	4-Very desirable	Detail	+	-
Budgeting	10/17/2002	4-Very Good	3-Desirable	Detail	+	-
Auditing	10/17/2002	3-Good	3-Desirable	Detail	+	-

Nested grid in a scroll area

The Evaluation ID/Type fields associated with the outer scroll area refer to the type of evaluation. The fields associated with the Assigned Competencies inner scroll area refer to the specific competencies included in the evaluation.

Another way of looking at nesting is to think of the scroll area and grid as having a parent and child relationship. The table that stores information about individual competencies is a child of the table that stores information about particular evaluations. Child tables share the same key structure as the parent tables, plus one or more additional keys to uniquely identify individual rows.

Working with Analytic Grids

This section provides an overview of analytic grids and discusses how to:

- Navigate through analytic grid data.
- Download analytic grid data.
- Pivot data cubes and dimensions.
- Expand and collapse dimension data.
- Slice analytic grid data.
- Saving customized analytic grid layouts.

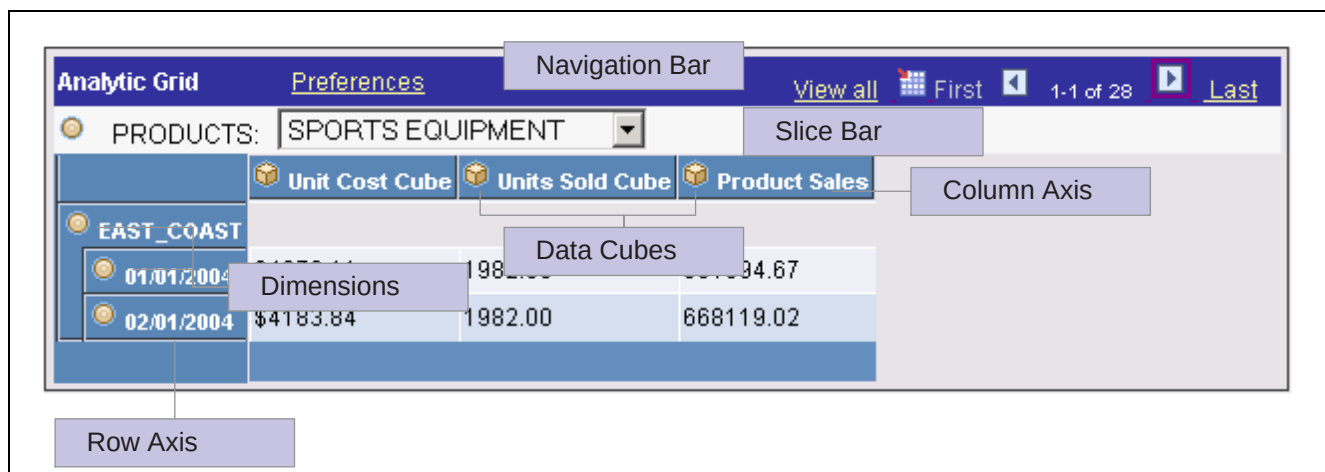
Understanding Analytic Grids

Analytic grids are specific to PeopleSoft Analytic Calculation Engine, PeopleSoft’s multidimensional reporting tool. Within PeopleSoft Analytic Calculation Engine, *analytic models* define the rules for calculating data. These analytic models consist of data cubes and dimensions. *Data cubes* are categories of data; you create one for each kind of information in your analytic model—for example, one for sales, one for rent, and one for salary. *Dimensions* are a list of one kind of data that can span various contexts—for example, months or product codes. You organize data cubes and dimensions into cube collections. Single members of data cubes or dimensions—such as one month—are known as *members*.

When the analytic grid is in Freeze Column mode, you can load into it data that does not come from the Analytic Calculation Engine.

PeopleSoft Pure Internet Architecture pages containing analytic grids display data from cube collections. You can use the analytic grid to edit your data, pivot data cubes and dimensions (move them between the row and column axis of the grid) to gain a different view of your data, and view selected “slices” of your data. Within an analytic grid, you can expand and collapse those dimensions that have a hierarchical structure; you can also drill down into such dimensions. Finally, you can modify preferences within an analytic grid—saving a particular layout that you have created or returning to the default grid layout.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Analytic Calculation Engine*.



Analytic grid components

Navigating Through Analytic Grid Data

For the most part, the navigation bar at the top of the analytic grid is much like the one associated with an ordinary grid.

See [Chapter 4, “Working With Pages,” Navigating Through Data, page 49](#).

In addition, in an analytic grid you can:

- Collapse or expand the slice bar by clicking on the arrow to the right of the analytic grid’s name (the name is “Analytic Grid” by default), which appears in the grid’s upper-left corner.
- Collapse and expand the entire grid, provided that the application developer has activated this feature (via the Collapsible Data Area check box on the Use tab of the Analytic Grid Properties dialog box). To do so, you use the arrow to the left of the analytic grid title, which is “Analytic Grid” by default.
- Collapse or expand dimensional data by clicking on the expand node or expand all icons.

Editing Analytic Grid Data

Editing data in an analytic grid is somewhat different from editing data in a standard grid:

- Some cells are editable but some cells may be designated as read only.
- Calculated cells are read only
- In hierarchies (trees), only the lowest level is potentially editable.
- The root and total are not editable.

Downloading Analytic Grid Data

You can download the contents of an analytic grid to a Microsoft Excel spreadsheet, much as you can download the data from a regular grid.

See [Chapter 4, “Working With Pages,” Working With Grids, page 52](#).

Dragging and Dropping Data Cubes and Dimensions

This section outlines the ways in which you can drag and drop data within an analytic grid:

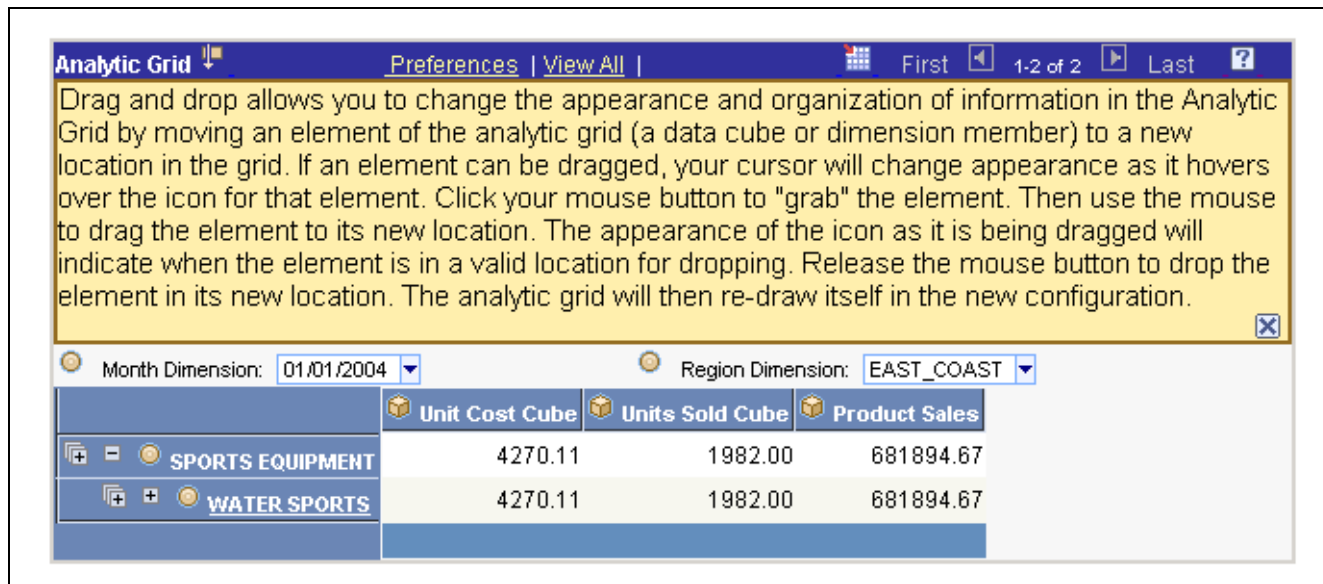
Location	Drag and Drop Possibilities
Row axis	You can drag from here to the column axis or the slice bar.
Column axis	You can drag from here to the row axis or the slice bar.
Slice bar	You can drag from here to the row or column axis. You cannot, however, drag to rearrange objects within the slice bar.
Dimensions	You cannot drag to rearrange objects within dimensions, whether they are hierarchical or not.
Data cubes	You cannot reorder data cubes, either on the column or the row axis.

Note. If an application developer specifies No Drag Drop mode for an analytic grid, you cannot drag or drop any item in an analytic grid. In addition, if Freeze Column Mode is specified, you cannot move frozen columns.

Pivoting Data Cubes and Dimensions

Using drag and drop, you can easily change the orientation of data cubes and dimensions within an analytic grid to get a different perspective on your data. For example, if your analytic grid initially displays the Month dimension across the columns, and the Products data cube down the rows, you could pivot the report to display the Months dimension down the rows and the Products data cube across the columns.

Next to the navigation elements is an icon that provides help text for novice users to perform drag and drop operations successfully. Clicking the icon toggles the display of the help text.



Analytic grid with help text displayed, before pivot

Analytic Grid | Preferences | View All | First | 1-30 of 30 | Last | ?

Region Dimension: EAST_COAST

	Unit Cost Cube	Units Sold Cube	Product Sales
01/01/2004			
SPORTS EQUIPMENT	4270.11	1982.00	681894.67
WATER SPORTS	4270.11	1982.00	681894.67
02/01/2004			
SPORTS EQUIPMENT	4183.84	1982.00	668119.02
WATER SPORTS	4183.84	1982.00	668119.02
03/01/2004			
SPORTS EQUIPMENT	4173.73	1982.00	666505.18
WATER SPORTS	4173.73	1982.00	666505.18
04/01/2004			
SPORTS EQUIPMENT	3925.05	1982.00	626792.07
WATER SPORTS	3925.05	1982.00	626792.07

Analytic grid after pivot operation

To pivot cubes and dimensions within an analytic grid:

1. Move the mouse pointer over the bullet icon representing a dimension or the cube icon representing a data cube.
The mouse pointer turns into a move cursor (a four-headed arrow), with an associated grabber hand.
2. Drag the bullet or cube icon from a column heading to a row heading or vice versa.

As you drag, the grabber hand will turn into an international no sign (circle with slash) when you are over locations where you cannot drop. You will instead see a bullet icon (for dimensions) or cube icon (for data cubes) when you drag over locations where you can drop the data cube or dimension.

Note. You can drop data cubes and dimensions onto the row axis, the column axis, and the slicer bar.

Slicing Analytic Grid Data

Slicing allows you to view a subset of your data. You can slice your data by choosing from any list—representing data cubes or dimensions—that appears on the slice bar by default. In addition, you can add data cubes or dimensions to the slice bar and use them to view alternate slices of your data. You can place multiple data cubes or dimensions on the slice bar. You can also slice your data further (viewing subsets of subsets) by choosing members from various data cubes and dimensions upon which to slice.

Note. You can add as many data cubes or dimensions to the slice bar as you like. Three fit per row, so if you add more than three, the fourth and so on are added to a second row on the slice bar. However, note that you can place only a single data cube on the slice bar. When you do so, the analytic grid reflects the data for that data cube only.

	EAST_COAST	HAWAII	MIDWEST
	SPORTS EQUIPMENT	SPORTS EQUIPMENT	SPORTS EQUIPMENT
Unit Cost Cube	4270.11	4270.11	4270.11
Units Sold Cube	1982.00	4015.00	815.00
Product Sales	681894.67	1354178.92	827281.86

Slice showing only February data

To slice your data based on a data cube or dimension that already appears on the slice bar:

1. Use the list box on the slice bar to display the values for the relevant data cube or dimension.

As an example, for a Months dimension, it would contain a list of months.

2. Select the desired value from the list box.

The analytic grid changes to show only data related to that value. For instance, if you select the month of March, you will see only data for that particular month.

To add a data cube or dimension to the slice bar and use it to slice your data:

1. Drag the desired data cube or dimension to the slice bar.
2. Select a member.

You will now see data related to that member only.

Dimensions that have filter functions applied will behave differently depending on whether they reside on the column axis/row axis or the slice bar. See the following for details.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Analytic Calculation Engine*, “Creating Rules, Formulas, and User Functions,” Filter User Functions.

Working with Hierarchical Dimension Data

Some dimension data has a hierarchical structure. When this is the case, you can expand and collapse dimension data within the analytic grid. In addition, you can drill down into the hierarchy to get a closer look at a particular subset of the data.

	Unit Cost Cube	Units Sold Cube	Product Sales
SPORTS EQUIPMENT	4270.11	1982.00	681894.67

Analytic grid, unexpanded, with multiple nodes to expand

	Unit Cost Cube	Units Sold Cube	Product Sales
SPORTS EQUIPMENT	4270.11	1982.00	681894.67

Analytic grid, unexpanded

	WATER SPORTS			
	SURFBOARDS	WAVE RUNNERS	JET SKIS	
Unit Cost Cube	4270.11	1019.70	2115.63	1119.19
Units Sold Cube	1982.00	430.00	211.00	41.00
Product Sales	681894.67	169339.50	446397.93	45886.99

Analytic grid, expanded

To expand or collapse dimension data:

1. Click the plus sign to the left of the dimension name to expand that dimension, showing all subdimensions immediately underneath it.

This approach expands the dimension one level at a time. If you click the multiple plus sign to the left of the single one, all the dimensions are expanded.

2. Click the plus sign to the left of any “subdimensions” to expand them as well.
3. Click the minus sign to the left of any dimension to collapse it.

Month Dimension: 01/01/2004		WATER SPORTS			
		SURFBOARDS	WAVE RUNNERS	JET SKIIS	BOOG
EAST_COAST					
Unit Cost Cube		4270.11	1019.70	2115.63	1119.19
Units Sold Cube		1982.00	430.00	211.00	41.00
Product Sales		681894.67	169339.50	446397.93	45886.99

Drilling in to see just the water sports information

To drill into and out of dimension data:

1. Click any dimension or subdimension that has elements beneath it in the hierarchy. (It is underlined and has a plus or minus sign to its left.)

The plus or minus sign changes into a Drill out this node arrow, and you see only the dimension or subdimension you clicked on, plus any elements directly underneath it in the hierarchy.

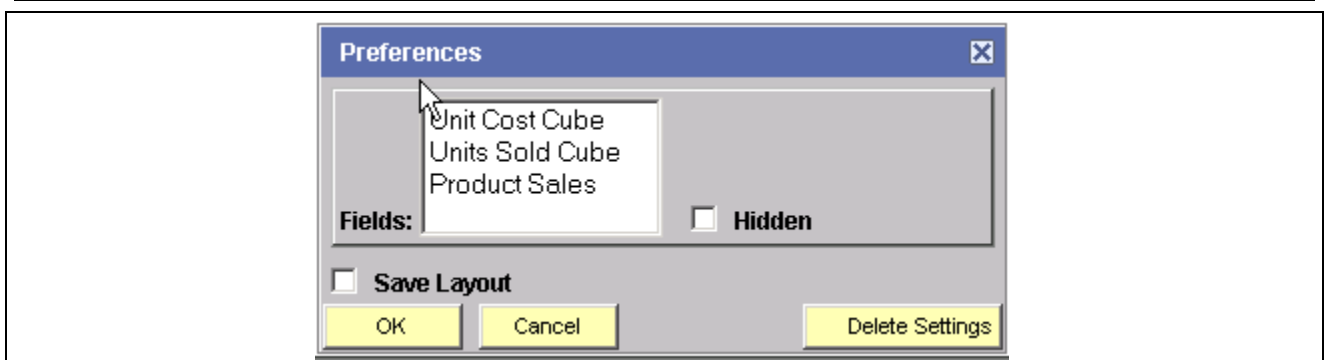
2. Click the Drill out this node arrow to drill back out within the hierarchy.

The dimension now shows the node you clicked on plus one level above it.

Saving Customized Analytic Grid Layouts

You have learned how to customize the initial layout of the analytic grid by pivoting data cubes and dimensions, viewing selected slices of your data, and more. In addition, you can save your customizations and return to them later. If you have saved a customized layout, you can also easily return the analytic grid to its original settings.

Note. The configuration of the Preferences dialog box changes depending upon whether there is a cube in the column header. If there is one, you have the option to hide nondimensional fields. If not, this option isn't available.



Preferences dialog box

To save a customized analytic grid layout:

1. Modify the grid's layout as desired.
2. Click the Preferences link.

The Preferences dialog box appears.

3. If applicable, select which nondimensional fields to hide by selecting them and clicking the Hidden check box.

You can hide all nondimensional fields but one. For example, if you have three, you can hide two; if you have four, you can hide three; and so on.

4. Select the Save Layout check box and click OK.

To restore an analytic grid's default settings:

1. Click the Preferences link.

The Preferences dialog box appears.

2. Click Delete Settings.

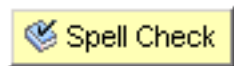
Note. Delete Settings restores the analytic grid's default layout, and also "unhides" hidden nondimensional fields.

Using Spell Check

PeopleSoft applications are equipped with a spell check feature that you can use on data entered in edit boxes and long edit boxes. Activate spell check by clicking the spell check icon to the right of those fields where spell check is available or by clicking the spell check toolbar button.



Click to activate spell check for the corresponding field. If there are no spelling errors, you see the message "No misspellings found." You can also activate spell check by pressing ALT+5 when the cursor is in the field.



Click to activate spell check for all fields in the component that have been enabled for spell check, regardless of whether those fields have changed. The system checks each field and then proceeds to the next spell check field until all fields in the component have been checked. If there are no errors, the "No misspellings found" message appears.

In the following example, spell check is available for the Description, Message Text, and Explanation fields.

Message Catalog

Message Set Number: 10

Description: 

Short Description:

Messages
[Find](#) | [View All](#)
First  1 of 6  Last

Last Update Timestamp: 03/03/1998 2:11PM

Message Number:

Severity:

Message Text: 

Explanation:

One of the objects you are trying to lock is already locked by another user.
Do you want to attempt to lock any other objects you've selected?



 Save
  Return to Search
  Notify
  Refresh
  Spell Check
  Add
  Update/Display

Spell check icons

The Spell Check button opens the Spell Check page. This page displays the errors in the text and offers a list of alternatives, if applicable. You can choose to ignore the occurrence, ignore all occurrences, change the spelling, change the spelling for all occurrences, or add the word to the current language dictionary.

Spell Check

Field Label: Explanation

Spell Check Text: One of the objects you are trying to lock is already locked by **another** user. Do you want to attempt to lock any other objects you've selected?

Change To: another

Alternatives: another
anther

Ignore Ignore All Change Change All Add

OK Cancel

Spell Check page

Field Label	Displays the field label text of the field currently being checked.
Spell Check Text	Displays all of the text in the field being checked, highlighting the first misspelled word. This field is display-only. This field information is particularly important when multiple fields are being checked simultaneously by using the toolbar action or mandatory spell check.
Change To	Initially displays the first highlighted value in the Alternatives list. You can select a new value from the Alternatives list or enter a new word in the Change To field. The maximum length is based on the maximum field length, which is 40 characters. If you enter a new value, the system spell checks the entry when you click the Change or Change All buttons to verify the correct spelling. If the system does not find any alternative spellings, the Change To field is blank and the Change and Change All buttons are disabled.
Alternatives	Lists other possible spellings. The options listed match the case of the misspelled word.
Ignore	Click to leave the current spelling as is and locate the next misspelled word.
Ignore All	Click to leave the current spelling as is for all text in the field that exactly matches the original text. This action is case-sensitive; only exact matches are ignored.

Change	Click to correct the error to the value that appears in the Change To field. Users can either select one of the proposed alternatives or type in their own value. The system then focuses on the next misspelled word.
Change All	Click to correct all occurrences of the error with the value in the Change To field. You can either select one of the proposed alternatives or type in your own value. The system then focuses on the next misspelled word. Like Ignore All, this action is case-sensitive; only exact matches are changed.
Add	Click to add the highlighted misspelled word (as is) to your personal dictionary. The system then focuses on the next misspelled word. Additions to the dictionary must be 40 characters or less. <u>See Chapter 2, “Setting User Preferences,” Adding Words to Your Personal Dictionary, page 32.</u>

Mandatory Spell Check

Certain pages, such as those that require an email response, have a mandatory spell check requirement. When you save these pages, the system automatically runs spell check on spell check enabled fields. A field is eligible for automatic spell check if you have changed its contents and you have not already run spell check for that field. If there is more than one spell check field, spell check runs in succession. If there are no errors, the system saves the data without issuing a message.

Using Foreign Language Dictionaries

Spell check supports numerous languages. The default spell check dictionary is based on your current sign in language. For example, if you select French as your sign in language when you sign in to your PeopleSoft application, your spell check dictionary is also in French. You can change your language dictionary on the My Personalizations page.

To change language dictionaries:

1. Select My Personalizations from the navigation menu.
2. Click the Personalize Option button for the General Options personalization category.
3. Enter the language dictionary that you want in the Override Value edit box for Spell Check Dictionary.
4. Click OK.

You can only use one dictionary per sign in session. To change language dictionaries again, make the change in My Personalizations and then sign out of the system before proceeding. To return to having your default spell check dictionary selected automatically based on your current sign in language, remove your override value or set it to *Use Session Language*.

Working With HTML Trees

When discussing trees, PeopleSoft uses terminology derived from the idea of a family tree. The nodes that report to the root node are called its children; the root node is their parent. Nodes that have the same parent are called siblings.

These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time. In the following example, Operations Administration is a child of Office of the President and a sibling of Human Resources, Controller, and Retail Banking Admin.

Tree Manager

SetID:	QEDM1	Last Audit:	Valid Tree
Effective Date:	05/05/1997	Status:	Active
Tree Name:	QE_PERS_DATA	Personal Data Tree	

[Save As](#)
[Close](#)
[Tree Definition](#)
[Display Options](#)
[Print Format](#)

00001 > 10100 > 10900

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

First Page
15 of 132
Last Page

00001 - Corporate Headquarters

- [8200] - ALBRIGHT
- [8300] - VINCENT
- [8400] - WALTERS
- [8500] - DUNCAN
- [8600] - ELIAS

10100 - Office of the President

- [8001] - ASD
- [8501] - BENNETT
- [8661] - CHERRIER
- 10200 - Human Resources
- 10300 - Controllers
- 10400 - Retail Services
- 10900 - Operations Administration

20100 - Office of the President (CDN)

Notify

Sample HTML tree

Click the yellow folders with + (plus) signs to expand another level. The leaves represent the lowest level of the tree and are not expandable. Click the links beside the nodes to see representations of the data. Clicking a link either opens an entirely new page or displays data for that link to the right of the HTML tree.

Navigating Within an HTML Tree

Navigate the tree by using the navigational bar (the horizontal bar at the top of the tree) and the navigation path, as shown in the previous example. You can perform the following actions on the selected tree by using the links and images on the navigation bar.

Collapse All

Click to close all of the visible nodes except for the root node. The root node is always expanded.

Expand All

Click to expand all of the nodes on the tree, so that the entire tree or branch hierarchy is visible.

Expands all parent and child relationships, but the tree hierarchy is still presented one page at a time. Use the next and previous page arrows to page forward and backward through the tree.

Find

Click to access the Find Value page and search for nodes and detail values.

As you find your way through your tree, navigation paths appear above the navigation bar. They show you a basic map of your route through the tree; you can also use them to jump back to a previously visited node. These navigation paths represent nodes in the current branch (A type nodes) and the parent branch of the opened branch (B type nodes). In the example, node 00001 is the parent branch of C10100 and C10100 is the parent node of C10900.

The maximum number of navigation paths displayed is seven. When you exceed that number, the system removes the earlier ancestor nodes.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Tree Manager, “Using PeopleSoft Tree Manager”

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Tree Manager, “Using PeopleSoft Tree Manager,” Navigating PeopleSoft Tree Manager

Working With Field-Level Prompts and Validation

This section provides an overview of field-level prompts and validation and discusses how to:

- Use look-up prompts.
- Use calendar prompts.

Understanding Prompts and Validation

Some edit box fields are linked to database prompt tables, which store values for information shared across your organization, such as department IDs, country codes, and state codes. They are called prompt or lookup tables because you can prompt the system to give you a list of valid values. In many cases, fields are defined so that the system validates the values that you enter against a prompt table to ensure that the values are valid.

Many of these values have individual prompt tables of their own. For example, currency codes and country codes are each stored in their own tables: CURRENCY_CD_TBL and COUNTRY_TBL. Fields prompting against these kinds of prompt tables appear as edit boxes with a lookup button to the right.



Click to open the Look Up page for the current field.



Click to open a small calendar that displays the current month. Alternatively, you can press ALT+5 while in the field containing the prompt to open the calendar.

Using Lookup Prompts

To initiate a search, click the lookup button. The Look Up page opens, displaying all valid values for that field up to 300 rows. To narrow your search, you can search by a certain field in the Search By field. If you only have partial data, the search operators in the drop-down list box can help make a search more specific. As with a search page, use the Advanced Look Up page to enter additional criteria by which to search. When you find the field value that you need in the Search Results grid, click the link to automatically populate the field from the original page with your selection.

Look Up Field Combination Table

Record (Table) Name: begins with ▾

[Basic Lookup](#)

Search Results

View All First ◀ 1-13 of 13 ▶ Last

Record (Table) Name	Description
BARITEMNAME VW	(blank)
BARNAME VW	(blank)
BASE_CUBE2 VW	Base Cube Instance View
BASE_CUBE3 VW	Base Cube Def View
BASE_CUBE4 VW	Base Cube Inst Component View
BASE_CUBE VW	Base Cube Instance NOT View
BASE_STRINGS VW	Retrieves base lang strings
BATCHWLOPR	(blank)
BATRUNCNTL	(blank)
BAT_RUNCNTL VW	(blank)
BAT_TIMINGS DTL	(blank)
BAT_TIMINGS FN	(blank)
BAT_TIMINGS LOG	(blank)

Look Up page example

Alternatively, if you know a partial value of the item you are searching for, you can enter that value on the main page and then click the prompt button, as in the previous example. Search Results is populated with all the choices available to you based on the partial value that you entered.

Note. Your system administrator may opt to exclude extremely large tables from automatically prompting, for performance reasons.

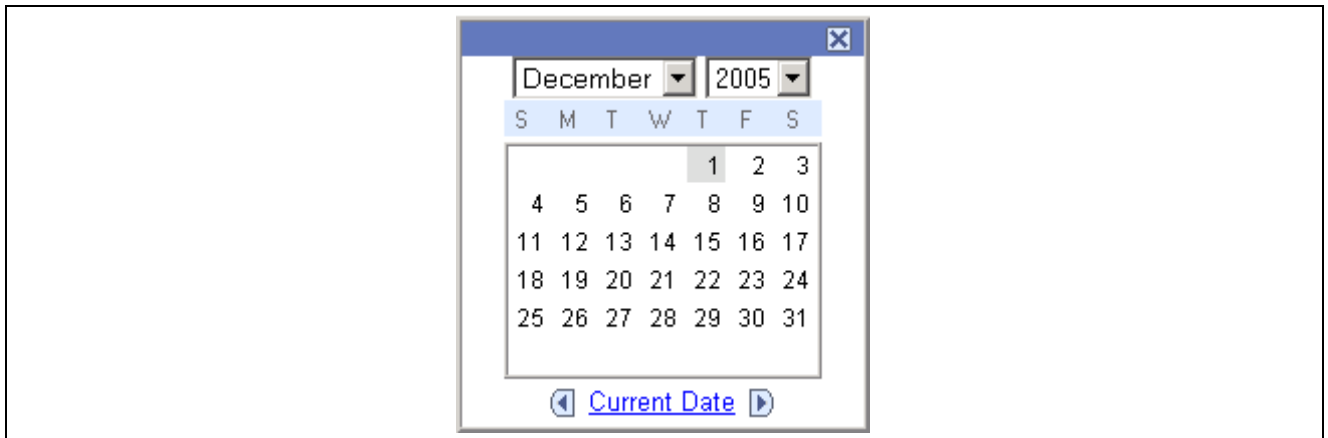
See Also

Chapter 3, “Using Keys and Search Pages,” Using Search Pages to Retrieve Data, page 36

Using Calendar Prompts

When entering information in a date field, you can select the calendar prompt button to the right of the field to help you choose a date. You can also enter the current day's date by entering *today* in the date field. Press TAB to exit the field; the current date appears. This feature can also use languages specific to the locale.

This example shows the calendar prompt window that displays when you click the prompt button:



Calendar prompt window

To change the calendar month, select the drop-down list box arrow for the month. To change the year, select the drop-down list box arrow for the year. Click the correct day of the month to select the day. Press ESC to cancel and close the calendar.

CHAPTER 5

Working With Processes and Reports

This chapter provides an overview of PeopleSoft processes and reports and discusses how to:

- Request reports in PeopleSoft applications.
- Check the status of reports.
- View reports in Report Manager.

Note. The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your PeopleSoft application tells you which third-party application to use.

Understanding PeopleSoft Processes and Reports

Although much of your interaction with the PeopleSoft system involves working with the online pages of a PeopleSoft application, you also run off-line, or batch, processes that run in the background while you are still using the application or even after you have left the office.

A batch process is a predefined process or program that runs independent of any end user intervention. Typical off-line processes include payroll, journal posting, complex mathematical calculations, or reports that you share with colleagues.

You run batch processes in the PeopleSoft system using the PeopleSoft Process Scheduler, which enables your organization to define processes, submit requests for processes, and set up an "agent" that scans for and runs submitted processes.

As an end user, you need only to be concerned with successfully submitting process requests, monitoring their progress, and viewing their output in Report Manager. You can safely leave process definitions and configuring the Process Scheduler Server to the technical staff at your site. This chapter covers the general procedure for running the standard reports that come with your PeopleSoft applications. If you, or someone in your organization, have added custom reports to the system, the procedure should be similar.

Requesting Reports in PeopleSoft Applications

This section discusses how to:

- Select reports.
- Specify report parameters.
- Specify where and when to run reports.
- Select output formats and set report distribution.

Selecting Reports

To run a report, select it from the appropriate menu in your PeopleSoft application. Many applications have a report menu that lists available reports.

Run Controls

When you want to run a report, you must tell the system when and where you want it to run. For example, you might tell the system to run the report on the database server at midnight, or on a Windows server every Sunday afternoon, or make it available immediately in your browser. For most reports, you also must set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time that you run a report, you create (and save) a run control with those settings. The next time that you run the report, you select the run control, and the system fills in the settings.

Run Control IDs

Each run control that you create receives a unique run control ID. These IDs are product-specific. Refer to your PeopleSoft product documentation for details on the run control IDs that you will be using. When you select a report to run, the system prompts you for a run control ID. If you are in Add mode, enter a new ID for the run control that you are about to define. If you are in Update/Display mode, enter an existing run control ID, or click the Search button and select from the list of available run control IDs.

Note. If you are running a number of reports in a row from the same menu, you must enter only the run control ID for the first report. When you select a second report from the menu, the application remembers which run control you are using.

To select a report:

1. Select the required PeopleSoft application menu item—for example, Process Financial Information, Maintain Ledgers.
2. Select Report, and then click the required report name.

When you select a report name, you can choose from these two actions:

- Add a new run control ID.
- Select an existing run control ID.

Specifying Report Parameters

You can run off-line processes from pages in your PeopleSoft application in a variety of ways. The way in which you use the processes depends on the application. Access the page from which you want to run your process. For many reports, you need to enter values for parameters that specify what data the report includes, such as from and to dates or business units. The parameters page appears after you enter the run control ID. The following is an example of the General Ledger Activity report.

The screenshot displays the 'GL Activity' window with a 'Report Request Parameters' section. It includes fields for 'Run Control ID' (testEnglish), 'Language' (English), 'Unit' (US001), 'Ledger' (LOCAL), 'Fiscal Year', 'Currency' (USD), 'From Period', and 'To Period'. There are also checkboxes for 'Show Discrepancies Only', 'Show Journal Detail', and 'Display Full Numeric Field'. A 'Refresh' button is present. Below this is a 'ChartField Selection' table with columns for 'Sequence', 'Field Long Name', 'Select', 'Subtotal', 'Value', and 'ChartField TO Value'. The table has one row with empty input fields.

General Ledger Activity page

Note. The pages you use to submit report parameters in your applications may appear differently.

If you selected an existing run control ID, the values in this page reflect the settings from the selected run control; if you added a new value, or if you're using an HCM application, they are the default values.

You can change any of these settings. However, keep in mind that your changes are saved to the run control when you save or run the report.

To run your report, click Run; the Process Scheduler Request page appears.

Specifying Where and When to Run Reports

You submit a process request from the Process Scheduler Request page. This page displays the options that you have selected for a particular process request and which processes are available for you to submit. Select the options that you want to use in running your process, and select the check box for each process that you want to run. Click OK to queue your process request.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests".

The options available to you on this page are determined by your security profile. For example, each end user has a user profile, which is linked to one or more *roles*. Roles define groups or types of end users, such as payroll clerks, sales staff, or managers. Each role has one or more permission lists that control what a user can access. You can run only those processes that are associated with your permission list. For example, if you are in the human resources department, you probably belong to a human resources role and therefore can run only human resources processes. The number of processes that appear in the list on the Process Scheduler Request page is directly associated with your security profile.

Select the run options that you want to use in running your process. Depending on your security, you can select the server and run date and time variables for your process. In the Process List group box, select the check box for each process that you want to run.

Process Scheduler Request

User ID: VP1 **Run Control ID:** testEnglish

Server Name: **Run Date:** 11/10/2003

Recurrence: **Run Time:** 1:34:46PM Reset to Current Date/Time

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	File Dependency
☐	COBOL Multi-process Job	3CBL	PSJob	(None)	(None)	
☐	Crystal Multi-process Job	3CRYSTAL	PSJob	(None)	(None)	
☐	SQR Multi-process Job	3SQR	PSJob	(None)	(None)	
☐	6XRFWIN	6SQR	PSJob	(None)	(None)	

Process Scheduler Request page

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests”.

Selecting Output Formats and Setting Report Distribution

You can choose several kinds of output formats for your process. The following table shows a list of output formats listed by process type and output type:

Process Type	Output Type	Output Format	Default
AppEngine	FILE	PDF, XLS, TXT, HTM	TXT
AppEngine	WEB	PDF, XLS, TXT, HTM	TXT
AppEngine	WINDOW	PDF, XLS, TXT, HTM	TXT
COBOL	NONE	NONE	NONE
COBOL	WEB	TXT	TXT
COBOL	WINDOW	TXT	TXT
Crystal	EMAIL	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Crystal	FILE	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Crystal	PRINTER	RPT	RPT
Crystal	WEB	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM

Process Type	Output Type	Output Format	Default
Crystal	WINDOW	DOC, HTM, RPT, RTF, TXT, XLS, PDF	HTM
Cube	NONE	NONE	NONE
nVision	EMAIL	HTM, XLS	XLS
nVision	FILE	HTM, XLS	XLS
nVision	PRINTER	HTM, XLS	XLS
nVision	WEB	HTM, XLS	XLS
nVision	WINDOW	HTM, XLS	XLS
nVision	DEFAULT	DEFAULT	DEFAULT
SQR	EMAIL	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	FILE	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	PRINTER	HP, LP, PS, WP	PS
SQR	WEB	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
SQR	WINDOW	CSV, HP, HTM, LP, PDF, PS, SPF, OTHER	PDF
WinWord	WEB	DOC	DOC
WinWord	WINDOW	DOC	DOC
Data Mover	FILE	TXT	TXT
Data Mover	WEB	TXT	TXT

Process Type	Output Type	Output Format	Default
Data Mover	WINDOW	TXT	TXT
OTHER	NONE	NONE	NONE

Note. You must have Adobe Acrobat Reader installed on your workstation to be able to read Acrobat (.pdf) files.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests,” Selecting Output Types and Formats.

Report Distribution

The Distribution Detail page enables you to choose the recipients of your process output. To set up distribution for your process output, click the Distribution icon.

If your process allows output that can be emailed—for example, Crystal can create Adobe Acrobat (.pdf) files—you can enter an email subject and message and send the output to a group of email addresses.

You can add users or roles to the distribution list by adding a row and entering the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

Note. If you are entering a list of email addresses, insert a semicolon between each address.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests,” Setting Report Distribution.

Checking the Status of Reports

When you click OK on the Process Scheduler Request page, the system returns you to your application page. Use the Process Monitor to view the status of your submitted processes. Process Monitor is a tool designed to track the status of all running, pending and completed Process Scheduler requests.

Note. The time it takes for a process request to complete varies. The complexity of the process and the current load on the system are examples of the factors that can lengthen the duration of a process request. For example, a large, complicated report extracting large volumes of data will take longer to run than a simpler report. Keep this in mind when monitoring the status of your process requests.

Process List **Server List**

View Process Request For

User ID: QEDMO Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: ☒ Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | First 1-9 of 9 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	9999932		PSJob	3CBL	QEDMO	03/24/2004 9:53:29AM PST	Queued	N/A	Details
☐	9999931		SQR Report	XRFWIN2	QEDMO	03/24/2004 5:00:00PM PST	Queued	N/A	Details
☐	9999927		PSJob	38QR	QEDMO	03/24/2004 9:45:13AM PST	Queued	N/A	Details
☐	9999926		SQR Report	XRFWIN2	QEDMO	03/24/2004 9:42:05AM PST	Queued	N/A	Details
☐	9999925		Crystal	XRFWIN	QEDMO	03/24/2004 9:42:05AM PST	Queued	N/A	Details

Checking process status with Process Monitor

To check the status of your report:

1. Click the link to Process Monitor, or select PeopleTools, Process Scheduler, Process Monitor.
Your user ID appears in the User ID list box. If the list of processes is too long, you can use the navigation arrows on the screen to scroll through the list.
2. Use the Server, Type, Run Status, Last, and Instance list boxes to limit the processes that Process Monitor displays.
3. Click Refresh to update this page with the latest system activity.
If the run status is *Initiated* or *Processing*, the report is still running. If the run status is *Success*, the system has finished running the report.

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete the report's information from Process Monitor. Click Details to display the options for canceling or holding a request.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler, "Using Process Monitor"

Viewing Reports in Report Manager

Report Manager is like your own personal "in box" of reports and processes to which you have access. It provides a secured means to view report content, check the status of a job, and see content detail messages.

To view your list of reports:

1. Select Reporting Tools, Report Manager.
2. Select View to view your report output.
The Report/Log Viewer page appears in another browser window.
3. Click the link to the report or any associated files that you want to view.
The report appears in Adobe Acrobat (.pdf) format.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler, “Using Report Manager”

CHAPTER 6

Using Workflow

This chapter provides an overview of workflow and discusses how to:

- Send and receive notifications.
- Work items.
- Use timeout worklists.

Understanding Workflow

Many of the tasks that you perform throughout the day are part of larger tasks of an entire business process that involve several steps and several people working together. For example, when you enter a vendor invoice into the system, you are also initiating an approval and payment process: someone else reviews and approves the invoice, and a third person submits payment to the vendor. The term *workflow* refers to the way in which work flows through the steps of the larger, business process.

To facilitate this type of multiuser process, PeopleSoft automatically triggers workflow *routing*s—notifications to inform other people of the work awaiting them. So when you enter an invoice, PeopleSoft automatically notifies the appropriate individual that the invoice has been submitted and is awaiting review.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology, “Understanding PeopleSoft Workflow”

Sending and Receiving Notifications

This section discusses how to:

- Send notifications.
- Use worklists to receive notifications.

Page Used for Sending and Receiving Notifications

Page Name	Object Name	Navigation	Usage
Send Notification	PT_WF_NOTIFY	Click the Notify button in the toolbar at the bottom of any transaction page.	Use to enter a personal message and send an email or worklist notification to an individual or group when a relevant event has occurred.
Worklist	WORKLIST	Select Worklist, Worklist from the menu pagelet or select Worklist from the universal navigation header.	Use to view and work from an organized list of the work items awaiting your attention.
Worklist Details	WORKLIST_DETAILS	Select Worklist, Worklist Details from the menu pagelet.	Use to view additional information about items on your worklist.

Sending Notifications

The system sends notifications automatically as part of the standard workflow routings. You can also send notifications from most PeopleSoft components by using the Notify toolbar button. This button picks up any available notification templates for that component.

In both cases, you can send notifications by way of worklist or by email.

Access the Send Notification page:

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details

[Lookup Recipient](#)
[Delivery Options](#)

To:

CC:

BCC:

Priority:

Subject:

<Enter Subject here>

Template Text:

Workflow Notification
Priority: %NotificationPriority
Date Sent: 2004-03-24

Message:

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

OK

Cancel

Apply

Send Notification page

To	Enter the user names or email addresses of those who need to take action. This field can contain one or more email addresses or user names separated by a semicolon.
CC (carbon copy)	Enter the names or email addresses of CC recipients, who are made publicly aware of the notification.
BCC (blind carbon copy)	Enter the names or email addresses of BCC recipients, who are made aware of this notification privately.
Priority	Select a priority level for the notification: low, medium, or high. This priority is reflected in the notification only if the %NotificationPriority variable is in the template text.
Subject	Enter the topic or a brief description of the notification. The subject value may appear by default from a template, but you can edit it.
Template Text	Displays the template text, which is based on a predefined notification template. The text in this field is sent in the language of the recipient. However, the notification template has to be defined with template text for each language.
Message	Enter your own comments. The message text is sent in the language of the sender.

Lookup Recipient	Click to access the Lookup Address page. Enter the first characters of a recipient and click Search to receive a list of people who match your search. To use someone as a recipient, select the check box for the type of recipient (To ,cc, bcc) and click Add to Recipient List.
Delivery Options	The check boxes are populated based on the delivery options that are defined in the recipient's user profile. The Worklist check box is unavailable for external email addresses.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology, “Administering PeopleSoft Workflow,” Setting Notification Options

Working with Received Notifications

PeopleSoft offers two types of workflow notifications:

- email
- worklists

Working with Email Notifications

While many workflow-enabled applications use worklists to assign work, you may receive workflow notifications through email. When you receive an email notification, the notification typically includes a link to the PeopleSoft page where you will perform the necessary work. Depending on your business processes, you may need to notify a colleague or supervisor that you've completed the work.

See [Chapter 6, “Using Workflow,” Sending and Receiving Notifications, page 83](#).

Viewing a Worklist

When you are using a workflow-enabled application, changes in your day-to-day tasks are reflected in a worklist. A worklist is an organized list of the work items awaiting your attention. Selecting items to work on from a worklist automatically returns the pages that you need. This enables you to bypass any other navigational structure and work directly from the worklist.

The Worklist page provides summary information about all items on your personal worklist. This page also provides links enabling you to:

- View additional details about the work.
- Perform the indicated work.
- Reassign work items.

Access the Worklist page. As with other grids, you can customize the sorting and columns within Worklist grid.

Worklist for VP1: Kenneth Schumacher

[Detail View](#) Work List Filters:

Worklist						Customize	Find	View All	First	1-25 of 34	Last
From	Date From	Work Item	Worked By Activity	Priority	Link						
Theresa Monroe	04/13/2001	Supplier Schedule	PO_SUPPLIER_SCHEDULE		SHARE_SCM0000004_US008 FR7002_2001-04-13-09.16.02.000000	Mark Worked	Reassign				
Theresa Monroe	01/25/2002	Recommendation Made	RS_MYRECS_CHANGE		KU0015_US004_0000000017.1	Mark Worked	Reassign				
Theresa Monroe	08/16/2000	Routing Notification	Maintain Routing		SAMPLE_2000-08-16-14.03.41.000000_US008_MT2000_RW.1.PR	Mark Worked	Reassign				

Worklist page

Work List Filters

Enables you to select a worklist to view. You can only view worklists to which you are assigned. The system maintains the filter you have selected until you sign out of the PeopleSoft system.

Note. If you complete all of your work items in a worklist and mark them as "worked" during your current PeopleSoft session, the system displays Invalid Value. This is because the worklist is empty; it contains no more work items.

From

Displays who triggered the work item.

Date From

Displays when the work item was triggered.

Work Item

Displays the work items, which are the types of activities that you need to carry out. You can have multiple entries all with the same work item. For example, if you approve expense reports, you may have several entries with *Expense Approval* in the Work Item column. Each of these entries represents a different expense report that requires your attention.

Worked By Activity

Displays the activity that needs to be worked by the worklist item.

Priority

Rank the worklist entry by importance. Priority values include: 1 for high, 2 for medium, and 3 for low.

Link

Click a link to access the target page—the page where you work the item. The target page is specific to the type of work that you are doing. For example, the link for an expense approval item accesses the page where you can review and approve expense reports.

Note. You cannot sort on this column. In addition Find won't work on it and Download to Excel won't download this information.

Mark Worked

Click to remove an item from your worklist without actually accessing the target page. You should not use this option unless the item is a simple notification and no additional work is required.

Reassign

Click to forward the item to another user and remove it from your list.

Refresh

As items are added to and removed from your worklist, click this button to update the page with the most recent changes.

By default, all work items assigned to you are visible from the oldest to the newest. Click any of the column headings to sort work items according to the data in that column.

Performing Work

To work an item on its target page, click the link on the Worklist page for the item that you want to work. The system transfers you to the page where you can perform the required task. When you have worked the item, it automatically disappears from your worklist.

If you need to mark an item as worked manually—such as when an entry is a simple notification with no necessary followup—select the Mark Worked button. The item disappears from your worklist.

Reassigning a Worklist

You can also reassign a worklist item to another user. Your organization can choose to prevent particular types of items from being reassigned.

To reassign a worklist item to another user:

1. Click the Reassign button.
The Reassign page appears.
2. Enter the user ID of the person to whom you are reassigning the item.
Click the Search button if you need help finding the appropriate user ID.
3. (Optional) Enter a comment.
The comment becomes part of the worklist item when it appears in the assignee's worklist.
4. Click OK.

Viewing Worklist Details

Access the Worklist Details page.

The Worklist Details page provides additional information about items on your worklist; it includes all of the information from the Worklist page, along with the additional details described here.

Timed Out Dttm (timed out date and time)	Displays the date and time when the item will time out if it is not already worked.
Previous User	Displays the user whose action triggered this item.
Selected Dttm (selected date and time)	Displays the date and time when you first selected this item (to work the item).
Comment	Displays the comment (if any) entered by the user if the item was forwarded from another user.
Timed Out	Indicates whether the item has timed out.
Instance	Displays a unique identifier for each item of the same type.
Transaction	Displays a unique identifier for each item in the worklist.

Working Items

Depending on how the worklist item has been defined, there are different requirements for what actions are sufficient before the item is considered worked and removed from your worklist.

Although you cannot differentiate between the different types of worklist items just by looking at them, understanding these different types will clarify why different items respond to different actions:

Worklist Type	Description
User Specified	A work item is not marked as "worked" until you click Mark Worked. This option is typically used when you may need to return to the same work item several times or wait for supporting information.
Saved	A work item is marked as "worked" when you save your work on the page assigned to the worklist. This option is typically used when you can complete the item in one visit to the target page.
Selected	A work item is marked as "worked" as soon as you select it from the worklist. This option is typically used when the work items serve primarily as a notification.
Programmatic	A work item is marked as "worked" by behind-the-scenes processing attached to the page. This option is typically used when the data on the page must be evaluated to determine whether the item can be considered worked.

Using Timeout Worklists

Items in your worklist contain built-in timeout parameters. Depending on how your organization handles timeout processing, you may receive an email or another worklist entry if you have not worked an item by the time it times out.

When you open a timeout notification in your worklist, you are transferred to the Worklist Timeout Data page. You can also open this page by selecting PeopleTools, Workflow, Monitor Worklist, Update Timeout Data.

On this page, you can view information about the timed-out work item, enter a comment about the item, or reassign the item to another user.

CHAPTER 7

Using PeopleSoft Navigator

This chapter provides an overview of PeopleSoft Navigator and discusses how to:

- Access PeopleSoft Navigator.
- Work with PeopleSoft Navigator.

Understanding PeopleSoft Navigator

PeopleSoft offers multiple navigation methods for accessing application pages. PeopleSoft Navigator is an alternative navigational structure that uses a process-oriented organization to show you how individual steps fit together into a single activity or process.

This section discusses:

- Advantages of PeopleSoft Navigator.
- The PeopleSoft Navigator hierarchy.
- Workflow processing.

Advantages of PeopleSoft Navigator

PeopleSoft Navigator maps are organized by procedure. For example, the delivered navigation hierarchy for PeopleSoft Enterprise Human Resources Management is organized functionally: payroll-related pages appear under a different hierarchy than benefits-related pages. Using PeopleSoft Navigator's process-oriented organization, on the other hand, you might have a hire activity that includes both payroll-related and benefits-related steps.

PeopleSoft Navigator's process orientation also provides an high-level view of the process, helping you to understand the overall flow of work in your organization. Unlike text and menu-based navigation, PeopleSoft Navigator displays graphical maps. These maps clarify relationships among the steps in a process and ease your navigation through sequential tasks.

Navigator maps can also show you any workflow notifications that are triggered by changes that you make on a page. Without PeopleSoft Navigator, you would not necessarily know when you trigger a workflow notification. A PeopleSoft Navigator map can clarify when a notification is sent.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology, “Understanding PeopleSoft Workflow”

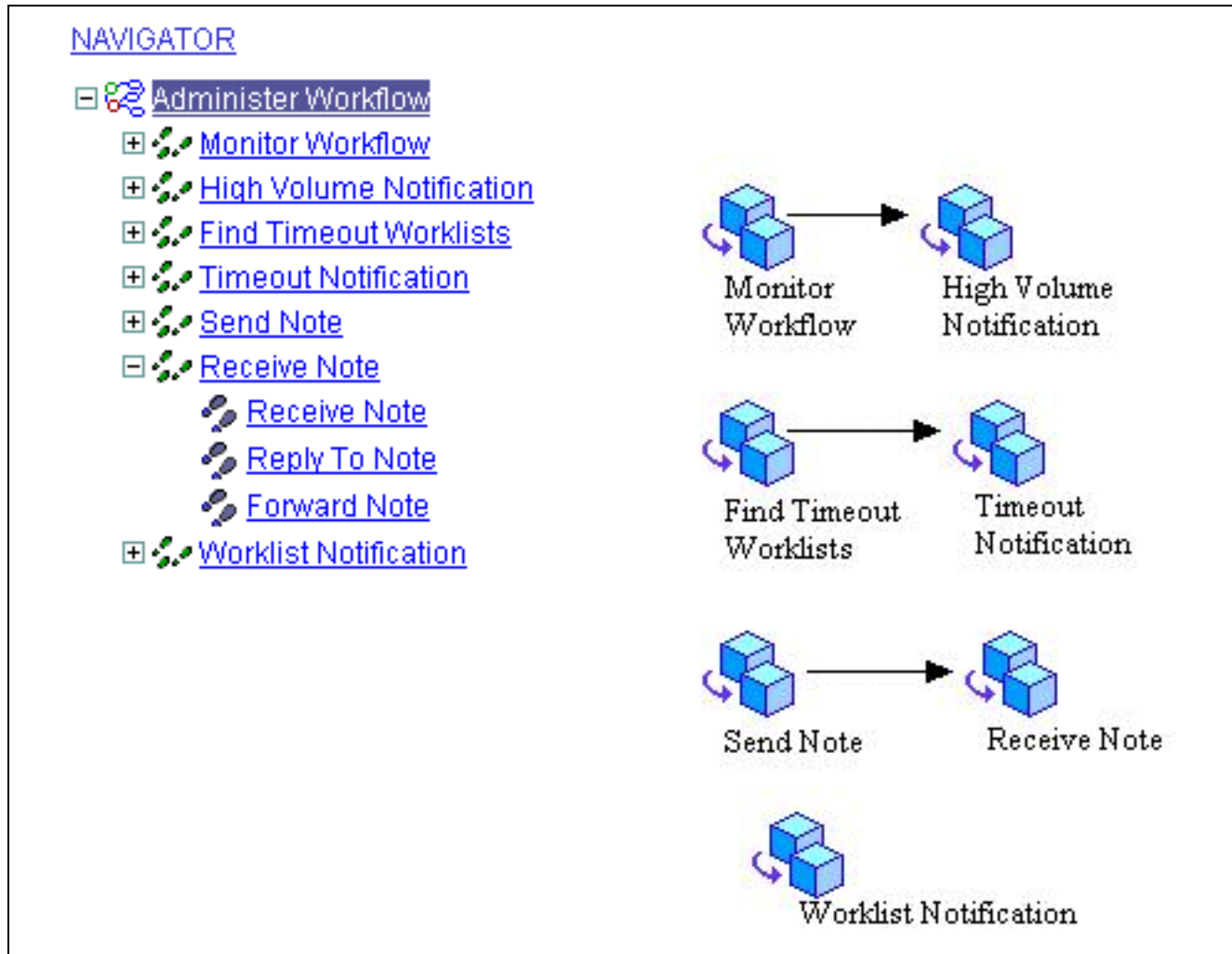
Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology, “Building Workflow Maps”

The PeopleSoft Navigator Hierarchy

PeopleSoft Navigator maps are organized hierarchically, enabling you to navigate from processes to subprocesses to the lowest level page where an individual transaction occurs. Workflow uses three hierarchical levels. The first two levels, business processes and activities, are both maps: graphical representations of the relationships between the component objects (other maps or steps).

The third level, steps, does not contain maps. Steps are elements within activities and represent the level at which the user interacts directly with application pages.

This example shows the PeopleSoft Navigator hierarchy:



PeopleSoft Navigator hierarchy

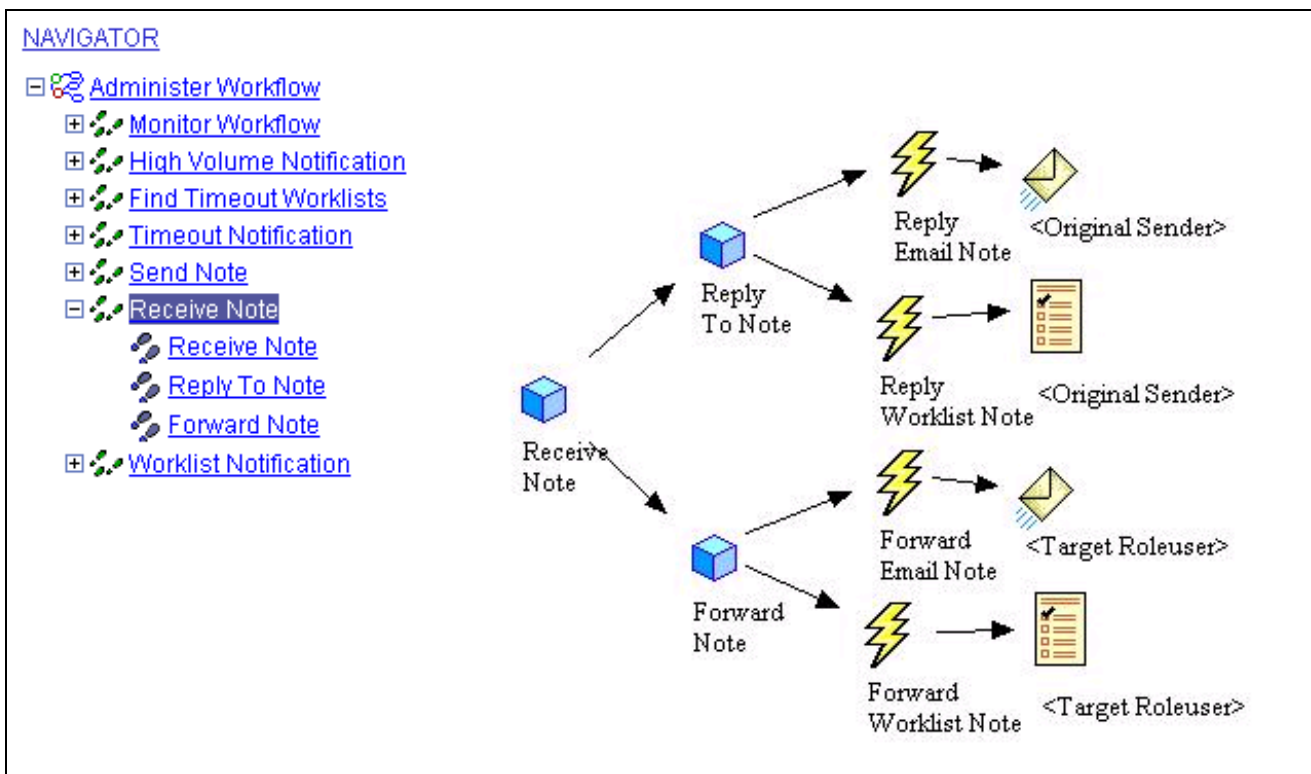
See Also

Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology, “Building Workflow Maps,” Understanding Map Hierarchies

Workflow Processing

Some PeopleSoft Navigator maps incorporate a visual representation of associated workflow processing. The icons associated with workflow processing appear only in the maps, not in the PeopleSoft Navigator tree. These icons merely provide information.

This diagram shows some of the icons associated with workflow processing:



Map with workflow icons

Some of the icons that you are likely to see include:



Event: A condition that triggers a workflow notification.



Email Routing: A workflow notification that is delivered to the user by email.



Worklist Routing: A workflow notification that is delivered to the user through her or his worklist.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology, “Building Workflow Maps,” Understanding Workflow Maps

Working With PeopleSoft Navigator

This section discusses how to:

- Navigate the map hierarchy.
- Navigate to a page.
- Navigate to the next page in an activity.

Pages Used to Work with PeopleSoft Navigator

Page Name	Object Name	Navigation	Usage
Navigator	NAVIGATOR	Worklist, Navigator	The Navigator page displays a tree with nodes that represent various processes; the right displays the map that corresponds to the highest level of the tree. The specific tree and map that appear depend on how your user profile is defined through PeopleSoft Security. Note. From PeopleSoft Navigator, you can return to the menu pagelet at any time by clicking Home in the universal navigation header.

Navigating the Map Hierarchy

You can navigate through the PeopleSoft Navigator hierarchy by opening nodes in the tree or by clicking icons in the map. Either way, both the tree and the map always show the currently selected item. Navigate the map hierarchy by using the following actions:

- To select a tree node and simultaneously expand it, click either the node or the plus sign that appears next to the node.
- To collapse a tree node, click the minus sign that appears to the left of the node.
- To return to a higher-level map, click the appropriate tree node; you cannot use the map to move to a higher level.

Navigating to a Page

When you click a step (the map element corresponding to a single page), the corresponding page appears on the right side of the screen where the map otherwise appears. A page that you access through PeopleSoft Navigator has the same access requirements as a page that you access through the standard application navigation. You therefore may need to go through a search page before accessing the transaction.

All of the standard page operations, including the Save and Return to Search buttons, are available. The PeopleSoft Navigator tree also remains available, and you can use it to move to maps or to other pages.

Navigating to the Next Page in an Activity

When an activity contains sequential steps, PeopleSoft Navigator offers two ways to move through the sequence:

- Continue using the tree by clicking the next step in the activity.
- Click the navigation links that appear in the upper-right corner of any page that appears in PeopleSoft Navigator.

Depending on where the page falls in the sequence of pages, links for the Prev (previous) page and Next page appear. When you move from page to page, key fields are remembered so that you do not have to go through the search page unless you are moving to a page with different high-level keys.

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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