PeopleSoft®

PeopleSoft Enterprise Infosync Server 8.9 PeopleBook

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PeopleSoft Enterprise Infosync Server 8.9 PeopleBook
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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 B, "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 Server Preface

This preface provides:

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

Book Structure

The *PeopleSoft Enterprise Infosync Server 8.9 PeopleBook* provides implementation and business processing information for the PeopleSoft Infosync Server 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 Server.* This chapter provides an overview of PeopleSoft Infosync Server. It discusses the business processes and functionality of the integration that enables automatic data synchronization that is transparent to PIM (Personal Information Manager) end users.
- *Setting Up Integration Between PeopleSoft CRM and the PIM Servers.* This chapter identifies the steps you take to set up PeopleSoft Infosync Server. 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.

Additional Documentation

Besides the *PeopleSoft Enterprise Infosync Server 8.9 PeopleBook,* information that pertains to this integration is also available in other PeopleSoft and third-party vendor 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 PIM servers. Refer to the tools version for your release.

- *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.

- *PeopleSoft Infosync Server Installation Guide.*

  This document provides additional instructions for installing PeopleSoft Infosync Server and is available for download on Customer Connection, under Support, Documentation, Documentation Updates, Customer Relationship Management, All in Selected Product Line.

- *Intellisync Server Installation and Administration Guides.*

  This document provides information on installing and administering the synchronization engine for Intellisync Server. It is installed on the computer where your Infosync server is installed.

CHAPTER 1

Getting Started with PeopleSoft InfoSync Server

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

PeopleSoft InfoSync Server Overview

PeopleSoft Infosync Server 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.

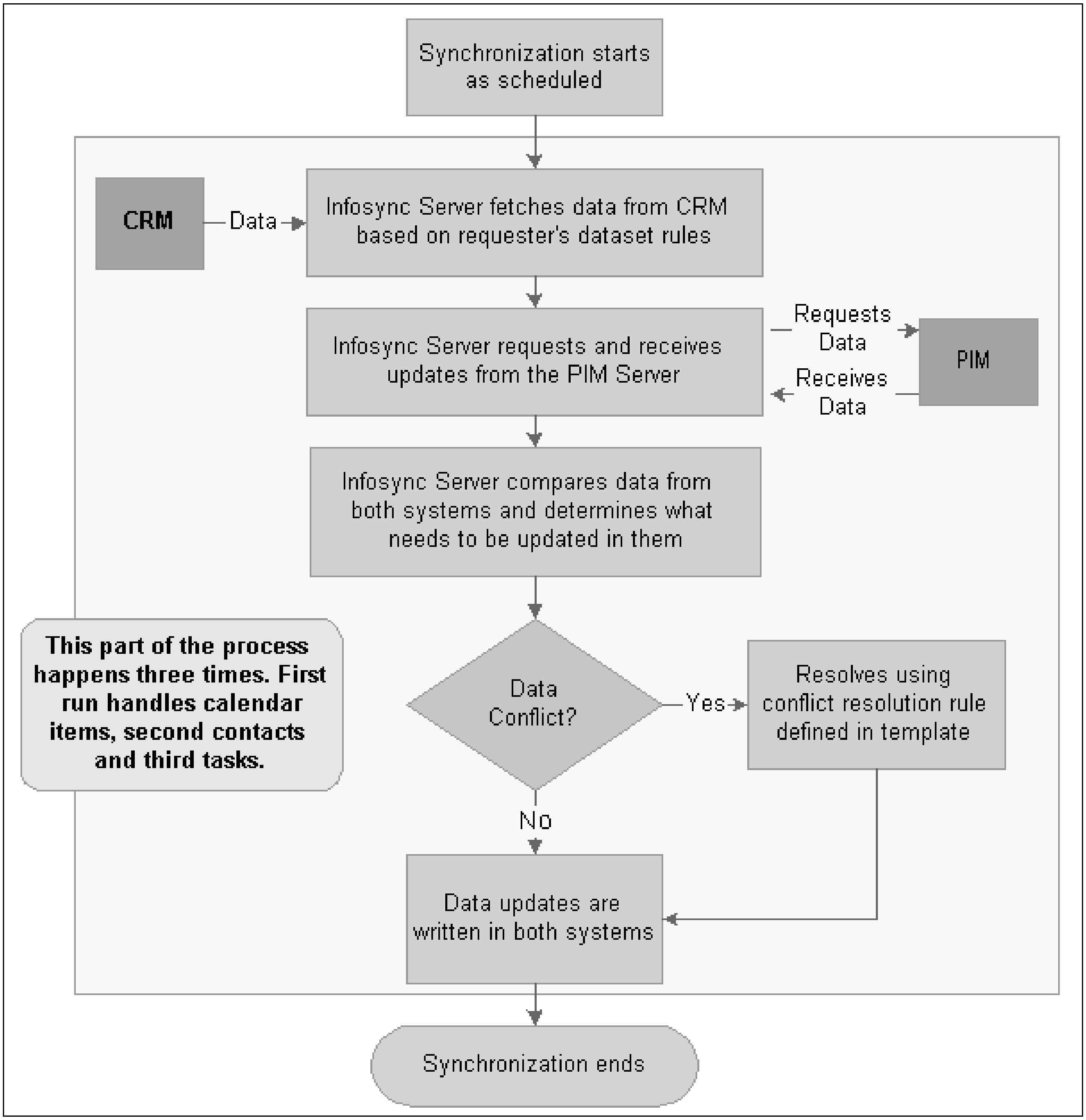
With this application, you can:

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

PeopleSoft InfoSync Server Integrations

PeopleSoft Infosync Server consists of three parts: Intellisync Server, message peoplecode, and Integration Broker. In this server to server data synchronization solution, PeopleSoft Infosync Server initiates synchronization requests regularly based on the specified time interval. PeopleSoft uses Integration Broker to handle the XML-based communication between PeopleSoft CRM and Infosync Server. When the synchronization process starts, PeopleSoft Infosync Server sends an XML request message to Integration Broker, which executes a message peoplecode to gather the changed data in PeopleSoft CRM and sends the reply back. Next, PeopleSoft Infosync Server polls the PIM server 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 CRM is formatted in XML and sent back to PeopleSoft CRM as an XML message. Changes that are specific to the PIM server get updated simultaneously.

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



PeopleSoft InfoSync Server synchronization process diagram

CHAPTER 2

Understanding PeopleSoft Infosync Server

This chapter discusses:

- PeopleSoft Infosync Server.
- Data synchronization concepts.

PeopleSoft Infosync Server

PeopleSoft Infosync Server synchronizes data between your contacts, tasks, and calendars in PeopleSoft CRM and Microsoft Exchange 5.5 and 2000 or Lotus Domino 5.x and 6.0. This enables end users, such as field service engineers and sales representatives, to manage PeopleSoft CRM contacts, tasks, and calendar items.

Note. PeopleSoft Infosync Server synchronizes contacts between PeopleSoft CRM and the PIM server, which includes contacts, consumers, and workers. In PeopleSoft CRM, contacts, consumers, and workers are all instances of the person component. Whereas in the PIM server, 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.

Through this server-to-server synchronization, end users receive and send updates from their address books, to-do list, and calendar. Because the communication occurs at the server level, the synchronization process is automatic and transparent to end users.

PeopleSoft Infosync Server:

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

  Unicode is supported.
- Provides administrative control on the synchronization process.

  Administrators set up PIM preferences 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 a 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 specific definition of PIM preferences 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 kind of data that is exchanged in the synchronization process. You can limit the amount of data that is downloaded to PIM end users by defining dataset rules that determine the most relevant set of data (based on the dataset roles to which end users belong) delivered within the shortest possible synchronization time. Similarly, you can restrict certain data that exists on the PIM server, such as a private calendar item or a private contact, from getting synchronized to PeopleSoft CRM by using categories and filters.

- Delivers predefined rules to resolve data conflicts that occur during synchronization.
- Provides multiple mail server support.
- Provides synchronization status and error logs.

Note. In this documentation, Microsoft Exchange and Lotus Domino are collectively referred to as *PIM server*, and Microsoft Outlook and Lotus Notes are referred to as *PIM client*. Through the PIM client, end users view and modify their data that is stored centrally on the PIM server.

Data Synchronization

This section discusses:

- Supported objects.
- Templates and PIM preference.
- Categories and filtering.
- Multiple mail server synchronization.
- Conflict resolution.
- Datasets.
- Field mapping.

Supported Objects

PeopleSoft Infosync Server supports synchronization for these records between PeopleSoft CRM and PIM servers:

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

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 contact, consumer, and worker simultaneously. In the PIM server, consumers and workers are the same as contacts and are stored in the address book. Category is used to distinguish which role that 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 roles are in the contact category. You can modify category names.

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 further 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 server. For any unsuccessful synchronization of records that happens due to unauthorized operations, errors for end users are logged on the PIM Errors page.

Contacts (with the contact category) supports multiple companies. End users can specify multiple companies in a contact record using 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. You must associate the contact with a company in order to locate it in the system.

Note. Consider defining contact web page URLs a one-time implementation decision. If end users are currently using this field, using this feature will overwrite 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 server. You can set up filter conditions that identify which categories of contacts are to be synchronized to PeopleSoft CRM in the Template Configuration Manager. By excluding the private category from the filter, private contacts are not synchronized.

Tasks and Calendar Items

Tasks and calendar items are stored in the PIM server'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. The difference between calendar items and tasks is that calendar items are associated with a specific time, whereas tasks are not.

In PeopleSoft CRM, you can link tasks to transactions (such as leads, opportunities, and service orders) or leave them independent (not transaction-related). If a task that is created from a lead or opportunity is synchronized to the PIM server, the lead or opportunity name automatically appears on the subject line of the task in square brackets ([and]). PeopleSoft Infosync Server delivers dataset rules that determine the most relevant subset of data that is synchronized to the PIM server 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. For example, you can create a dataset rule that filters out cancelled and completed tasks because end users may not need to see these tasks anymore.

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 server and the record's the start date is set to equal its end date. If the calendar item is created from the PIM server, a warning message appears, stating that an appointment cannot span more than a day and therefore that the appointment is ignored by the synchronization. PeopleSoft CRM currently doesn't support the creation of recurring tasks or calendar items.

Private Objects

PeopleSoft Infosync Server supports the synchronization of private contacts, tasks, and calendar items. If contacts are marked as private in PeopleSoft, these contacts are synchronized and their private status transfers to the PIM server. 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 the item 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 deletes records differently. This table summarizes what happens to the copy of a record, which was previously deleted in the PIM server, 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. It can be reactivated 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 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 a deleted task or calendar item in PeopleSoft CRM.

Templates and PIM Preference

Templates, in conjunction PIM preferences, identify end user synchronization settings. When synchronization starts, PeopleSoft Infosync Server reads these values to determine what data gets exchanged and updates both the PeopleSoft CRM and the PIM Server.

A template contains the field mapping for contacts, tasks, and calendar items. In addition, you select the filter for excluding unnecessary data, as well as the conflict resolution rule for handling possible data conflicts during synchronization. PeopleSoft Infosync Server delivers two sample end user templates, one for Microsoft Exchange and the other for Lotus Domino. You can modify the delivered template for the PIM server that you use, or create custom ones to fit end users better. For example, sales managers may need a different conflict resolution for contacts than field technicians because certain user groups don't synchronize tasks. Typically, you would 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 preferences at the individual user level.

When you import a list of users to PeopleSoft Infosync Server through the Bulk User Import utility, you associate a template with the end users, and the settings defined in the template build the profile for each user. View or modify templates from the Configuration Template Manager (select Start, Programs, Intellisync Server, Tool, Configuration Template Manager). Refer to the Intellisync Server administration guide for more information on templates and Configuration Template Manager.

Note. You must be a Sales user to modify templates in the Configuration Template Manager.

See Also

PeopleSoft Enterprise Infosync Client 8.9 PeopleBook, "Understanding PeopleSoft Infosync Client," Configuration Settings and PIM Preference

Category and Filtering

PeopleSoft Infosync Server uses categories in conjunction with filters to identify what records to retrieve from the PIM server and synchronize to PeopleSoft CRM. For every synchronization-enabled object, you specify a category in PIM preferences with which to associate end users. End users must enter the correct category (case sensitive) for each record that they want to synchronize to PeopleSoft CRM. 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

Note. Consider defining categories and filtering a one-time setup process. We recommend that you not make changes after implementation. Doing so may cause unexpected results.

Categories are used in conjunction with filters to determine what data is synchronized. For each of these objects, contact (including contact, consumer, and worker), task, and calendar, set up a filter with one or multiple rules. For filters with multiple rules, specify whether 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 to 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 Server delivers a predefined filter for each object (contact, task, and calendar); the filters are set based on categories. Following are the default filters for each object:

- Contact - Contact/Consumer/Worker Only.
- Task -To Do.
- Calendar -Appointment.

These filters are provided as samples; modify them as necessary to meet your business needs.

Warning! If you specify multiple rules in a filter, use either the *AND* or *OR* operator to illustrate the relationship of the conditions, but not both.

Enabling Private Support

To enable support for private tasks or calendar items:

- Set the PrivateFlag Field parameter to *1* in the DCSSettings.cfg file for tasks or calendar items.
- Ensure that the Private Flag field is mapped correctly.
- Ensure 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:

- 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.

Multiple Mail Server Synchronization

PeopleSoft Infosync Server supports information synchronization for multiple mail servers. This is applicable to corporations that have mail servers set up in multiple sites worldwide. In order to synchronize mail servers as a group through PeopleSoft Infosync Server, these mail servers must have the same server type and version. For example, a Microsoft Exchange 5.5 server cannot be synchronized with a group of Microsoft Exchange 2000 servers. Each mail server is associated with a group of mail users, and you must install a PeopleSoft Infosync Server on the same exchange site as the user mailboxes that are to be synchronized through the integration. You can have multiple PeopleSoft Infosync Servers point to the same PeopleSoft CRM database.

Note. These guidelines apply only to the Microsoft Exchange server: PeopleSoft Infosync Server and Microsoft Exchange server must reside on the same NT domain.

See Also

PeopleSoft Infosync Server Installation Guide

Conflict Resolution

The PeopleSoft CRM and PIM integration provides conflict resolution capabilities. When data conflicts occur during synchronization (for example, when end users modify the same field or the same record in both systems with different values), PeopleSoft Infosync Server resolves the conflict based on the selected conflict resolution rule.

For each object (contact, calendar, and task) in each template, select a conflict resolution rule from these three predefined rules:

- Add all conflicting items.
- XML Connector Wins.

  The value in PeopleSoft CRM is used as the master in both systems when conflict occurs. This is the default rule.
- Microsoft Exchange or Lotus Domino wins (depending on which PIM server that you use).

  The value in PIM server is used as the master in both systems when conflict occurs.

During synchronization, PeopleSoft Infosync Server resolves data conflicts based on the selected resolution rule; no user intervention is involved.

Datasets

To control the distribution of data only to 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 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 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 server. Through the use of datasets, individual users receive updates for data that pertains only to them. For example, Jane Smith, a sales user, gets updates for all the leads and tasks created by herself, as well as calendar items that are created for her leads (governed by dataset rules). If another colleague changed a task that he created for his lead, it is not updated in Jane'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 that identify sets of data to be downloaded to PIM server for end users associated to that role at synchronization.

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

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 Dataset Role	Dataset	Dataset Rule	Set of Data That Gets Updated
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 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 8.9 Enterprise Components PeopleBook

PeopleSoft Enterprise Infosync Client 8.9 PeopleBook, "Setting Up Integration Between PeopleSoft CRM and PIM Clients," Defining Dataset Rules

Field Mapping

Field mapping dictates where data appears after it is transferred from one system to another. You can review the field map for each object (contacts, calendar, and task) in the Configuration Template Manager.

Note. PeopleSoft recommends that you leverage the delivered field mapping and not change it. If you must modify it, make sure the modifications are well tested.

These tables list the field mappings between PeopleSoft CRM and PIM servers. The column heading *# of Char* (number of characters) means the maximum number of characters to be synchronized for each field.

Note. XML names are used internally in the program; they don't necessarily match the names that you see under the XML Connector column in the Configuration Template Manager's Field Mapping window.

Field Mapping for Contacts

PIM Field Label	XML Name	Record Name	PeopleSoft Field Name	Type	Note	# of Char
First Name	firstName	BO_NAME	FIRST_NAME	NA	NA	41
Last Name	lastName	BO_NAME	LAST_NAME	NA	NA	51
Middle Name	middleName	BO_NAME	MIDDLE_NAME	NA	NA	61
Suffix	suffix	BO_NAME	NAME_SUFFIX	NA	NA	32
Company Name	companyName	BO_NAME	BO_NAME	NA	NA	51
Job Title	jobTitle	RD_PERSON	TITLE	NA	NA	51
Title	title	RD_PERSON	SALUTATION_CD	NA	Codeset mapping supported	31
Office Street	businessStreet	CM_ADDRESS	ADDRESS1	Business type (32)	NA	481
Office City	businessCity	CM_ADDRESS	CITY	Business type (32)	NA	61
Office State	businessState	CM_ADDRESS	STATE	Business type (32)	Codeset mapping supported	61
Office Zip	businessZip	CM_ADDRESS	POSTAL	Business type (32)	NA	61
Office Country	businessCountry	CM_ADDRESS	COUNTRY	Business type (32)	Codeset mapping supported	81
Home Street	homeStreet	CM_ADDRESS	ADDRESS1	Home type (35)	NA	481
Home City	homeCity	CM_ADDRESS	CITY	Home type (35)	NA	61
Home State	homeState	CM_ADDRESS	STATE	Home type (35)	Codeset mapping supported	61

PIM Field Label	XML Name	Record Name	PeopleSoft Field Name	Type	Note	# of Char
Home Zip	homeZip	CM_ADDRESS	POSTAL	Home type (35)	NA	61
Home Country	homeCountry	CM_ADDRESS	COUNTRY	Home type (35)	Codeset mapping supported	81
Other Street	otherStreet	CM_ADDRESS	ADDRESS1	Other type (38)	Microsoft Outlook only	481
Other City	otherCity	CM_ADDRESS	CITY	Other type (38)	Microsoft Outlook only	61
Other State	otherState	CM_ADDRESS	STATE	Other type (38)	Codeset mapping supported; Microsoft Outlook only	61
Other Zip	otherZip	CM_ADDRESS	POSTAL	Other type (38)	Microsoft Exchange only	61
Other Country	otherCountry	CM_ADDRESS	COUNTRY	Other type (38)	Codeset mapping supported; Microsoft Outlook only	81
Email1 Address	email	CM_EMAIL	EMAIL_ADDR	Business type (27)	NA	241
Email2 Address	email2	CM_EMAIL	EMAIL_ADDR	Home type (30)	Microsoft Outlook only	241
Office Phone	businessPhone	CM_PHONE	PHONE	Business type (11)	NA	51
Home Phone	homePhone	CM_PHONE	PHONE	Home type (15	NA	51
Other Phone	otherPhone	CM_PHONE	PHONE	Other type (43)	Microsoft Outlook only	51
Mobile Phone	mobile	CM_PHONE	PHONE	Cellular type (12)	NA	51

PIM Field Label	XML Name	Record Name	PeopleSoft Field Name	Type	Note	# of Char
Fax	fax	CM_PHONE	PHONE	Fax type (14)	NA	51
Pager	pager	CM_PAGER	PHONE	Pager 1 type (21)	NA	51
Categories	category	PIM_CNTS_INFO	PIM_CATEGORY	NA	NA	133

Field Mapping for Calendar Items

PIM Field Label	XML Name	Record Name	PeopleSoft Field Name	Type	Note	# of Char
Start Date	taskDate	RB_TASK	DATE_UNDER_RPT	NA	NA	9
Start Time	startTime	RB_TASK	START_TIME	NA	NA	9
End Date	dateClosed	RB_TASK	DATE_UNDER_RPT	NA	NA	9
End Time	endTime	RB_TASK	END_TIME	NA	NA	7
Subject	subject	RB_TASK	DESCR254	NA	NA	256
Body	notes	RB_TASK	ACTIVITY_NOTES	NA	NA	4096
Category	category	PIM_TASK_INFO	PIM_CATEGORY	NA	Not applicable to Lotus Notes 4.6	133
Private	private	PIM_TASK_INFO	PIM_PRIVATE_FLG	NA	NA	1

Field Mapping for Tasks

PIM Field Label	XML Name	Record Name	PeopleSoft Field Name	Type	Note	# of Char
Start Date	taskDate	RB_TASK	DATE_UNDER_RPT	NA	NA	9
Due Date	taskDate	RB_TASK	NA	NA	Hard-coded to task date	9
Status	status	RB_TASK	STATUS	NA	NA	26
Body	notes	RB_TASK	ACTIVITY_NOTES	NA	NA	4096

PIM Field Label	XML Name	Record Name	PeopleSoft Field Name	Type	Note	# of Char
Category	category	PIM_TASK_INFO	PIM_CATEGORY	NA	Not applicable to Lotus Notes 4.6	133
Private	private	PIM_TASK_INFO	PIM_PRIVATE_FLG	NA	NA	1

Synchronization Rules and Considerations

PeopleSoft Infosync Server is supported in multiple PeopleSoft CRM and PIM server versions. In each of these environment combinations, the behavior of the system changes slightly. This section discusses general and object-specific rules that govern the synchronization process, as well as considerations that describe how the system works in different situations.

General Rules

Here is a list of rules or considerations that apply to the entire integration:

Administrators *must* specify the localization country for all PIM end users on the Overall Preferences page.	All
By default, user accounts are deactivated after three unsuccessful synchronization attempts. You can update the FailedSyncsAllowed parameter in the ilopt.cfg file under C:\Program Files\Intellisync Server to modify the maximum number of failed synchronizations allowed before deactivating user accounts.	All
Deletion of end users from the Web Admin Console is not immediate if these end users are currently in use (for example, synchronization is in progress for them). These users are transferred to a deletion queue that is scheduled to process every 15 minutes. When you delete an end user from the Web Admin Console, await 15 minutes to see the end user getting deleted from the queue.	All
When a user synchronizes for the first time, this is called an initial synchronization. PeopleSoft Infosync Server compares the keys of all records for that end user with the same type of records in the other system, looking 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
PeopleSoft Infosync Server 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 in the RB_TASK table for tasks and calendar items.	All
If a record cannot be synchronized successfully to PeopleSoft CRM because the operation is not supported, PeopleSoft Infosync Server rolls back to PIM server 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 PIM server, and the update contact operation is not supported in the end user's PIM preference. When synchronization occurs, it displays an error message about not synchronizing that updated contact record on the PIM Errors page (synchronization fails because the end user doesn't have the permission to perform this process). As a result, the contact is updated in the PIM server but not in PeopleSoft CRM. When the next synchronization occurs, the contact (the version available in PeopleSoft) is synchronized to the PIM server.	All

Contact Rules

Here is a list of rules or considerations that apply only to contacts:

As designed, if end users synchronize a contact that has some bad data (for example, an invalid country in the contact address), the error is logged and the bad data is not synchronized to PeopleSoft CRM. At next synchronization, PeopleSoft Infosync Server replaces the bad data with the good data that's available in the same copy in PeopleSoft CRM (data is rolled back). If the good data doesn't exist in PeopleSoft CRM (for example, the contact is newly added in the PIM server), the bad data is removed because it's overwritten by an empty value in PeopleSoft CRM. This behavior of PeopleSoft Infosync Server explains why sometimes end users encounter data missing issues on the PIM server. End users must check for PIM errors regularly to ensure that they correct any synchronization errors as soon as possible. In this example, in order to synchronize the address properly, the end users must correct the invalid country problem on the PIM server *before* the next synchronization and ensure that their conflict resolution rule is set to allow the PIM server to win.	All
If end users are unable to synchronize new contacts to PeopleSoft CRM because there is missing or invalid value in information that is represented by multiple fields (for example, the contact address fields and the contact name field), the end users must modify all the correlated fields in order to synchronize the contact again. For example, if an end user creates a new contact without a last name and performs synchronization, 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 next synchronization occurs.	All
If end users create a new contact and it's associated with a company that doesn't exist in PeopleSoft CRM (assuming that the Allow Add with Invalid Company feature is enabled), PeopleSoft Infosync Server 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. The contact is synchronized to PeopleSoft CRM without a company relationship.	All
When consumers or workers are synchronized to the PIM server, 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 server, the company is ignored by the synchronization process.	All
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. End users cannot synchronize a contact who is associated with multiple categories if more than one of them is defined in the PIM preference; PeopleSoft Infosync Server logs an error on PIM Errors page, 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 user receives a record for each role this person has at synchronization. In this example, end users receive two records, one for the contact role and one for the consumer role.	All
When end users delete the address from a contact record in the PIM server, the synchronization process automatically deletes the country, which does not appear as part of the address in the Address field, in order to ensure successful synchronization.	Microsoft Exchange

If an end user enters a list of companies at one time in the PIM server and the length of the company list exceeds 51 characters, the entire company list is not synchronized (assuming that the Support Multiple Companies feature is enabled). However, if an end user enters one company at a time 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
If an end user adds a contact to a task in PeopleSoft, the contact will not show on the task in Microsoft Outlook.	Microsoft Exchange
If an end user adds a contact to a task in PeopleSoft, the contact will appear in the address book in Lotus Notes.	Lotus Notes
If an end user assigns a task to another person, when the assignee synchronizes, the assignee will become the owner of the task on the PIM Server.	PeopleSoft 8.9 CRM Microsoft Exchange

Calendar Item and Task Rules

Here is a list of rules or considerations that apply only to calendar items and tasks:

If end users delete tasks or calendar items (from the PIM server), and these tasks or calendar items were originally created from the task list in PeopleSoft CRM, these deleted records are no longer viewable from the task list in PeopleSoft CRM after synchronization. To see these deleted records, end users must go to their monthly or daily calendar.	PeopleSoft 8.9 CRM
In PeopleSoft CRM, the start and end dates of calendar items are identical.	All
If end users create a task from the task list in PeopleSoft CRM with a specified start date and synchronize, the task is transferred to Microsoft Exchange with its due date set to equal the start date. When the next synchronization process runs, the task is transferred back to PeopleSoft CRM, along with the due date. Because the due date in the PIM server is mapped to the close date in PeopleSoft CRM, the task is associated with the close date on the task list, and the task is stored as history.	PeopleSoft 8.9 CRM Microsoft Exchange
Microsoft Outlook users must manually add the category in the master category list of the application (a one-time task). The list is available by clicking the Categories button on a task, calendar item, or contact.	PeopleSoft 8.9 CRM Microsoft Exchange
When viewing tasks in PeopleSoft, the default in the Task Management component may be *All Open Tasks* although when the user synchronizes the*Completed*tasks will show on the PIM server. *Cancelled* tasks will not show on the PIM server.	PeopleSoft 8.9 CRM Microsoft Exchange

Task Note Rules

Here is a list of rules or considerations that apply only to notes.

Rule or Consideration	
If an entry with more than one note is synchronized with the PIM server from PeopleSoft CRM, the notes are concatenated or only the most recent notes appear. This is specified for the end user in the PIM Preference page.	All
From PIM, end users can only update the notes that they are entering. Any previous notes must be updated in PeopleSoft and then synchronized.	All

Rule or Consideration	
Task note delimiters that appear in PIM where the note begins and ends are specified on the PIM Preferences page. These are configurable, although it is recommended that you use only characters, numbers, or dashes.	All
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

Note. Attachments are not a supported object.

CHAPTER 3

Setting Up Integration Between PeopleSoft CRM and PIM Servers

This chapter discusses how to:

- Define dataset rules and roles.
- Set up PIM preferences.
- Set up PIM user settings.
- Set up bypass signon for accessing PeopleSoft CRM.
- Install PeopleSoft Infosync Server.
- Set up Integration Broker.
- Export users from PeopleSoft CRM to PeopleSoft Infosync Server.
- Define configuration templates.
- Modify synchronization settings.

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

Defining Dataset Rules and Roles

This section 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 server as a result of a 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 datasets rules for this integration. You can modify them or create custom ones to work with your implementation.

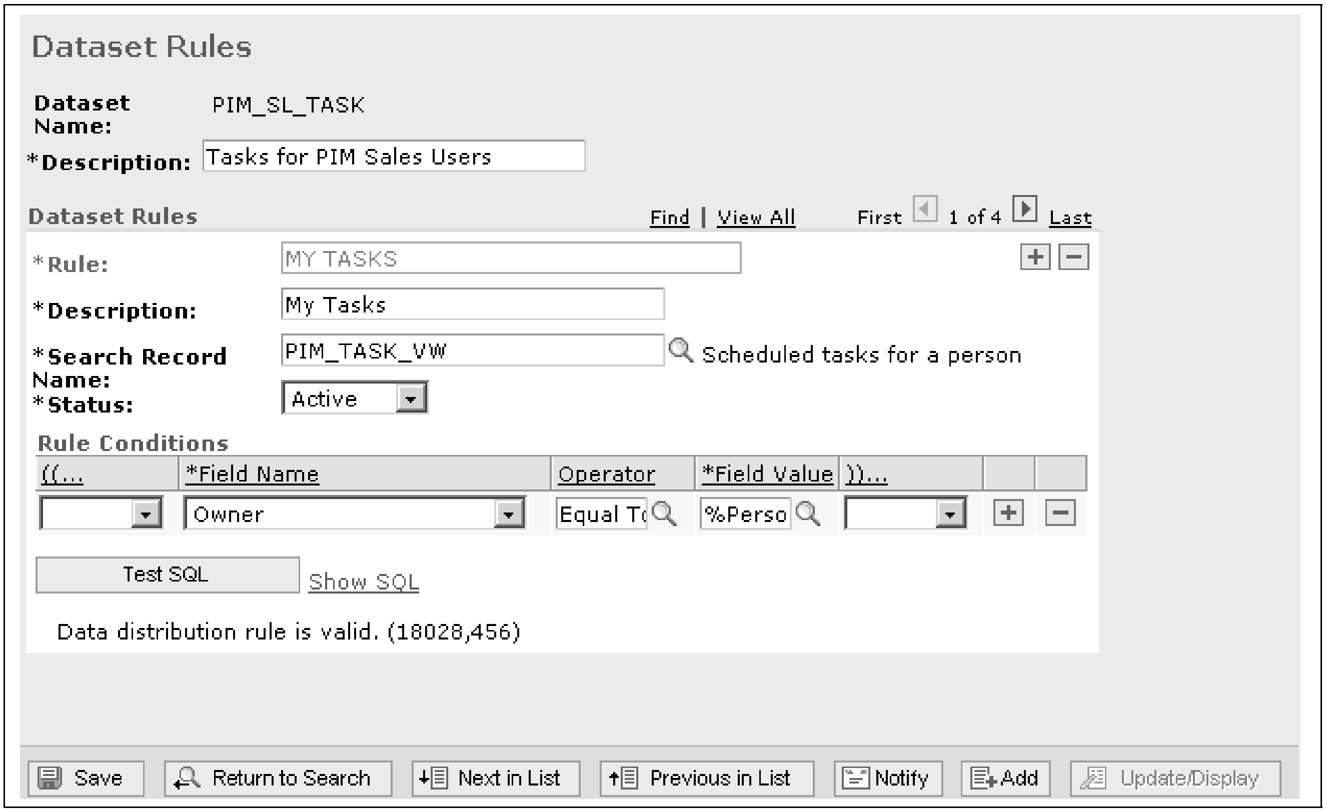
Note. If an end user is no longer associated with a contact, consumer, or worker (for example, a sales user reassigns a lead task to another person and therefore does not receive any updates about the lead's contacts from the CONTACTS_FOR_LEAD_TASK_ASSIGNEE dataset rules), the record is removed from 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 server.
PIM Dataset Roles	PIM_ROLE	Set Up CRM, Install, PIM, PIM Dataset Role, PIM Dataset Roles	Define dataset roles and associate them with datasets and dataset rules.

Defining Dataset Rules

Access the Dataset Rules page.



Dataset Rules page

Rule
Enter the name of the rule. This field is unavailable for entry after you save the page.

In addition to the system-delivered rules, you can also add custom rules to datasets and associate them with dataset roles to meet your business requirements.

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 ORfield blank, specify the nesting level for this condition. 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)
Click to test the validity of the rule conditions. The result is returned below the button.

Show SQL (show Structured Query Language)
Click to view the SQL statement that is generated by the rule.

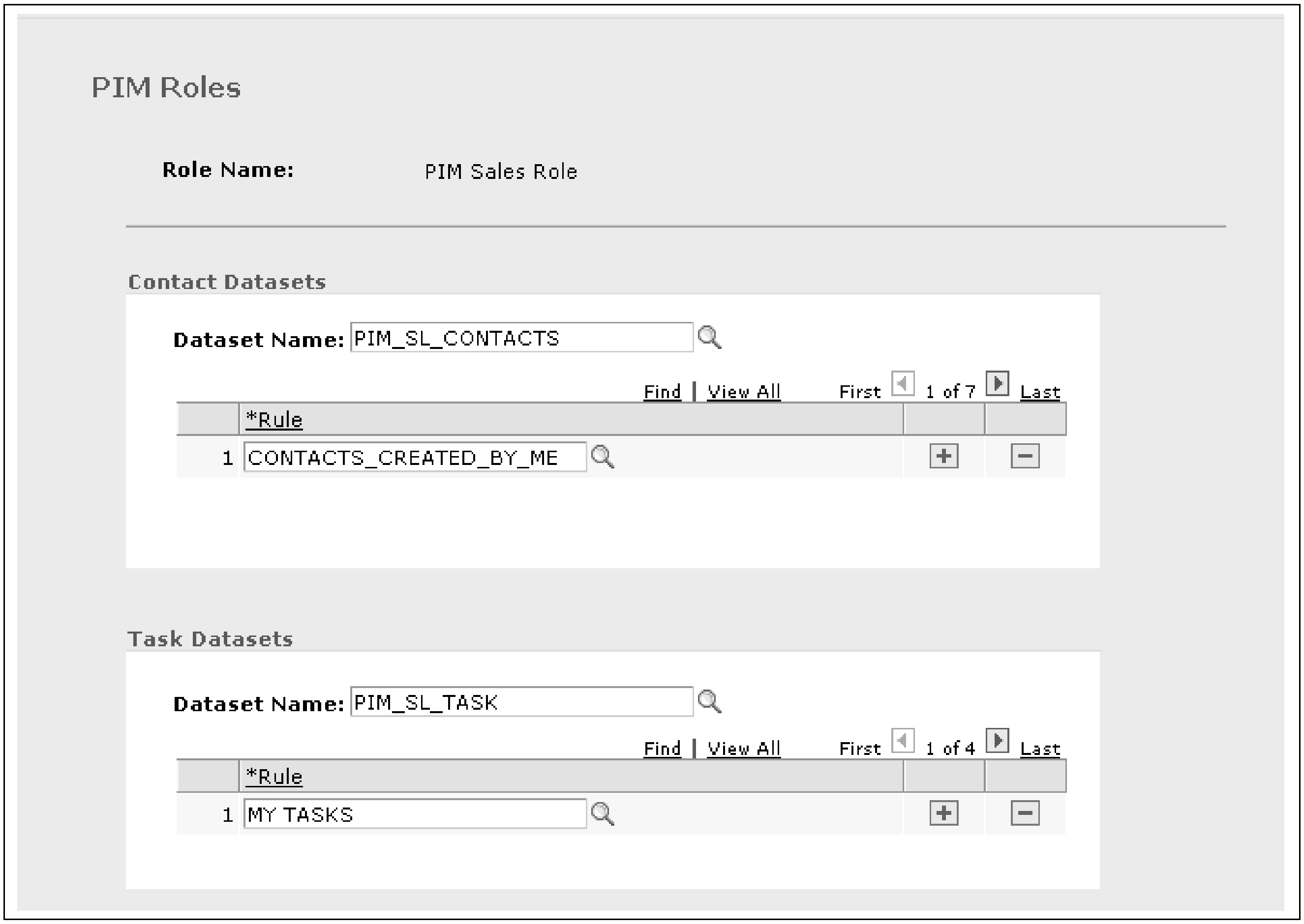
See Also

Chapter 2, "Understanding PeopleSoft Infosync Server," Datasets, page 8

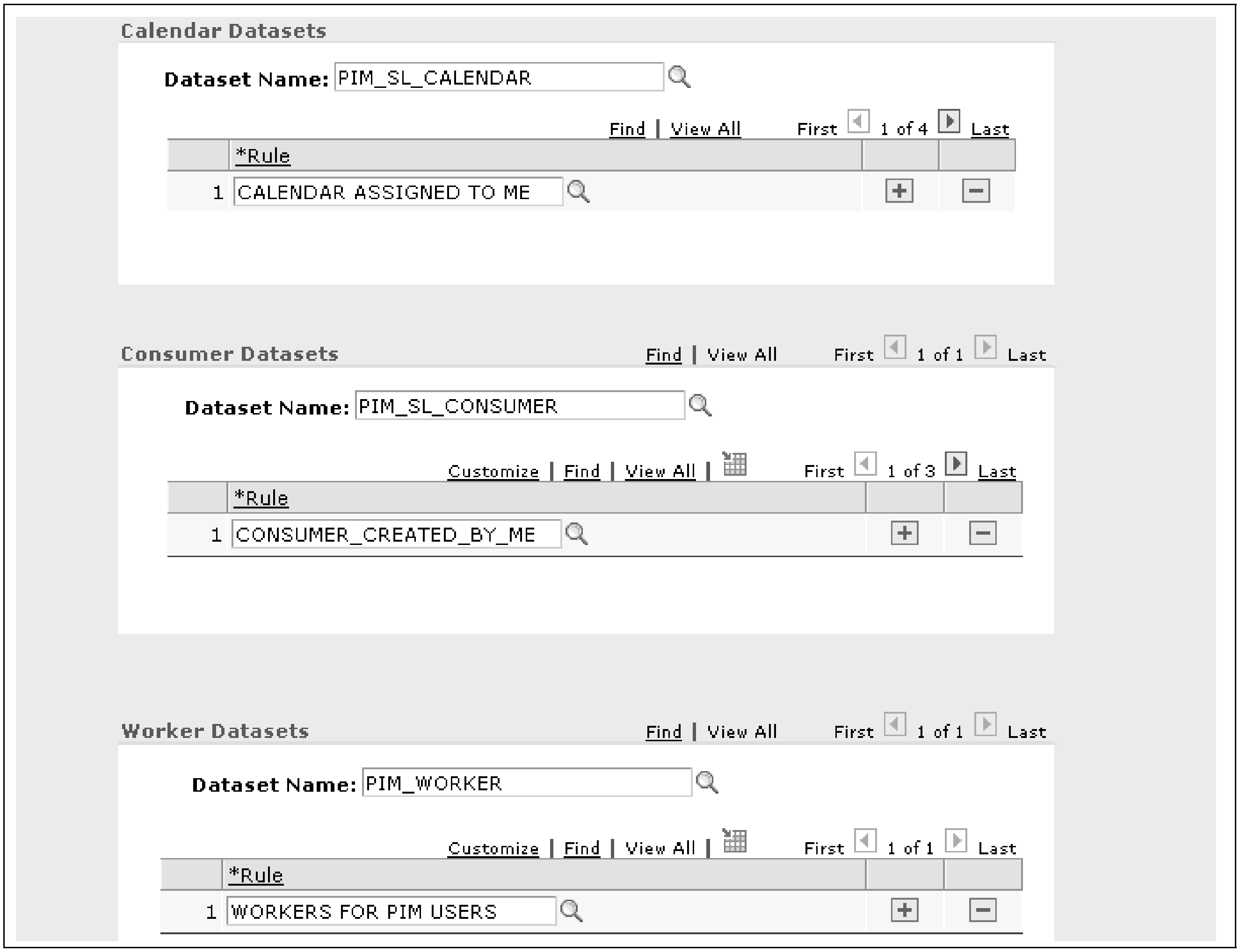
PeopleSoft 8.9 Enterprise Components PeopleBook

Defining PIM Dataset Roles

Access the PIM Dataset Roles page.



PIM Roles page (1 of 2)



PIM Roles page (2 of 2)

PeopleSoft delivers two predefined dataset roles: PIM Field Service Role and PIM Sales Role.

Dataset Name Select a dataset for each object that you want to synchronize: contact, consumer, worker, task, and calendar. All of the associated rules are available in the Rule grid after you select a dataset.

Rule Select dataset rules that are applicable to this role.

Note. You don’t need to select all of the rules that are defined in a dataset for the dataset role. For example, if sales users prefer to see updates on tasks that are assigned to only them, select the*My Tasks* rule for the *PIM Sales* role.

See Also

Chapter 2, “Understanding PeopleSoft Infosync Server,” Datasets, page 8

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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.

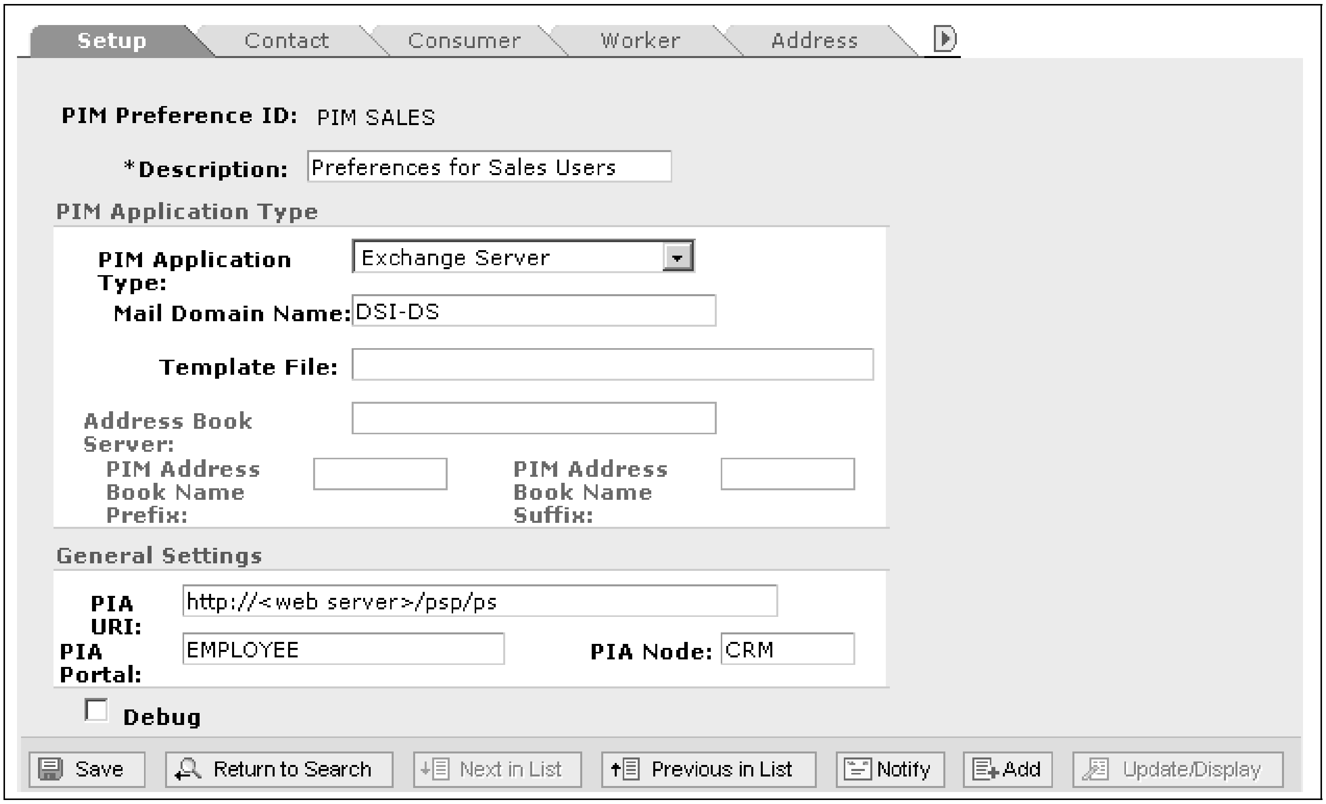
Note. When you configure PIM preferences, consider it a one-time implementation process. Avoid changing PIM preferences after PeopleSoft Infosync Server goes into production.

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, by PIM server, the overall synchronization preference for each defined PIM role as information is synchronized from the PIM server to PeopleSoft CRM.
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, Search 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	Setup 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(Personal Information Manager Preference ID)

Enter the name of the PIM preference that you are defining. Associate each user with a PIM preference by specifying a PIM preference ID in the user preference on the Overall Preferences page.

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

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

Identifies the PIM server type and other relevant information of the PIM server that is pertinent to this integration. Information in this group box is used by the PIM_SYNC_ID application engine program.

PIM Application Type Personal Information Manager Application Type

Select the PIM server (Lotus Domino or Microsoft Exchange server) to use in the integration: *Domino Server* (default) and *Exchange Server.*

Mail Domain Name and **Mail Folder**

Enter the domain for Microsoft Exchange server or the folder in which the mail server resides for the Lotus Domino server.

The name of this field is Mail Folder if the PIM application type is *Domino Server,*. The name changes to Mail Domain Name if the PIM application type is *Exchange Server.*

Template File (Optional) Enter the name of the template that is used to create user accounts for end users. Every end user must be associated with a template when the user account is first created.

Address Book Server Enter the name of the server where the address book resides.

Note. This field is required only if the PIM application type is *Domino Server.* You must place an address book on the server to enable synchronization of contacts by PeopleSoft Infosync Server.

PIM Address Book Name Prefix and **PIM Address Book Name Suffix** (Optional) Enter the prefix and suffix to be added as part of the address book name for users. When you run the application engine program to export PeopleSoft user IDs, it generates address book names for users using this format:

<address book prefix><user ID><address book suffix>.nsf

For example, suppose that you define *SLS* as the prefix and *10* as the suffix for sales users. The address book name for the *FPETERSON* user ID becomes *SLSFPETERSON10.nsf.*

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 will take the end user to the associating contact record in the 360 Degree View. If your web server address includes a port number, you must also include it 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 PIM users will have.

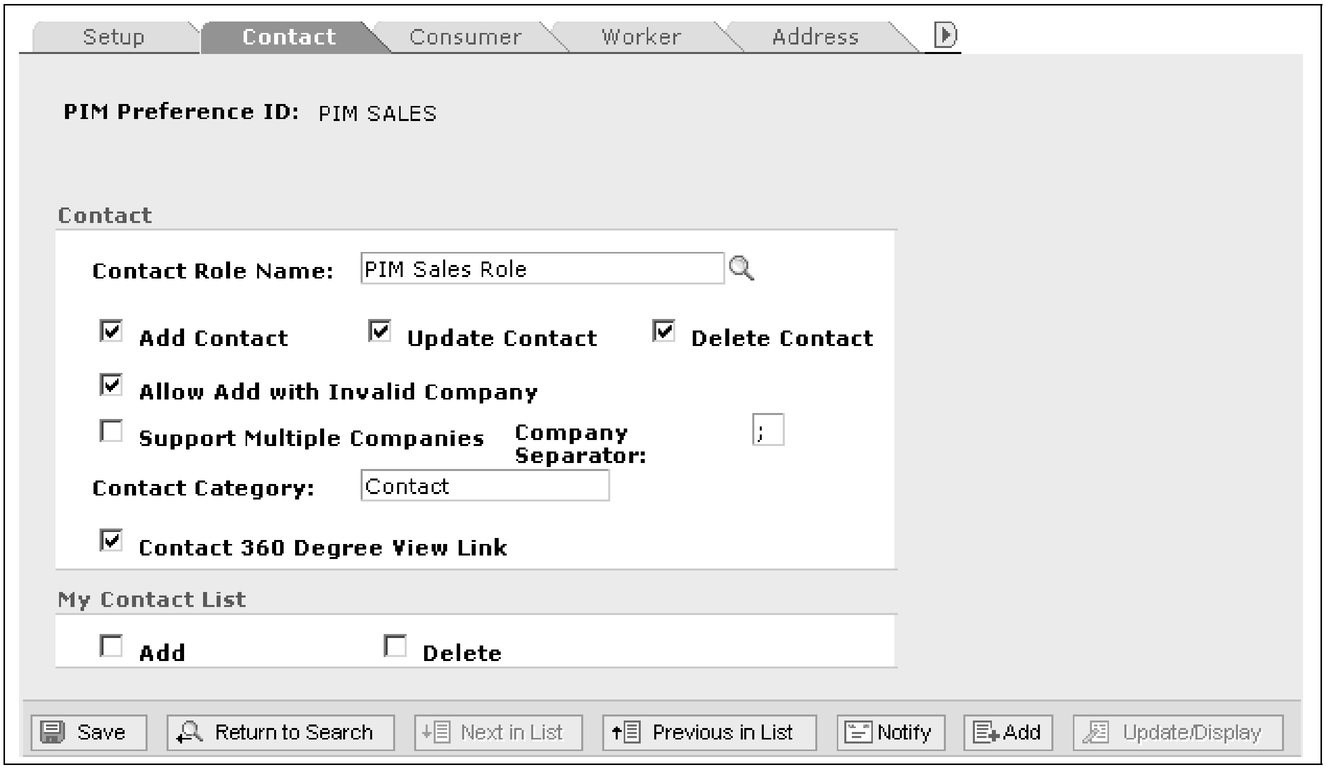
PIA Node Enter the PeopleSoft Internet Architecture node that your system uses for integration.

See Also

Chapter 2, “Understanding PeopleSoft Infosync Server,” Templates and PIM Preference, page 6

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 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 will receive an error message on the PIM Errors page. The corresponding contact in PeopleSoft CRM is not impacted and is used to roll back to the end user 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 server 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 servers.

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 Server 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 enable 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 server. In the PIM server, 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 handles only 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 recommends that you consider this configuration a one-time setup process and not change it after implementation.

Contact Category

Enter a category that is used by PeopleSoft Infosync Server to identify which contacts in the PIM server are to be synchronized. 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 ensure that the filter and the category mapping are updated as well. The default value is *Contact.*

Contact 360 Degree View

Select this link to enable the Contact URL to be synchronized to the PIM Server. 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. You must associate the contact with a company for this URL to link to the contact.

My Contacts List

Specifies the synchronization preference that applies to the My Contact List.

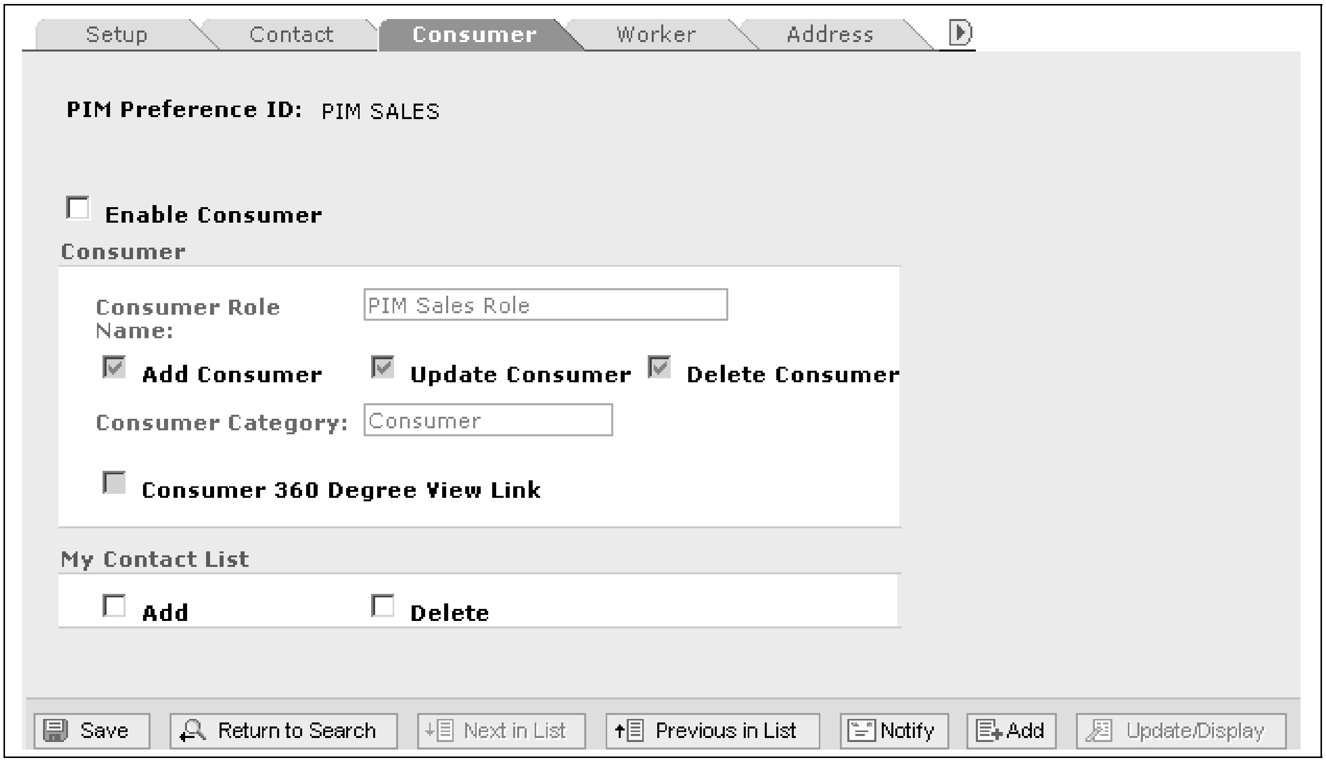
Add

Select to enable contacts to be added to the PIM Server.

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

Specifying PIM Preference for Consumers

Access the Consumer page.



Consumer page

Consumer

Specifies the synchronization preference that applies 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 receive an “object type not enabled” error message on their 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 on 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 the PIM Errors page. The corresponding consumer in PeopleSoft CRM is not impacted and rolls back to the end user address book at next synchronization. However, if a user adds or updates a consumer directly from PeopleSoft CRM, the change is synchronized to the PIM server 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 servers.

Note. You cannot delete consumers from PeopleSoft CRM.

Consumer Category Enter a category that is used by PeopleSoft Infosync Server to identify which consumers in the PIM server are to be synchronized. The consumer category that you specify in this field must be identical to the one that 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 update the filter and the category mapping as well. The default value is *Consumer.*

Consumer 360 Degree View Select to allow the Consumer URL to be synchronized to the PIM Server. 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 consumer must be associated with a company for this URL to link to the consumer.

My Contacts List

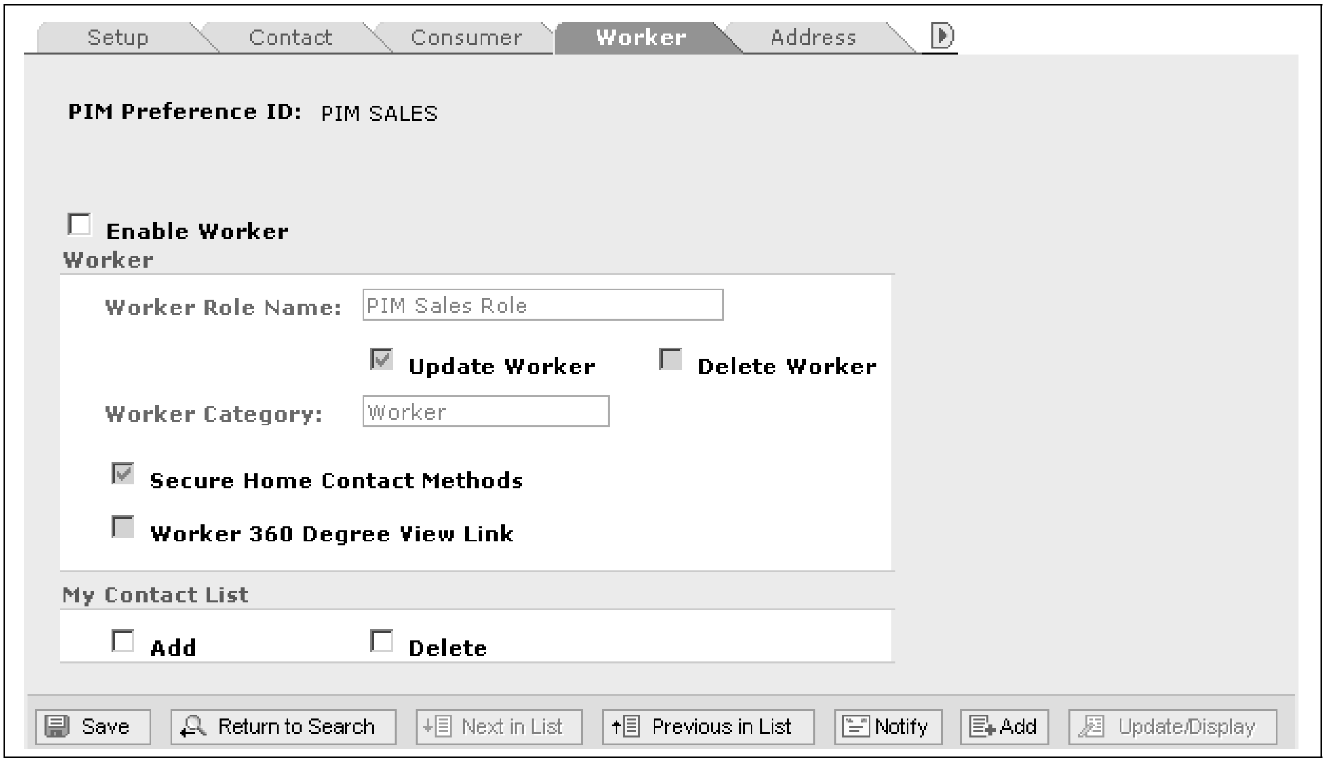
Specifies the synchronization preference that applies to the My Contact List.

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

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

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 server 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 the PIM server and 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 the PIM Errors page. The corresponding worker in PeopleSoft CRM is not impacted and is rolled back to the end user address book at next synchronization. However, if a user updates a worker directly from PeopleSoft CRM, the change is synchronized to the PIM server 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 servers.

Worker Category Enter a category that is used by PeopleSoft Infosync Server to identify which workers in PIM applications 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 application. Contacts that don't belong to this category are not synchronized as workers. You can change the category name to anything during setup, but also update the filter and the category mapping. The default value is *Worker.*

Secure Home Contact Methods

Select to prevent worker home contact information from being synchronized to PIM server. This includes the phone number, address, and email that has *Home* as the purpose, as well as pager number that has *Pager 1* or *Page 2* as the purpose in PeopleSoft CRM. For example, if you map the business address type (PIM server) to the home address type (PeopleSoft CRM) on the Address page of the PIM preference, the business address in the PIM server is never synchronized. Home contact information in PeopleSoft CRM is secured: it doesn't take updates from the PIM server (no permission error occurs) and is not synchronized to the PIM server. 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 server. However, any update on it from the PIM server 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 server and have the information synchronized to PeopleSoft CRM, the Secure Home Contact Methods feature must be disabled and end users must have a secured worker role. Secured worker roles are set up in the Secured Worker Role object. Select Set Up CRM, Security, Secured Worker Role.

Worker 360 Degree View

Select to enable the Worker URL to be synchronized to the PIM Server. 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. You must associate the worker with a company for this URL to link to the worker.

My Contacts List

Specifies the synchronization preference that applies to My Contact List.

Add

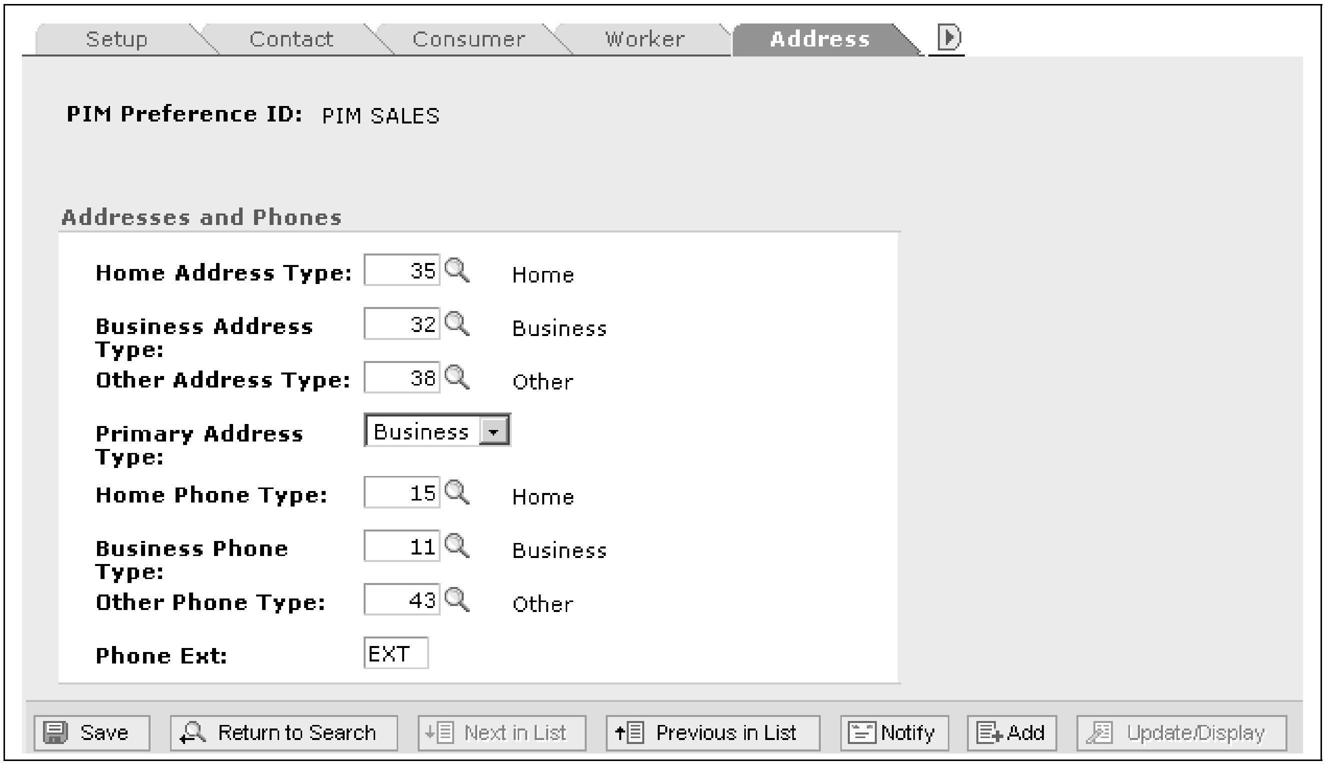
Select to enable workers to be added to the PIM Server.

Delete

Select to enable workers to be deleted from the PIM Server.

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 server are mapped to in PeopleSoft CRM after synchronization. A contact method purpose indicates when the specified contact method may be used. For example, let's say that 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 Exchange Server only.

Primary Address Type

Select the primary address type: *Home, Business,* and *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 server 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.*

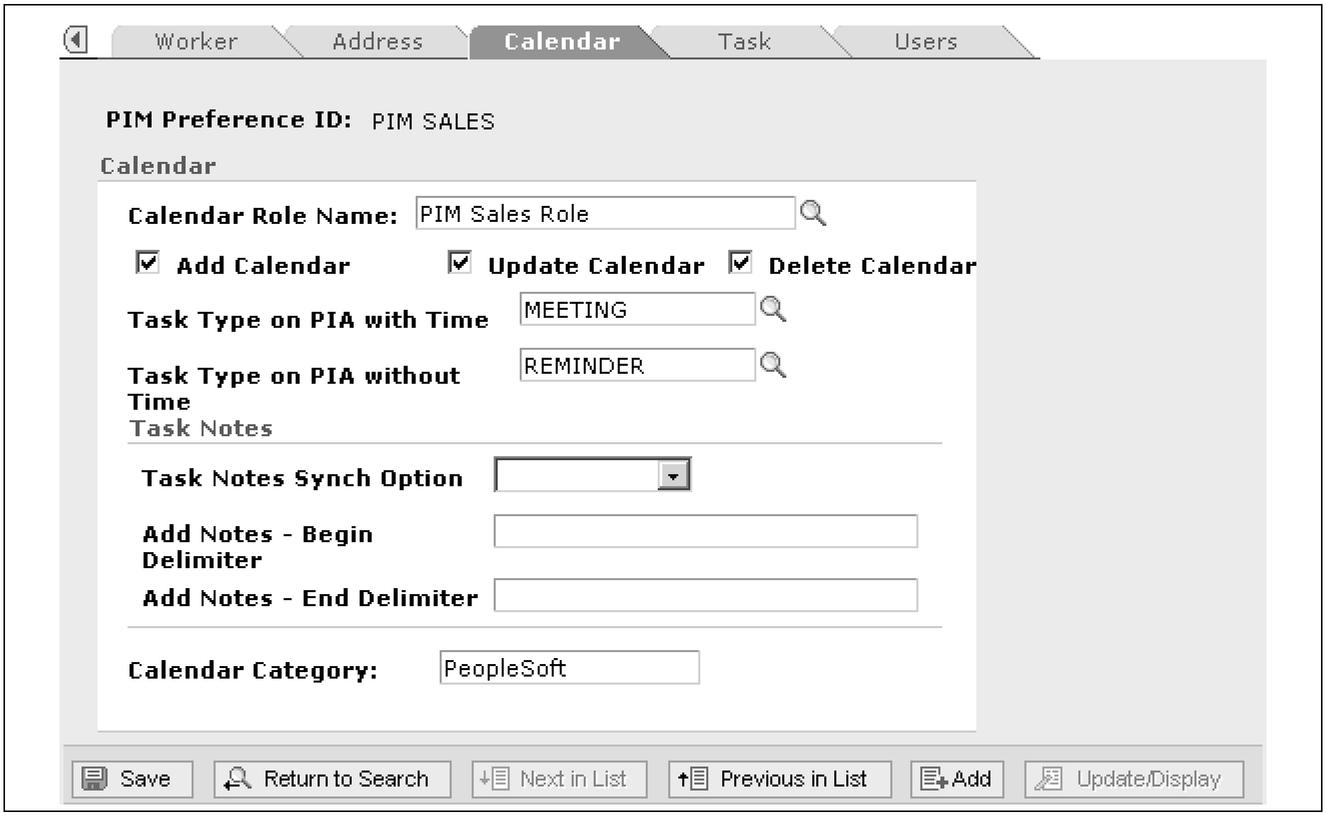
Note. The *Other* phone type is applicable to Microsoft Exchange Server only.

Phone Ext (phone extension)

Enter a prefix for phone extensions. PeopleSoft Infosync Server 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 applies 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 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 the PIM Errors page. The corresponding calendar item in PeopleSoft CRM is not impacted and rolls back to the end user 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 server 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 servers.

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.

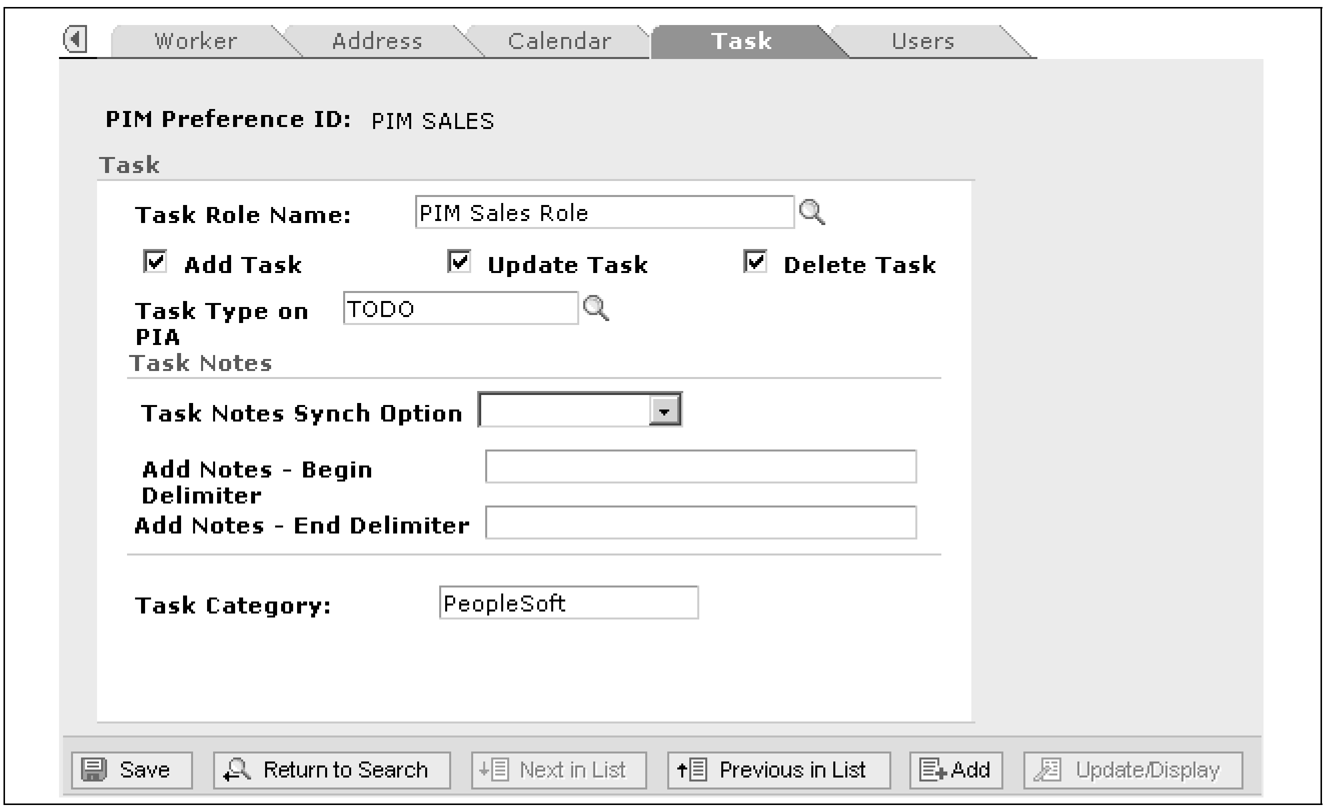
Task Notes Sync Option
Select *Concatenate* or *Most Recent* to view the Task Notes.

Add Notes Begin Delimiter and **Add Notes End Delimiter**
Enter a beginning and ending delimiter that defines where the task note begins and ends. The note description field in the PIM Server 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 Server 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 Server. 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 in 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 the PIM Errors page. The corresponding task in PeopleSoft CRM is not impacted and is rolled back to the end user 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 server 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 servers.

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 Server 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 server. Tasks that don't belong to this category are not synchronized. You can change the category name to anything during setup, but also update the filter and the category mapping. The default value is *PeopleSoft.*

Setting Up PIM User Settings

This section discusses how to:

- Associate PIM preferences with users using the Users page.
- Associate PIM preferences with users using the Overall Preferences page.
- Specify PIM accounts for users.

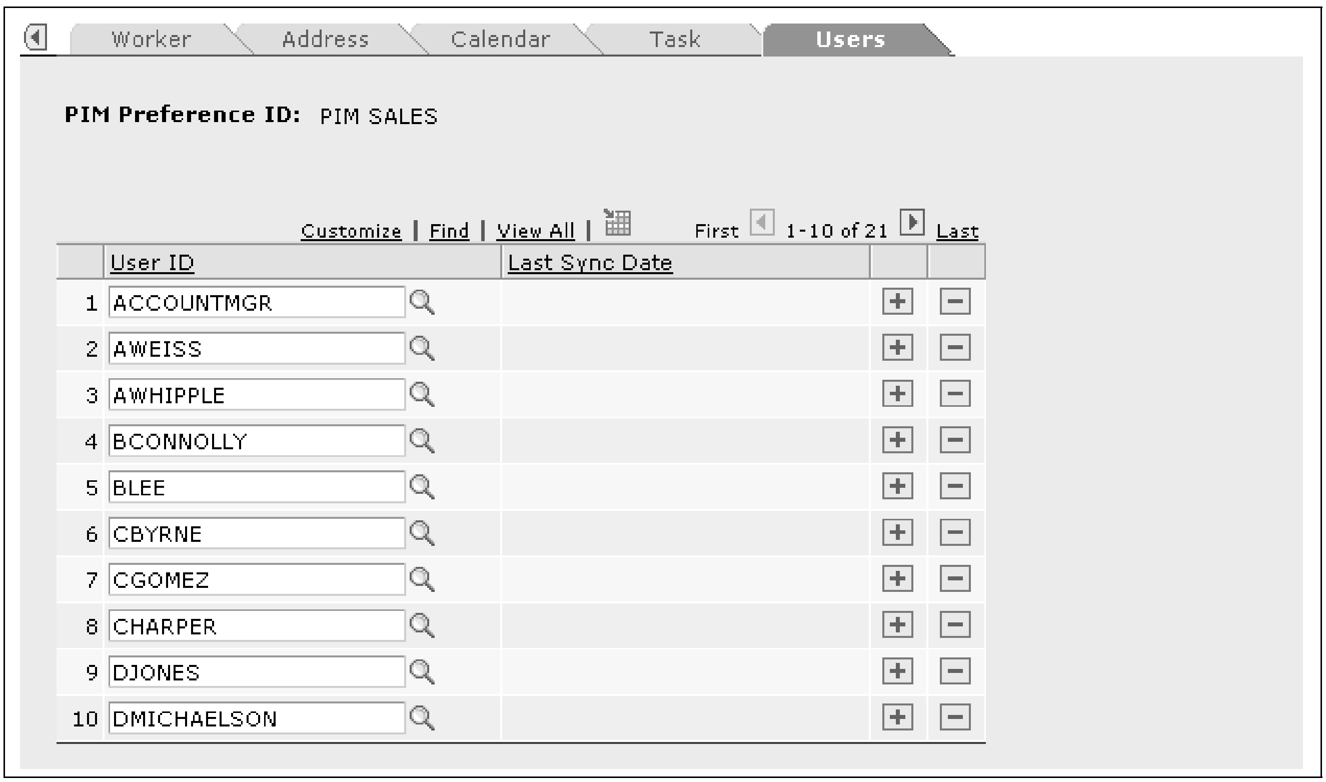
Note. You can associate a PIM preference with users by accessing either the Users page or the Overall Preferences page.

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.
Worker	RD_PERSON_84	Workforce, Search Worker	Specify PIM accounts for users.

Associating PIM Preferences with Users Using the Users Page

Access the Users 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, the user is associated with the new PIM preference.

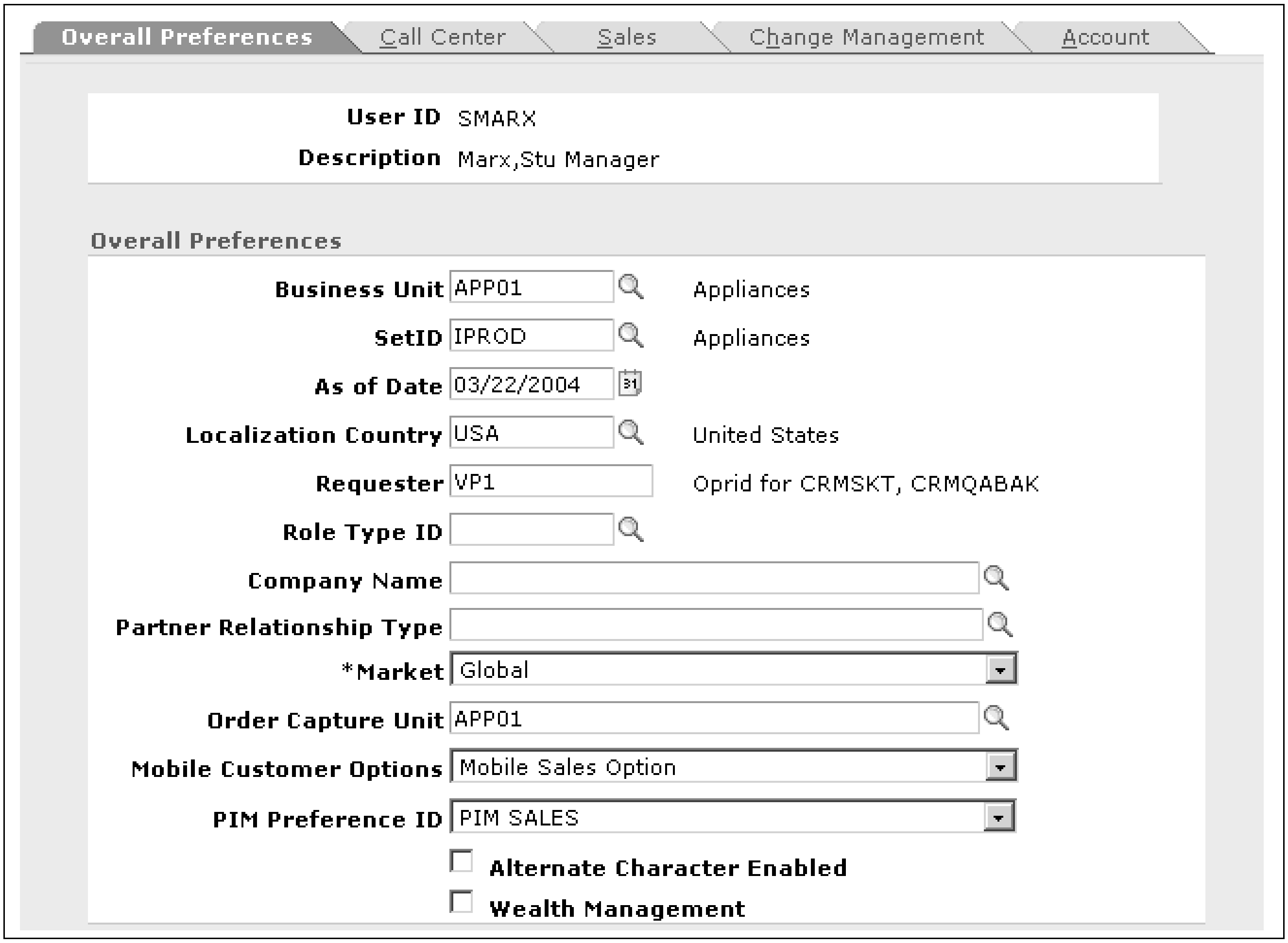
Ensure that you complete the prerequisite on saving the user preferences record for each PIM end user; otherwise, all of them may not be available for selection.

Last Sync Date (last synchronization date)

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

Associating PIM Preferences Using the Overall Preferences Page

Access the Overall Preferences page.



Overall Preferences page

SetID

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

Localization Country

Specify a country code for the user as the localization country.

Note. You *must* specify this value for PIM end users because PeopleSoft Infosync Server 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 server for the user. Set up PIM preferences 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

Specifying PIM Accounts for Users

Access the Worker page.

PIM Account Name Enter the login name of the user's PIM client (Microsoft Outlook or Lotus Notes). If you don't specify the PIM account name for the user, the PeopleSoft user ID of the user appears as the account name in the import text file after you run the PIM_ID_SYNC process to export PeopleSoft users.

Setting Up Signon PeopleCode for PIM Users

This section discusses how to:

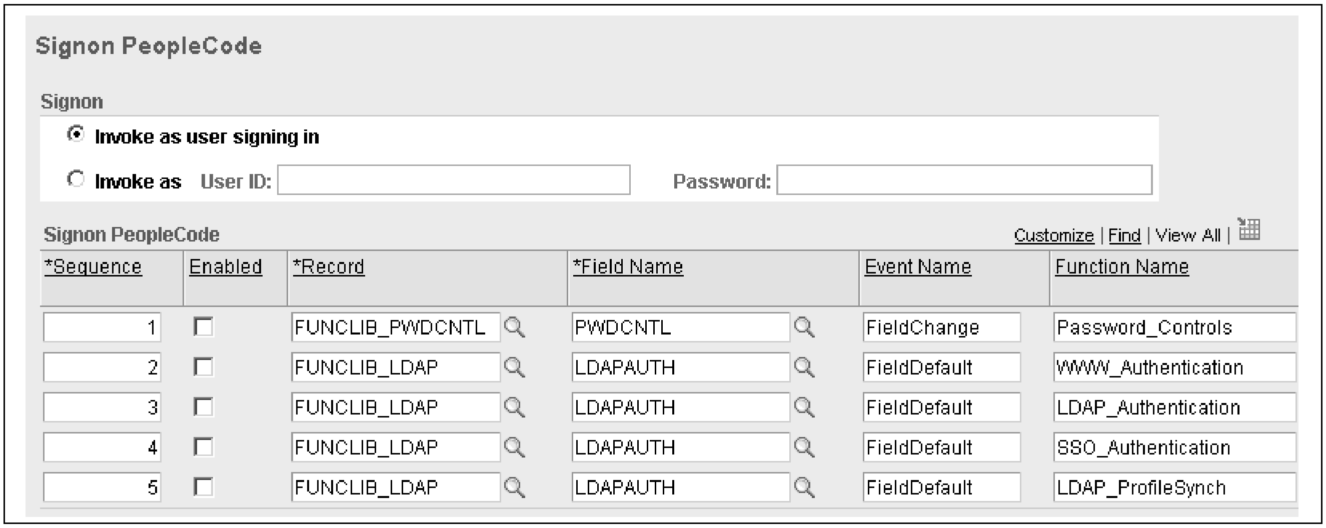
- Enable Signon PeopleCode.
- Create users for accessing PeopleSoft CRM from PeopleSoft Infosync Server.
- Define PIM system data.

Pages Used to Setup Signon PeopleCode for PIM Users

Page Name	Object Name	Navigation	Usage
Signon PeopleCode	SIGNONPPC_PAGE	PeopleTools, Security, Security Objects, Signon PeopleCode	Enable Signon PeopleCode programs.
PIM System Data	PIM_SYSTEM_DATA	Set Up CRM, Install, PIM, PIM System Data	Define PIM system data to enable users from PeopleSoft Infosync Server to log on to PeopleSoft CRM through Integration Broker without requiring user passwords.

Enabling Signon PeopleCode

To enable Signon PeopleCode for the PeopleSoft Infosync Server integration, set the logged on user as the one who invokes the Signon PeopleCode program (developed specifically for this integration).



Signon PeopleCode

Signon

Invoke as user signing in

Invoke as User ID: Password:

Signon PeopleCode Customize | Find | View All |

*Sequence	Enabled	*Record	*Field Name	Event Name	Function Name
1		FUNCLIB_PWDCNTL	PWDCNTL	FieldChange	Password_Controls
2		FUNCLIB_LDAP	LDAPAUTH	FieldDefault	WWW_Authentication
3		FUNCLIB_LDAP	LDAPAUTH	FieldDefault	LDAP_Authentication
4		FUNCLIB_LDAP	LDAPAUTH	FieldDefault	SSO_Authentication
5		FUNCLIB_LDAP	LDAPAUTH	FieldDefault	LDAP_ProfileSynch

Signon PeopleCode page

1. Create a user that is used to log on to PeopleSoft CRM through bypass signon.

   Select PeopleTools, Security, User Profiles, User Profiles, and create a user (for example, default_user) with these settings:

   - On the General page, enter a password that is long and complex so that it's difficult to guess.

     The password must be exposed on the configuration.property file. Select a symbolic ID for the user as well.

   - On the ID page, set the ID Type field to *None*.

     You don't need to associate the user with any roles or permission lists.

2. Modify the configuration.property file under C:\bea\wlserver6.1\config\peoplesoft\applications \PORTAL\WEB-INF\psftdocs\ps with these changes:

   byPassSignOn=true

   defaultUSERID=<userID created in step 1>

   defaultPWD=<user's long and complex password>

3. Stop and restart the web server.

4. Enable the Signon PeopleCode program on the Signon PeopleCode page, and update the page with these settings:

   - Select the Invoke as check box and enter the user ID and password that are defined in step 1.
   - Add a new row for the PIM Signon PeopleCode program if you don't have it already.

     Select the Enabled check box for this row, and enter *FUNLIB_PIM* as the record, *PWDCNTL* as the field name, *FieldDefault* as the event name, and *PIM_Authentication* as the function name.

   - Save the page.

See *PeopleTools 8.45 PeopleBook: Security Administration*

Creating Users for Accessing PeopleSoft CRM from the PeopleSoft Infosync Server

Next, you must create user IDs that are referenced in the PIM System Data page. These user IDs are:

- PIM Power User ID.

This user must be able to start that application server. Select PeopleTools, Security, User Profiles, User Profiles, and create the user with these settings:

- On the General page, enter *ALLPAGES* in the Navigator Homepage, Primary, Process Profile, and Row Security fields.
- On the ID page, set the ID Typefield to *None.*
- On the Roles page, add these roles: *UPG_APPSRVR* and *UPG_ALLPAGES.*

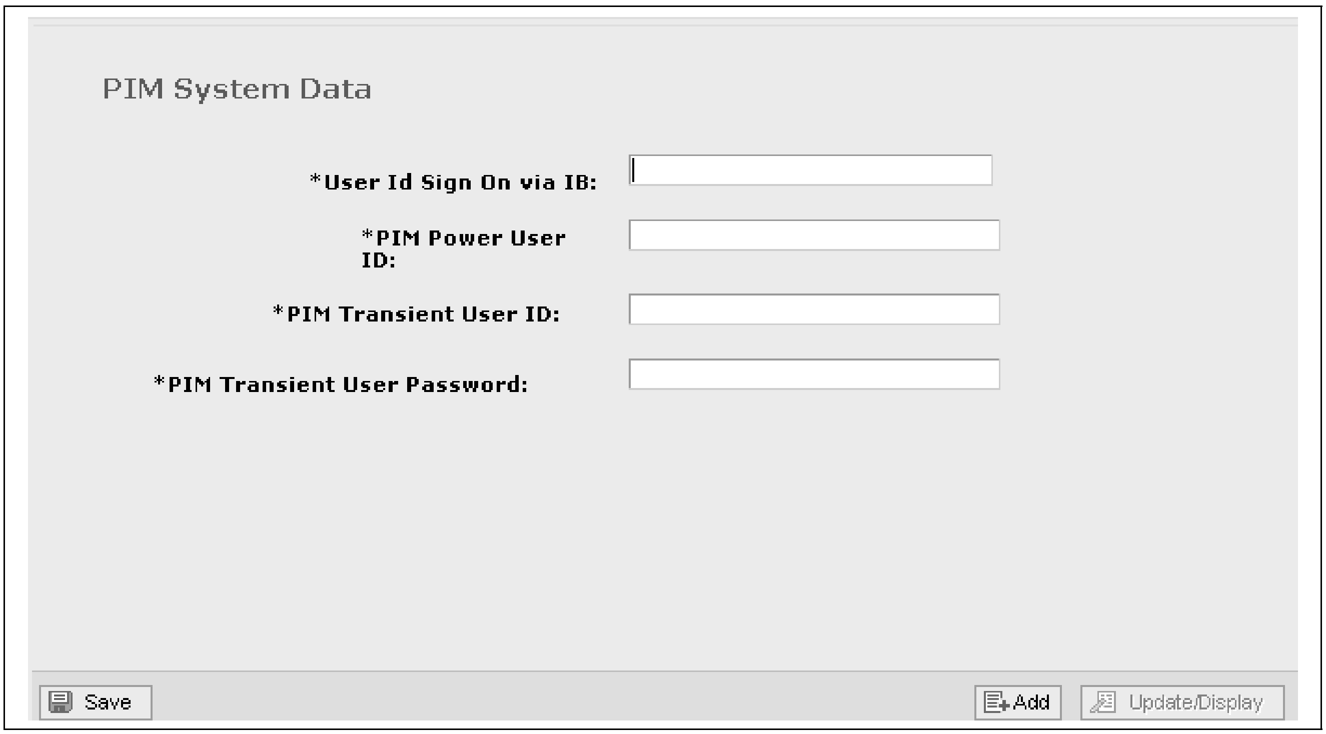
• Transient ID.

You don't need to specify any permission lists roles for this user. On the ID page, set the ID Type field to *None.*

Note. You don't need to create the Integration Broker signon ID (the value specified in the User Id Sign On via IB field.

Defining PIM System Data

Access the PIM System Data page.



PIM System Data page

Note. None of these user IDs should be subject to synchronization. In other words, on the PIM System Data page, don't specify any sales or field service user who uses PeopleSoft Infosync Server for data synchronization.

User Id Sign On via IB (user ID sign on via Integration Broker)

Enter the user ID that is specified in the integration.property file under C:\bea\wlserver6.1\config\peoplesoft\applications\PSIGW\WEB-INF. For example, enter *VP1* if the value is specified in the file like so:

ig.isc.serverURL=//<server_name>:9000

ig.isc.userid=VP1

PIM Power User Id

Enter a user ID that has the privilege to start the application server.

PIM Transient User Id	Enter a user ID that serves as a transient user. Create a transient user like any regular user by selecting PeopleTools, Security, User Profiles, User Profiles. There are no special requirements on how it should be created.
PIM Transient User Password	Enter the password of the transient user.

Note. The PIM power user ID and PIM transient user ID must be different. The PIM power user ID and the Integration Broker user ID (specified in User Id Sign On via IB) also must be different.

Installing PeopleSoft Infosync Server

See the PeopleSoft Infosync Server Installation Guide for information on how to install PeopleSoft Infosync Server. This document is available on the Customer Connection website.

Note. Ensure that the Apache or Microsoft IIS server is installed properly before installing PeopleSoft Infosync Server.

Setting Up Integration Broker

A complete Integration Broker setup is provided as part of PeopleSoft Infosync Server to synchronize data between PeopleSoft CRM and PIM servers. The setup delivers these Integration Broker objects that 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 selecting PeopleTools, Integration Broker, Node Definitions.

  After you've changed the password on the Node Info page, ensure that you do the same in the DCSSettings.cfg file. Access the Web Admin Console and update the URI parameter with the new password.
- 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 up 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. Ensure that the toolsRel value matches the version of your PeopleTools release.

- If you change the Integration Broker user ID and password, ensure that 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. Click the Load button to populate the connector information and save.

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

See *PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker*

Considerations for Modifying Integration Broker Setup

If administrators want to modify any of the Integration Broker setup data that is delivered with PeopleSoft Infosync Server, use these guidelines:

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

  Follow the structure of the nodes listed here as you modify system delivered nodes:

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, “Administering Basic Integrations”

- Do not change the transaction message.

  See PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker, “Administering Basic Integrations”

- Do not change the names of codesets or codeset groups because doing so requires corresponding code change 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 server: *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, addingnew match names (using XML names displayed in the field mapping tables) in order to translate data in other data fields, is considered a consulting project because it requires certain code change.

  The implementation of data translations for PeopleSoft Infosync Server is a three-step setup and verification process, which includes the setting up of codeset groups, codesets, and codeset values.

  See *PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker*

Exporting Users from PeopleSoft CRM to PeopleSoft Infosync Server

This section discusses how to:

- Export users from PeopleSoft CRM.
- Import users to PeopleSoft Infosync Server.

Page Used to Export Users from PeopleSoft CRM to PeopleSoft Infosync Server

Page Name	Object Name	Navigation	Usage
PIM ID Export	PIM_TL_RUN	Set Up CRM, Install, PIM, PIM ID Export	Run the PIM_ID_SYNC application engine process to export IDs of all PIM users to a text file.

Exporting Users from PeopleSoft CRM

PeopleSoft CRM delivers an application engine process (PIM_ID_SYNC) that exports PIM user IDs from PeopleSoft CRM to a text file. The file is used by a utility to import users to PeopleSoft Infosync Server. There are three ways to run this application engine process: two through PeopleSoft Internet Architecture and the other through the DOS prompt.

To run the application engine process through PeopleSoft Internet Architecture (first approach):

Note. Make sure that PeopleSoft Process Scheduler is up and running before making any application engine process requests in PeopleSoft Internet Architecture.

---

1. Access the PIM ID Export page.

   You can use an existing run control to run the application engine process or add a new one.

2. Select Run.

   The Process Scheduler Request page appears. Ensure that *PIM_ID_SYNC*is selected in the Process List group box, and click OK.

3. On the PIM ID Export page, click the Process Monitor link to check the status of the application engine process.

   Refresh the page until the status becomes *Success,* and click the Details link.

   The Process Detail page appears.

4. Click the View Log/Trace link.

   These four links appear in the File List group box:

   - Redirected_Terminal_Output: contains the DOS prompt output.
   - InfoSync_Domino_ID_Import.txt: the user import text file that the Bulk User Import utility needs to import users to PeopleSoft Infosync Server.

     This file applies to Lotus Domino Server.

   - InfoSync_Exchange_ID_Import.txt: the user import text file that the Bulk User Import utility needs to import users to PeopleSoft Infosync Server.

     This file applies to Microsoft Exchange Server.

   - InfoSync_ID_Import_Log.txt: the log file for the application engine process.

     Here's the format of the log file:

     <Date/time stamp>:<Message indicator>:<Actual message>

     where *Message indicator* can be *I* (information), *W* (warning), and *E* (error).

To run the application engine process through PeopleSoft Internet Architecture (second approach):

1. Access the Request page.

   Select PeopleTools, Application Engine, Request AE. You can use an existing run control to run the application engine process or add a new one. If you add a new run control, select *PIM_ID_SYNC* as the program name and click Add.The Application Engine Request page appears and displays the status of the PIM ID Export program.

2. Click Run.

   The Process Scheduler Request page appears.

   It takes you back to the Application Engine Request page.

3. Select *PIM_ID_SYNC* in the Process List group box, and click OK.

4. Select PeopleTools, Process Scheduler, Process Monitor, Process List to check the status of the application engine program.

5. On the Process List page, click refresh until the status becomes *Success*, and then click the Details link.

   The Process Detail page appears.

6. Click the View Log/Trace link.

   These four links appear in the File List group box:

   - Redirected_Terminal_Output: contains the DOS prompt output.
   - InfoSync_Domino_ID_Import.txt: the user import text file that the Bulk User Import utility needs to import users to PeopleSoft Infosync Server.

     This file is specific to Lotus Domino Server.
   - InfoSync_Exchange_ID_Import.txt: the user import text file that the Bulk User Import utility needs to import users to PeopleSoft Infosync Server.

     This file is specific to Microsoft Exchange Server.
   - InfoSync_ID_Import_Log.txt: the log file for the application engine process.

     Here's the format of the log file:

     <Date/time stamp>:<Message indicator>:<Actual message>

     where *Message indicator* can be *I* (information), *W* (warning), and *E* (error).

Alternatively, you can run the application engine program in the DOS prompts, which creates three files (one for each server type and one log file).

To run the application engine process through the DOS prompt (third approach):

1. Open a DOS prompt, and change the directory to <PT_HOME>\bin\Client\winx86.

2. Type this line:

   PSAE -CT <Database type> -CD <Database name> -CO <User ID> -CP <Password>
   -R PIM_ID_SYNC -AI PIM_ID_SYNC,

   where *Database type* is the vendor of the database that PeopleSoft CRM uses.

   For example, *MICROSFT* for Microsoft SQL Server, or *ORACLE* for Oracle server. *Database name* specifies the database from where the application engine process pulls all PIM end users. *User ID* and *Password* are the login information of the person in PeopleSoft CRM who requests the application engine process.

3. Press Enter.

4. The process generates three output files in the Temp directory: InfoSync_Domino_ID_Import.txt, InfoSync_Exchange_ID_Import.txt and InfoSync_Import_Log.txt.

Importing Users to PeopleSoft Infosync Server

Use the Bulk User Import utility to import large numbers of users to PeopleSoft Infosync Server. In this utility, reference the user import text file that is generated by the PIM_ID_SYNC program and begin the import process.

To import users to PeopleSoft Infosync Server:

1. On the Windows workstation where PeopleSoft Infosync Server resides, select Start, Programs, Intellisync Server, Tools, Bulk User Import.

   The Bulk User Import dialog box appears.

2. Select Use import file, and then browse for or enter the name of the user import text file (the one for your PIM server type) in the field underneath.

3. Enter a template file in the Default Template field.

   PeopleSoft Infosync Server delivers two predefined templates, one for each PIM server type, and they are stored under C:\Program Files\Intellisync Server\Templates.

   Note. When you run the application engine process to export users, the process looks up the PIM preference for each PIM server type to see if a template file is specified. If so, the process associates the template file with user IDs that are linked to that PIM preference in the user import text file. If you do not specify a template file on the PIM preference, users are not associated with template files in the user import text file after the application engine process runs. In this case, you must specify a template file on the Bulk User Import dialog box before you run the utility. Otherwise, the utility cannot create user profiles properly in PeopleSoft Infosync Server, which creates issues during synchronization.

   The template file that is specified in the user import text file takes precedence over the template file that is entered in the Default Template field.

4. Click Import to start the process.

   After the user import, you can access the Web Admin Console to see if profiles are created for all users.

   Note. If you use Lotus Domino server and receive this error message: “Error 0 while accessing Lotus Domino user list” when you try to import users, first select the Select from Lotus Domino user group option. Second, select the Use import file option. Third, click the Import button to start the process.

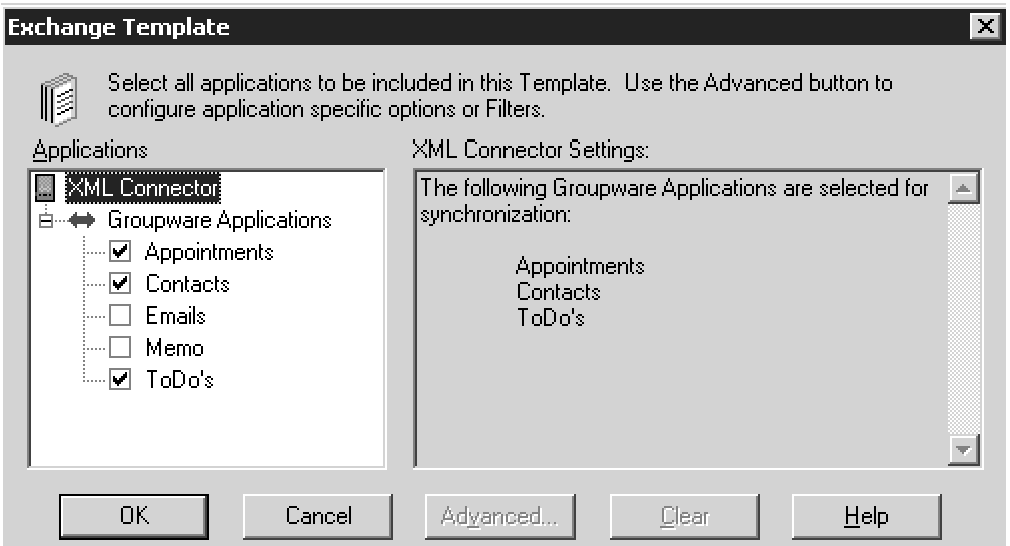
   Click the View Log button to view issues that occurred during user account creation.

Note. You can run IAWDesk.exe to manually reactivate user profiles (user profiles are automatically deactivated after three consecutive unsuccessful synchronization attempts and change template settings for users. IAWDesk.exe comes in handy during the development or test cycle because it enables you to create user profiles and modify templates individually.

When you run the user import program to create user accounts for new users, you should delete users that already exist in PeopleSoft Infosync Server from the newly created user import text file so that the utility creates accounts for only new users. Typically, you include existing users in the user import process *only* if you have modified their templates and want to apply the changes to the end users. Reimporting a user that already exists recreates a profile for that user and causes an initial synchronization, which you should avoid because you don’t want to create duplicate records.

Defining Configuration Templates

Access a template through Configuration Template Manager to modify existing templates or create new ones for users.



A sample template

PeopleSoft delivers two predefined templates, which are available under C:\Program Files\Intellisync Server\Templates. The Exchange.template file applies to the Microsoft Exchange implementation, and the Domino.template file applies to the Lotus Domino implementation. Typically, when you import a list of users to PeopleSoft Infosync Server through the Bulk User Import utility, you associate a template with them, and the settings defined in the template build the profile for each user. When synchronization occurs, the process references the user profile and determines what data gets synchronized to PeopleSoft CRM for each user, based on the selected filter and other properties that are selected for each supported object. Any data conflict that occurs in the process is resolved according to the conflict resolution rule. Users without a profile are not subject to synchronization.

Note. Templates are currently used for creating user profiles only. After that templates are no longer related to users. Because there’s no mechanism to track the relationship between templates and users, you must reimport users to PeopleSoft Infosync server if you plan to modify an existing template and apply it to users.

When you log on to Configuration Template Manager and select a template, ignore the company name on the XML Connector Configuration Options dialog box as you log on again as an end user.

If you decide not to support synchronization for contacts, tasks, or calendar items, clear the corresponding check box (Contacts, ToDo’s, or Contacts) and disable all the operations for that object on the PIM Preferences component. Make sure that the Emails and Memo check boxes are clear because they are not supported by PeopleSoft Infosync Server. Please refer to the Intellisync Server Administration guide for more information.

Modifying Synchronization Settings

This section discusses how to:

- Modify the Web Admin Console.
- Modify the PeopleSoft Infosync configuration file (DCSSettings.cfg).

Modifying the Web Admin Console

Web Admin Console is the GUI version of the DCSSettings.cfg file, where you can review and modify the configuration settings of PeopleSoft Infosync Server and control how the synchronization process operates. Many settings that you find on DCSSettings.cfg are also available for update on the Web Admin Console, under Server Settings, XML Connector Settings. Choose to update these settings either on the console or the configuration file. PeopleSoft recommends changes in these configuration options:

- Go to Server Settings, XML Connector Settings.
  - Under the General XML Settings section, enable Use GMT for dates and times (use for dates and times) to allow dates and times of XML messages to appear using the GMT time zone.
  - Under the Server XML Server Connection Settings section, change the server URL to the web server on which Integration Broker is running, the port to the port number that Integration Broker listens to, and URL to reflect the default node that you use.

    For example:

    Server URL=<web server on which Integration Broker runs>

    Port=8001

    URI=/PSIGW/HttpListeningConnector?From=PSFT_PIM&To=<default_node_name>&MessageName=PIM_CONTACT_SYNC&MessageType=sync&Password=infosync
- Go to Server Settings, Synchronization Settings, and change the Monitor Interval setting to a value that is reasonable to your implementation.

  Do not enter a duration value that is shorter than the time that is needed to synchronize all users.

  Note. Changes made to the Monitor Interval setting take effect only after you have restarted the ISS Sync service. Select Settings, Control Panel, Administrative Tools, Services.

When the Web Admin Console is down, a command line utility, ServAccUtil.exe, can serve as a backup administrative tool. At the DOS prompt, enter `ServAccUtil /?` for a list of options that are available to you. For example, you can:

- Enter `ServAccUtil ListUser -s` to check user status.
- Enter `ServAccUtil ActivateProfile <username>` to activate the profile of the specified user.
- Enter `ServAccUtil DeactivateProfile <username>` to deactivate the profile of the specified user.

Please refer to the Intellisync Server Administration guide for more information.

Modifying the PeopleSoft Infosync Server Configuration File

Besides the Web Console Admin, you can also use the DCSSettings.cfg file to view and modify configuration settings for PeopleSoft Infosync Server. Note that there are two copies of DCSSettings.cfg available in these locations: C:\Program Files\Intellisync Server and C:\Program Files\Intellisync Server\SyncEngine\Connectors\XML. Because the Infosync Server references settings from both copies, make sure that when you change one that you also update the other.

In the DCSSettings.cfg file, you *must* change the UID count to 1, like so:

```
[XML Interface]
UID Count=1
```

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 Server provides three permission lists that give user groups access to different PIM pages based on their 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.

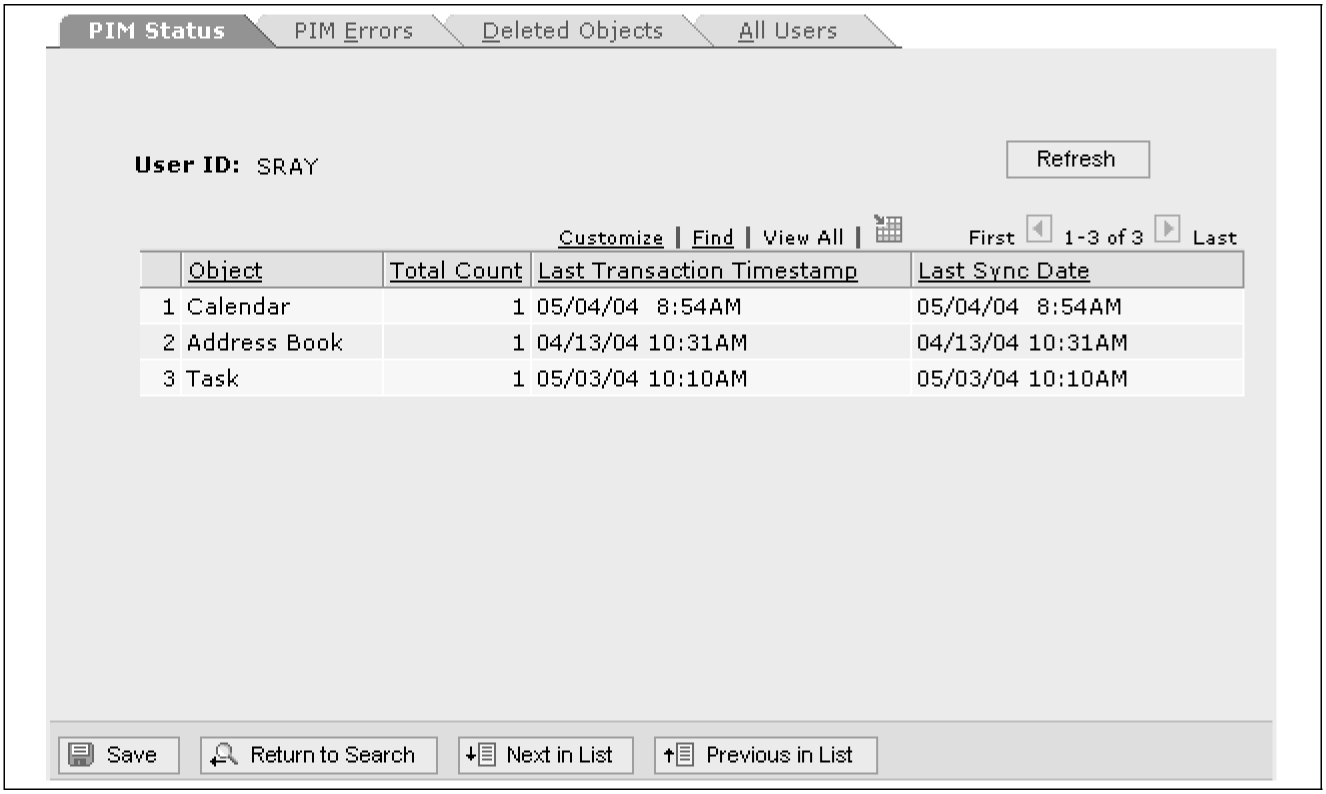
Note. Managers have access to the status information of all PIM end users; PIM end users have access to their own status information. Access to status information is controlled by permission lists.

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) • Set Up CRM, Install, PIM, PIM Users 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	View a list of PeopleSoft users who use PeopleSoft Infosync Server to synchronize information.

Viewing Synchronization Status

Access the PIM Status page.



PIM Status

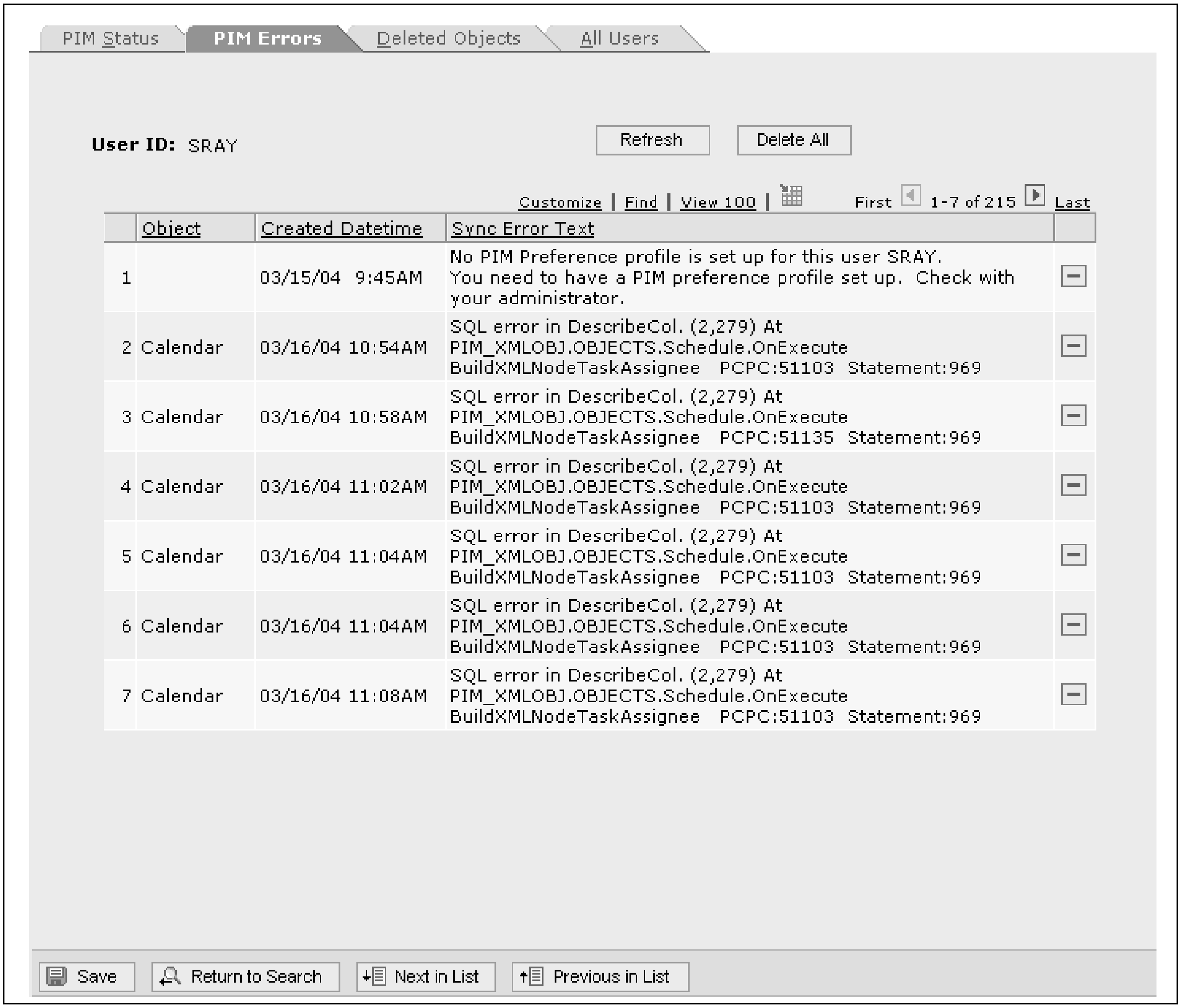
Object — Displays the three types of PIM objects that are synchronized: calendar, address book (contact), and task.

Total Count — Displays the total number of records transferred.

Last 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

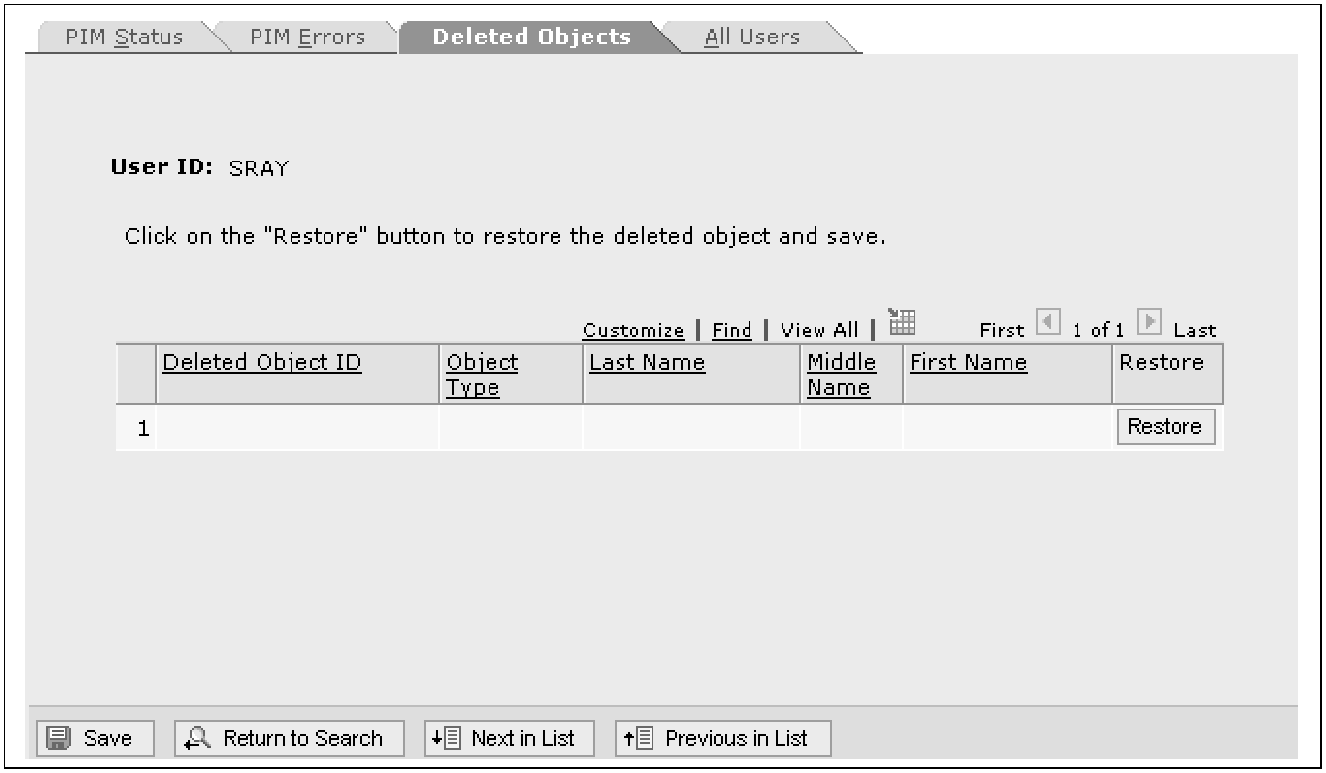
Object Displays, if applicable, the object that the error pertains to.

Sync Error Text Displays errors and warnings that occurred in PeopleSoft CRM during synchronization. Select the Debug check box on the Setup page of the PIM preferences component to get more specific error text for troubleshooting purposes.

Note. You can find additional log information that is captured by the Intellisync Server in the C:\LOGS\XML and C:\LOGS\SYNCENGINE folders.

Viewing and Retrieving Deleted Objects

Access the Deleted Objects page.



Deleted Objects page

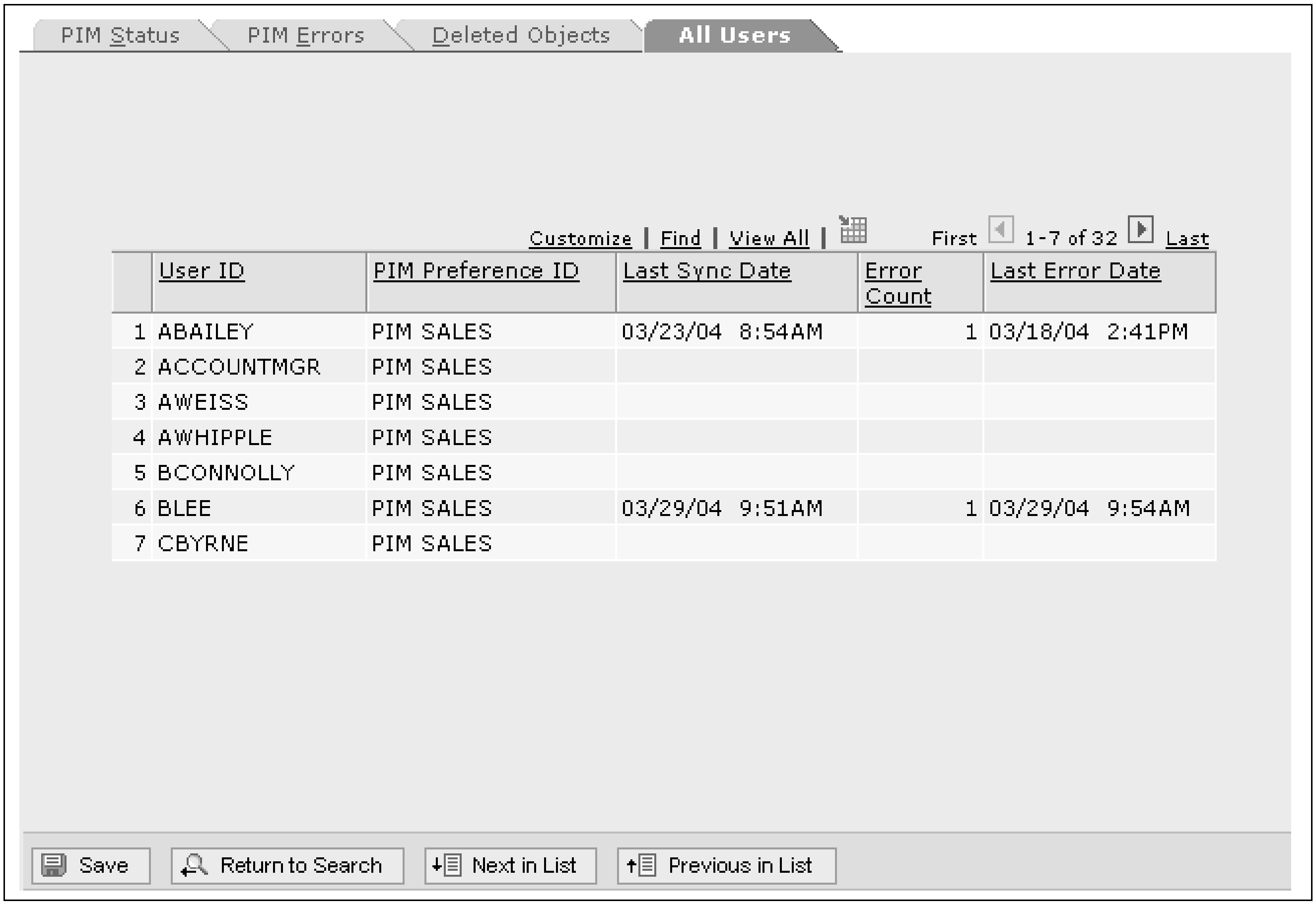
Deleted Object ID Displays the Object ID for the deleted object.

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

APPENDIX A

International Support

This appendix provides an overview of the international support that is available in PeopleSoft Infosync Server.

PeopleSoft Infosync Server is designed to support global deployments. When possible, data is processed without regard for the data source code page. Exceptions to this are when an external application, such as one of the groupware applications, forces non-unicode data though the system.

Understanding International Support for PeopleSoft Infosync Server

This section discusses:

- Administration functions and user interface .
- Connector elements.
- Native language environment.
- Mixed language environment support.
- PeopleSoft Infosync Server limitations.
- Environmental imitations.
- Configuration recommendations.

Administration Function and User Interface

PeopleSoft Infosync Server administration function and user interface are shipped in English. Localized user interfaces are currently not available. Administration function and user interface include all user interface elements, on-line help and documentation. Please contact your account representative for information on how to localize the administrator function and user interface. The PeopleSoft Infosync Server administrator console is designed for server to server synchronization and does not include a user interface feature for end users.

Connector Elements

Portions of the connectors for PeopleSoft and the groupwares have been localized. These areas are limited to the field mapping display. When mapping fields from PeopleSoft to a groupware application with English installation, the administrator can see the label *City*. If PeopleSoft Infosync Server and connectors have been installed for German, the administrator sees *Stadt*.

PeopleSoft Infosync Server supports connector localization for the these languages:

- US English
- European French

- German
- Modern Spanish
- Japanese

Connector support for the above languages and the mixed language environment outlined below is included in all PeopleSoft Infosync Server releases.

Native Language Environment

In a native language model all points in the application model have been installed with the same language model. This model is well suited for regional specific installation. For example, a site requires synchronization support for the Japanese office only. In this model, the administrator would work entirely in English except when mapping fields from the PeopleSoft application to the target groupware application.

While the administrator is working in English, the synchronization engine and connector process data in the native or entered language.

Mixed Language Environment Support

In addition to native environment support, where all points in the application model have been installed with the same language model, PeopleSoft Infosync Server can run in a mixed mode. One mode is where both the PeopleSoft and groupware applications have been installed while PeopleSoft Infosync Server has been installed using an English model. In this model, the administrator would work entirely in English. This includes while mapping fields from the PeopleSoft application to the target groupware application. PeopleSoft Infosync Server does not support an installation where the server and connectors have been installed with different language options.

While the administrator is working in English, the synchronization engine and connector process data in the native or entered language.

Infosync Server Limitations

There are a limited set of regions where using the English connector limits the functional specification of the product. The most obvious is for the Japanese markets, where contact records contain Yomi fields for both company name and contact name. In this case using English connectors would result in the phonic name field not being synchronized.

It should be noted that when installing PeopleSoft Infosync Server to connect to a language that is not supported by a localized version of the connectors, the installer cannot see the target language. For example, in the above model the site will be using an English installation of PeopleSoft Infosync Server to connect to a Dutch version groupware product. On the Installation Mode Selection screen of the setup wizard, the Select the language of groupware's server drop-down list box is displayed without reference to Dutch. The installer should select English and continue with the installation process.

Environmental Limitations

Unique issue arises when using a mixed language model. This model assumes that the environment is connected to globally enable application models on both ends. Though PeopleSoft is fully unicode enabled, there are questions surrounding the groupware applications. One area of concern is with older version of the groupware applications. If these applications have not been designed to use language independent codes in their APIs, field mapping and subsequent synchronization errors will occur.

In addition to concerns with the older groupware APIs, it is possible for users to configure the OS code pages and user interface for the environment in a manner that can create issues.

Configuration Recommendations

Due to inherent complexity in with mixed language environment, here are the recommendations for installations:

- Keep all portions of the deployment environment within one code page. For example, if the business requires support for French, Dutch and English, PeopleSoft Infosync Server and groupware product should be installed using a Western European code page or Unicode. All application should be installed using the same code page.
- All server OS should be installed with the same code page options.

APPENDIX B

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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