PeopleSoft®

PeopleSoft Enterprise CRM Portal Pack 8.9 PeopleBook

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PeopleSoft Enterprise CRM Portal Pack 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 Appendix A, "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.

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

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

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

PeopleSoft CRM Portal Pack Preface

This preface discusses:

- Additional resources.
- PeopleSoft Enterprise Customer Relationship Management (CRM) application fundamentals.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleTools PeopleBooks.

Note. This PeopleBook documents 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.

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website.

Resource	Navigation
Application maintenance information	Patches + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Data Models
Enterprise Integration Point (EIP) catalog	Support, Documentation, Enterprise Integration Point (EIP) Catalog
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Product release roadmap	Support, Roadmaps + Schedules

Resource	Navigation
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade Documentation	Implement, Optimize + Upgrade, Upgrade Guide

PeopleSoft Enterprise CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

  This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

  This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

  This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

  This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

  This part discusses setting up agreements and warranties.

- SmartViews

  This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft CRM Enterprise Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*discusses automation and configuration tools that are common to multiple PeopleSoft CRM applications. This is an essential companion to the PeopleSoft CRM Application Fundamentals PeopleBook.

There are four parts to the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*

- Correspondence Management.

  This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation Tools.

  This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (OAF), business projects, and scripts.

- Configuration Tools.

  This part discusses configurable search pages, configurable toolbars, attributes, and industry-specific field labels and field values.

- Knowledge Management.

  This part discusses the setup of Natural Language Processing (NLP) and Verity search.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.45 PeopleBooks.

CHAPTER 1

Getting Started with PeopleSoft CRM Portal Pack

This chapter provides an overview of PeopleSoft CRM Portal Pack and discusses PeopleSoft CRM Portal Pack implementation.

PeopleSoft CRM Portal Pack Overview

PeopleSoft CRM Portal Pack provides a collection of pagelets that can be individually selected to appear on a corporate intranet or extranet homepage. The individual pagelets provide information that is gathered from various PeopleSoft CRM applications.

PeopleSoft CRM Portal Pack Implementation

PeopleSoft CRM Portal Pack does not require table-loading implementation steps.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in *PeopleSoft CRM 8.9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

CHAPTER 2

Introducing PeopleSoft CRM Portal Pack

This chapter provides an overview of PeopleSoft CRM Portal Pack and lists:

- PeopleSoft CRM Portal Pack pagelets.
- PeopleSoft CRM Navigation Collection Pagelets.
- PeopleSoft CRM Pagelet Wizard Pagelets.

Understanding PeopleSoft CRM Portal Pack

PeopleSoft CRM Portal Pack is a collection of portal pagelets for corporate intranet or extranet homepages that provides access to key data and transactions within PeopleSoft CRM applications for use in the employee and customer portal registries. The portal pack supplements the PeopleSoft CRM applications that provide the underlying data.

When you install PeopleSoft CRM Portal Pack, your users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft-system role-based security ensures that users can access only the pagelets appropriate to their roles. You click the Content link (located above the left navigation menu) to access a list of role-appropriate pagelets.

Users can configure their portal homepages with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. You click the Layout link (located above the left navigation menu) to modify pagelet layout. When this documentation provides two object names for a pagelet, the first one refers to the narrow version.

To use the pagelets in PeopleSoft CRM Portal Pack, you must first install the enabling CRM application. The CRM pagelets and the enabling application are listed in the PeopleSoft CRM Portal Pack Pagelets section of this document.

You can also design your own pagelets when your installation includes PeopleSoft CRM Portal Pack.

See Also

PeopleTools Internet Technology PeopleBook

Audience

The PeopleSoft CRM Portal Pack pagelets are targeted for specific functional roles, which generally fit into three audiences (mirroring the different portal registries):

- Employee
- Customer
- Partner

Pagelet Security

You control pagelet security at the component level by associating it with a permission list, which is then associated with a role; each pagelet has its own component to enable more granular access. You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system, or object, name.

Pagelets are grouped into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before your users can access them, or use the permission list definitions that are provided in the delivered system data. The PeopleSoft system also delivers sample roles that you can use as an example of how to set up pagelet access.

Here is an example of some of the roles that include access to PeopleSoft CRM Portal Pack pagelets:

- Call center agent
- Customer
- Consumer
- Broker
- Field sales representative
- Help desk agent
- Guest

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences"

Pagelet Personalization

Some pagelets require that you first select default settings on a related customer selection page prior to using the pagelet. The system retrieves the transactional information associated with the selection to display in the pagelet.

To customize a pagelet, you click the Customize button:

Customize button

If you don't specify values on a pagelet's customer selection page, the pagelet does not display any data. Pagelets that do not have configuration options do not display this button.

Each of the following pagelets listed provide information about a specific type of customer interaction, such as sales leads, support cases, and service orders. Collectively, these pagelets provide a 360-degree view of your organization's relationship with the customer. Many of these pagelets provide links that enable you to navigate to further details about the interactions; some enable you to add new interaction information:

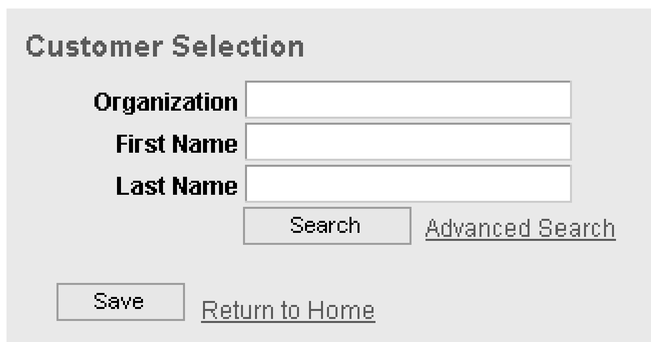
- Agreements
- Installed Products
- RMA
- Recent Interactions
- Recent Leads

- Recent Support Cases
- Recent Service Orders
- Recent Opportunities
- Relationship Grid

Note. You must first select a customer or contact by using the Customer Selection page. After you identify the customer or contact, the other configurable pagelets display information related to that customer or contact.

Customer Selection Page

You use the Customize button to select the customer or consumer or the contact for the information that you want to view. Once you click the Customize button, the Customer Selection page appears:



Customer Selection page

Enter search criteria and click the Search button to select the customer, consumer, or contact for whom you want to view interaction information. After you select a customer, consumer, or contact and save your selection, information related to your selection appears on the configurable pagelets until you make another selection.

PeopleSoft CRM Portal Pack Pagelets

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

- The audience for the pagelet: employees or customers.

  The audience also identifies the portal registry where the pagelet is registered.
- The role of the person who uses the pagelet.

  These are functional roles, not delivered PeopleTools roles.
- The pagelet’s enabling application.

  The enabling application provides the information that appears in the pagelet.

Pagelet Name	Audience	Functional Role	Enabling Application
Accounts CR_RBT_SERV_PGT_ CMP_COM	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Bill Presentment and Account Management
Catalog Search RX_PROD_SRCH_PGT	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Order Capture Self Service
My Accounts CR_RBF_CUST_ACT_ PGT_FIN	Customer	Customer or consumer	PeopleSoft Enterprise Banking Transactions
My Information CR_RBT_INFO_SS_ COM	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Order Capture Self Service
My Information CR_RBF_CUST_CONT_ PGT_FIN	Customer	Customer, consumer	PeopleSoft Enterprise Banking Transactions
My Reports RC_CASE_SW_SS_ RPT.GBL	Customer	Customer	Any PeopleSoft Enterprise CRM application
Recent Cases RC_SS_SW, RC_SS_SW_W	Customer	Customer, consumer, or broker	PeopleSoft Support Self Service
Recent Orders RE_C_QUO_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Recent Quotes RE_C_ORD_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Services RBT_SERV_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture Self Service
Shopping Cart RE_CART_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture

Pagelet Name	Audience	Functional Role	Enabling Application
Site Selection RX_LANG_SEL_PGLTL	Customer	Guest user	PeopleSoft Order Capture
Quotes RBI_CUST_QUOTE_ PGT	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Policy and Claims Presentment
Claims RBI_CUST_CLAIM_ PGT	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Policy and Claims Presentment
Agreements RI_PE_AGREEMENT_ GBL	Employee	Customer service representative	PeopleSoft Support or PeopleSoft Integrated FieldService
Catalog Search RX_PROD_SRCH_PGT	Employee	Employee	PeopleSoft Order Capture Self Service
CRM Chart 1, 2, and 3 (iScript)	Employee	Manager or employee	PeopleSoft Support, PeopleSoft Order Capture
CRM Worklist PE_WRKLST_PGT	Employee	Employee	Any PeopleSoft Enterprise CRM application
Installed Products PE_PROD_PGT	Employee	Customer service representative	Any PeopleSoft Enterprise CRM application
My Forecast REP_FCAST_PGT	Employee	Salesperson	PeopleSoft Sales
My Leads PRTL_LEADS_PGT	Employee	Salesperson	PeopleSoft Sales
My Monthly Calendar PRTL_CAL_MTH_PGT	Employee	Salesperson	PeopleSoft Sales

Pagelet Name	Audience	Functional Role	Enabling Application
My Opportunities PRTL_OPP_PGT	Employee	Salesperson	PeopleSoft Sales
My Reports PT_PSRF_REPRT_ PAGELET_GBL	Employee	Employee	Any PeopleSoft Enterprise CRM application
My Tasks RSF_PRTL_ACTLIST_ PGT	Employee	Salesperson	PeopleSoft Sales
Recent Interactions RI_PE_REC_INT_PGT	Employee	Customer service representative	Any PeopleSoft Enterprise CRM application
Recent Service Orders RI_PE_SO_PGT	Employee	Customer service representative	PeopleSoft Integrated FieldService
Recent Support Cases PE_SUPPORT_PGT	Employee	Customer service representative	PeopleSoft Support
Relationship Grid CR_RI_REL_GRID_ PGT_GBL	Employee	Employee	Any PeopleSoft Enterprise CRM application
RMA RI_PE_RMA_PGT	Employee	Customer service representative	PeopleSoft Support
Self Service Help Desk RC_SS_HD, RC_SS_HDW	Employee	Employee	PeopleSoft HelpDesk

PeopleSoft CRM Pagelet Wizard Pagelets

Pagelet Wizard provides a user-friendly, browser-based graphical user interface (GUI) that walks you through a series of steps involved in creating and publishing a pagelet. The following pagelets available with the CRM Portal Pack were built using the Pagelet Wizard feature: EOPP_CREF_BY_DATE_ID, RC_CASES_AVG_AGE, RC_CASES_BY_PRIORITY, RC_CASES_BY_SOURCE, RC_CASES_CLOSED_FIRSTCONTACT, RC_CASES_CREATED_CLOSED, RO_PRT_MGR_ORD, RO_PRT_MGR_QUO, RO_PRT_REP_ORD, RO_PRT_REP_QUO.

The primary users of these pagelets are call center agents/managers, and sales representatives/managers.

Authorized users can easily modify and maintain these pagelets using the Pagelet Wizard.

See Also

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook, “Using Pagelet Wizard”

CHAPTER 3

Working with CRM Employee-Facing Pagelets

This chapter provides an overview of employee-facing pagelets and discusses how to:

- Use employee-facing pagelets common to CRM applications.
- Use PeopleSoft Sales pagelets.
- Use PeopleSoft Support pagelets.
- Use PeopleSoft FieldService pagelets.

Understanding Employee-Facing Pagelets

Employee-facing pagelets enable employees to view and update their own information and view customer information. Pagelets that display customer or contact information can be customized using the Customize button.

Using Employee-Facing Pagelets Common to CRM Applications

This section discusses the CRM employee pagelets that are common to the PeopleSoft CRM applications. The following pagelets enable you to view the products installed at a customer's site, a list of recent interactions with a customer, and a list of self-service cases.

Pagelets Used to View Customer Information

Pagelets include:

Pagelet	Usage	For More Information
Installed Products	Displays the product ID and quantity of each product installed at a customer's site and provides a link to the product ID details.	See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, "Tracking Installed Products".

Pagelet	Usage	For More Information
Recent Interactions	Lists the most recent interactions that a customer has had with your organization and provides a link to the details.	See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Interactions”.
Self Service Help Desk	Enables users to review their own cases.	See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, “Working with Self-Service Application Transactions”.
CRM Worklist	Enables users to see a summary of their worklist items and supports navigation to individual worklist items.	See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Setting Up PeopleSoft CRM Workflow”.
Relationship Grid	Provides a view of the relationships that a customer has with other customers or contacts in the database.	See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Interactions and 360-Degree Views”.

Using PeopleSoft Sales Pagelets

PeopleSoft Sales offers several pagelets to help sales representatives manage their sales activities. There are pagelets for each of the major sales objects—leads, opportunities, and forecasts—plus pagelets for managing sales tasks. This section discusses how sales representatives manage their sales activities by using the following pagelets.

Pagelets Used to View Sales Activities

Pagelets include:

Pagelet	Usage	For More Information
My Forecast	Displays at-a-glance estimates of future sales revenues for sales opportunities.	See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, “Managing Sales Leads and Opportunities”. See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, “Using Forecasts”.

Pagelet	Usage	For More Information
My Leads	Displays a list of leads that have an associated upcoming task. Lists the three most recent leads based on the date and time that the lead was added.	See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, "Managing Sales Leads and Opportunities".
My Monthly Calendar	Displays your calendar for the current month. You can then enter new task information or update existing tasks on your calendar.	See *PeopleSoft Enterprise Sales 8.9 PeopleBook*.
My Opportunities	Displays the opportunity name, customer, telephone number, and status of your three most recently added sales opportunities, and provides a link to the details page where you can edit the opportunity information.	See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, "Managing Sales Leads and Opportunities".
My Tasks	Displays a list of upcoming tasks from your calendar.	See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, "Creating Sales Tasks and Adding Notes for a Lead or Opportunity".

Using PeopleSoft Support Pagelets

This section discusses the pagelets that PeopleSoft Support enables. The following pagelets enable you to display a list of agreements, return materials, and recent support cases.

Pagelets Used to View Support Cases

Pagelets include:

Pagelet	Usage	For More Information
Agreements	Displays a summary list of a customer's existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties".
RMA	Displays a list of a customer's return material authorizations (RMAs), provides a link to the RMA details, and provides an Add link to create a new RMA.	See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, "Tracking Installed Products".
Recent Support Cases	Displays a list of a customer's recent support cases, provides a link to the case details, and provides an Add link to create a new support case.	See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, "Managing Cases".

Using PeopleSoft Integrated FieldService Pagelets

This section discusses the pagelets that PeopleSoft Integrated FieldService activities enable. The following pagelets enable you to view a list of agreements and recent service orders.

Pagelets Used to View Agreements and Service Orders

Pagelets include:

Pagelet	Usage	For More Information
Agreements	Displays a summary list of a customer's existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties".
Recent Service Orders	Displays a list of a customer's recent service orders, provides a link to the service order details, and provides an Add link to create a new service order.	See *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook*, "Creating and Managing Service Orders".

Using PeopleSoft Client Management Pagelets

This section discusses the pagelets that PeopleSoft Client Management enable.

PeopleSoft CRM Client Management offers all the tools necessary for a Financial Advisor (FA) to successfully manage clients. When an FA enters the Client Management application, the FA will see a summary of top clients, referrals, clients at risk, today's tasks, opportunities, and the FA's calendar.

Pages Used to Manage Client Activity

Pagelets include:

Pagelet	Usage	For More Information
My Calendar	Displays the calendar entries of the person for that day. A maximum of five entries are displayed. FAs can expand to view all. Tasks that do not have a start time are not displayed in the My Calendar pagelet. Additional calendar entries can be created from this pagelet.	See *PeopleSoft Enterprise Client Management 8.9 PeopleBook*, "Managing Clients," Working with and Maintaining Clients.
My Top Clients	Displays the top five clients that the FA owns. The top clients are determined by the sum of all the financial accounts for each client. This list excludes inactive clients. Either the Holding field or the Revenue field is displayed. The Configuration Parameter in the Wealth Management Setup page determines which field to display.	See *PeopleSoft Enterprise Client Management 8.9 PeopleBook*, "Managing Clients," Working with and Maintaining Clients.
My Referrals	Up to five referrals that are assigned to the user are displayed. A referral is denoted as belonging to a financial advisor if they are listed as the assigned to value on that referral.	See *PeopleSoft Enterprise Client Management 8.9 PeopleBook*, "Managing Clients," Managing Referrals.
My Clients at Risk	Displays the clients assigned to the user that are at risk of leaving. A maximum of five are displayed. The at-risk criteria are pre-defined. Additionally, customers can create their own rules to define what denotes a client at risk.	See *PeopleSoft Enterprise Client Management 8.9 PeopleBook*, "Managing Clients," Viewing Risk Summary Information.

Pagelet	Usage	For More Information
My Tasks	Displays the tasks of the logged-in user for the current day. The only tasks displayed here are those with a due date of today; these tasks do not show up on the calendar. A total of five tasks are displayed. Users can expand to view all.	
My Opportunities	Referrals are converted into opportunities. An opportunity is a potential customer.	See *PeopleSoft Enterprise Client Management 8.9 PeopleBook*, “Managing Clients,” Managing Opportunities.

CHAPTER 4

Working with CRM Charts

This chapter provides an overview of CRM charts and discusses how to:

- Define chart names and labels.
- View CRM charts.
- Personalize charts.

Understanding CRM Charts

This section discusses:

- CRM chart pagelets.
- Delivered charts.

CRM Chart Pagelets

Three identical pagelets, CRM Chart 1–3, provide charts that give users valuable snapshots of their operations. Each chart pagelet can be configured to show summary information, details, or both:

- Summary charts show the total number of cases that meet a chart's selection criteria during a specified time period.
- Detail charts break the time period into smaller units and provide subtotals for each period.
- Combined charts show a summary chart on top and a detail chart on the bottom.

Position the mouse over a chart (over the bar representing the charted data) to display pop-up text with information about the underlying data.

Delivered Charts

The PeopleSoft system delivers charts that display call center and order capture data. When you set up charts, you can change the chart names and the labels used for the x- and y-axes on the chart.

PeopleSoft Support Charts

Chart Name	Description
Case Backlog	The number of new cases created during the specified time period minus the number of cases closed during the specified time period. This is determined based on the Date Created and Date Closed fields in the case. Note that this may be a negative number if more cases are closed than created.
Cases Resolved by the First Call	The number of cases closed on the first call during a specified time period. This is determined based on the Resolved by First Contact field in the case.
Cases with Links to Resolutions	The number of new cases that are resolved. Cases are considered resolved if they are associated with a solution and the solution status is *Resolution Successful.* This chart differs from the Problem Reports Closed chart because resolving a case does not necessarily close the case.
High Priority Cases	The number of high-priority cases created during the specified time period. This is determined based on the Priority field in the case. (All priorities are associated with one of three priority types: *high*, *medium*, or *low.*) Cases are counted regardless of the current status, so this chart might include high-priority cases that have been closed. The priority is evaluated at the time the chart fetches the data; cases where the priority has changed from *high* to another value are not included in the count.
New Problem Reports	The number of cases created during the specified time period. This is determined based on the Date Created field in the case.
Problem Reports Closed	The number of cases closed during the specified time period. This is determined based on the Date Closed field. (All statuses are associated with one of three status categories: *open*, *closed*, or *cancelled*.)

PeopleSoft Order Capture Charts

Chart Name	Description
Captures on Hold	The number of captures created during the specific time period whose current status is Hold.
New Orders	The number of sales orders created during the specific time period.
New Quotes	The number of quotes created during the specific time period.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, "Managing Cases"

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

Defining Chart Names and Labels

This section discusses how to define chart names and labels.

Pages Used to Define Chart Names and Labels

Page Name	Object Name	Navigation	Usage
Chart Setup	RB_CHART_SETUP	Set Up CRM, Common Definitions, Chart Setup	Configure labels for the charts that the PeopleSoft system delivers. You access these charts through the CRM Charts pagelets.

Defining Chart Names and Labels

Access the Chart Setup page.

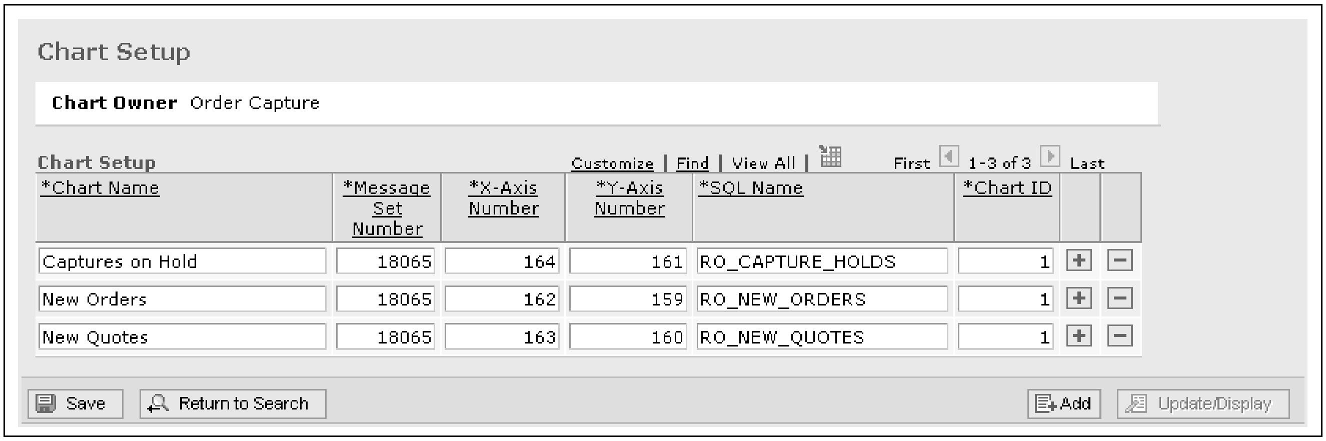


Chart Setup page

This page lists the charts that the PeopleSoft system delivers.

Chart Name — Enter the name to be used as the label in the chart pagelet. When users select which chart to display, they see the name that you enter here.

Message Set Number, X-Axis Number, and **Y-Axis Number** — Labels for the x- and y-axes in the chart come from the message catalog. Enter the message set number where the labels are stored, and enter separate message numbers for the x-axis label and the y-axis label.

SQL Name — Enter the name of the PeopleTools SQL object that populates the chart.

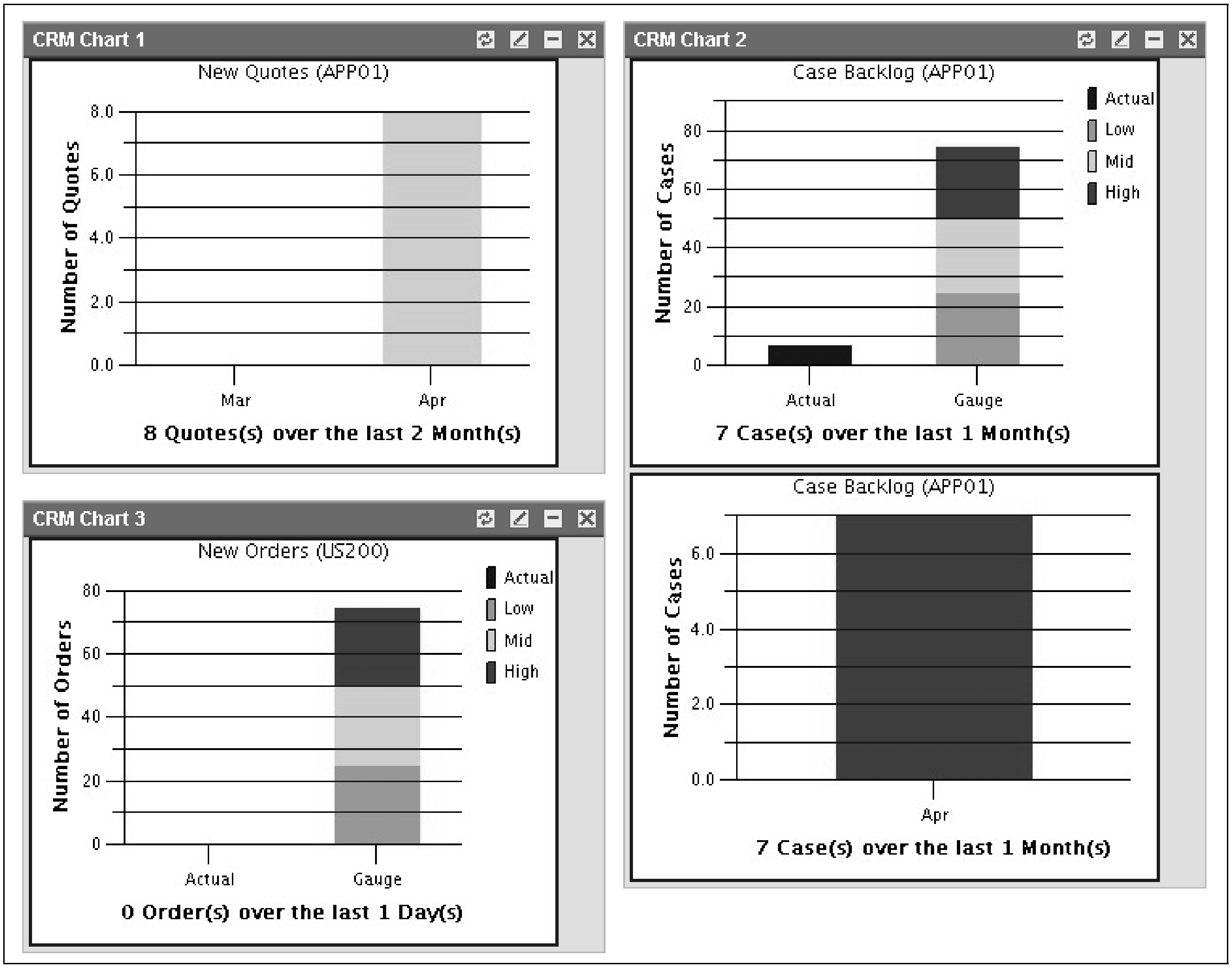
Chart ID — Enter the chart ID used to set parameters for the selected SQL program. The charts that PeopleSoft delivers all use chart ID *1*, which is appropriate for charts that display numbers of objects (for example, the number of cases or orders) over time.

Viewing CRM Charts

This section discusses how to view the CRM chart pagelets.

Viewing the CRM Chart Pagelets

Use these pagelets to review metrics related to your call center and order capture operations:



CRM charts 1–3

The pagelets all present data in bar charts:

- A detail bar chart displays a bar for each included time period.
- A summary bar chart displays one bar for the actual data and another bar for a gauge.

  The gauge is divided into low (green), middle (yellow), and high (red) zones for easy evaluation of the chart data. Users set low, middle, and high ranges when they personalize the page.

The pagelets additionally display the following text information:

- The chart name (for example, Case Backlog) appears at the top of the pagelet.
- The business unit appears in parenthesis after the chart name.
- A text summary of the number of cases and the included time period appears under the bar graph.

Personalizing Charts

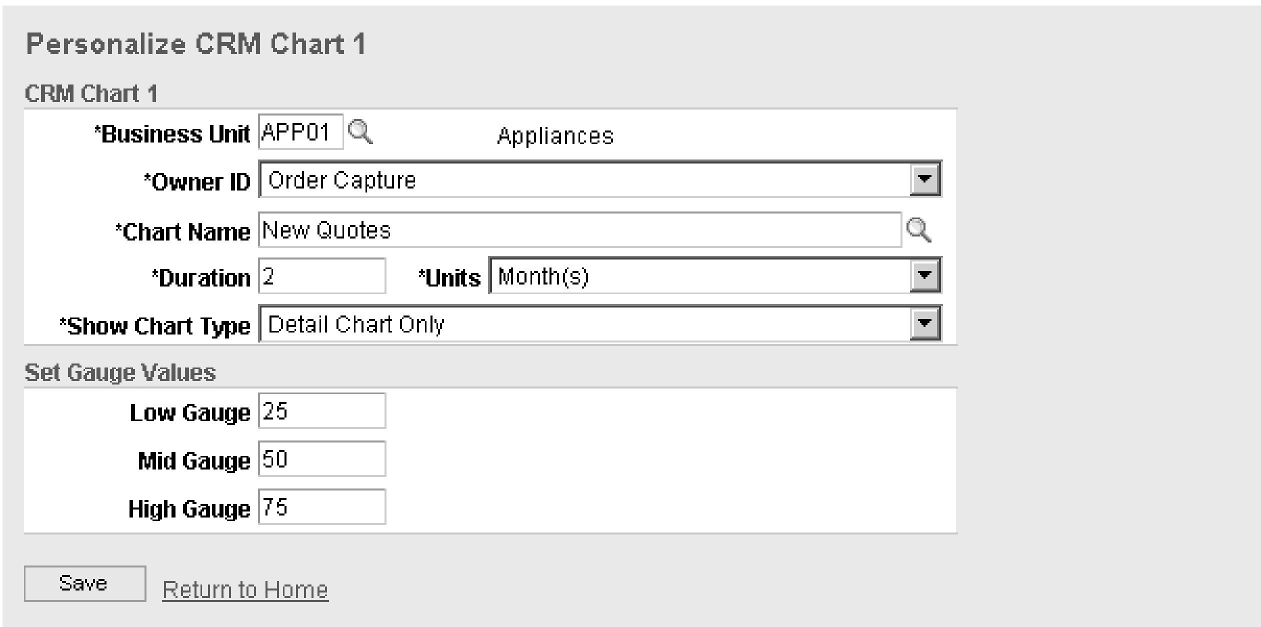
This section discusses how to personalize CRM chart pagelets.

Page Used to Personalize Charts

Page Name	Object Name	Navigation	Usage
Personalize Summary Chart	RB_CHART_1, RB_CHART_2, RB_CHART_3	Click the Customize button for the pagelet to be personalized (CRM charts 1–3).	Choose a chart and its display options.

Personalizing CRM Chart Pagelets

Access the Personalize CRM Chart page:



Personalize CRM Chart page

Business Unit

Enter the business unit whose data is to be charted.

Owner ID

Select the owner of the chart. Values are: *Call Center* and *Order Capture.*

Chart Name

Select a chart associated with the selected owner ID.

Duration and Units

Select the number of days, hours, months, or weeks to be included in the chart data. You can show up to 24 hours, 7 days, 16 weeks, or 12 months of data.

Show Chart Type

Select a chart type. Values are: *Detail Chart Only, Summary Chart Only,* and *Summary and Detail Chart.*

Low Gauge Value, Mid Gauge Value, and **High Gauge Value**

Enter the top number for the low, middle, and high ranges in the gauge that appears in a summary chart. The gauge appears alongside the actual data. The gauge is strictly informational; it does not affect underlying data.

Gauges appear only in summary charts; ignore these fields if the chart type is *Detail Chart Only.*

CHAPTER 5

Working with CRM Self-Service Pagelets

This chapter provides an overview of self-service pagelets and discusses how to:

- Use PeopleSoft Order Capture Self Service pagelets.
- Use PeopleSoft Support pagelets.
- Use PeopleSoft pagelets for the financial services industry.
- Use PeopleSoft pagelets for the communications and energy industries.
- Use PeopleSoft pagelets for the insurance industry.

Understanding Self-Service Pagelets

Customer-facing pagelets enable customers, consumers, and brokers who are registered users of the system to view and update their own information. Unregistered users can see some pagelets such as Catalog Search, Shopping Cart, and Site Selection. The Site Selection pagelet is available to unregistered or guest users for the purposes of navigating multiple sites.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Self-Service for Customers”

Using PeopleSoft Order Capture Self Service Pagelets

This section discusses how customers manage their personal information and shopping orders, select websites, and search catalogs by using the following pagelets.

Pagelets Used to View Customer Information

Pagelets include:

Pagelet Name	Usage	For More Information
Catalog Search	Customers can search a specified catalog or all catalogs based on user-entered keywords.	See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*, “PeopleSoft Order Capture Self Service”.

Pagelet Name	Usage	For More Information
My Information	Customers can view the name, address, phone number, and email address that are associated with a user who is logged in to the system.	See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Self-Service for Customers".
Shopping Cart	Displays the number of products along with the order subtotal of a customer's shopping cart. Provides the customer with a direct link to checkout.	See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*, "PeopleSoft Order Capture Self Service".
Site Selection	Guest users can select a website if multiple sites are implemented. Switches a user to the selected site.	See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Self-Service for Customers".
Recent Orders	Customers can view recent orders by order number, order date, and status, and they can link directly to order details.	See *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook,* "Creating and Managing Service Orders".
Recent Quotes	Customers can view recent quotes by quote number, quote date, and status, and they can link to quote details.	See *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook,* "Creating and Managing Service Orders".

Using PeopleSoft Support Pagelets

This section discusses how customers can review their support cases and search for solutions by using the Recent Cases pagelet.

Pagelet Used to View Recent Cases

Pagelets include:

Pagelet Name	Usage	For More Information
Recent Cases	Customers can view the five most recent open cases and access pages for reviewing existing cases, creating new cases, and searching for case solutions. **Note.** The pagelet has a slightly different appearance depending on whether it is placed in a narrow or a wide column on the portal homepage.	See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, "Managing Cases". See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions".

Using PeopleSoft Pagelets for the Financial Services Industry

This section discusses the pagelets that PeopleSoft CRM enables for the financial services industry.

Customers can use the following pagelets to view accounts, issues, and personal information.

Pagelets Used to View Account Information

The pagelets include:

Pagelet Name	Usage	For More Information
My Accounts	Customers can view accounts and associated products, including account balance, currency, and the date and time that the account was created.	See *PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook*, “Managing Accounts and Viewing Bills,” Managing Accounts.
My Information	Customers can view their personal information such as name, address, phone number, and email address.	See *PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook*, “Working with Financial Accounts”.

Using PeopleSoft Pagelets for the Communications and Energy Industries

This section discusses the pagelets that PeopleSoft CRM enables for the communications and energy industries.

Use the pagelets to review accounts and trouble tickets.

Pagelets Used to View Accounts and Services

Pagelets include:

Pagelet Name	Usage	For More Information
Accounts	Customers can view a list of their accounts and accounts status and link to account details.	See *PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook*, “Understanding Account and Billing Management”.
Services	Customers can view and change service details.	See *PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook*, “Understanding Account and Billing Management”.

Using PeopleSoft Pagelets for the Insurance Industry

This section discusses how customers can view their insurance quotes and claims.

Pagelets Used to View Quotes and Claims

Pagelets include:

Pagelet Name	Usage	For More Information
Quotes	Displays insurance quotes for a customer.	See *PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook*.
Claims	Displays insurance claims for a customer.	See *PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook*, “Working with Claims”.

APPENDIX A

ISO Country and Currency Codes

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

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

“About This PeopleBook,” Typographical Conventions and Visual Cues

ISO Country Codes

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

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

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

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

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

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

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

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

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

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

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

ISO Currency Codes

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

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

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

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

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

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

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

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

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

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

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

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

Glossary of PeopleSoft Terms

absence entitlement — This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take — This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class — In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date — The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split — The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator — You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason — The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template — In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

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

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

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

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
	In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).
	In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file

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

learner group

In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components

In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment

In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history

In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping

You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section

In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section

In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable

In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load

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

local functionality

In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location

Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task

In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

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

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

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

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

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

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

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

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

See *record input VAT flag.*

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

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

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

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

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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