PeopleSoft®

PeopleSoft Enterprise Infosync Client 8.9 PeopleBook

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PeopleSoft Enterprise Infosync Client 8.9 PeopleBook
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Open Source Disclosure

Contents

About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page 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 applications are defined in this preface.

PeopleSoft 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 applications.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. 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 applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. 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 this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

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, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft 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 *O*.
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 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.

See *About These PeopleBooks*, "ISO Country and Currency Codes," ISO Country Codes.

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.

Appendix A, "ISO Country and Currency Codes" ISO Currency Codes.

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 PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These 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.
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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
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.

PeopleSoft Infosync Client Preface

This preface provides:

- An overview of the *PeopleSoft Enterprise Infosync Client 8.9 PeopleBook* structure.
- A list of reference documentation for setting up and using PeopleSoft Infosync Client.

Book Structure

The *PeopleSoft Enterprise Infosync Client 8.9 PeopleBook* provides implementation and business processing information for the PeopleSoft Infosync Client application. This documentation is divided into four chapters:

- *Preface.* This chapter explains the structure of this documentation and provides links to other references.
- *Understanding PeopleSoft Infosync Client.* This chapter provides an overview of the integration between PeopleSoft CRM and Microsoft Outlook or Lotus Notes. It discusses the business processes and functionality of the integration that enables total data synchronization with just a mouse click.
- *Setting Up Integration Between PeopleSoft CRM and PIM (Personal Information Manager) Clients.* This chapter identifies the steps you take to set up PeopleSoft CRM and Infosync Client for the integration. To reduce duplicate of information, this chapter provides links to other documents if topics that are discussed in this chapter are documented elsewhere.
- *Viewing Synchronization Status Information.* This chapter discusses the availability of synchronization status and log information for users based on permission lists.

Relevant Documentation

Besides the *PeopleSoft Enterprise Infosync Client 8.9 PeopleBook*, you can also find information that pertains to this integration in other PeopleSoft documentation. Consult these publications where applicable:

- *PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker.*

  This book describes the processes required to use Integration Broker, which is the integration technology used to facilitate data synchronization between PeopleSoft CRM and other PIM applications. Refer to the tools version for your release.
- *Supplemental Installation Instructions for PeopleSoft Infosync Client.*

  This document provides additional instructions for installing PeopleSoft Infosync Client and is available for download on Customer Connection, under Support, Documentation, Documentation Updates, Customer Relationship Management, All in Selected Product Line.
- *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook.*

  This book provides implementation and processing information for your PeopleSoft FieldService application.
- *PeopleSoft Enterprise Sales 8.9 PeopleBook.*

  This book provides implementation and processing information for your PeopleSoft Sales application.

CHAPTER 1

Getting Started with PeopleSoft InfoSync Client

This chapter provides an overview of PeopleSoft InfoSync Server and discusses PeopleSoft InfoSync Client Integrations.

PeopleSoft InfoSync Client Overview

PeopleSoft Infosync Client synchronizes data between your contacts, tasks and calendars in PeopleSoft CRM and Microsoft Exchange or Lotus Domino. This allows end users to manage CRM contacts, tasks, and calendar items.

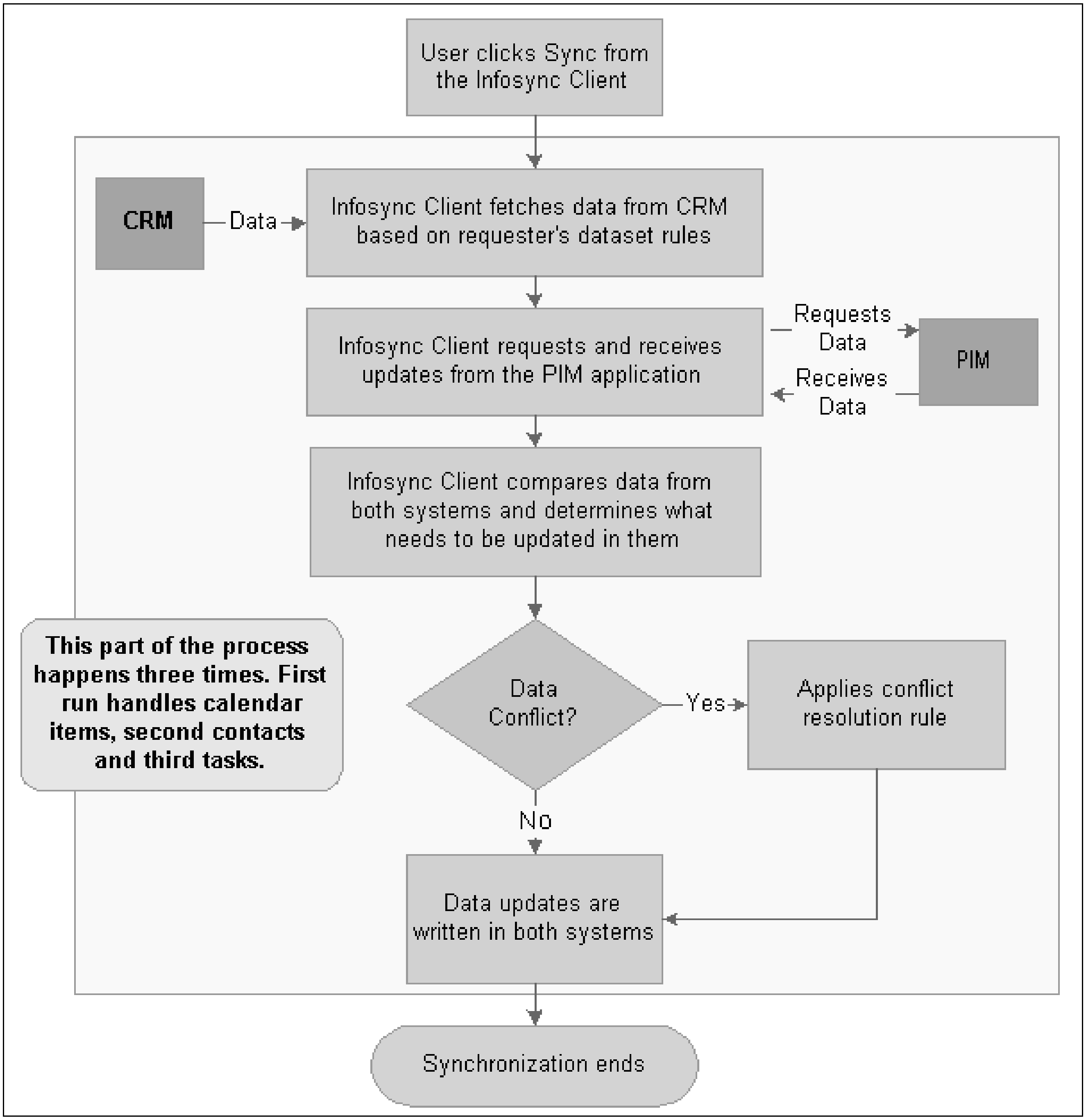
With this application, you can:

- Synchronize data between PeopleSoft CRM and Microsoft Outlook or Lotus Notes.
- Control the user data being sent back and forth using roles and rules.
- Resolve data conflicts.
- Support multiple mail Clients.
- Monitor synchronization status and error logs.

PeopleSoft InfoSync Client Integrations

PeopleSoft Infosync Client consists of three parts: PeopleSoft Infosync Client, message PeopleCode, and Integration Broker. In this data synchronization solution, field sales and field service personnel use PeopleSoft Infosync Client to make any synchronization requests. PeopleSoft uses Integration Broker to handle the XML-based communication between PeopleSoft CRM and the PIM application. When an end user clicks the Sync button from PeopleSoft Infosync Client, an XML request message is generated and sent to Integration Broker, which initiates a message PeopleCode to gather the changed data in PeopleSoft CRM and sends the reply back to the client application. Next, the client polls the PIM application for changes. It then performs a comparison between the two sets of data and resolves any data conflict that occurs. At the end, the data pertaining to PeopleSoft CRM is formatted in XML and sent back to PeopleSoft CRM as an XML message. Changes that are specific to the PIM client get updated simultaneously.

This diagram illustrates the data synchronization process flow of the PeopleSoft CRM and PIM integration:



Data synchronization process of the PeopleSoft CRM and PIM integration

CHAPTER 2

Understanding PeopleSoft Infosync Client

This chapter discusses:

- PeopleSoft Infosync Client.
- Data synchronization concepts.

PeopleSoft Infosync Client

PeopleSoft CRM integrates with PIM (Personal Information Manager) clients (for example, Microsoft Outlook) to provide data synchronization capabilities for end users, such as field service engineers and sales representatives, to manage contacts, calendar items, and tasks more effectively. When end users are connected to the company network, they can synchronize data between PeopleSoft CRM and their PIM clients with one click of a button.

Note. PeopleSoft Infosync Client synchronizes contacts between PeopleSoft CRM and the PIM client, which includes contacts, consumers, and workers. In PeopleSoft CRM, contacts, consumers, and workers are all instances of the person component. Whereas in the PIM client, they are all considered contacts in the address book. Consumers are contacts in the consumer category, and workers are contacts in the worker category. In this documentation, the term *contacts* refers to contacts, consumers, and workers as a whole unless stated otherwise.

PeopleSoft Infosync Client:

- Provides data synchronization capabilities between PeopleSoft 8.9 CRM and Lotus Notes (version 5.x, or 6.0) or Microsoft Outlook (version 98, 2000, 2002).
- Provides administrative control on the synchronization process.

  Administrators set up PIM preference to specify details on how the supported PeopleSoft CRM objects are handled when they are synchronized to PeopleSoft CRM (for example, does it allow new contacts to be added or does it synchronize private tasks, and so on). Every PIM end user is associated with PIM preference. Typically, you define a number of PIM preference settings that cover all PIM end users in a company based on roles or job functions. But if the company calls for a more granular definition of PIM preference for PIM end users, you can configure PIM preference settings on an individual user basis.
- Provides full control on data flow.

  Administrators can manipulate the type of data that gets exchanged in the synchronization process. You can limit the amount of data that gets downloaded to PIM end users by defining dataset rules that determine the most relevant set of data that end users receive (based on the dataset roles to which end users belong) within the shortest possible synchronization time.
- Provides predefined rules to resolve data conflicts that occur during synchronization.
- Provides synchronization status and error logs.

Data Synchronization Concepts

This section discusses:

- Supported objects.
- Configuration settings and PIM preference.
- Categories and filtering.
- Conflict resolution.
- Datasets.
- Field mapping.

Supported Objects

PeopleSoft Infosync Client supports synchronization for these objects between PeopleSoft CRM and PIM clients:

- Contacts.
- Consumers.
- Workers.
- Tasks.
- Calendar items.
- Private.

Contacts, Consumers, and Workers

In PeopleSoft CRM, contact, consumer, and worker are instances of the person component and are referred to as roles. A person can have multiple roles; he or she can be a contact, a consumer, and a worker simultaneously. In the PIM client, consumers and workers are the same as contacts and they are stored in the address book. Category is used to distinguish which role the person has in a contact record. By default, contact records with a consumer role are in the consumer category; those with a worker role are in the worker category, and those with a contact role are in the contact category. You can modify the names of categories.

You can enable or disable consumer or worker synchronization. For each of the enabled objects, you can further select the operations that synchronization supports. Suppose that you enable consumer synchronization. You can later decide whether to allow actions, such as consumer creation, update, or deletion to be synchronized to PeopleSoft CRM if any of these occurs in the PIM client. For any unsuccessful synchronization of records that happens due to unauthorized operations, errors appear on screen immediately and are logged on the PIM Errors page.

Contacts (with the contact category) support multiple companies. End users can specify multiple companies in a contact record using a separator; when the record synchronizes, it establishes and maintains a one-to-many relationship between that contact and its companies. You can view the contact in the 360 Degree View in PeopleSoft CRM using the Contact Web Page URL field on the PIM Preference page. The contact must be associated with a company to locate the contact in the system.

Note. Consider defining Contact Web Page URLs a one-time implementation decision. If end users are currently using the Contact Web Page URL field, using this feature overwrites the existing values during synchronization.

PeopleSoft Infosync Client supports the synchronization of private contacts. There is a Private option in PeopleSoft that enables these contacts to be synchronized and that transfers the value of the Private option to the PIM client.

Tasks and Calendar Items

Tasks and calendar items are stored in the PIM client's to-do list and calendar, respectively. When they are synchronized to PeopleSoft CRM, they appear on the monthly or daily calendar of end users.

In PeopleSoft CRM, you can relate tasks to transactions (such as leads, opportunities, and service orders) or they can remain independent (not transaction-related). If a task that is created from a lead or opportunity is synchronized to the PIM client, the lead or opportunity name automatically appears on the subject line of the task in square brackets ([and]). PeopleSoft Infosync Client delivers dataset rules that determine the most relevant subset of data that is synchronized to the PIM client for end users. You can refine the data subset by adding more dataset rules to exclude insignificant data records from being synchronized for end users.

Note. If end users create a calendar item from the Task List in PeopleSoft CRM that spans multiple days, the synchronization process creates one corresponding record on the first day of the calendar item in the PIM client and sets the record's start date to equal its end date. If the calendar item is created from the PIM client, a warning message appears, stating that an appointment cannot span more than a day and that synchronization will ignore the appointment. PeopleSoft CRM currently supports the creation of recurring tasks or calendar items.

Private

PeopleSoft Infosync Client supports the synchronization of private contacts, tasks, and calendar items. There is a Private option in PeopleSoft that enables these objects to be synchronized; the value of this option transfers to the PIM client. When the Support Private feature is enabled, the synchronization process creates a record for every private calendar item on the monthly calendar. The record displays the duration of the private calendar item and has a subject line that indicates that it is a private record. Private tasks are handled similarly; the only difference is that no task duration appears on the private task records in PeopleSoft CRM.

Note. If you must reassign tasks that are transaction-related, do so directly from the transactions in PeopleSoft CRM.

Deletion of Objects

Each object handles the deletion of records differently. This table summarizes what happens to the copy of a record, which was previously deleted in the PIM client, in PeopleSoft CRM if the delete operation is enabled for the record's object:

Object	Result
Contact (delete contact operation is enabled)	Record is stored on the Deleted Objects page. You can reactivate it later for synchronization.
Task or calendar item (delete calendar and delete task operations are enabled)	Transaction-related: record status changes to the status that is defined for the deleted task or calendar item in PeopleSoft CRM.
	Independent: record is deleted if the delete independent task or calendar item feature is enabled. Otherwise, the record status changes to the status that is defined for the deleted task or calendar item in PeopleSoft CRM.

Configuration Settings and PIM Preference

PeopleSoft Infosync configuration settings, in conjunction PIM preference, identify end user synchronization profiles. When synchronization starts, PeopleSoft Infosync Client reads these values to determine what data gets exchanged and performs the update in both PeopleSoft CRM and the PIM client.

Configuration Settings

You define the configuration settings for each of these areas in PeopleSoft Infosync Client: address book, calendar, and to-do list. In the Advanced Settings window for each of these areas, you can view the field map, select a filter to exclude unnecessary data from synchronizing to PeopleSoft CRM, and select a conflict resolution rule to handle possible data conflicts during synchronization. PeopleSoft Infosync Client delivers predefined values for these settings; you can modify them to best suit your business needs.

PIM Preference

PIM preference specify details on how the supported PeopleSoft CRM objects are handled when they are synchronized to PeopleSoft CRM. PeopleSoft Infosync Client provides two sample PIM preferences, and they're highly configurable. You can modify them as needed or create new ones. Typically, you define multiple function-specific (for example, sales manager or field technician) PIM preferences to cover all end users across the enterprise. For end users with specific data synchronization requirements, you can customize PIM preference at the individual user level.

Category and Filtering

PeopleSoft Infosync Client uses categories in conjunction with filters to identify what records to pick from the PIM client and synchronize to PeopleSoft CRM. For every synchronization-enabled object, specify a category in PIM preference with which end users associate. End users must enter the correct category (case sensitive) for each record that they want synchronize to PeopleSoft CRM. To do so:

- (Microsoft Outlook) Click the Categories button on the main page of the record, and select the category that is specified in PIM preference for the record's object.
- (Lotus Notes) Select the Options page of the record, and in the Categorize drop-down list box, select the category that is specified in the PIM preference for the record's object.

  For the address book, do so in the Categories drop-down list box on the Advanced page.

This table lists the system-delivered category values for each object:

Object	System Delivered Category
Contact	Contact
Worker	Worker
Consumer	Consumer
Task	PeopleSoft
Calendar	PeopleSoft

Categories are used with filters to determine what data is synchronized. For each of these objects, contacts (including contacts, consumers and workers), tasks, and calendar, set up a filter with one or multiple conditions. For filters with multiple conditions, specify the rule for combining conditions—whether or not all conditions must be met before a record can be transferred to the other system.

For example, if you want to support the synchronization of contacts, consumers, and workers in PeopleSoft CRM, specify conditions in the filter using the *contains* and *or*operators like this:

Categories contains “Contact” OR

Categories contains “Consumer” OR

Categories contains “Worker”

PeopleSoft Infosync Client delivers preset filters for the address book, calendar, and to-do list:

Section	Filter
Address book	Categories (condition: category equals “PeopleSoft”).
Calendar	• Exclude private data (condition: mark private is false). • Categories. • Categories and private (condition: category equals “PeopleSoft” *and* mark private is false).
To do	• Exclude private data. • Categories. • Categories and private.

Suppose that an end user marks a task as private and groups it under the PeopleSoft category in the PIM client. If the filter for the ToDo section is set to *Categories and Private* in PeopleSoft Infosync Client, the private task is not synchronized to PeopleSoft CRM. This task, however, is synchronized if the filter is set to *Categories.*

Note. Consider defining categories and filters a one-time setup process. It’s highly recommended that you don’t make changes after implementation, as that may cause unexpected results.

There is sample setup that you can use as guidelines; you should add or modify rules as necessary to meet your business needs. By default, no filter is selected.

Warning! If you specify multiple rules in a filter, you can use either the *AND* or *OR* operator to illustrate the relationship of the conditions (by selecting the rule for combining conditions), but not both.

Enabling Private Support

To enable support for private tasks or calendar items, you:

- Set the PrivateFlag Field parameter to *1* in the DCSSettings.cfg file for tasks or calendar items.
- Make sure that the Private Flag field is mapped correctly.
- Make sure that the filter being used doesn’t exclude private data.

  If you set to exclude private data, no time slots are reserved for private tasks or calendar items on the PeopleSoft CRM calendar, even when the Support Private feature is enabled because these records are not synchronized to PeopleSoft CRM.

Disabling Private Support

To disable support for private tasks or calendar items, you:

- Set the PrivateFlag Field parameter to *0* in the DCSSettings.cfg file for tasks or calendar items.
- Do not map the Private Flag field.

No extra steps are required for contacts because the concept of “private” is not supported for contacts.

Conflict Resolution

PeopleSoft CRM and PIM integration provides conflict resolution capability during synchronizations. When data conflict occurs (for example, end users have modified the same field or the same record in both systems with different values), PeopleSoft Infosync Client resolves the conflict based on the selected conflict resolution rule.

PeopleSoft Infosync Client delivers five predefined conflict resolution rules. You decide how the system handles data conflicts for the address book, calendar, and to-do list by selecting one of these rules:

- Add all conflicting items.
- Ignore all conflicting items.

Warning! It is recommended to not use this option. There is a potential for overwriting data.

- Notify me when conflicts occur (default value).
- PeopleSoft Infosync Client wins.
- Lotus Notes or Microsoft Outlook wins.

See Also

Chapter 3, “Setting Up Integration Between PeopleSoft CRM and PIM Clients,” Specifying Conflict Resolution Rules, page 46

Datasets

To control the distribution of data only to end users who need it and help shorten the time needed for synchronization, datasets are used in the PeopleSoft CRM and PIM integration to filter and display data for end users based on their roles.

Datasets, PIM Dataset Roles, and Dataset Rules

Every end user is associated with a PIM dataset role through the PIM preference ID that is selected in their user preferences in PeopleSoft CRM. Every PIM dataset role is linked to three datasets (contact, task, and calendar), each of which contains its own dataset rules. A dataset rule defines the collection of data that is downloaded to the PIM client. Through the use of datasets, each user receives updates for data that pertains to them only. For example, Jane Smith, a sales user, gets updates for all the leads and tasks created by her, as well as calendar items that are created for her leads (governed by dataset rules). If another colleague changes a task that he created for his lead, it is not updated in Jane Smith’s PIM application.

This table lists the predefined PIM dataset roles, datasets, and associated dataset rules that are delivered with the PeopleSoft CRM and PIM integration. Each dataset corresponds to a specific role and is associated with a number of dataset rules, which identify sets of data to be downloaded to the PIM client for end users associated to that role at synchronization.

Note. This set of dataset information is delivered in the system for demonstration; you can modify it. For example, administrators can create new dataset rules or modify existing ones as long as these rules carry the syncID for contacts, calendar items, and tasks to PeopleSoft CRM.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data That Gets Updated
PIM Field Service Role	PIM_FS_ CALENDAR	CALENDAR ASSIGNED TO ME	Calendar items that are assigned to the user.
		CALENDAR FOR MY SERVICE ORDER	Calendar items for the service orders that are owned by the user, including those calendar items (for the service orders) that belong to other users.
		CALENDAR OWNED BY ME	Calendar items that are owned by the user.
PIM Field Service Role	PIM_FS_ CONTACTS	CONTACTS_CREATED_ BY_ME	Contacts that are created by the user.
		CONTACTS FOR MY SERVICE ORDER	Contacts for the service orders that are owned by the user.
		CONTACTS_ACT_TM	Contacts for the account team.
		MY_TASK_ASSIGNEE	My task assignees.
		MY_TASK_CONTACT	My task contacts.
PIM Field Service Role	PIM_FS_ CONSUMER	CONSUMER_ CREATED_BY_ME	Consumers that are created by the user.
		CONSUMERS_FOR_ MY_SO	Consumers for the service orders that are owned by the user.
PIM Field Service Role	PIM_FS_TASK	TASKS ASSIGNED TO ME	Tasks that are assigned to the user.
		TASKS FOR MY SERVICE ORDER	Tasks that are associated with the user’s service orders.
		TASKS OWNED BY ME	Tasks that are owned by the user.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data That Gets Updated
PIM Sales Role	PIM_SL_ CALENDAR	CALENDAR ON MY LEADS	Calendar items for the leads that are owned by the user, including those calendar items (for the leads) that belong to other users.
		CALENDAR ON MY OPPORTUNITIES	Calendar items for the opportunities that are owned by the user, including those calendar items (for the opportunities) that belong to other users.
		MY CALENDAR	Calendar items that are created or owned by the user.
		CALENDAR ASSIGNED TO ME	Calendar items that are assigned to the user.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data That Gets Updated
PIM Sales Role	PIM_SL_ CONTACTS	CONTACTS_CREATED_ BY_ME	Contacts that are created by the user.
		CONTACTS_FOR_ LEAD_TASK_ ASSIGNEE	Contacts for the leads in which lead tasks are assigned to the user.
		CONTACTS_FOR_OPP_ TASK_ASSIGNEE	Contacts for the opportunities in which opportunity tasks are assigned to the user.
		CONTACTS_FOR_ LEAD_TEAM	Contacts for the lead sales team of which the user is a member.
		CONTACTS_FOR_OPP_ TEAM	Contacts for the opportunity sales team of which the user is a member.
		CONTACTS_FOR_MY_ LEAD	Contacts for the leads that are owned by the user.
		CONTACTS_FOR_MY_ OPP	Contacts for the opportunities that are owned by the user.
		MY_TASK_ASSIGNEE	My task assignees.
		MY_TASK_CONTACT	My task contacts.
		CONTACTS_ACT_TM	Contacts for the account team.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data That Gets Updated
PIM Sales Role	PIM_SL_TASK	MY TASKS	Tasks that are created or owned by the user.
		TASKS ASSIGNED TO ME	Tasks that are assigned to the user.
		TASKS ON MY LEADS	Tasks for the leads that are owned by the user, including those tasks (for the leads) that are not assigned to the user.
		TASKS ON MY OPPORTUNITIES	Tasks for the opportunities that are owned by the user, including those tasks (for the opportunities) that are not assigned to the user.
PIM Sales Role	PIM_SL_CONSUMER	CONSUMER_CREATED_BY_ME	Consumers that are created by the user.
		CONSUMER_FOR_MY_LEAD	Consumers for the leads that are owned by the user.
		CONSUMER_FOR_MY_OPPY	Consumers for the opportunities that are owned by the user.
Both	PIM_WORKER	WORKERS FOR PIM USERS	Workers in the same department as the user.

See Also

PeopleSoft Enterprise Components PeopleBook

Chapter 3, "Setting Up Integration Between PeopleSoft CRM and PIM Clients," Defining Dataset Rules, page 26

Field Mapping

Field mapping dictates where data appears after it is transferred from one system to another. You can review the field map of the address book, calendar, and to-do list by clicking the Field Mapping button on the Advanced Settings window.

Note. PeopleSoft highly recommends that you leverage the field mapping as delivered and do not change it. If you must modify the field mapping, make sure it's well tested.

Field mapping for the integration can be found in these PeopleSoft database records:

- BO_NAME

- RD_PERSON
- CM_ADDRESS
- CM_EMAIL
- CM_PHONE
- CM_PAGER
- PIM_CNTS_INFO
- RB_TASK
- PIM_TASK_INFO

Note. XML names are used internally in the program. They don't necessarily match the names that you see in the field map. The column heading *# of Char* (number of characters) denotes the maximum number of characters to be synchronized for each field.

BO_NAME Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
First Name	firstName	FIRST_NAME	NA	NA	30
Last Name	lastName	LAST_NAME	NA	NA	30
Middle Name	middleName	MIDDLE_NAME	NA	NA	30
Suffix	suffix	NAME_SUFFIX	NA	NA	2
Company Name	companyName	BO_NAME	NA	NA	50

RD_PERSON Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Job Title	jobTitle	TITLE	NA	NA	35
Title	title	SALUTATION_CD	NA	Codeset mapping supported	30

CM_ADDRESS Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Office Street	businessStreet	ADDRESS1	Business type (32)	NA	55
Office City	businessCity	CITY	Business type (32)	NA	30

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Office State	businessState	STATE	Business type (32)	Codeset mapping supported	32
Office Zip	businessZip	POSTAL	Business type (32)	NA	12
Office Country	businessCountry	COUNTRY	Business type (32)	Codeset mapping supported	32
Home Street	homeStreet	ADDRESS1	Home type (35)	NA	55
Home City	homeCity	CITY	Home type (35)	NA	30
Home State	homeState	STATE	Home type (35)	Codeset mapping supported	32
Home Zip	homeZip	POSTAL	Home type (35)	NA	12
Home Country	homeCountry	COUNTRY	Home type (35)	Codeset mapping supported	32
Other Street	otherStreet	ADDRESS1	Other type (38)	Microsoft Outlook only	55
Other City	otherCity	CITY	Other type (38)	Microsoft Outlook only	30
Other State	otherState	STATE	Other type (38)	Codeset mapping supported; Microsoft Outlook only	32
Other Zip	otherZip	POSTAL	Other type (38)	Microsoft Outlook only	12
Other Country	otherCountry	COUNTRY	Other type (38)	Codeset mapping supported; Microsoft Outlook only	32

CM_EMAIL Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Email1 Address	email	EMAIL_ADDR	Business type (27)	NA	70
Email2 Address	email2	EMAIL_ADDR	Home type (30)	Microsoft Outlook only	70

CM_PHONE Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Office Phone	businessPhone	PHONE	Business type (11)	NA	24
Home Phone	homePhone	PHONE	Home type (15)	NA	24
Other Phone	otherPhone	PHONE	Other type (43)	Microsoft Outlook only	24
Mobile Phone	mobile	PHONE	Cellular type (12)	NA	24
Fax	fax	PHONE	Fax type (14)	NA	24

CM_PAGER Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Pager	pager	PHONE	Pager 1 type (21)	NA	24

PIM_CNTS_INFO Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Categories	category	PIM_CATEGORY	NA	NA	132

RB_TASK Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Start Date	taskDate	DATE_UNDER_RPT	NA	For calendar item and task	9

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Due Date	taskDate	NA	NA	Hard-coded to task date; task specific	9
Status	status	STATUS	NA	Task specific	26
Start Time	startTime	START_TIME	NA	Calendar item specific	9
End Date	dateClosed	DATE_UNDER_RPT	NA	Calendar item specific	9
End Time	endTime	END_TIME	NA	Calendar item specific	7
Subject	subject	DESCR254	NA	For calendar item and task	254
Body	notes	ACTIVITY_NOTES	NA	For calendar item and task	4095

PIM_TASK_INFO Record

PIM Field Label	XML Name	PeopleSoft Field Name	Type	Note	# of Char
Category	category	PIM_CATEGORY	NA	For calendar item and task; not applicable to Lotus Notes 4.6	132
Private	private	PIM_PRIVATE_FLG	NA	For calendar item and task	1

Status Mapping for Tasks: Microsoft Outlook

This table shows the task status mapping between PeopleSoft CRM and Microsoft Outlook.

Note. In Lotus Notes, status is not available in individual task records, so there is no task status mapping between PeopleSoft CRM and Lotus Notes.

Task status in PeopleSoft CRM	Task status in Microsoft Outlook
In Progress	In progress
Completed	Completed
Cancelled	Deferred

Task status in PeopleSoft CRM	Task status in Microsoft Outlook
Open	Not started
Open	Waiting on someone else

Assignee Mapping for Tasks: Microsoft Outlook

This table shows the task assignee mapping between PeopleSoft CRM and Microsoft Outlook:

Task Assignee Status	Task Assignee Status in Microsoft Outlook
Accepted	In progress
Completed	Completed
Assigned	Assigned
Declined	Deferred
Declined	Waiting on someone else

Synchronization Rules and Considerations

PeopleSoft Infosync Client is supported in two PeopleSoft CRM versions and two PIM clients (each of which has its own supported versions). In each of these environment combinations, the behavior of the system changes slightly. This section discusses general rules that govern the synchronization process and considerations that describe how the system works in different situations.

The section discusses:

- General rules.
- Rules that are specific to contacts.
- Rules that are specific to calendar items and tasks.
- Rules that are specific to task notes.

General Rules

Here is a list of rules or considerations that are applicable to the entire integration.

Rule or Consideration	Applies To
When end users perform data synchronization between PeopleSoft CRM and their individual PIM clients using PeopleSoft Infosync Client, PeopleSoft recommends that they always initiate the process from the same machine. In other words, use only one machine to synchronize data, even if the end user has multiple workstations.	All
Administrators *must* specify the localization country for all PIM end users on the Overall Preferences page.	All

Rule or Consideration	Applies To
When a synchronization happens to an end user for the first time, this is called an initial synchronization. PeopleSoft Infosync Client compares the keys of all records for that end user with the same type of records in the other system, searching for duplicates. The process creates a copy of the record in the other system (unless it finds an existing record with matching values in all keys). The keys for contact records are first name, middle name, last name, and company. The key for task records is subject; for calendar records, keys are start date and subject.	All
When, during synchronization, PeopleSoft Infosync Client displays a message indicating that there's a data conflict and end users decide to cancel the process, the next synchronization becomes an initial one if the conflict involves changing the key value of a record in both systems. Because the key value is changed, the PeopleSoft CRM copy and PIM copy of that record no longer recognize each other as the equivalent in the other system. Therefore, when the next synchronization occurs, the process creates a copy for that PeopleSoft CRM copy in the PIM client, as well as a copy for that PIM copy in PeopleSoft CRM (because the process can't find the corresponding record for each of these two copies in the other system with all matching key values due to the change in key value).	PeopleSoft 8.9 CRM
PeopleSoft Infosync Client uses the syncID to uniquely identify every contact, task, and calendar item in PeopleSoft CRM for synchronization. The syncID is stored in the BO_ROLE table for contacts and the RB_TASK table for tasks and calendar items.	All
If PeopleSoft Infosync Client cannot synchronize a record to PeopleSoft CRM because the operation is not supported, it rolls back to the PIM client the copy of the record that resides in PeopleSoft CRM at next synchronization. For example, let's say that an end user updates a contact in the address book, but the update contact operation is not supported in the end user's PIM preference. When synchronization occurs, the process displays an error about not synchronizing that updated contact record on screen (and on the PIM Errors page) because the end user doesn't have the permission to do so. As a result, the contact is updated in the PIM client but not in PeopleSoft CRM. When the next synchronization occurs, the contact (the version available in PeopleSoft) is synchronized to the address book in the PIM client.	All
If you make a change to the existing setup, for example, reenabling the add contact capability in the PIM preference or changing the conflict resolution rule or filter, the change takes effect on data updates that happen *after* that change. To resynchronize data that wasn't synchronized successfully before the change, end users can modify the record on the PIM client and perform synchronization. For example, if an end user wants to recreate a contact that was not added to PeopleSoft CRM because the add contact capability was disabled, that user can modify the contact in the PIM client and synchronize data. The synchronization process then picks up the contact from the PIM client and creates it in PeopleSoft CRM.	Lotus Notes
PeopleSoft recommends that administrators complete the system setup before deploying the client application to users. Consider system setup a one-time implementation process and minimize changes made to system settings (for example, specifying new category or filter) after deployment because it may cause unexpected results. If administrators want to change the setup parameters, PeopleSoft recommends that users perform an initial synchronization to the device.	All

Rule or Consideration	Applies To
If end users create a new contact in Microsoft Outlook and enter information on address line fields for the *other* address type and synchronize, all the line information is formatted on the first address line of the contact in PeopleSoft CRM.	PeopleSoft 8.9 CRM Microsoft Outlook
Microsoft Outlook users must manually add the categories (defined in PIM preferences) in the master category list of the PIM client (one-time task) before these categories can be used. The list is available by clicking the Categories button on a task, calendar item, or contact.	PeopleSoft 8.9 CRM Microsoft Outlook

Rules That are Specific to Contacts

Here is a list of rules or considerations that are specific to contacts:

Rule or Consideration	Applies To
When end users synchronize a contact from PeopleSoft CRM to the PIM client for the first time and the contact is associated with multiple companies, the process displays the newest existing relationship that the contact has with a company in the PIM client (if the Support Multiple Companies feature is disabled). If end users later add another company relationship to that contact and perform synchronization, the process picks up the new relationship and updates the company for that contact in the PIM client accordingly.	All
The display of contact addresses in PIM clients can change after synchronization based on which address type becomes primary for that contact in PeopleSoft CRM. For example, a PeopleSoft CRM contact, who is associated with multiple addresses of type *business* and *home*, is synchronized for the first time. The process takes the first addresses that were created for each type and displays them in the equivalent contact record in the PIM client. (In PeopleSoft CRM, the first address that's created for a contact, regardless of type, becomes the primary address.) If an end user adds a new home address for the contact and performs synchronization, the process picks up the old home address and doesn't make the address update in the PIM client unless the primary check box for this new address is selected. If the end user changes the primary address to a newly created business address, this new business address and the old home address are synchronized and appear in the PIM client.	All
If end users are unable to synchronize new contacts to PeopleSoft CRM because there is missing or invalid information that is represented by multiple fields, for example, contact address (which includes address lines, state, country, and so on) and contact name (which includes first and last names), they must modify all the correlated fields before synchronizing the contact again. For example, if an end user creates a new contact without a last name and attempts to synchronize, an error is returned and the contact is not synchronized. To correct the problem, the end user must modify the first name and enter the last name before the synchronization process continues.	All
When consumers or workers are synchronized to the PIM client, their company name fields are populated with the value — *Consumer* — or — *Worker* — respectively (because consumers and workers are not associated with companies in PeopleSoft CRM). If a company is added to a consumer or worker in the PIM client, the company is ignored by the synchronization process.	All

Rule or Consideration	Applies To
If end users associate a contact record with multiple categories (*and* none or only one of these categories is defined in the PIM preference), it is synchronized to PeopleSoft CRM when any of its categories is listed as a filter condition for the contact object. A contact who is associated with multiple categories and more than one of them is defined in the PIM preference cannot be synchronized; PeopleSoft Infosync Client users will receive an error message, and the contact is not synchronized to PeopleSoft CRM.	All
If end users receive updates about a contact based on their dataset rules, and this contact has multiple roles (for example, this person is also a consumer in PeopleSoft CRM), the end users will receive a record for each role that this contact has at synchronization. In this example, end users receive two records: one for the contact role and one for the consumer role.	All
The Notes field in contact records is by default not mapped.	Microsoft Outlook
When end users delete the address from a contact record in the PIM client, the synchronization process automatically deletes the country, which doesn't appear as part of the address in the Address field, to ensure successful synchronization.	Microsoft Outlook
Company assignment to contacts. If, after synchronization, PeopleSoft CRM receives a contact record that is associated with a company, the system links the contact to that company if it successfully locates the company record with the exact same name in PeopleSoft CRM (assuming that the Allow Add with Invalid Company feature is disabled). In order for the system to recognize a company, even if only an abbreviated name is provided in the contact record, you can add match and return value pairs for commonly used company names in system delivered codesets. An example would be to add a pair for *GE* and *General Electric* so that the system knows recognizes GE and General Electric as one and the same. However, if the Allow Add with Invalid Company feature is enabled, and end users create a new contact that is associated with a company that doesn't exist in PeopleSoft CRM, PeopleSoft Infosync Client sends a message to end users in this format: "Company 'XYZ' does not exist. Cannot process this contact." What this warning message suggests is that the invalid company is not processed as part of the contact during synchronization; therefore, the contact is synchronized to PeopleSoft CRM without a company relationship. See *PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker*	All
As designed, if end users synchronize a contact that has some bad data (for example, an invalid country in the contact address) to PeopleSoft CRM, the synchronization process stops and displays the corresponding error. End users must correct the problem from the PIM client before the process continues.	All
Suppose that the Support Multiple Companies feature is enabled. If end users enter a list of companies at one time in the PIM client, and the length of the company list exceeds 51 characters, the entire company list is not synchronized. However, if end users enter one company at each synchronization, only the last company name is not synchronized if adding it exceeds the maximum characters that are allowed to be synchronized for the Company field.	All
After configuring the PIM preferences in PeopleSoft to enable the 360 Degree View Link for contacts, the link will appear to the end user on the PIM after the second synchronization.	PeopleSoft 8.9 CRM Lotus Notes

Rule or Consideration	Applies To
It is recommended that when a user creates a contact in Microsoft Outlook this user must decide if the contact is private or not. If later, the user selects the *Private*option on an existing contact and synchronizes, the contact will remain in PeopleSoft. The end user should use categories to define what data is synchronized.	Microsoft Outlook
Lotus Notes does not exclude private data because Lotus Notes considers everything to be private. Therefore there is not an option to *Exclude Private Data* in Lotus Notes.	Lotus Notes
If the end user has added a FAX number to the contact under Home and Business, it is going to show one phone in the PIM Client. The PIM Client does not define if he fax number is Home or Business. The number that is primary or entered first will show. This situation is true for other types of phone numbers that are duplicated.	Microsoft Outlook

Rules That are Specific to Calendar Items and Tasks

Here is a list of rules or considerations that are specific to calendar items and tasks:

Rule or Consideration	Applies To
In PeopleSoft CRM, calendar items and tasks are stored in the same table, RB_TASK. The difference between calendar items and tasks is that time is not associated with tasks. In the PIM client, calendar items appear on the calendar, and tasks appear on the to-do list with an exception of Lotus Notes. Tasks (with no time) that are created in PeopleSoft CRM appear in both the calendar and to-do list of Lotus Notes after synchronization.	All
The calendar of Lotus Notes does not display the status of calendar items that were originally created for leads and opportunities in PeopleSoft CRM.	PeopleSoft 8.9 CRM Lotus Notes
Enter a start and end time when you create a calendar item in PeopleSoft CRM. If the end time is not specified in the calendar item, PeopleSoft Infosync Client automatically enters an end time (by adding 30 minutes to the start time) on the record in the PIM client calendar after synchronization.	All
In PeopleSoft CRM, calendar items cannot span more than a day. Therefore, the start and end dates of calendar items are always identical.	All
PeopleSoft Infosync Client sets the maximum length of the description and subject for calendar items and tasks to *4095* and *254* characters, respectively. That means if the length of a sales lead task subject that is created in PeopleSoft CRM exceeds the limit, only the first 254 characters are synchronized to the to-do list in the PIM client.	PeopleSoft 8.9 CRM Microsoft Outlook
In system-delivered dataset rules, if a lead or opportunity task or calendar item is assigned to someone else, that assigned item is still visible on the owner’s PIM calendar. This is because the delivered rules indicate synchronization of all tasks and calendar items for user leads and opportunities. You can modify the delivered rules as necessary.	PeopleSoft 8.9 CRM
When a new task or calendar item is created in the PIM client and synchronized to PeopleSoft CRM, the type of task is by default set to *note*, and the calendar item is set to *appointment*.	All

Rule or Consideration	Applies To
PeopleSoft Infosync Client defines the maximum number of entries that it creates in PeopleSoft CRM for each recurring task or calendar item. These parameter settings are located in the DCSSettings.cfg file. You can modify these settings to allow more or fewer number of recurrences to be created for each type. The parameters and their delivered values are: • Daily Max Fanout=31 • Weekly Max Fanout=53 • Monthly Max Fanout=13 • Quarterly Max Fanout=8 • Yearly Max Fanout=5 • Other Max Fanout=50	All
Task Types are set up in the Task Management component. Set Up CRM, Common Definitions, Task Management When setting up Task Types, the option to *Do not show in calendar* is available. According to the PIM Client, if the option is selected, this means that the task will show as a task. If the option is not selected, this means that the task will show as a calendar item.	PeopleSoft 8.9 CRM Lotus Notes
If an end user creates a task in PeopleSoft that spans an entire day and associates contacts and invitees to this task, the contacts and invitees do not show in the PIM Client. Note that PeopleSoft does not deliver a Task Type that spans an entire day like *All Day Event* or *Anniversary*. It is recommended that this Task Type is created Set Up CRM, Common Definitions, Task Management and then associated with the *Task Type on PIA without a time* field on the Calendar page of the PIM Preferences component.	PeopleSoft 8.9 CRM Lotus Notes
If a meeting with invitees is created in the PIM Client and is sent out, the invitees of this meeting receive the calendar item and accept it to add it to their calendar. When the owner synchronizes, the invitees now have a duplicate entry in their calendar. The primary entry does not have a category associated with it, but the second entry does. To work around this, the administrator must remove the category value in the Calendar page of the PIM Preferences component. Take note that this allows the end user's entire calendar to be synchronized.	PeopleSoft 8.9 CRM Lotus Notes

Rules That are Specific to Task Notes

Here is a list of rules or considerations that are specific to task notes:

Rule or Consideration	
If an entry with more than one note is synchronized with the PIM client from PeopleSoft CRM, the notes are either concatinated or only the most recent note appears. This is specified in the PIM Preference page.	All
From PIM, end users can only update the note that they are entering. Any previous note must be updated in PeopleSoft CRM and then synchronized.	All
Task note delimiters showing in PIM where the note begins and ends are specified on the PIM Preferences page. These are configurable, although PeopleSoft recommends that you use only characters, numbers, or dashes.	All

Rule or Consideration	
When task notes are created in PIM and synchronized, the subject line of the note reads *Note Added from PIM.*	All
If a user has previously selected the *Most Recent* option for synchronizing task notes then later changes the option to *Concatenate*, the existing notes that have been synced will not automatically become concatenated, they will remain showing the most recent note.	All
When a user adds a task note on the PIM Client and synchronizes, the note on the PIM Client will show the same as before the synchronization which includes the delimiters surrounding the note. The user must synchronize once more to see the note without the delimiters.	All
Only one set of note delimiters should be used when adding notes to a task. If a user needs to enter more than one note to a task, it is recommeded that they synchronize twice, then add the additional note.	All

Note. Attachments are not a supported object.

CHAPTER 3

Setting Up Integration Between PeopleSoft CRM and PIM Clients

This chapter discusses how to:

- Define dataset rules and roles.
- Set up PIM preferences.
- Set up PIM user settings.
- Install PeopleSoft Infosync Client.
- Set up Integration Broker.
- Specify conflict resolution rules.
- Modify synchronization settings.

Note. This chapter covers all the tasks that are involved in setting up the integration between PeopleSoft CRM and PIM clients. Administrators can take full advantage of the system-delivered data that is predefined for some tasks (for example, dataset rules, dataset roles, PIM preference, and so on), or they can modify and create new rules and preferences that best fit their business needs.

Defining Dataset Rules and Roles

This section provides an overview of discusses how to:

- Define dataset rules.
- Define dataset roles.

A dataset is a collection of dataset rules that are used to determine what data end users receive on their PIM clients as a result of synchronization. In the integration setup process, you define the relationship between end users and dataset rules using this logic:

- Each user is associated with a PIM preference.
- Each PIM preference specifies a dataset role for each synchronization object (contact, consumer, worker, calendar, and task).
- Each dataset role is associated with a dataset (group of dataset rules) for each synchronization object.

When synchronization completes, end users receive updates on data based on the associated dataset rules. For example, suppose that you use the system-delivered dataset rules for synchronizing sales user tasks. After synchronization, the updates that sales users get for the task object come from their own tasks (rule: MY TASKS), tasks that are assigned to their leads (rule: TASKS ON MY LEADS), and opportunities (rule: TASKS ON MY OPPORTUNITIES). PeopleSoft delivers predefined datasets and dataset rules for this integration. You can modify them or create custom dataset rules to work with your implementation.

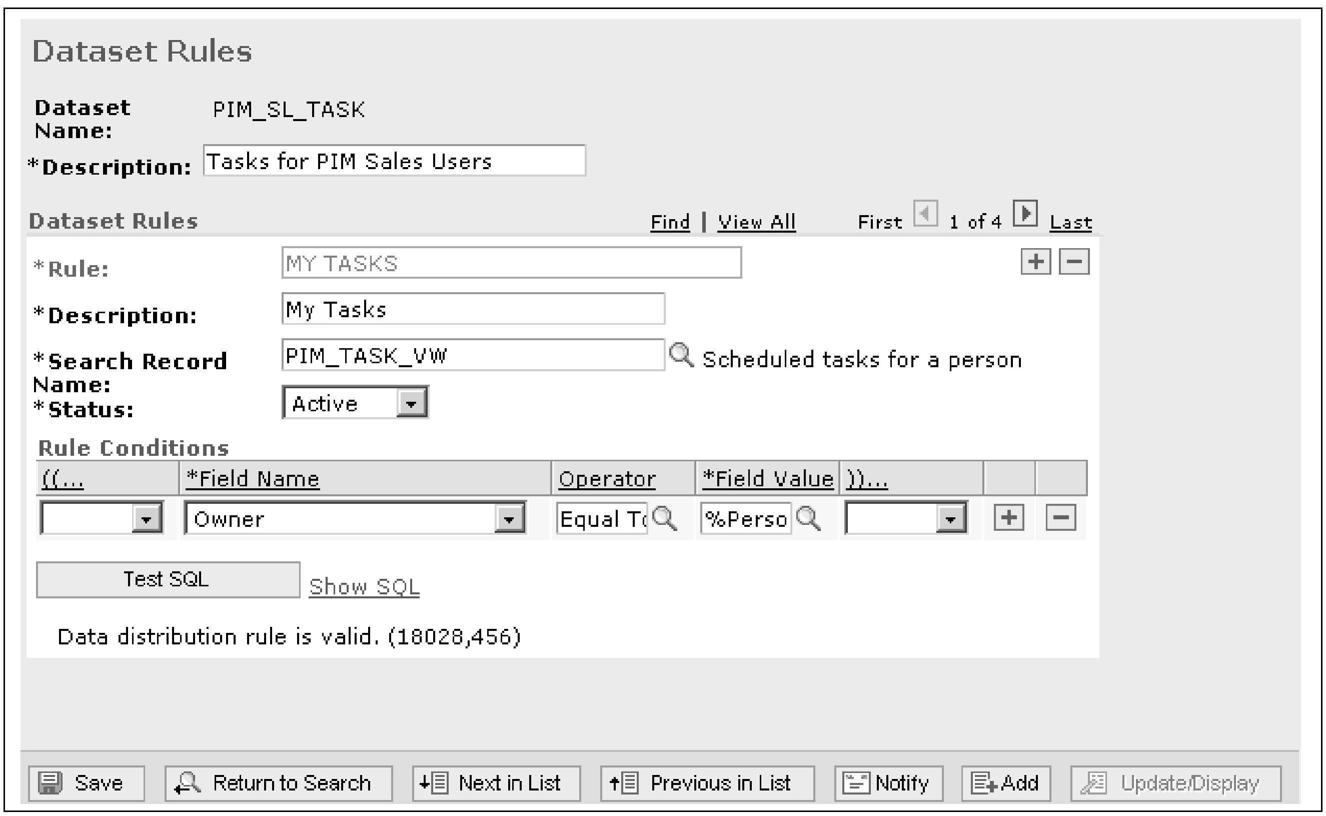
Note. If an end user is no longer associated with a contact, consumer, or worker (for example, a sales user reassigns a lead task to another person and therefore does not receive any updates about the lead's contacts from the CONTACTS_FOR_LEAD_TASK_ASSIGNEE dataset rules), the record is removed from the end user's address book.

Pages Used to Define Dataset Rules and Roles

Page Name	Object Name	Navigation	Usage
Dataset Rules	EOEC_DATASET	Enterprise Components, Component Configurations, Datasets, Dataset Rules	Define rules that comprise a dataset. Dataset rules are associated with users through dataset roles; they are used in the synchronization process to determine what data gets updated in PeopleSoft CRM and the PIM client.
PIM Dataset Roles	PIM_ROLE	Set Up CRM, Install, PIM, PIM Dataset Role	Define dataset roles and associate them with dataset rules.

Defining Dataset Rules

Access the Dataset Rules page.



Dataset Rules page

Rule	Enter the name of the rule. When you save the page, this field becomes unavailable.
Search Record Name	Enter the name of the search record for this rule. You can create a view specifically for use in the rule.
((... and **))...**	If you leave the AND or OR field blank, specify the nesting level for this condition. Be sure to match opening and closing parentheses.
Field Name	Select the field name on which this rule operates from the drop-down list of fields in the selected component.
Operator	Specify the operation with which to compare the specified field value. Select from standard conditional operators.
Field Value	Enter the value of the specified field against which to compare.
Test SQL (test structured query language button)	Click this button to test the validity of the rule conditions. The result is returned below the button.
Show SQL (show structured query language)	Click this button to view the SQL statement generated by the rule.

See Also

Chapter 3, "Setting Up Integration Between PeopleSoft CRM and PIM Clients," Defining Dataset Rules, page 26

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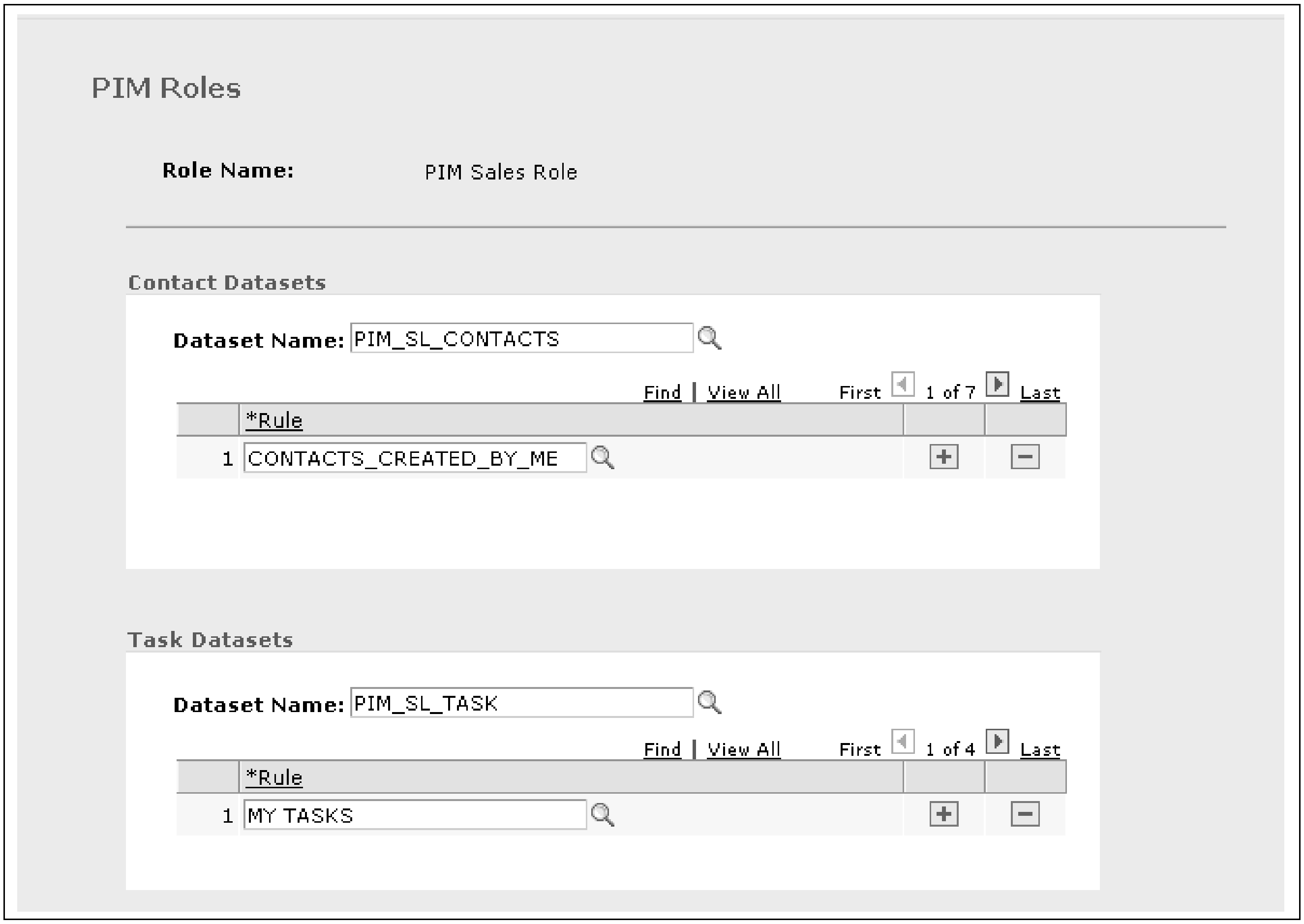
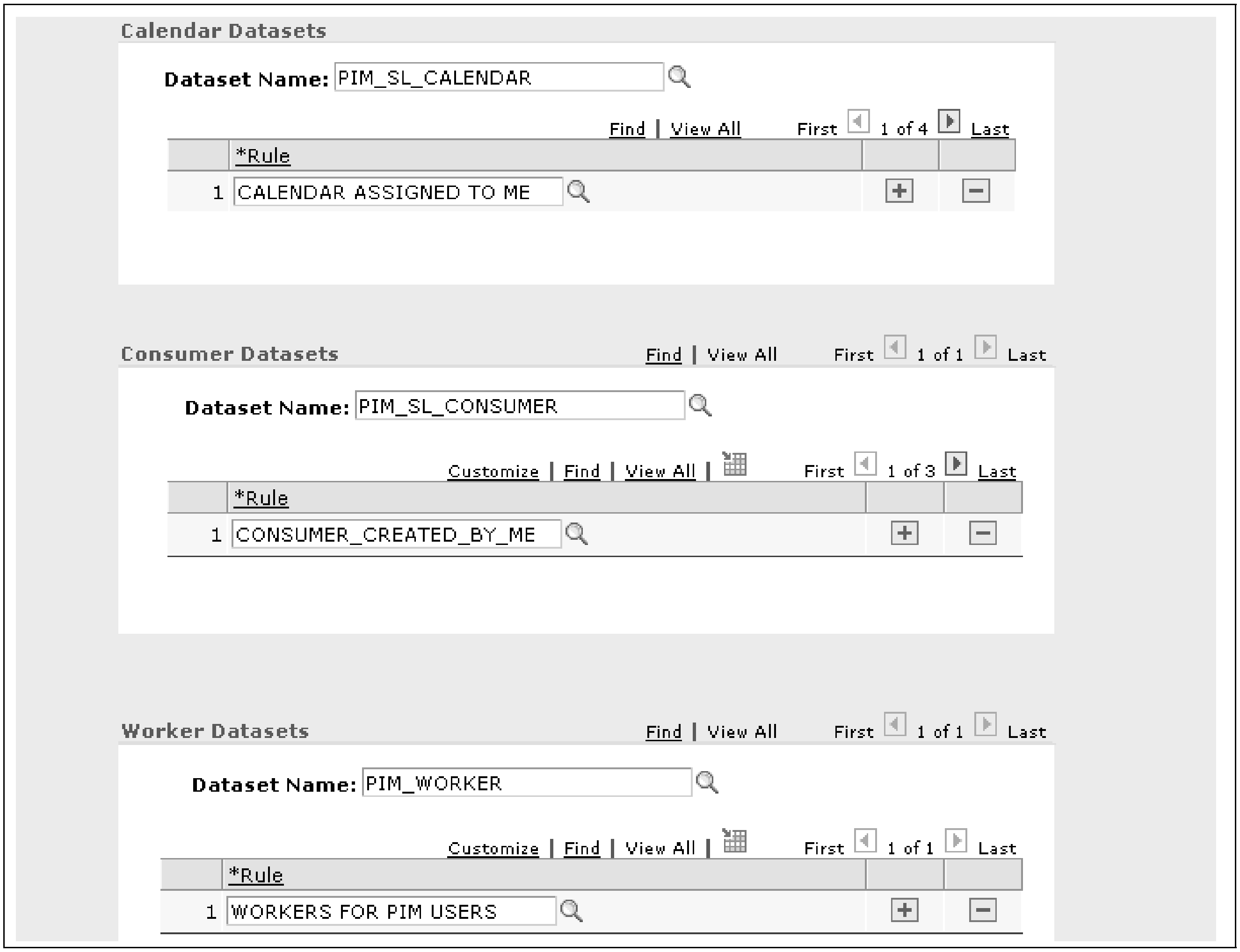
Defining PIM Dataset Roles

Access the PIM Dataset Roles page.



PIM Roles page (1 of 2)



PIM Roles page (2 of 2)

The system delivers two PIM dataset roles: the*PIM Field Service Role* and the *PIM Sales Role.*

Dataset Name Select a dataset for each synchronizable object: contact, consumer, worker, task, and calendar. All of the rules that are associated with this dataset are then available in the Rule grid.

Rule Select a dataset rule that is applicable to this role.

Note. You can update, add, or remove rules from datasets for PIM roles. For example, if sales users prefer not to see tasks that are assigned to other users (even though the tasks belong to their leads and opportunities), administrators can delete the *TASKS ON MY LEADS* and *TASKS ON MY OPPORTUNITIES* rules from the task dataset of the PIM sales role.

See Also

Chapter 3, "Setting Up Integration Between PeopleSoft CRM and PIM Clients," Defining Dataset Rules, page 26

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Setting Up PIM Preferences

This section discusses how to:

- Specify overall PIM preference.
- Specify PIM preference for contacts.
- Specify PIM preference for consumers.
- Specify PIM preference for workers.
- Specify contact method mapping.
- Specify PIM preference for calendar items.
- Specify PIM preference for tasks.

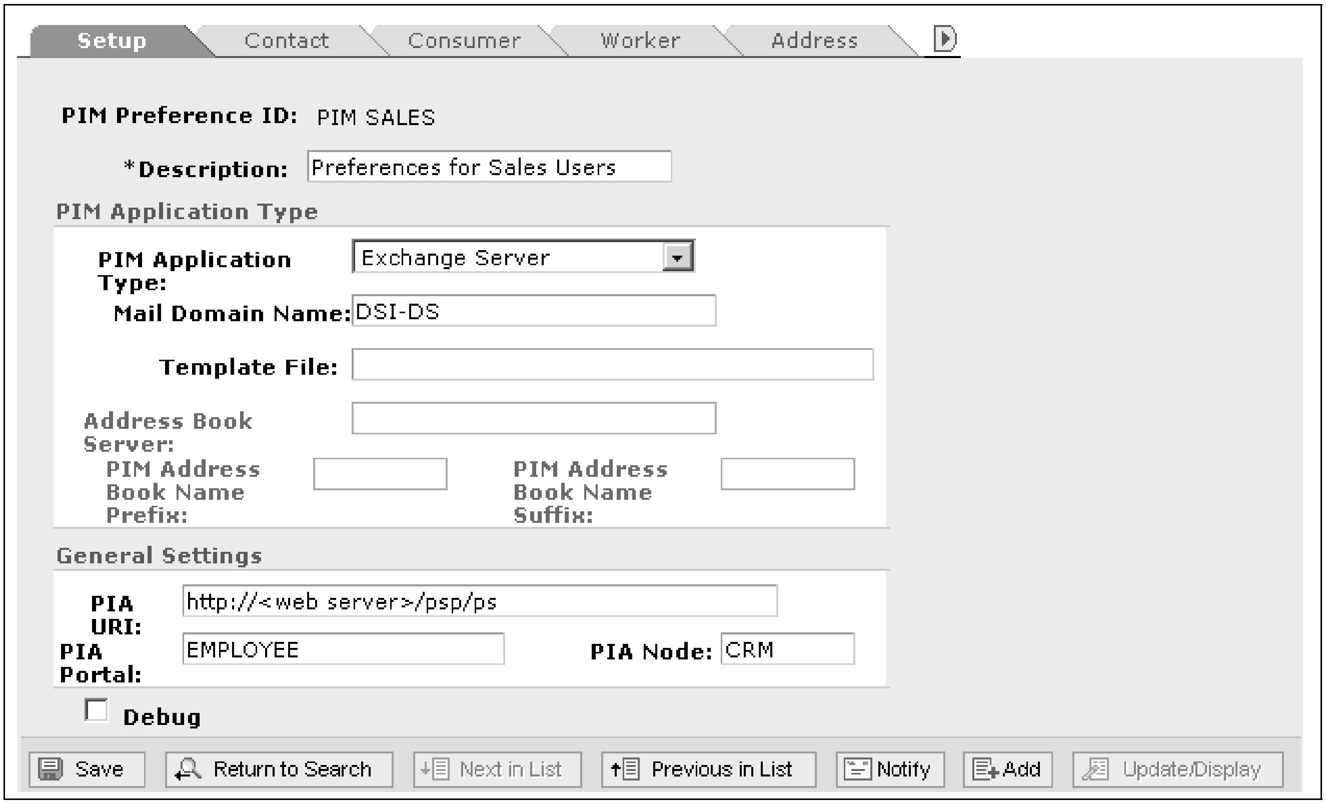
Note. When you configure PIM preferences, consider it a one-time implementation process. Avoid changing PIM preferences after PeopleSoft Infosync Client is in production.

Pages Used to Set Up PIM Preferences

Page Name	Object Name	Navigation	Usage
Setup	PIM_PREFERENCE_PG1	Set Up CRM, Install, PIM, PIM Preferences, Setup	Specify the PIM application type for end users who take this PIM preference.
Contact	PIM_PREF_CONTACT	Set Up CRM, Install, PIM, PIM Preferences, Contact	Specify the synchronization preference for contacts.
Consumer	PIM_PREF_CONSUMER	Set Up CRM, Install, PIM, PIM Preferences, Consumer	Specify the synchronization preference for consumers.
Worker	PIM_PREF_WORKER	Set Up CRM, Install, PIM, PIM Preferences, Worker	Specify the synchronization preference for workers.
Address	PIM_PREF_ADDRESS	Set Up CRM, Install, PIM, PIM Preferences, Address	Specify contact method mapping for contacts, consumers, and workers.
Calendar	PIM_PREF_CALENDAR	Set Up CRM, Install, PIM, PIM Preferences, Calendar	Specify the synchronization preference for calendar items.
Task	PIM_PREF_TASK	Set Up CRM, Install, PIM, PIM Preferences, Task	Specify the synchronization preference for tasks.

Specifying PIM Preference

Access the Setup page.



Setup page

PIM Preference ID

Enter the name of the PIM preference that is being defined. Associate each user with a PIM preference by specifying a PIM preference ID in the user preference on the Overall Preferences page.

See Chapter 3, "Setting Up Integration Between PeopleSoft CRM and PIM Clients," Associating PIM Preferences with Users, page 41.

Debug

Select to allow more specific information (for example, technical errors and message logs that are sometimes not end-user friendly) to be captured and displayed on the PIM Errors page. This is useful for administrators to debug and troubleshoot the application.

PIM Application Type

Information that is entered in this group box pertains to PeopleSoft Infosync Server and does not apply to PeopleSoft Infosync Client. However, PeopleSoft recommends that you select the PIM application type.

PIM Application Type

Select the type of PIM server (Lotus Domino or Microsoft Exchange server) that is used by PIM clients:*Domino Server* (default) and *Exchange Server.*

General Settings

Information that is entered into this group box pertains to PeopleSoft CRM.

PIA URI

Enter web server information to generate a URI on the contact page in PIM. This URI takes the end user to the associating Contact record in the 360 Degree View. If your web server address includes a port number, also include this in the address.

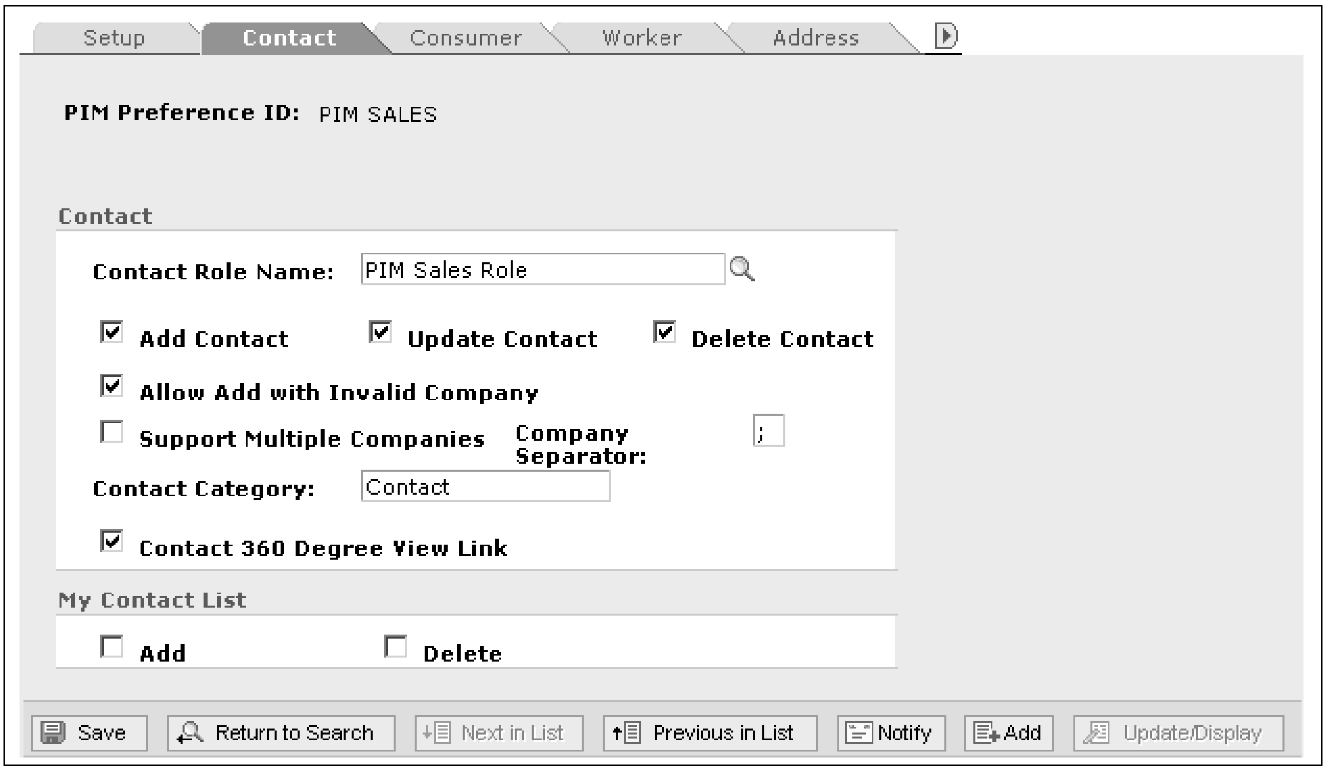
Note. A URI does not include the content information in the link. Think of it as a subset of the URL that points to the location of the resource, but does not include any parameters passed to that resource.

PIA Portal Enter the level of portal access that PIM users will have.

PIA Node Enter the PIA node that your system uses for integration.

Specifying PIM Preference for Contacts

Access the Contact page.



Contact page

Contact

Specifies the synchronization preference that applies to contacts.

Contact Role Name Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.

Add Contact, Update Contact, and **Delete Contact** Select to provide end users who are associated with this preference the ability to add, update, and delete contacts from their address books and to synchronize the change in PeopleSoft CRM.

If any of these operations is disabled, any end user who tries to synchronize a contact to PeopleSoft CRM through the unauthorized operation receives an error message on screen and on the PIM Errors page. The corresponding contact in PeopleSoft CRM is not impacted and is used to roll back to the end user's address book at next synchronization. However, if a user adds or updates a contact directly from PeopleSoft CRM, the change is synchronized to the PIM client and is available to end users who receive updates on this contact (based on dataset rules). This is because the add, update, and delete operation settings do not control data flow originating from PeopleSoft CRM to PIM clients.

Note. You cannot delete contacts from PeopleSoft CRM.

Allow Add with Invalid Company

Select to allow newly created contacts to be synchronized to PeopleSoft CRM even if they are associated with companies that do not exist in PeopleSoft CRM. When that happens, PeopleSoft Infosync Client sends a message to end users stating that the invalid company is ignored while the contact is synchronized to PeopleSoft CRM. That means that the contact is added to PeopleSoft CRM without a company.

If this feature is disabled, end users get an error message if they try to synchronize any newly created contact with an invalid company name; the contact is not synchronized.

Support Multiple Companies and **Company Separator**

Select to allow synchronization to support a one-to-many relationship between contacts and companies. From the address book, end user can enter multiple companies for a contact in this format:

<company1>;<company2>;<company3>

where *;* (semicolon) is the default company separator. Do not enter space between a company name and separator.

When the contact record is synchronized to PeopleSoft CRM, it is associated with companies that were previously specified in the PIM client. In the PIM client, the company that has the longest relationship with the contact ranks the first in the array of companies. If a new company is added to the contact in PeopleSoft CRM, the new company appears at the end of the list after synchronization. If you add a new company to the contact in the address book and put the new company in the front, it is automatically placed at the end at next synchronization.

If this feature is disabled, the synchronization process only handles the newest company relationship. If the end user clears the company field in a contact record, the current relationship becomes inactive; if the end user updates the company name to a new one, the relationship with the new company becomes active. The old company remains in the contact record, and it is no longer synchronized. By default, this feature is disabled.

To enter multiple companies for a contact in Lotus Notes, click the drop-down list box for the Company field and enter the companies (in a formatted manner) in the New keyword field.

Note. PeopleSoft highly recommends that you consider this configuration a one-time setup process and not make changes to it after implementation.

Contact Category

Enter a category that is used by PeopleSoft Infosync Client to identify which contacts in the PIM client to synchronize. The contact category that you specify in this field has to be identical to the one that end users use to categorize contacts in the address book. Contacts that don't belong to this category are not synchronized. You can change the category name to anything during setup, but make sure that the filter and the category mapping are updated as well. The default value is *Contact.*

Contact 360 Degree View Select to enable the Contact URL to be synchronized to the PIM Client. The URL address is specified using the PeopleSoft CRM URL field on the Setup page of the PIM Preferences component. If this is disabled the URL will not be synchronized.

Note. You must associate the contact with a company for this URL to link to the contact.

My Contacts List

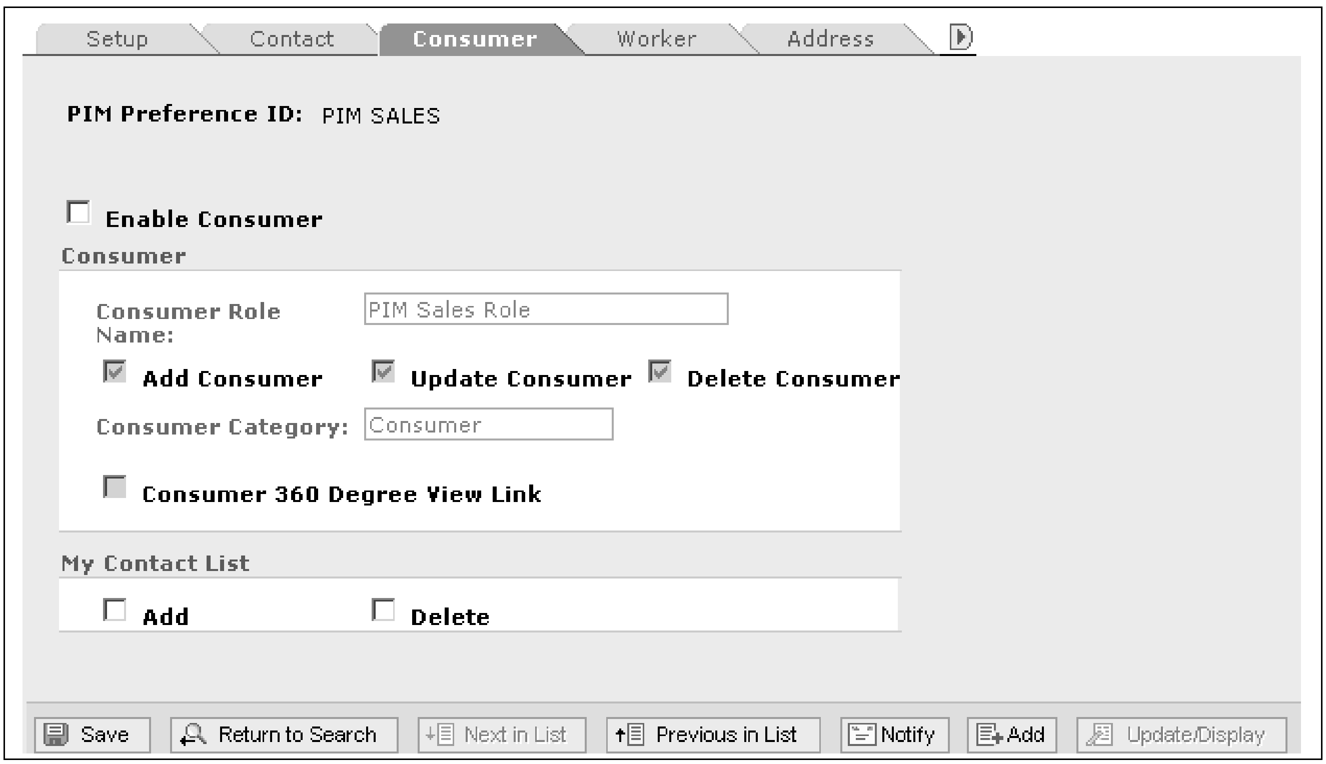
Specifies the synchronization preference that is specific to My Contact List.

Add Select to enable contacts to be added to the PIM Client.

Delete Select to enable contacts to be deleted from the PIM Client.

Specifying PIM Preference for Consumers

Access the Consumer page.



Consumer page

Consumer

Specifies synchronization preferences that are specific to consumers.

Enable Consumer Select to enable contacts (with a consumer-specific category) in the address book to be synchronized as consumers in PeopleSoft CRM. Clear this check box to deactivate the rest of the page (if you decide not to support synchronization of consumers). End users who are associated with this PIM preference get an "object type not enabled" error message on screen and on the PIM Errors page when they try to synchronize consumers to PeopleSoft CRM.

Consumer Role Name Select the role for which the PIM preference is created. Dataset roles are defined in the PIM Roles page.

Add Consumer, Update Consumer, and **Delete Consumer** Select to provide users who are associated with this preference the ability to add, update, and delete consumers (as a type of contacts) from their address books and synchronize the change in PeopleSoft CRM.

If any of these operations is disabled, any end user who tries to synchronize a consumer to PeopleSoft CRM through the unauthorized operation will receive an error message on screen and on the PIM Errors page. The corresponding consumer in PeopleSoft CRM is not impacted and is used to roll back to the end user's address book at the next synchronization. However, if a user adds or updates a consumer directly from PeopleSoft CRM, the change is synchronized to the PIM client and is available to all end users who receive updates on this consumer (based on dataset rules). This is because the add, update, and delete operation settings do not control data flow originating from PeopleSoft CRM to PIM clients.

Note. You cannot delete consumers from PeopleSoft CRM.

Consumer Category Enter a category that is used by PeopleSoft Infosync Client to identify which consumers in the PIM client are to be synchronized. The consumer category that you specify in this field has to be identical to the one end users use to categorize consumers in the address book. Contacts that don't belong to this category are not synchronized as consumers in PeopleSoft CRM. You can change the category name to anything during setup, but make sure the filter and the category mapping are updated as well. The default value is *Consumer.*

Consumer 360 Degree View Select to allow the consumer URL to be synchronized to the PIM Client. The URL address is specified using the PIA URL field on the Setup page of the PIM Preferences component. If this is disabled, the URL won't be synchronized.

Note. You must associate the consumer with a company for this URL to link to the consumer.

My Contacts List

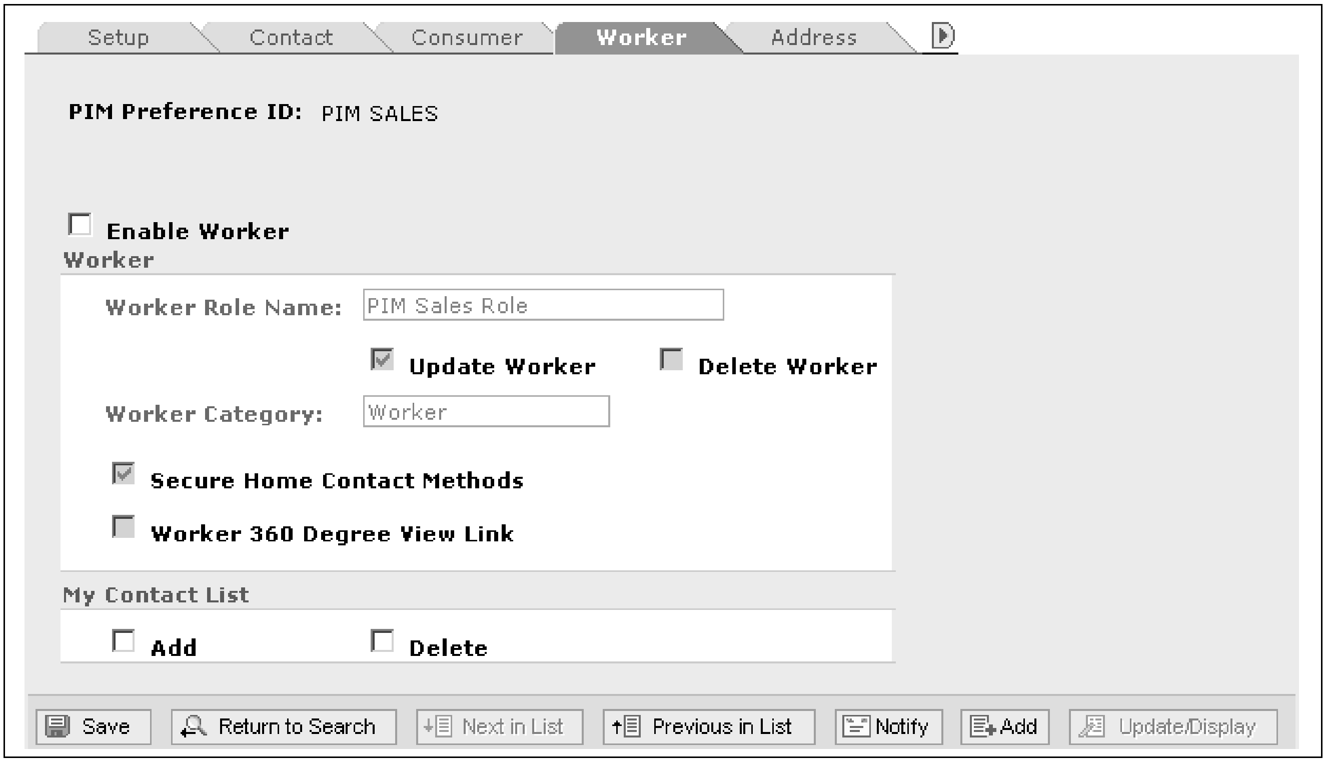
Specifies the synchronization preference that applies to My Contact List.

Add Select to enable consumers to be added to the PIM Client.

Delete Select to enable consumers to be deleted from the PIM Client.

Specifying PIM Preference for Workers

Access the Worker page.



Worker page

Worker

Specifies the synchronization preference that applies to workers.

Enable Worker

Select to enable contacts (with a worker specific category) in the PIM client to be synchronized as workers in PeopleSoft CRM. Clear this check box to deactivate the rest of the page (if you decide not to support synchronization of workers). End users who are associated with this PIM preference get an “object type not enabled” error message when they try to synchronize workers to PeopleSoft CRM.

Worker Role Name

Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.

Update Worker and **Delete Worker**

Select to provide end users who are associated with this preference the ability to update and delete workers (as a type of contacts) from their address books and to synchronize the change in PeopleSoft CRM.

If any of these operations is disabled, any end user who tries to synchronize a worker to PeopleSoft CRM through the unauthorized operation will receive an error message on screen and on the PIM Errors page. The corresponding worker in PeopleSoft CRM is not impacted and is used to roll back to the end user’s address book at next synchronization. However, if a user updates a worker directly from PeopleSoft CRM, the change is synchronized to the PIM client and is available to end users who receive updates on this worker (based on dataset rules). This is because the update and delete operation settings do not control data flow originating from PeopleSoft CRM to PIM clients.

Worker Category

Enter a category that is used by PeopleSoft Infosync Client to identify which workers in the PIM client are to be synchronized. The worker category that you specify in this field has to be identical to the one that you use to categorize workers in the PIM client. Contacts that don't belong to this category are not synchronized as workers. You can change the category name during setup, but make sure that you update the filter and the category mapping as well. The default value is *Worker*.

Secure Home Contact Methods

Select to prevent worker's home contact information from being synchronized to the PIM client. This includes the phone number, address, and email that has *Home* as the purpose and that has *Pager 1* or *Page 2* as the purpose in PeopleSoft CRM. For example, if you map the business address type (PIM client) to the home address type (PeopleSoft CRM) on the Address page of the PIM preference, the business address in the PIM client is never synchronized. Home contact information in PeopleSoft CRM is secured: it doesn't take updates from the PIM client (no permission error occurs) and is not synchronized to the PIM client. This feature is enabled by default.

If this check box is clear, the worker's home contact information still isn't synchronized to the PIM client. However, any update on it from the PIM client is synchronized to PeopleSoft CRM. You cannot see the change because of the security that is enforced for worker information in PeopleSoft CRM.

Note. In order for end users to add home contact information for a worker from the PIM client and to synchronize the information to PeopleSoft CRM, the Secure Home Contact Methods feature must be disabled and end users must have a secured worker role. Set up secured worker roles on the Secured Worker Role page.Set Up CRM, Security, Secured Worker Role.

Worker 360 Degree View

Select to allow the Worker URL to be synchronized to the PIM Client. The URL address is specified using the PIA URL field on the Setup Page of the PIM Preferences page. If this is disabled the URL will not be synchronized.

Note. The worker must be associated with a company for this URL to link to the worker.

My Contacts List

Specifies the synchronization preference that is specific to My Contact List.

Add

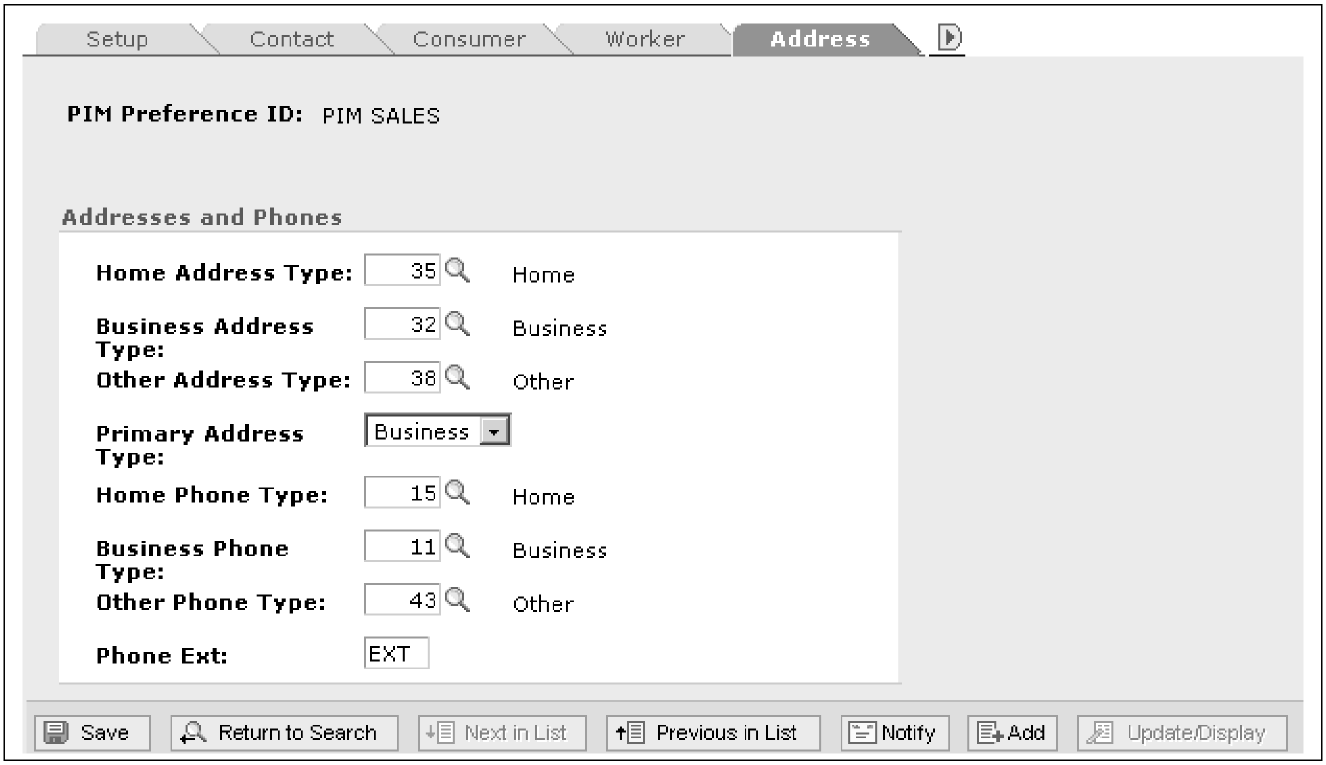
Select to allow workers to be added to the PIM Client.

Delete

Select to allow workers to be deleted from the PIM Client.

Specifying Contact Method Mapping

Access the Address page.



Address page

Addresses and Phones

Home Address Type, Business Address Type, and **Other Address Type**

Enter contact method purposes (defined in PeopleSoft CRM) that home, business, and other addresses in the PIM client are mapped to in PeopleSoft CRM after synchronization. A contact method purpose indicates when to use the specified contact method. For example, you typically send business-related correspondence to a contact using the contact's *business* address. To deliver an urgent document to the contact after office hours, you can use the *home* address. The default contact method purposes for home, business, and other address types are *Home*, *Business*, and *Other.*

If you change the address types, the next synchronization becomes an initial synchronization.

Note. The *Other* address type is applicable to Microsoft Outlook only.

Primary Address Type

Select the primary address type: *Home*, *Business*, or *Other.* If a contact has multiple addresses, the one that belongs to this address type becomes the primary address for the contact in PeopleSoft CRM.

Home Phone Type, Business Phone Type, and **Other Phone Type**

Enter contact method purposes (defined in PeopleSoft CRM) that home, business, and other phones in the PIM client are mapped to in PeopleSoft CRM after synchronization. The default contact method purposes for home, business, and other phone types are *Home*, *Business*, and *Other.*

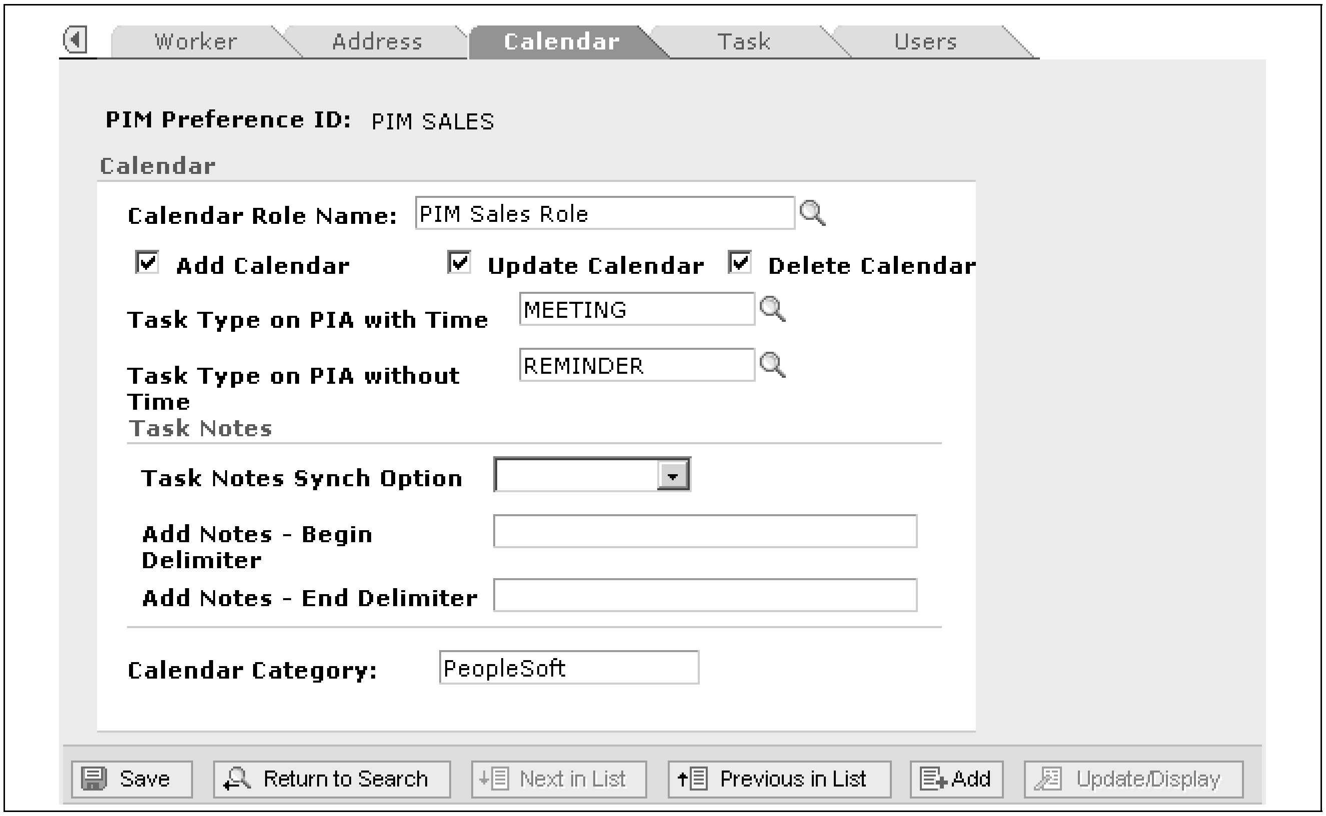
Note. The *other* phone type is applicable to Microsoft Outlook only.

Phone Ext (phone extension)

Enter a prefix for phone extensions. PeopleSoft Infosync Client supports phone extensions in all phone types.

Specifying PIM Preference for Calendar Items

Access the Calendar page.



Calendar page

Calendar

Specifies the synchronization preference that is specific to calendar items.

Calendar Role Name

Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.

Add Calendar, Update Calendar, and **Delete Calendar**

Select to provide users who are associated with this preference the ability to add, update, and delete items from the calendar and to synchronize the change in PeopleSoft CRM.

If any of these operations is disabled, any end user who tries to synchronize a calendar item to PeopleSoft CRM through the unauthorized operation will receive an error message on screen and on the PIM Errors page. The corresponding calendar item in PeopleSoft CRM is not impacted and is used to roll back to the end user's calendar at next synchronization.

If an end user adds, updates, or deletes a calendar item directly from PeopleSoft CRM, the change is synchronized to the PIM client and is available to end users who receive updates on this calendar item (based on dataset rules), regardless of the selection. This is because the add, update, and delete operation settings *do not* control data flow originating from PeopleSoft CRM to PIM clients.

Task Type on PIA with Time

Select a Task Type that will be associated with a time.

Task Type on PIA without Time Select a Task Type that will not be associated with a time.

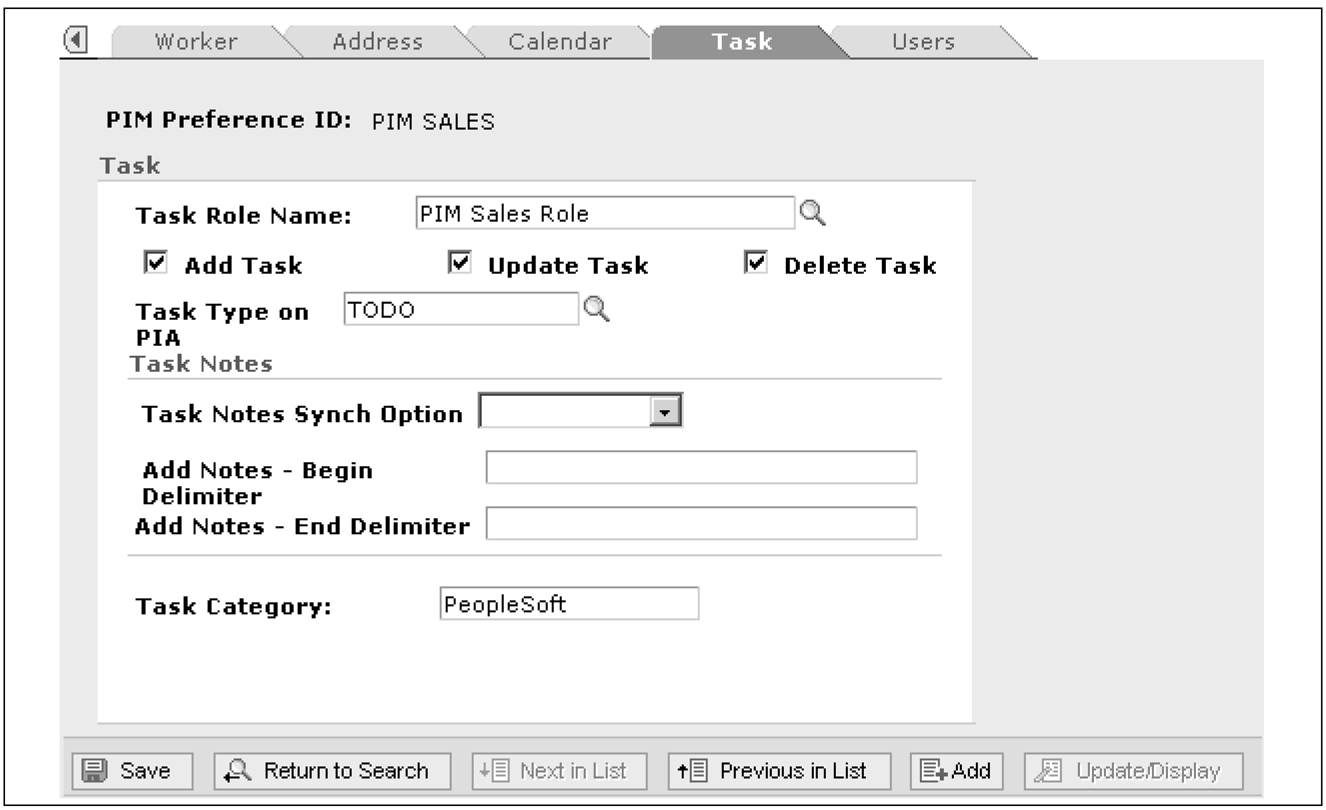
Task Notes Sync Option Select *Concatenate* or *Most Recent* to view the Task Notes.

Add Notes Begin Delimiter and **Add Notes End Delimiter** Define a beginning and ending delimiter that defines where the task note begins and ends. The note description field in the PIM Client shows these delimiters to define where the note text must be added. PeopleSoft recommends that you use only characters, numbers, or dashes.

Calendar Category Enter a category that is used by PeopleSoft Infosync Client to identify which items in the calendar are to be synchronized. The calendar category that you specify in this field has to be identical to the one that you use to categorize calendar items in the PIM Client. Calendar items that don't belong to this category are not synchronized. You can change the category name during setup, but make sure that you also update the filter and the category mapping. The default value is *PeopleSoft.*

Specifying PIM Preference for Tasks

Access the Task page.



Task page

Task

Specifies the synchronization preference that applies to tasks.

Task Role Name Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.

Add Task, Update Task, and **Delete Task**

Select to provide users who are associated with this preference the ability to add, update, and delete tasks from the to-do list and synchronize the change in PeopleSoft CRM.

If any of these operations is disabled, any end user who tries to synchronize a task to PeopleSoft CRM through the unauthorized operation will receive an error message on screen and on the PIM Errors page. The corresponding task in PeopleSoft CRM is not impacted and is used to roll back to the end user's to-do list at next synchronization. However, if a user adds, updates, or deletes a task directly from PeopleSoft CRM, the change is synchronized to the PIM client and is available to end users who receive updates on this task (based on dataset rules). This is because the add, update, and delete operation settings *do not* control data flow originating from PeopleSoft CRM to PIM clients.

Task Type on PIA

Select a Task Type that will be associated with a task in PeopleSoft.

Task Notes Sync Option

Select *Concatenate* or *Most Recent* to view the Task Notes on the PIM Client.

Add Notes Begin DelimiterAdd Notes End Delimiter

Enter a beginning and ending delimiter that defines where the task note begins and ends. The note description field in the PIM Client shows these delimiters to define where the note text must be added. PeopleSoft recommends that you use only characters, numbers, or dashes.

Task Category

Enter a category that is used by PeopleSoft Infosync Client to identify which tasks in the to-do list are to be synchronized. The task category that you specify in this field has to be identical to the one that end users use to categorize tasks in the PIM client. Tasks that don't belong to this category are not synchronized. You can change the category name, but make sure that you also update the filter and category mapping. The default value is *PeopleSoft.*

Setting Up PIM User Settings

This section discusses how to associate PIM preferences with users.

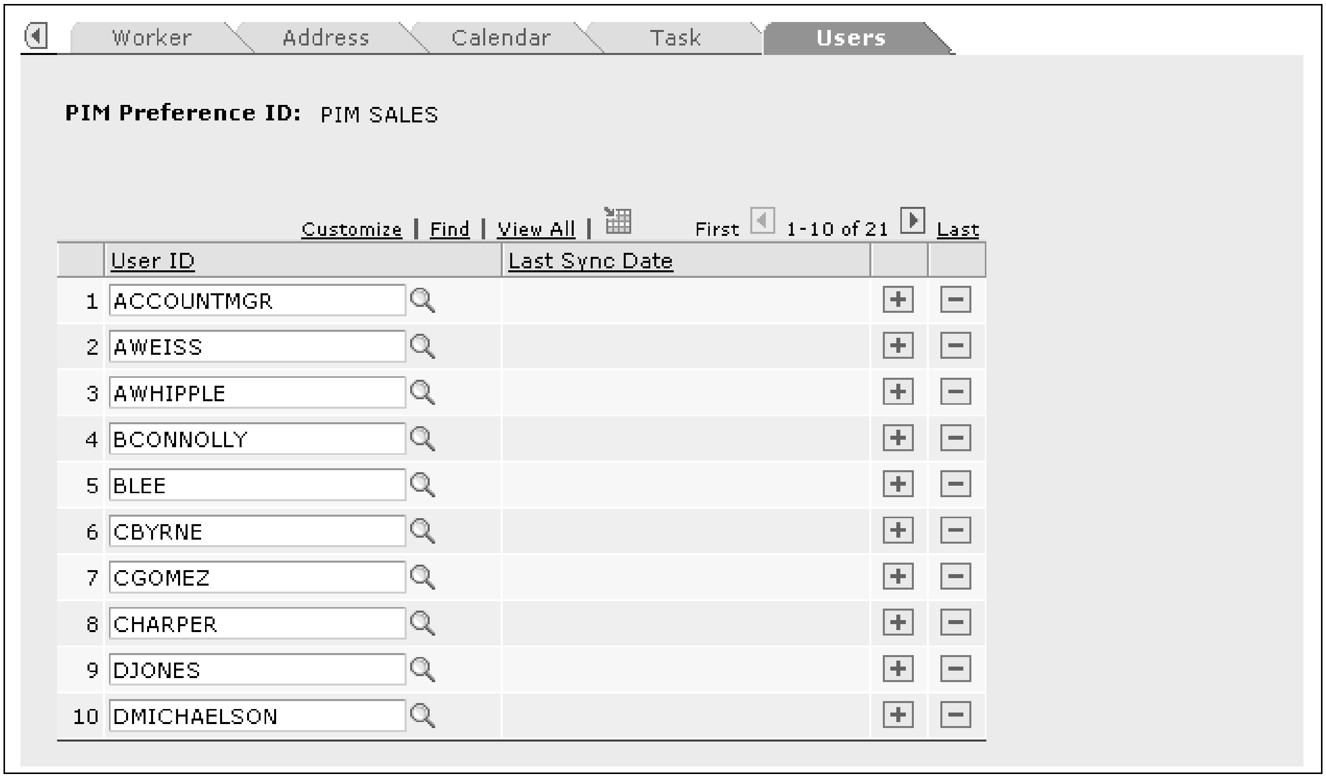
Pages Used to Set Up PIM User Settings

Page Name	Object Name	Navigation	Usage
Users	PIM_PREF_USERS	Set Up CRM, Install, PIM, PIM Preferences, Users	Associate end users with or disassociate end users from the PIM preference.
Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, Security, User Preferences, Overall Preferences	Associate users with the PIM preference.

Associating PIM Preferences with Users

Access the Users page.

Note. You can associate PIM preference with users by accessing either the Users page or the Overall Preferences page.



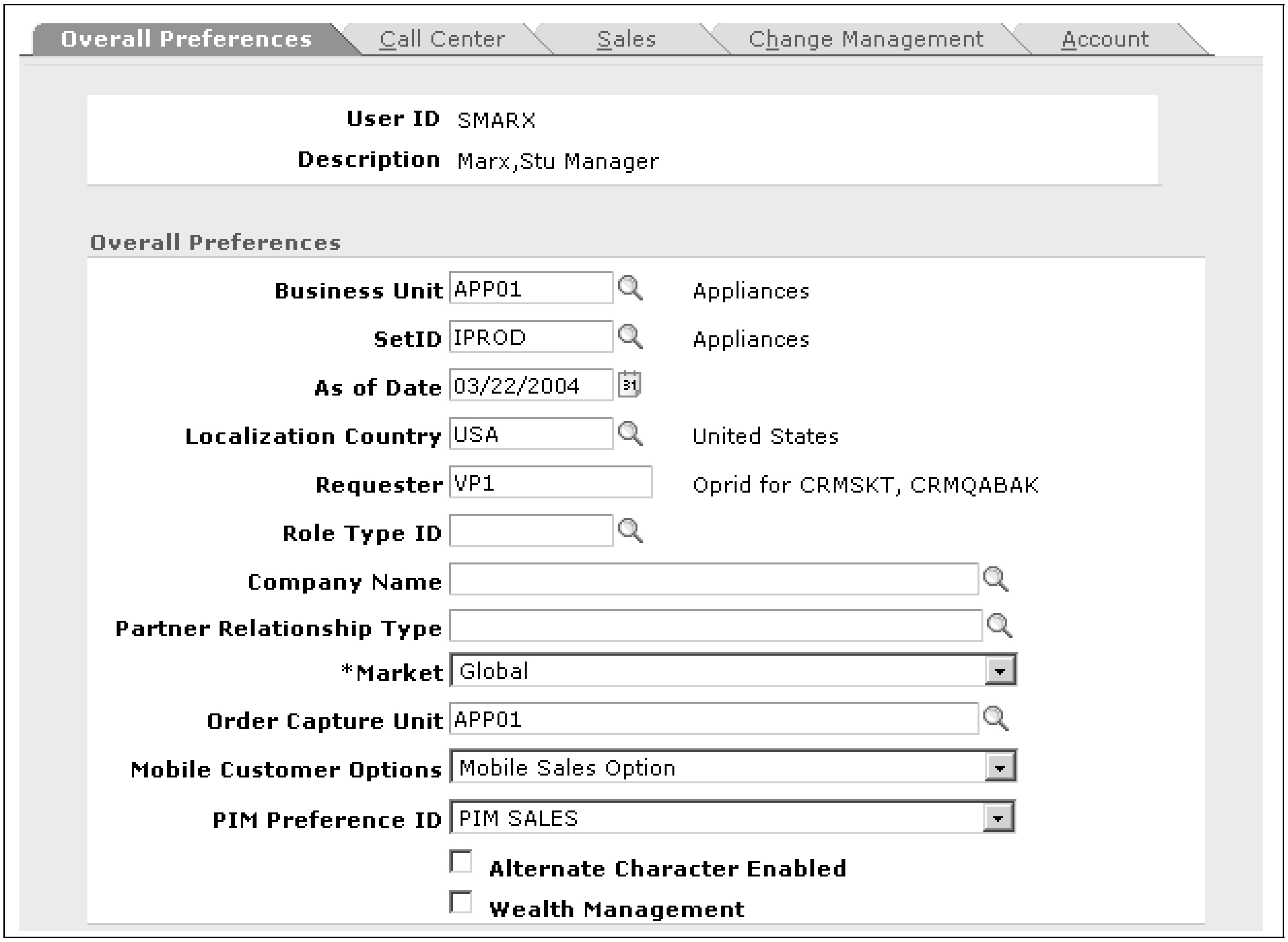
Users page

User ID Click to select the PeopleSoft user ID of end users to be associated with the given PIM preference. You can add or delete end users from the list as necessary. If you add a new user who is currently linked to another PIM preference, doing so associates the user with the new PIM preference.

Complete the prerequisite on saving the user preference record for each PIM end user; otherwise, all of the user IDs may not be available for selection.

Last Sync Date (last synchronization date) Displays the date and time when the last synchronization occurred. The last transaction date for different end users varies upon whether data updates actually occurred between PeopleSoft CRM and the PIM client. If there's no data update for some end users after synchronization, their last synchronization date displays an earlier time stamp than other users who have just received data update.

Access the Overall Preferences page.



Overall Preferences page

SetID

Enter a setID for the end user. This setID is used as the default setID for consumers (created by the end user in the PIM client) as the records are synchronized in PeopleSoft CRM (if sales business units are not applicable to that end user).

Localization Country

Enter a country code for the user.

Note. You *must* specify this value for PIM end users because PeopleSoft Infosync Client uses it as a default value in scenarios where a user adds a contact in the address book but forgets to enter a country for the contact. When synchronization occurs, the process populates the contact’s missing country value with the localization country value of the end user (who creates the contact); otherwise, the user receives synchronization errors.

PIM Preference ID

Select a PIM preference with which the user is associated. When synchronization occurs, the process verifies the user’s PIM preference and dataset rules that are associated with that preference to determine what data gets updated in the PIM client for the user. Set up PIM preference using the PIM Preferences component.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Defining Overall Preferences

Installing PeopleSoft Infosync Client

Refer to the supplemental installation instructions for PeopleSoft Infosync Client for information on how to install the client application. This document is available on Customer Connection. Select Support, Documentation, Documentation Updates, Customer Relationship Management, All in Selected Product Line.

Additional Note for Installing PeopleSoft Infosync Client

After client installation is complete, you must configure the client. When you are in the *Choose Translator* dialog box to select which PIM application to run, these three operations are available for selection: *Import, Export* and *Synchronize*.

- Select *Import* for the integration to perform one-way data update from the PIM Client to PeopleSoft CRM.
- Select *Export* for the integration to perform one-way data update from PeopleSoft CRM to the PIM Client.
- Select *Synchronize* for the integration synchronize data between PeopleSoft CRM and the PIM client.

Setting Up Integration Broker

A complete Integration Broker setup is provided as part of PeopleSoft Infosync Client. This setup synchronizes data between PeopleSoft CRM and PIM clients. The setup delivers these Integration Broker objects, which are used in this integration:

- Two nodes: PSFT_INFOSYNC and PSFT_PIM.
- One transaction message: PIM_CONTACT_SYNC.
- Two codesets for data translation: INFOSYNC TO PIM and PIM TO INFOSYNC.

PeopleSoft recommends that you perform these tasks before using Integration Broker:

- Change the default password that is used in the external node (that is, PSFT_PIM) by selectingPeopleTools, Integration Broker, Node Definitions.

  After you’ve changed the password on the Node Info page, do the same to the URI parameter in the DCSSettings.cfg file.
- Modify the IntegrationGateway.properties file under PSIGW\WEB-INF:
  - If the integration gateway supports only one database, set up the IntegrationGateway.Properties file with the default application server like this:

    ```
    ig.isc.serverURL=//<yourappserver:jsl_port>
    ig.isc.userid=VP1
    ig.isc.password=JekncVtPdNg=
    ig.isc.toolsRel=8.43
    ```

- If the integration gateway supports more than one database and you cannot set the default application server to point to the correct database, set up a node as follows:

```
ig.isc.<default local node in PIM database>.serverURL=//<yourappserver:jsl_port>
ig.isc.<default local node in PIM database>.userid=VP1
ig.isc.<default local node in PIM database>.password=JekncVtPdNg=
ig.isc.<default local node in PIM database>.toolsRel=8.43
```

  In every database, there is only one default local node. The Default Local Node check box is selected for this node.

  Note. Make sure that the toolsRel value matches the version of your PeopleTools release.

- If you change the Integration Broker user ID and password, make sure they are updated in the IntegrationGateway.properties file.

  Enter the password in the encrypted form. PeopleSoft provides a utility that returns an encrypted version for the password that you provide. The utility is called pscipher.bat and it's available under the *peoplesoft* domain in the web server. Run the file in the command prompt like so:

```
c:\bea\wlsever6.1\config\peoplesoft>pscipher <your_password>
```

- Verify that the gateway URL is updated (with the web server name on which Integration Broker resides) in the Gateways page.

  Select PeopleTools, Integration Broker, Gateways, and click the Load button to populate the connector information and save.

  Note. Do not log on to PeopleSoft Infosync Client and perform synchronization using the same user ID that Integration Broker uses, as specified in the IntegrationGateway.properties file.

Refer to the *PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker* for more details on how to set up and administer Integration Broker.

Considerations for Modifying Integration Broker Setup

Here are guidelines for modifying any Integration Broker setup data that is delivered with PeopleSoft Infosync Client:

- Do not change node names, even if you must modify system-delivered nodes.

  Follow the structure of the nodes listed here as you make modification:

Node Name	PSFT_INFOSYNC (internal node)
Node Type	PIA
Routing Type	Implicit
Authentication Option	None
Code Set Group Name	INFOSYNC

Gateway ID	LOCAL
Transaction Request Message	PIM_CONTACT_SYNC

Node Name	PSFT_PIM (external node)
Node Type	External
Routing Type	Explicit
Authentication Option	Password (delivered password is *infosync*)
Code Set Group Name	PIM
Gateway ID	LOCAL
Transaction Request Message	PIM_CONTACT_SYNC

See *PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker*

- Do not change the transaction message.

  See *PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker*

- Do not change the names of codesets or codeset groups because it requires corresponding code changes in the system, which is a consulting project.

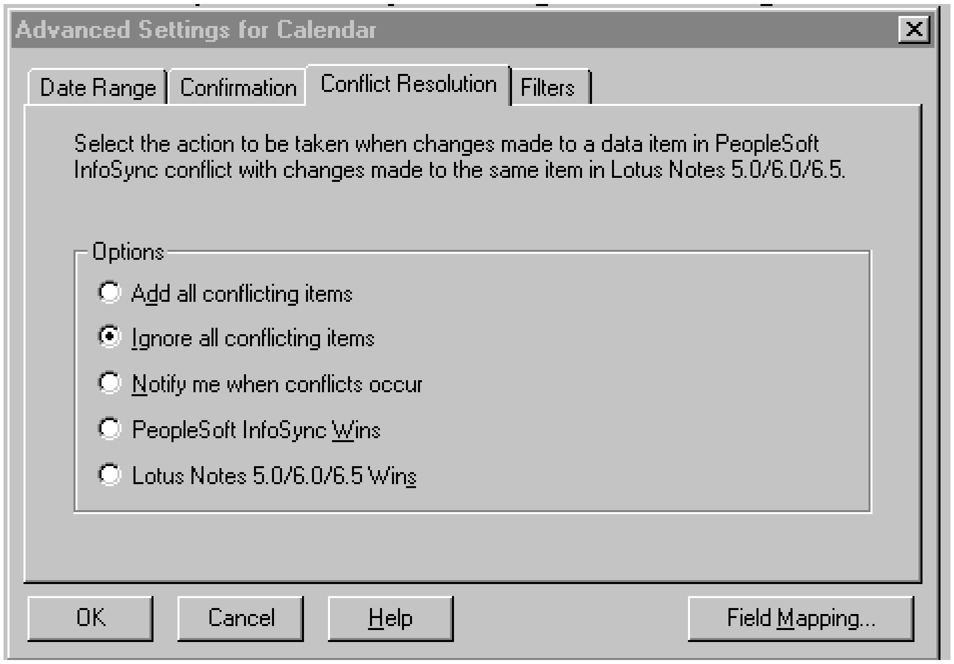
  For each delivered codeset group, the supported match names are *company*, *title*, and *status*. A match name is the name of a data field that might be part of a message sent by a node belonging to this codeset group. You can enter match values (possible values of the data field represented by the match name) for match names, as well as return values to facilitate data translation. For example, end users may enter the country *United States of America* differently in the PIM client: *U.S.*,*United States*,*U.S.A.*, and so on. If PeopleSoft CRM uses the term *USA* as the name of the country, and you want the translation program to recognize *U.S.*, *United States*,and *U.S.A.*the same as *USA*, add additional codeset group entries using *country* as the match name, *U.S.*, *United States*, and *U.S.A.* (three entries in total) as the match value and *USA* as the return value in the PIM TO INFOSYNC codeset.

  Currently, if you want to add new match names (using XML names in the field mapping tables) to translate data in other data fields, it's considered a consulting project (because it requires certain code change).

  The implementation of data translations for PeopleSoft Infosync Client is a three-step setup and verification process, which includes the setting up of codeset groups, codesets, and codeset values. For more information on how the data translation framework works, refer to the Performing Data Translation section of the Applying Filtering, Transformation, and Translation chapter in the PeopleSoft Integration Broker PeopleBook.

Specifying Conflict Resolution Rules

Access the Conflict Resolution page.



Conflict Resolution page

Note. Conflict resolution rules are predefined in PeopleSoft Infosync Client. Administrators should determine which rule to use before the client application is distributed to end users.

Add all conflicting items	Select to add both conflicting items to the database.
Ignore all conflicting items	Select to ignore all items if they are conflicting. ***Warning!*** It is recommeded to not use this option. There is a potential for overwriting data.
Notify me when conflicts occur	Select to notify the user when there is a conflict, giving the user the flexibility to select which item to update (default value).
PeopleSoft InfoSync Wins	Select to allow entries made in PeopleSoft CRM to overwrite what is in the PIM client.
Lotus Notes Wins	Select to allow entries made in PIM to overwrite what is in PeopleSoft CRM. PeopleSoft supports Lotus Notes 4.6, 5.x, and 6.0. *MS Outlook Wins* (Microsoft Outlook wins) appears if the selected PIM application is Microsoft Outlook.

Note. For information on how to use the Infosync Client, refer the online help available in the client application. Missing important information about the Infosync Client is documented in this PeopleBook.

See Also

Chapter 2, “Understanding PeopleSoft Infosync Client,” Field Mapping, page 12

Modifying Synchronization Settings

After PeopleSoft Infosync Client is installed, you must apply several changes to the configuration file, DCSSettings.cfg. The file is located under C:\Program Files/PeopleSoft/PeopleSoft Infosync.

Note. PeopleSoft provides a utility called Infosync Admin Console Wizard to facilitate the deployment of configuration changes to PIM end users. It collects the configuration information that is entered by administrators and creates a compression file that PIM end users use to apply the update. Refer to the Supplemental Installation Instructions for PeopleSoft Infosync Client document for more information on the utility.

Apply these changes:

- Update the Server URL parameter to the web server name on which Integration Broker is running, the Port parameter to indicate the port number that Integration Broker listens to. indicate the web server name on which Integration Broker is running, and the URI parameter to reflect the default node that you use. For example:

  [Connection]

  Server URL=<web_server_name>

  Port=<Intgration_broker_listening_port>

  URI=/PSIGW/HttpListeningConnector?From=PSFT_PIM&To=<default_node_name>&MessageName=PIM_CONTACT_SYNC&MessageType=sync&Password=infosync

  If you use a secure connection, make sure that the information on secure server URL, secure port, and secure URI is accurate.

- Change the value of the Email2 Field parameter to *1*:

  [Contact Options]

  mail2 Field=1

  Other Street=0

In addition to the DCSSettings.cfg file, administrators are recommended to increase the timeout value in the pstools.properties file under the PSIGW\WEB-INF\classes directory to allow Integration Broker longer for initial synchronization. To do so, copy the file from the PORTAL\WEB-INF\psftdocs\ps directory and change the value of the tuxedo_receive_timeout parameter to 1200 (in seconds). For example:

tuxedo_receive_timeout=1200

CHAPTER 4

Viewing Synchronization Status Information

This chapter provides an overview of system-delivered permission lists and discusses how to view synchronization status information.

Understanding System-Delivered Permission Lists

PeopleSoft Infosync Client provides three permission lists that give user groups access to different PIM pages based on job functions. These permission lists are:

- CRPIM0001 (PIM user permission list)

  With this permission, users have access to the My PIM Status page to view personal status, error logs, and deleted objects.

- CRPIM0002 (PIM administrator permission list)

  With this permission, users have access to all setup pages under Set Up CRM, Install, PIM.

- CRPIM0003 (PIM manager permission list)

  With this permission, users have access to the PIM Users Status page.

Viewing Synchronization Status Information

This section discusses how to:

- View synchronization status.
- View synchronization errors.
- View and retrieve deleted objects.
- View all synchronization users.

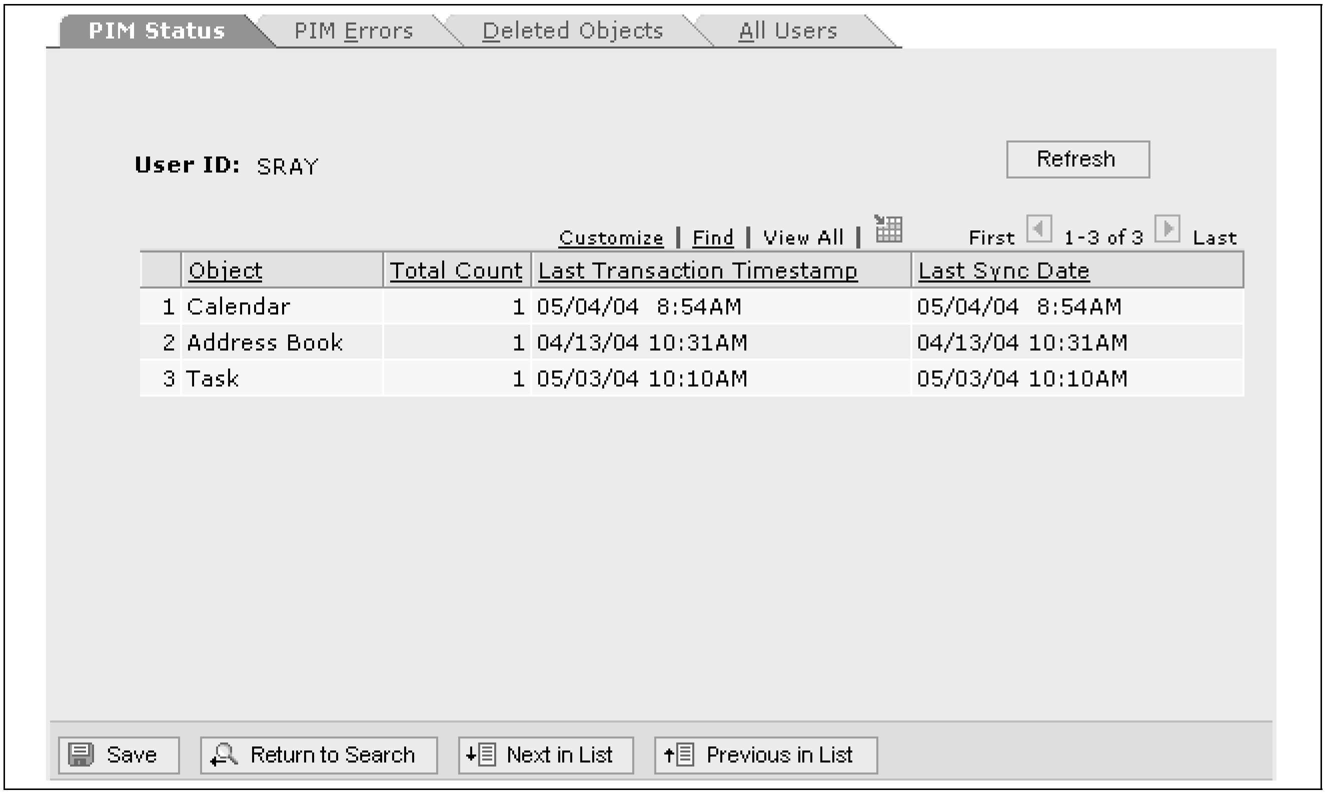
Note. Managers have access to the status information of all PIM end users; PIM end users have access to their own status information. Access to status information is controlled by permission lists.

Pages Used to View Synchronization Status Information

Page Name	Object Name	Navigation	Usage
PIM Status	PIM_STATUS_PG	• My PIM Status, PIM User Status (for users) • Setup CRM, Install, PIM, PIM Users Status, PIM Status (for administrators)	View user synchronization status.
PIM Errors	PIM_ERROR_PG	• My PIM Status, PIM Errors(for users) • Set Up CRM, Install, PIM, PIM Users Status, PIM Errors (for administrators)	View a log of errors and warnings that occurred on PeopleSoft CRM during synchronization.
Deleted Objects	PIM_DELETE_PG	• My PIM Status, Deleted Objects (for users) • Set Up CRM, Install, PIM, PIM Users Status, Deleted Objects (for administrators)	View and reactivate deleted contacts for synchronization.
All Users	PIM_SYNC_PG	Set Up CRM, Install, PIM, PIM Users Status, All Users	View a list of PeopleSoft users who use PeopleSoft Infosync Client to synchronize information.

Viewing Synchronization Status

Access the PIM Status page.



PIM Status

Object
Displays the three types of PIM objects that are synchronized: calendar, address book (contact), and task.

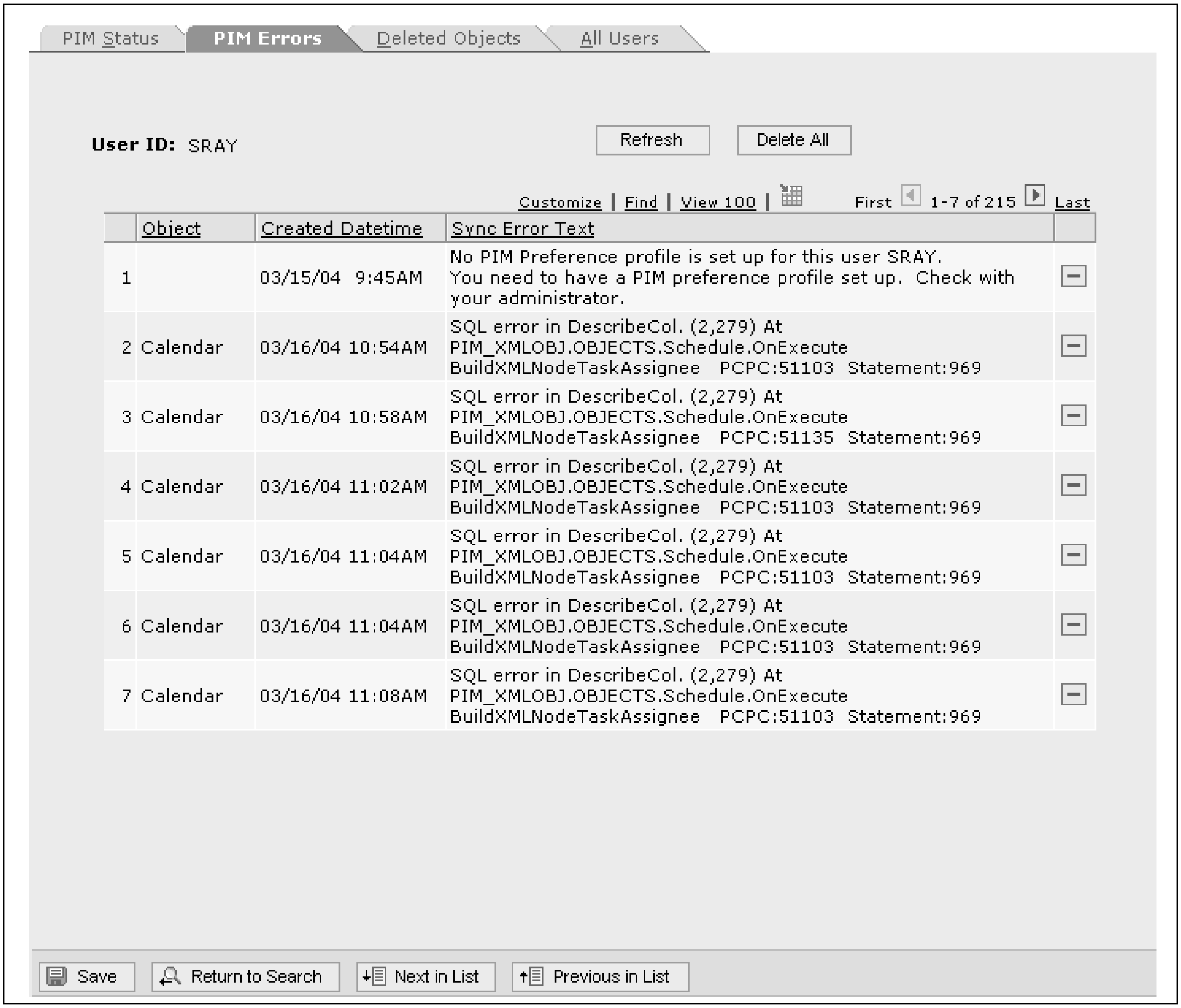
Total Count
Displays the total number of records transferred.

Last Transaction Timestamp
Displays the date and time when the data of the corresponding object was last added or updated successfully in a synchronization.

Last Sync Date (last synchronization date)
Displays the date and time when the last synchronization occurred. The last transaction timestamp may or may not be equal to the last synchronization date, depending upon whether data updates actually occurred between the CRM and PIM systems. If data was not updated for an object after synchronization, the last transaction time of the object indicates an earlier date and time than its last synchronization date.

Viewing Synchronization Errors

Access the PIM Errors page.

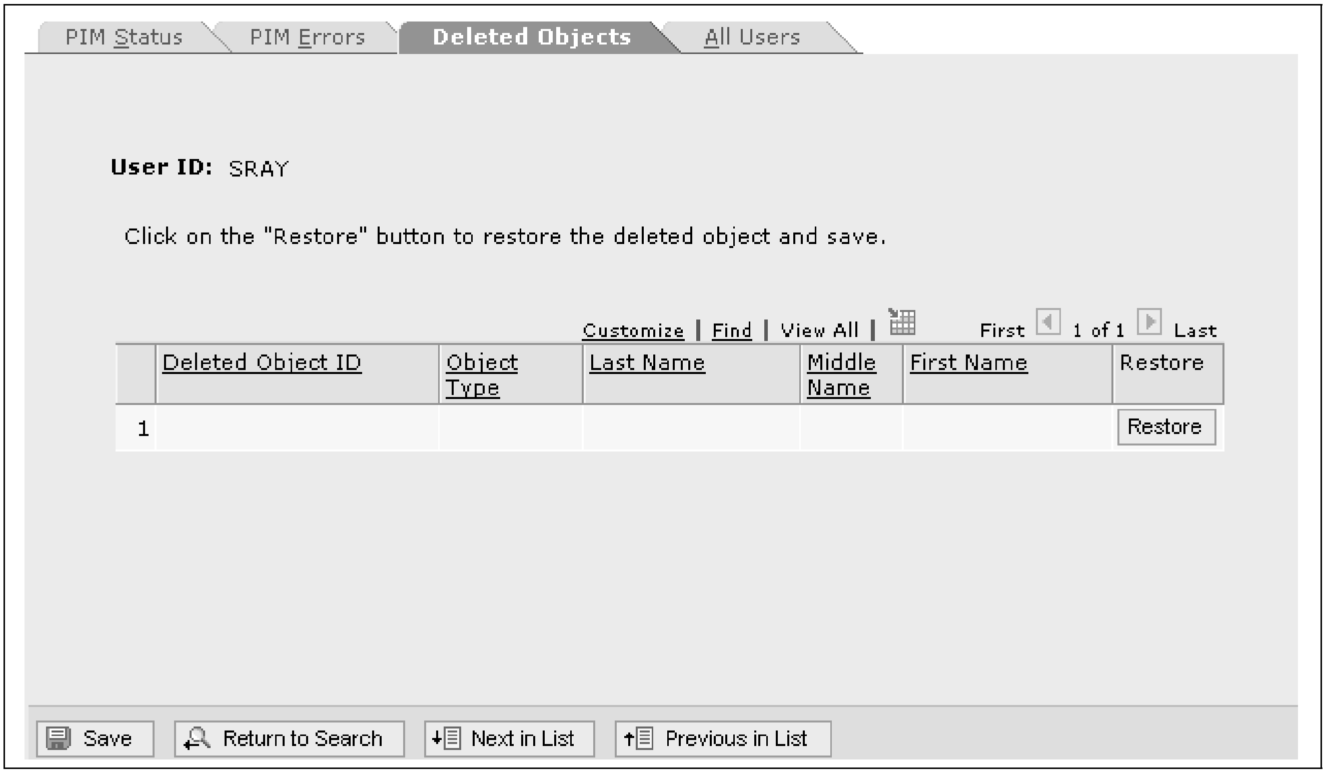


PIM Errors page

Object	Displays, if applicable, the object that the error pertains to.
Sync Error Text(synchronization error text)	Displays errors and warnings that occurred in PeopleSoft CRM during synchronization. Select the Debug check box on the Setup page of the PIM preference to get more specific error text for troubleshooting purposes.

Viewing and Retrieving Deleted Objects

Access the Deleted Objects page.



Deleted Objects page

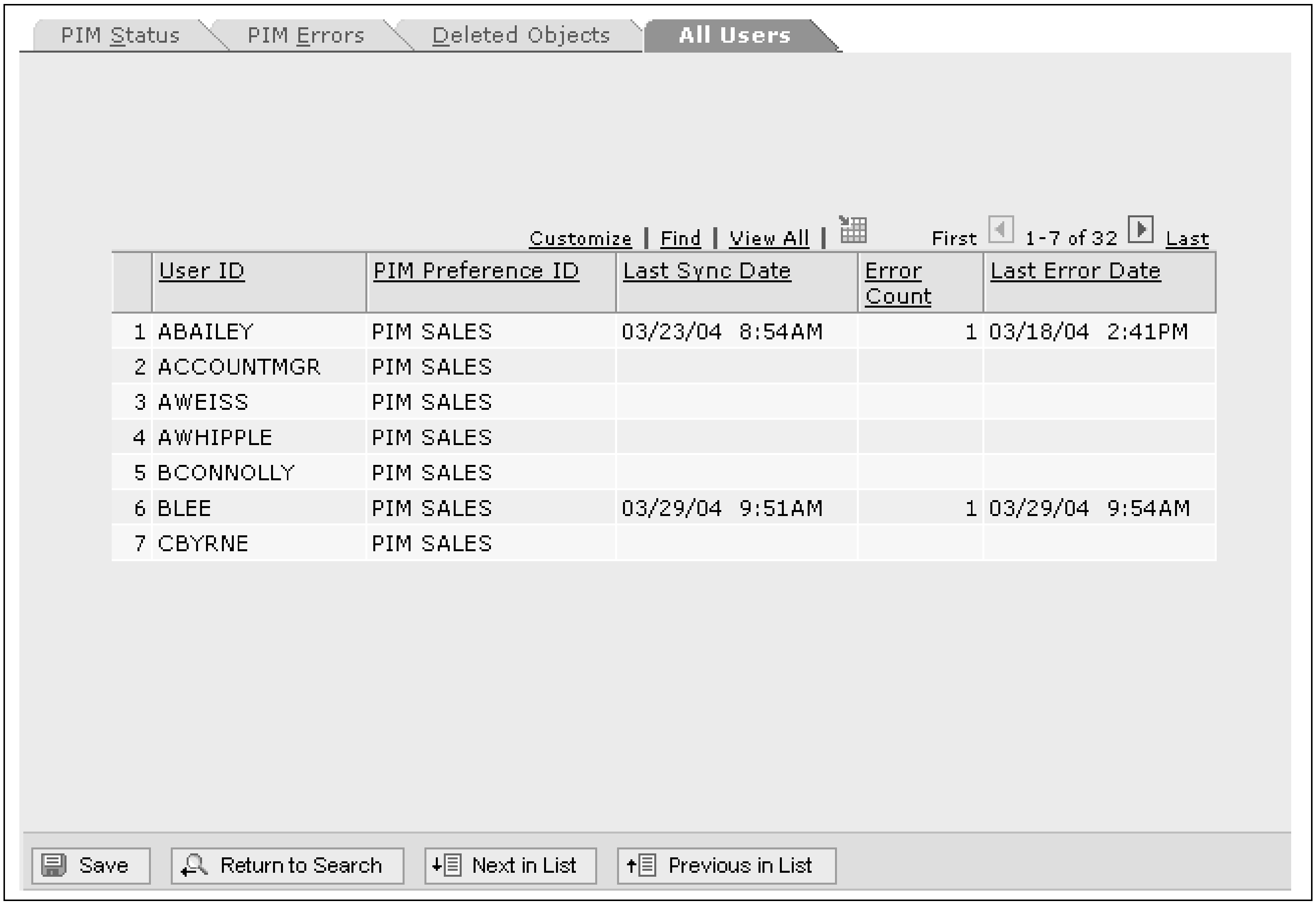
Deleted Object ID Displays the Object ID for the deleted object.

Object Type Displays the object type of the deleted object. *Contact*, *Consumer,* and *Worker* are types that are currently available to be restored.

Restore Click to reactivate the contact for synchronization. Users get updates about reactivated contacts at the next synchronization.

Viewing All Synchronization Users

Access the All Users page.



	User ID	PIM Preference ID	Last Sync Date	Error Count	Last Error Date
1	ABAILEY	PIM SALES	03/23/04 8:54AM	1	03/18/04 2:41PM
2	ACCOUNTMGR	PIM SALES			
3	AWEISS	PIM SALES			
4	AWHIPPLE	PIM SALES			
5	BCONNOLLY	PIM SALES			
6	BLEE	PIM SALES	03/29/04 9:51AM	1	03/29/04 9:54AM
7	CBYRNE	PIM SALES			

All Users page

Error Count Displays the number of errors that the user has encountered.

Last Error Date Displays the date when the last synchronization error occurred.

APPENDIX A

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook." Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa’anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft 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.

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 Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft 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 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.

agreement	In PeopleSoft 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 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.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft 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 Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft 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 event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft 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 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 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.

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 Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner — In PeopleSoft 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.

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 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 Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

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 *sub-classification.*

clone — In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

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, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft 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.

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.

condition In PeopleSoft 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. 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.

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 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 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.

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 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 Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). 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.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

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 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 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 *Enterprise Incentive Management ledger.* 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 General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft 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 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.

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 Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft 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.

Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception — In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing — In PeopleSoft 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 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.

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 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.

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.

group — In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft 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 Time and Labor, for example, employees are placed in groups for time reporting purposes.

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, user interaction objects, and so on.

incentive rule — In PeopleSoft 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 Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

item — In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft 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 Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

KPI — An abbreviation for *key performance indicator.* 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.

LDIF file

Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft 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.

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 *rates*) 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.

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.

load

In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality

In PeopleSoft 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 *1*—is the address you use most often and may be different from the main address.

logistical task

In PeopleSoft 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.

match group
In PeopleSoft 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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity
In PeopleSoft 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 Structured Query Language (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 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 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.

node-oriented tree
A tree that is based on a detail structure, but the detail values are not used.

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 and non-PeopleSoft 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 *compensation object.*

partner
A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle
In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item
In PeopleSoft 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 application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft 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.
plan	In PeopleSoft 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 Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft 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.
price list	In PeopleSoft Enterprise Pricer, 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	In PeopleSoft Enterprise Pricer, defines 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 condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft 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 category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
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 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 Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
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 *record input value-added tax flag.* Within PeopleSoft 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 Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag — Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data — In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

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 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 *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester — In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

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.

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.

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.

serial genealogy — In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production — In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session — 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 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.

single signon — With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction — In commitment control, any transaction generated in a PeopleSoft 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.

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.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft 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 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 *basis* 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 Receivables, an activity that defines how the system generates accounting entries for the general ledger.

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.

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, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage In PeopleSoft 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 systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

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 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.

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All 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 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 *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft 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.
worksheet	A way of presenting data through a PeopleSoft 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 schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft 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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