PeopleSoft®

PeopleSoft Enterprise Quality Management 8.9 PeopleBook

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PeopleSoft Enterprise Quality Management 8.9 PeopleBook
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Open Source Disclosure

Contents

About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

See 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 Country 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 Quality Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleSoft CRM automation and configuration tools.
- Enterprise 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.

PeopleSoft Application Fundamentals

The *PeopleSoft Quality Management 8.9 PeopleBook* provides implementation and processing information for your PeopleSoft Quality Management system. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft CRM 8.9 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

PeopleSoft CRM 8.9 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you are implementing only PeopleSoft Quality Management, a combination of applications within the product line, or the entire PeopleSoft CRM system, 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.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft CRM Automation and Configuration Tools

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

There are three parts to the *PeopleSoft CRM 8.9 Automation and Configuration Tools PeopleBook:*

- Correspondence management.

  This part discusses manual notifications and correspondence requests.
- Automation tools.

  This part discusses PeopleSoft CRM workflow, component event processing, business projects, and scripts.
- Configuration tools.

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

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

PeopleTools PeopleBooks

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

CHAPTER 1

Getting Started with PeopleSoft Quality Management

This chapter provides an overview of PeopleSoft Quality Management and discusses:

- PeopleSoft Quality Management business processes.
- Automating PeopleSoft Quality Management processes.
- PeopleSoft Quality Management implementation.

PeopleSoft Quality Management Overview

PeopleSoft Quality Management is a powerful yet simple-to-use tool for managing information related to product defects, enhancement requests, and resolutions (fixes). PeopleSoft Quality Management enables you to track reported defects and enhancement requests and keep a record of how they are resolved. With user-defined codes and comprehensive product descriptions, users can record defect and fix information. Workflow functionality helps move the defect through the resolution process by automating worklist assignments and notifications. The search tool enables managers, engineers, call center operators, and others to identify and access the correct records.

PeopleSoft Quality Management Business Processes

This section summarizes the PeopleSoft Quality Management business processes. We discuss these business processes in the business process chapters in this PeopleBook.

PeopleSoft Quality Management enables you to:

- Enter a record of a defect associated with particular products or components.
- Log product enhancement requests made by customers and quality assurance engineers.
- Monitor the progress of defects and enhancement requests as they move forward to resolution.
- Identify component problems affecting multiple products or versions.
- Provide links to other defect records, helping you to quickly identify similar problems.
- Provide a detailed history of when a defect was fixed, the effort involved, and the versions affected.
- Link call center cases to defects, enabling call center agents to quickly track the process of problem cases through the resolution process, and report up-to-date information to customers.

Automating PeopleSoft Quality Management Processes

PeopleSoft Quality Management workflow uses a powerful tool to automate notification of team members of defect resolution assignments and milestones. PeopleSoft Quality Management uses Active Analytics Framework (AAF) to automate the invocation of workflow-related notifications and processes based upon the evaluation of conditions within AAF policies. Take advantage of predefined policies provided in the system or create new ones to tailor the system to suit your business needs.

A complete discussion of AAF and delivered policies is available in the PeopleSoft Enterprise Automation and Configuration Tools 8.9 PeopleBook.

PeopleSoft CRM Quality Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Quality Management also provides component interfaces to help you load data from your existing system into PeopleSoft Quality Management. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have setup component interfaces:

Component	Component Interface	References
Defect RQ_DEFECT	RQ_DEFECT_AAF_CI	See Chapter 4, "Managing Defects and Fixes," Entering Defects, page 18.
Defect RQ_DEFECT	RQ_DEFECT_CI	See Chapter 4, "Managing Defects and Fixes," Entering Defects, page 18.
Defect RQ_DEFECT	RQ_DEFECT_WF_CI	See Chapter 4, "Managing Defects and Fixes," Entering Defects, page 18.
Fix RQ_FIX	RQ_FIX_AAF_CI	See Chapter 4, "Managing Defects and Fixes," Recording Fixes and Linking Them to Defects, page 29.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the *PeopleSoft Enterprise CRM Business Object Management PeopleBook,* with information about where to find the most current version of each.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Defining PeopleSoft Quality Management Business Units

This chapter provides an overview of PeopleSoft Quality Management business units and discusses how to define PeopleSoft Quality Management business units.

Understanding PeopleSoft Quality Management Business Units

PeopleSoft Quality Management business units enable you to organize your defect and fix management to correspond with distinct operational entities within your business. Segmenting your operation by business units facilitates filtering and reporting functionality. Each quality management business unit is also linked to a change management business unit and a call center business unit.

Defining PeopleSoft Quality Management Business Units

To define PeopleSoft Quality Management business units, use the Quality Definition (RQ_BUS_UNIT_TBL) component.

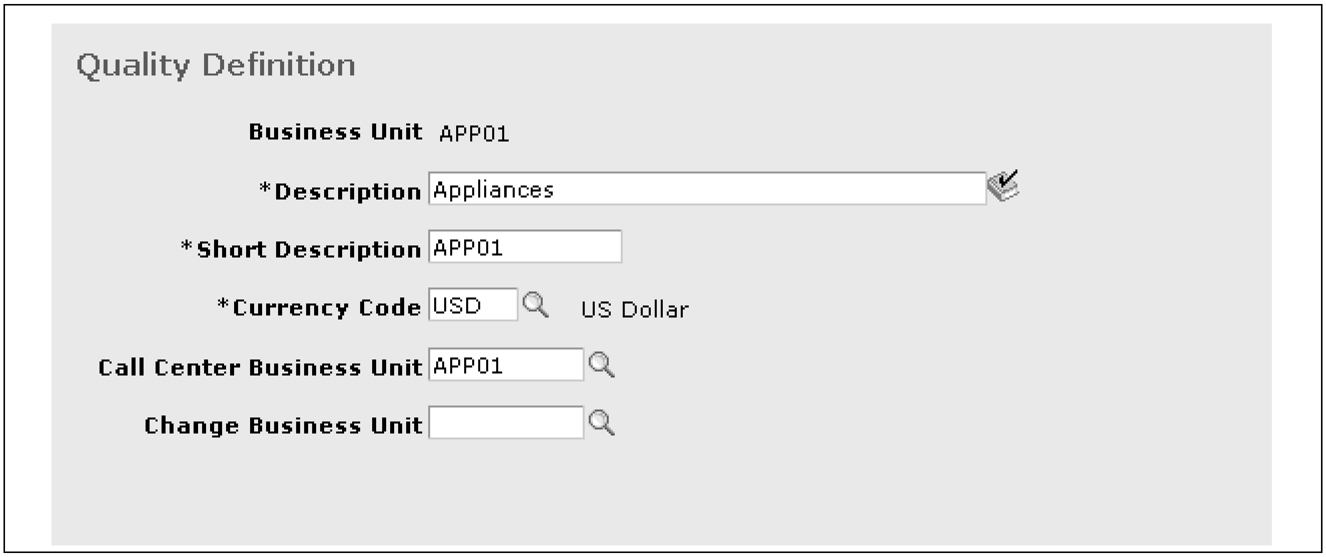
This section discusses how to define PeopleSoft Quality Management business units.

Page Used to Define PeopleSoft Quality Management Business Units

Page Name	Object Name	Navigation	Usage
Quality Definition	RQ_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Quality Definition	Define PeopleSoft Quality Management business units.

Defining PeopleSoft Quality Management Business Units

Access the Quality Definition page.



Quality Definition page

Business Unit Enter a code for the new business unit. Click the Add button to access the Quality Definition page.

Default SetID Select the default setID to associate with the business unit.

Note. The system displays this field only when you define a new business unit that has not already been defined elsewhere within CRM.

Currency Code Select the default monetary unit in which you conduct transactions in this business unit.

Call Center Business Unit Select the call center business unit that you want to associate with this PeopleSoft Quality Management business unit.

Change Business Unit Select the change management business unit that you want to associate with this PeopleSoft Quality Management business unit.

Create Business Unit Click to save and create the new business unit. This is the same as clicking the Save button.

Note. The system displays this button only when you define a new business unit that has not already been defined elsewhere within PeopleSoft CRM.

CHAPTER 3

Setting Up PeopleSoft Quality Management

This chapter lists common elements and discusses how to:

- Set up user codes.
- Set up products.

Common Element Used in This Chapter

Click the Datetime Added button to access the Additional Information page and view the date and time that a record was changed.

Setting Up User Codes

This section discusses how to:

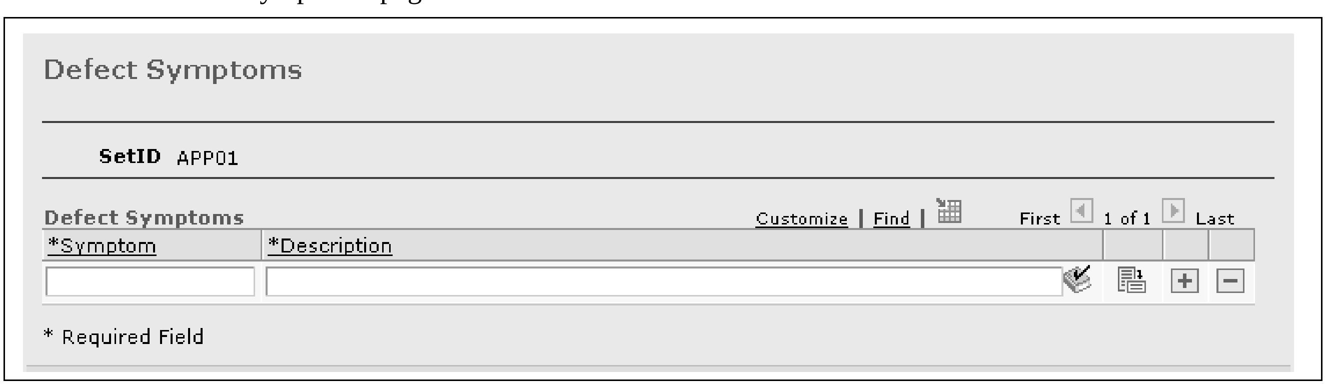
- Define defect symptom codes.
- Define defect cause codes.
- Define defect status codes.
- Define status states.
- Define status-state reasons.
- Define valid status-state combinations.
- Define defect relationship types.

Pages Used to Set Up User Codes

Page Name	Object Name	Navigation	Usage
Defect Symptoms	RQ_UD_DEF_SYMPTM	Set Up CRM, Product Related, Quality Management, Defect Symptoms, Defect Symptoms	Define defect symptom codes to provide consistent problem symptom descriptions and to facilitate data entry.
Defect Causes	RQ_UD_DEF_SUSPEC	Set Up CRM, Product Related, Quality Management, Defect Causes, Defect Causes	Define defect cause codes to provide consistent potential problem cause descriptions and to facilitate data entry.
Defect Statuses	RQ_UD_ST_STATUS	Set Up CRM, Product Related, Quality Management, Defect Status, Defect Statuses	Define defect status codes.
Defect Status State	RQ_UD_ST_REASON	Set Up CRM, Product Related, Quality Management, Defect Status State	Define status states to describe defect status more specifically.
Defect Status State Reason	RQ_UD_ST_ST_RSN	Set Up CRM, Product Related, Quality Management, Defect Status State Reason, Status State Reason	Define status-state reason codes to explain why a defect is in a particular status state.
Valid Status Combinations	RQ_UD_STAT_COMBO	Set Up CRM, Product Related, Quality Management, Status Combinations, Valid Status Combinations	Define valid status-state combinations to control permissible transitions.
Defect Relationship Type	RQ_RELATION_TYPE	Set Up CRM, Product Related, Quality Management, Defect Relationship Types	Define defect relationship types to describe dependencies and relationships among defects.

Defining Defect Symptom Codes

Access the Defect Symptoms page.



Defect Symptoms page

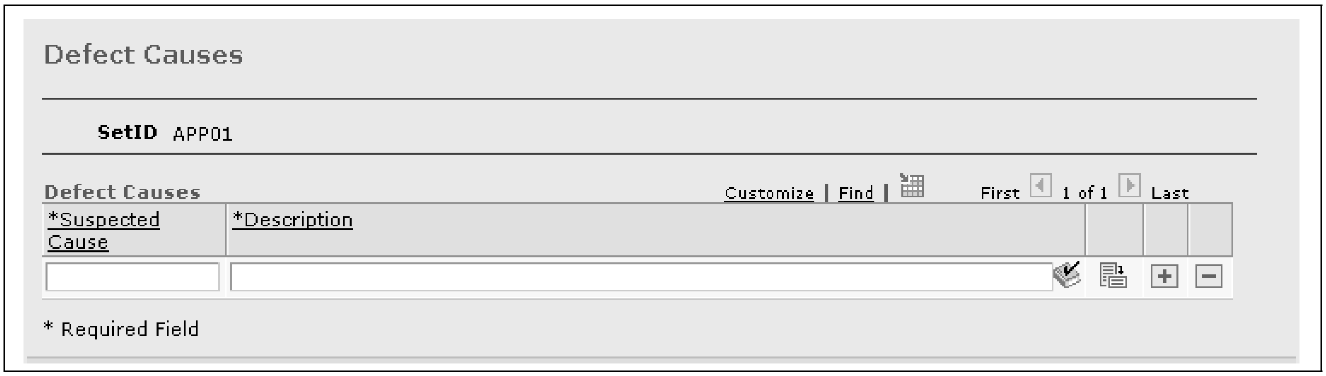
Note. The system provides sample field values. You can configure these codes to match product offerings or meet business objectives.

Defect symptom codes describe common symptoms that your customers might experience. For example, when a faulty motherboard causes a computer to crash, the symptom is the crash.

Symptom Enter a unique code that represents the defect symptom.

Defining Defect Cause Codes

Access the Defect Causes page.



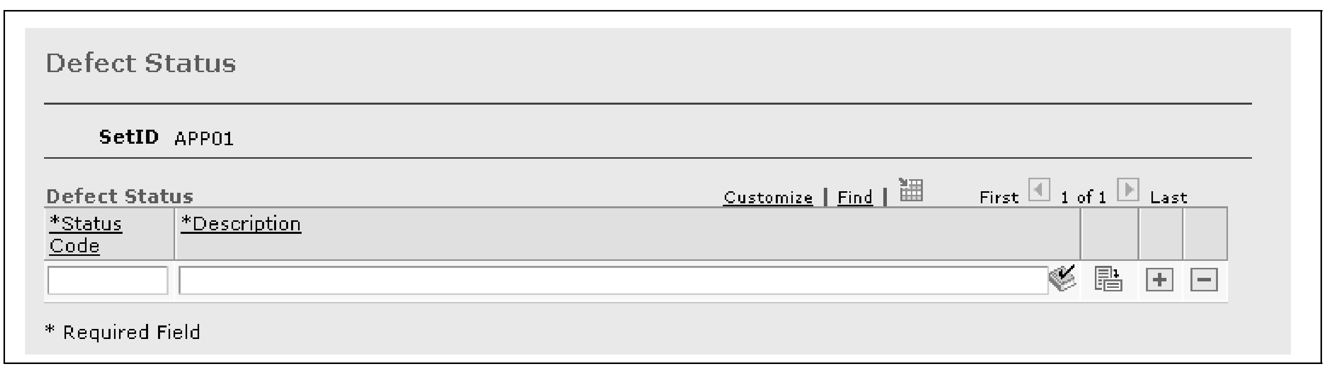
Defect Causes page

Defect cause codes describe the actual cause of a problem. For example, when a loud squealing noise comes from the bottom of a refrigerator, the actual cause is a bad compressor bearing.

Suspected Cause Enter a unique code that represents the suspected cause of the defect.

Defining Defect Status Codes

Access the Defect Status page.



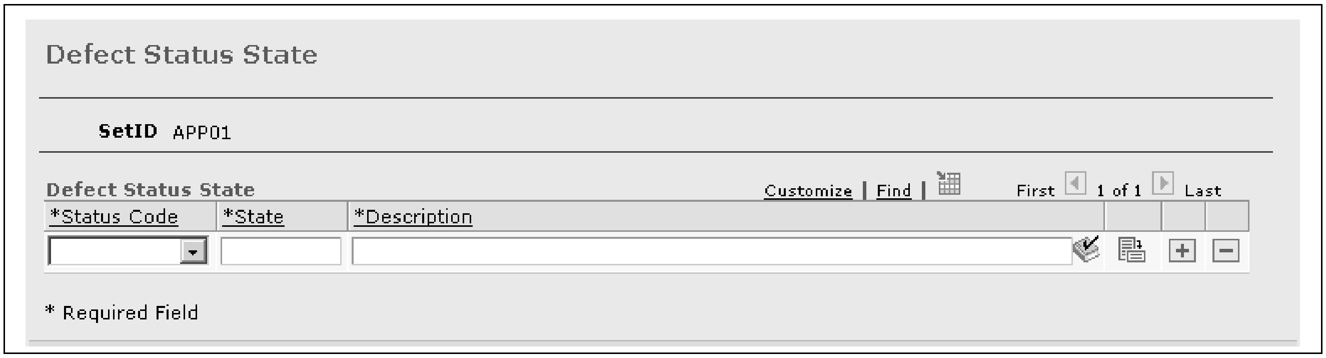
Defect Status page

Defect status codes describe the defect's most fundamental status in the problem resolution (fix) cycle. The values *OPEN* and *CLOS* (closed) are delivered with the system. Add additional values as required; however, the delivered values should be adequate for most needs.

Status Code Enter a unique 4-character code that represents the defect status.

Defining Status States

Access the Status State page.



Status State page

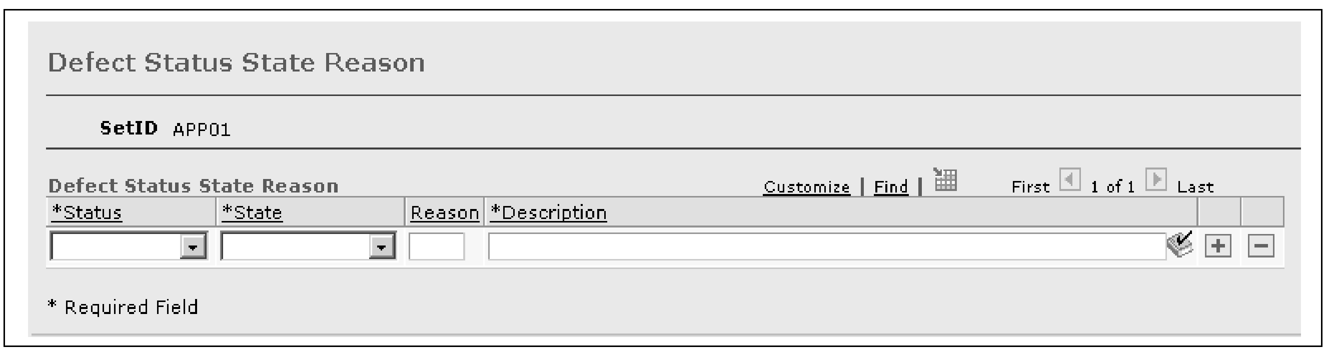
Status states define the defect's status in the resolution process more specifically than status codes. For example, when you close an enhancement request, you may do so because you have completed the process or because you decided not to enhance the product as requested. Each status state is linked to a valid status at definition and is available on the Defect page when the corresponding status is chosen.

Status Code Select the description of the defect's status in the resolution process. Delivered status options are: *Closed* and *Open.*Define status codes on the Defect Status page.

State Enter a unique code of up to 4 characters to represent the status state.

Defining Status-State Reasons

Access the Status State Reason page.



Status State Reason page

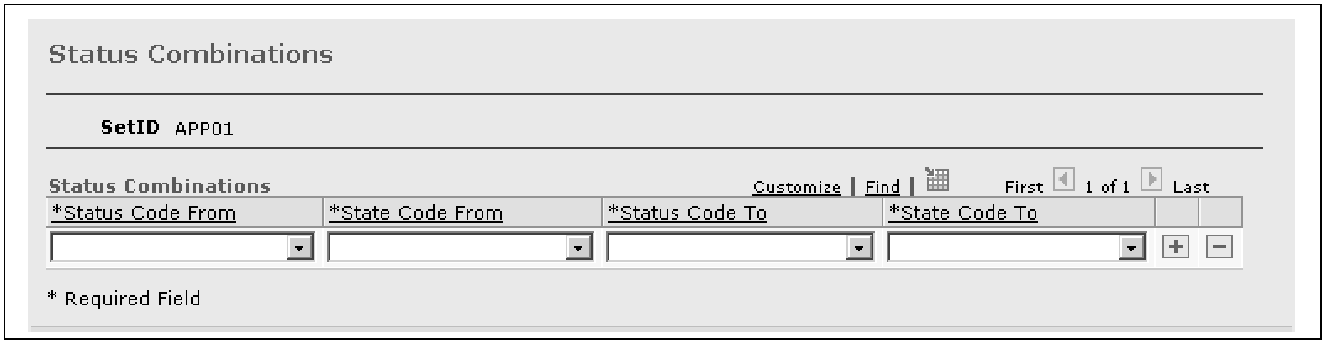
Use the Reason field to describe why a defect resolution has a particular status and state. One status-state combination might have several reasons. For example, a defect may be set to a status state of Closed - Do Not Fix because the product is no longer supported, or because you have determined that the defect complaint should really be an enhancement request. Each status-state reason is linked to a valid status and state combination at definition and is available on the Defect page when the corresponding status and state are chosen.

Status Select the description of the defect's status in the resolution process. Delivered status options are: *Closed* and *Open.* Define status codes on the Defect Status page.

Reason Enter a code of up to 3 characters to further explain the reason for the status-state combination.

Defining Valid Status-State Combinations

Access the Status Combinations page.



Status Combinations page

As a defect or enhancement request moves thorough the resolution process, you want to change the status-state combination to reflect its progress. However, certain changes do not make sense. For example, if an enhancement request's status is Open - Deferred, you should not change it to Closed - Fixed without passing through the Verify, Fix, and Test stages.

Use the Valid Status Combinations page to control which transitions are permissible. Define combinations for all possible transitions, including reverse transitions. For example, if a software fix fails in testing, it must be returned to the developer; you need a valid status combination that allows the change back from testing to fix or development.

Status Code From Select the description of the beginning status code from the codes that you defined on the Defect Statuses page.

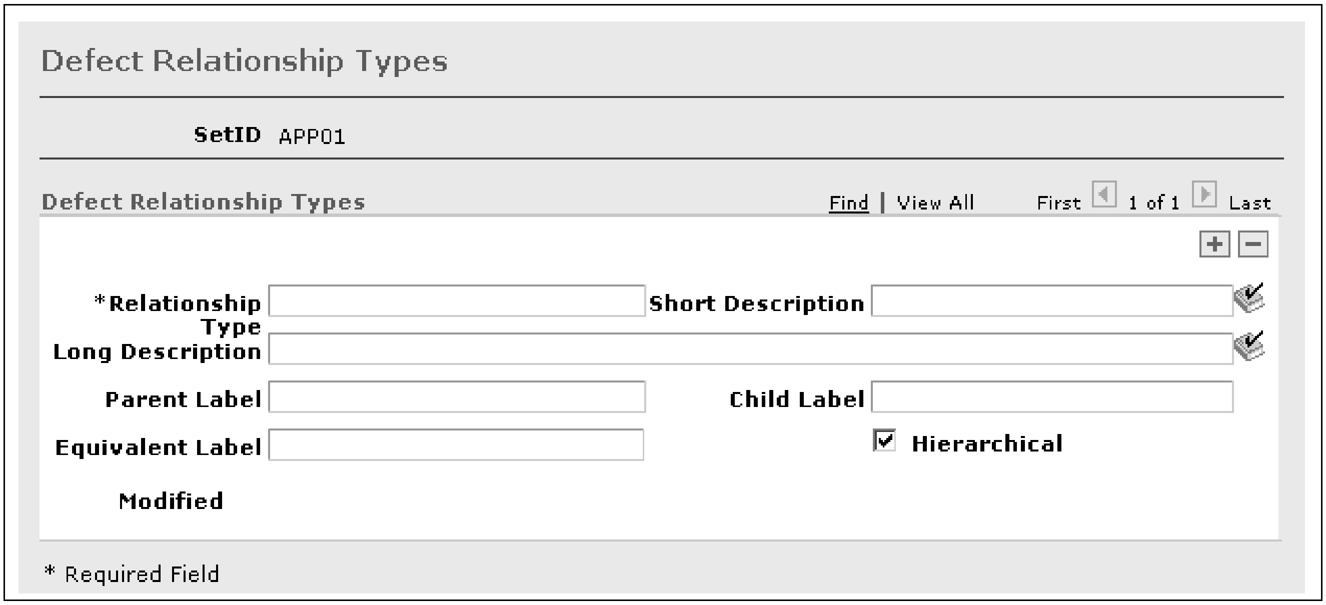
State Code From Select the description of the beginning state code from the codes that you defined on the Status State page.

Status Code To Select the description of the new (after the combination change) status code from the codes that you defined on the Defect Statuses page.

State Code To Select the description of the new state code after the change from the codes that you defined on the Status State page.

Defining Defect Relationship Types

Access the Defect Relationship Types page.



Defect Relationship Types page

Sometimes, two or more defect cases are related to one another, or the solution to a defect may be dependent on the solution to a prior defect. Defect relationship types describe those dependencies. All defect relationships fall into the general categories of hierarchical or equivalent. An *equivalent relationship* is two or more defects having the same cause. One fix resolves multiple cases. A *hierarchical relationship* is an instance when one case cannot be resolved without first resolving another.

Use the Defect Relationship Types page to define relationship types.

Relationship Type	Enter a unique code up to 5 characters to represent the relationship type.
Parent Label and **Child Label**	If you are defining a hierarchical relationship, enter a label value for both the parent and the child defects. These labels are used on the Related Defects page to describe the relationship.
Equivalent Label	If you are defining an equivalent relationship, enter a label value to appear on all related cases.
Hierarchical	Clear to define an equivalent relationship type.

Setting Up Products

This section provides an overview of products and components and discusses how to:

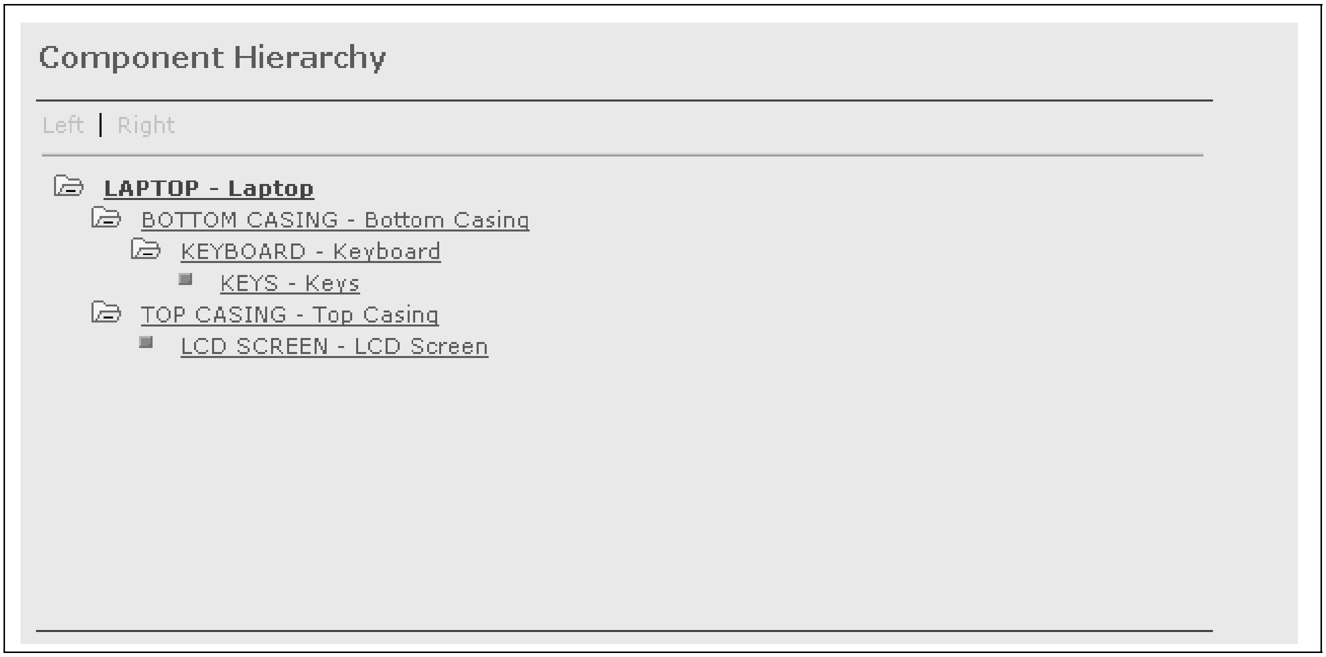
- Define component types.
- Define product components.
- Define component relationships.
- Define component versions.
- Define version environments.

Understanding Products and Components

Generally, every product consists of components, each of which may also consist of subcomponents. You use the Component Type page to break down products into an unlimited number of component and subcomponent levels.

You can then combine components and subcomponents in a hierarchical relationship on the Component Definitions page. As changes are made in the combination of components and subcomponents, a different component definition of the product is created and distinguished from all others by a unique version definition. When you select a specific product version while creating a defect record, you can drill down to the correct components and subcomponents that you used to build that particular version.

For example, here is a simple breakdown of a laptop computer's components:



Example of laptop component hierarchy

At the least, a laptop computer is made up of a bottom casing and a top casing. One of the bottom casing's subcomponents is the keyboard, which is made up of several individual keys. The top casing has a liquid crystal display (LCD) screen as one of the subcomponents. As you can see, this breakdown could go on for many levels.

Suppose that you manufacture laptops, and you want to offer an improved LCD screen. The laptops that include the improved screen are a new version. As you create the version's component definition, the only change is the LCD screen, but that change means that the hierarchy of components is different. By attaching the new component definition to a new and unique component version, you are assured that the correct LCD screen is available as you drill down on the product components.

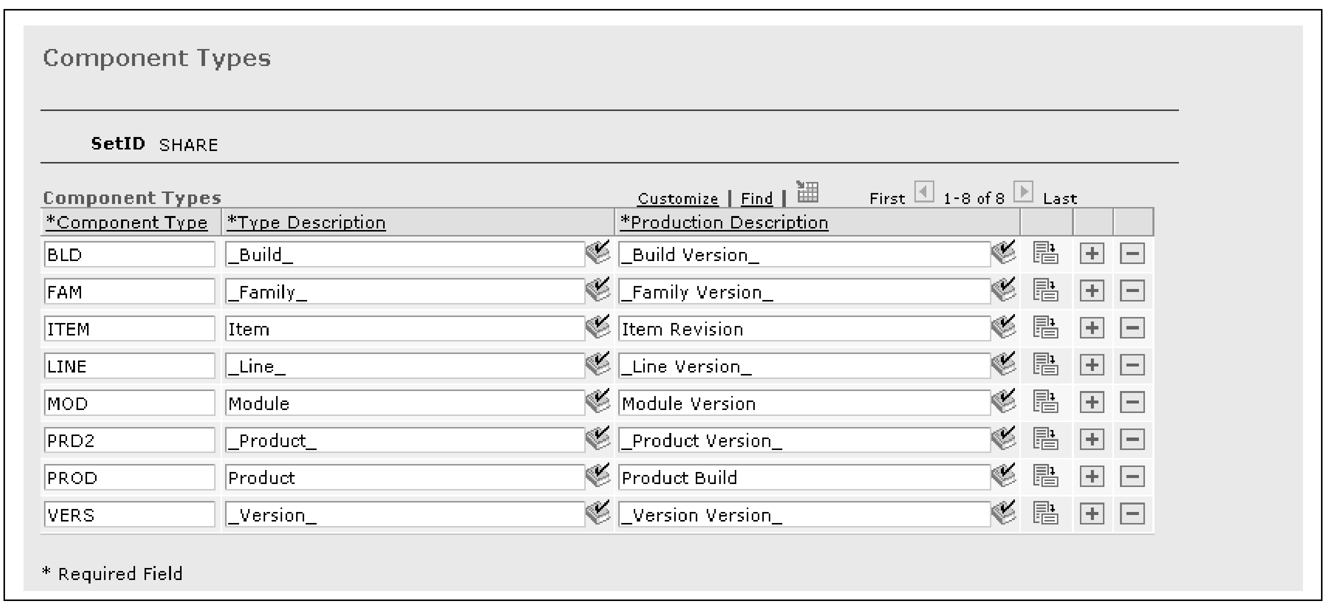
Note. Product definitions can become quite complex. Consult with product experts to obtain the information needed to complete the following pages.

Pages Used to Set Up Products

Page Name	Object Name	Navigation	Usage
Component Types	RQ_UD_COMP_TYPE	Set Up CRM, Product Related, Quality Management, Component Types	Define general component types.
Component Definitions - Component Definition	RQ_COMP_DEFN	Set Up CRM, Product Related, Quality Management, Component Definitions, Component Definition	Define product components.
Component Definitions - Relationships	RQ_COMP_PAR_LNK	Set Up CRM, Product Related, Quality Management, Component Definitions, Relationships	Define parent-child relationships between product components.
Component Versions - Version	RQ_PROD_VERS	Set Up CRM, Product Related, Quality Management, Component Versions, Version	Define distinct component versions.
Component Versions - Environments	RQ_PROD_VERS_ENV	Set Up CRM, Product Related, Quality Management, Component Versions, Environments	Define version environment details.

Defining Component Types

Access the Component Types page.



Component Types page

The component type is the most basic definition of a component. This general description can be used in multiple component definitions. For example, you might define a component type that represents all keyboards, or you might narrow the definition to only keyboards for laptops.

Component Type

Enter a unique code that represents the component specifically defined by the combination of the type description and the production description.

Type Description

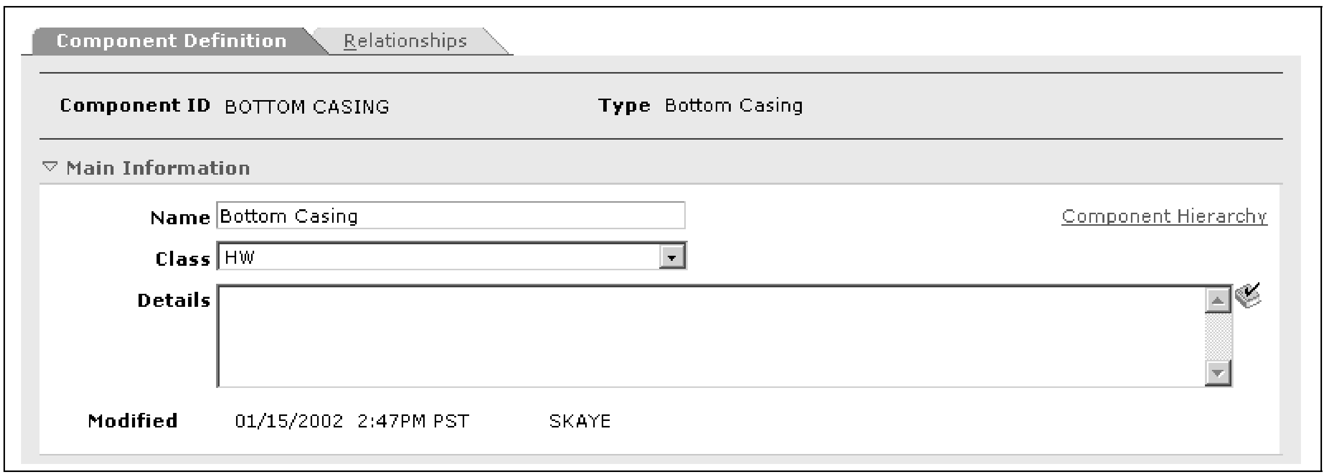
Briefly describe the component. This description appears in the component hierarchy display and on the main defect page, and you can use it to describe the same component in multiple component definitions. For example, all laptop computers have a keyboard. There may be differences in the keyboards for each laptop model, but they all have a keyboard of some type. The type description *keyboard* is a general description of the component that is used for all models.

Production Description

Briefly describe the product to which the component belongs. This field is informational and provides a means of further distinguishing a type description by associating it with a particular product or by adding further defining characteristics. For example, you can distinguish between a laptop keyboard and a desktop keyboard by changing the production description.

Defining Product Components

Access the Component Definition page.



Component Definition page

The component definition is a more specific description of a particular component. For example, you might have a laptop keyboard with gray keys and another with black keys. The component definition enables you to distinguish between the two keyboards.

The component definition is also the level at which subcomponents are linked to other components in a child-to-parent relationship, creating a hierarchy that culminates in the product component definition.

Name

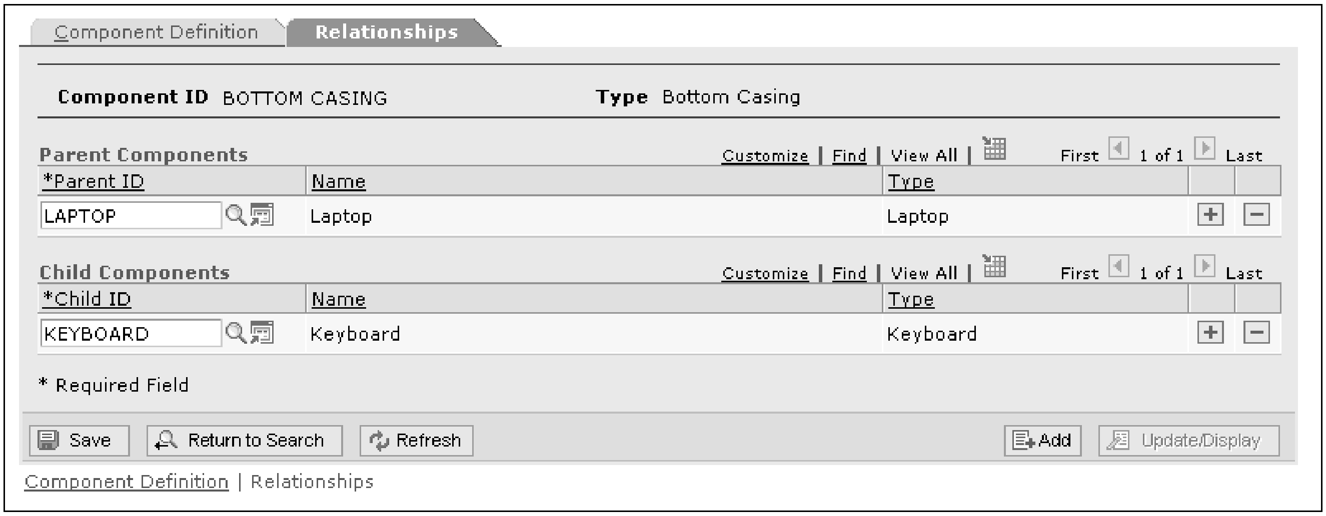
Enter the component name. This name is informational only and can be the same as the component ID or type description.

Class

Select a component class description. Values are: *Doc* (documentation), *HW* (hardware), *Service*, *Test*, *Third Party Doc* (third-party documentation), *Third Party HW* (third-party hardware), *Third Party SW* (third-party software), and *Third Party Service.*

Defining Component Relationships

Access the Relationships page.



Relationships page

Component relationships define the component hierarchy. In the example of the laptop computer, the bottom casing includes the keyboard assembly, which is made up of individual keys. Thus the bottom casing is the parent to the keyboard assembly, which, in turn, is the parent to the keys.

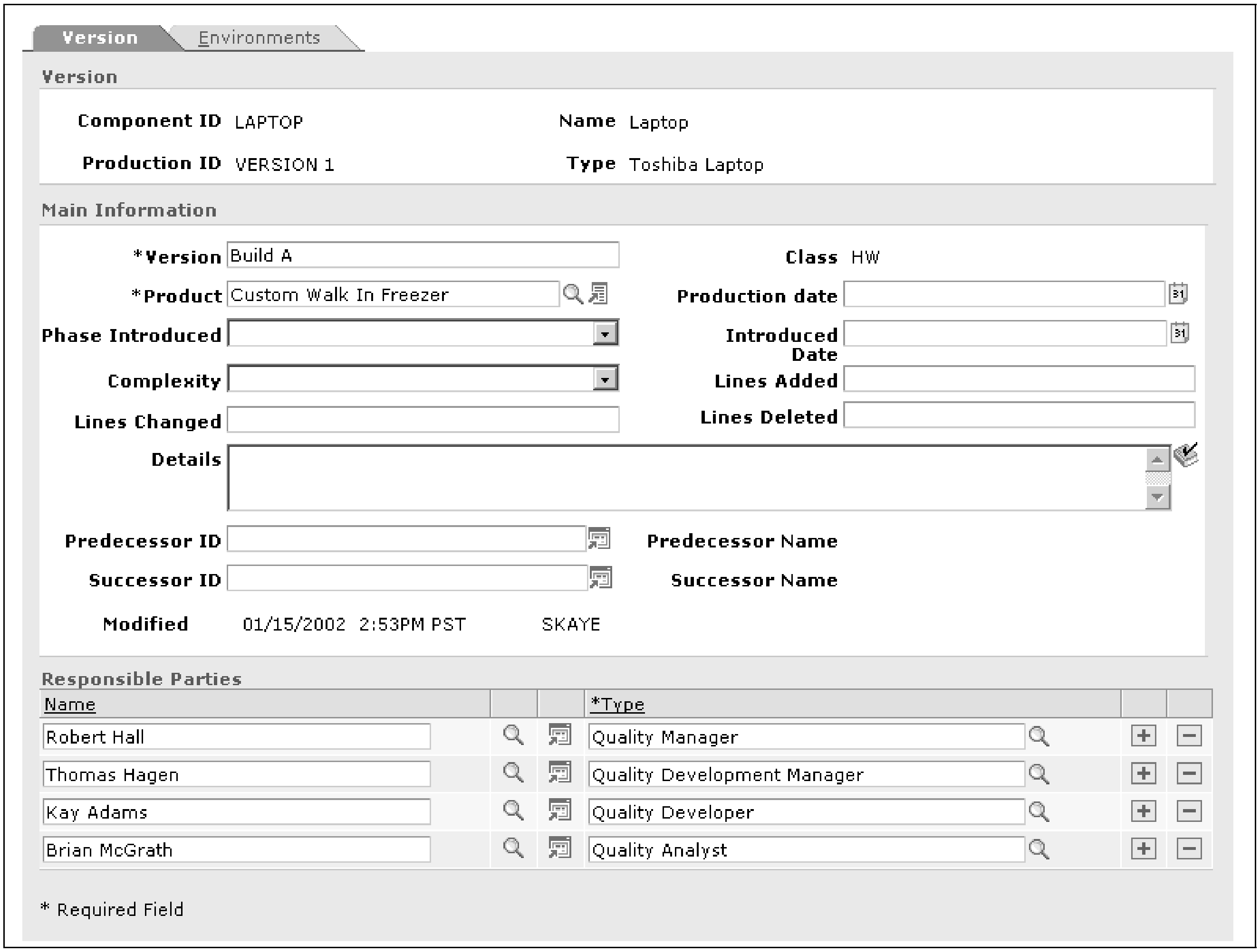
Parent ID	Select the parent component to which the defined component is related.
Name and **Type**	Displays the name and type of the selected parent component.
Child ID	Select the child component to which the defined component is related.
Name and **Type**	Displays the name and type of the selected parent component.

Note. To link components, both the component being linked and the component to which you are linking must have valid component definitions. If the component to which you are linking does not have a definition, you can create the definition by clicking the Component Definitions button.

To view the component relationship, return to the Component Definition page. Click the Component Hierarchy link to access the Component Hierarchy page. Click the Refresh button to display newly added components.

Defining Component Versions

Access the Version page.



Version page

Products consist of components. When one or more of these components change, you refer to the changed product as a new *version*. PeopleSoft Quality Management enables you to uniquely identify different product versions by defining different component versions. Each version represents a unique product component definition.

Note. When creating a new value, the Production ID is in a free form text field. The Production ID is the link between the product and the version.

Main Information

Version	Enter a word or phrase to describe the version build.
Phase Introduced	Enter the product development phase in which this component version was introduced. Values are: *Alpha, Analysis/Design, Beta, Concept, Implementation, Maintenance, Production, Requirements,* and *Retirement.*
Lines Added, Lines Changed, and **Lines Deleted**	Enter the lines of code that were added, changed, or deleted in this version. These fields apply to software code.
Predecessor ID and **Successor ID**	Enter a predecessor and successor version, if applicable.

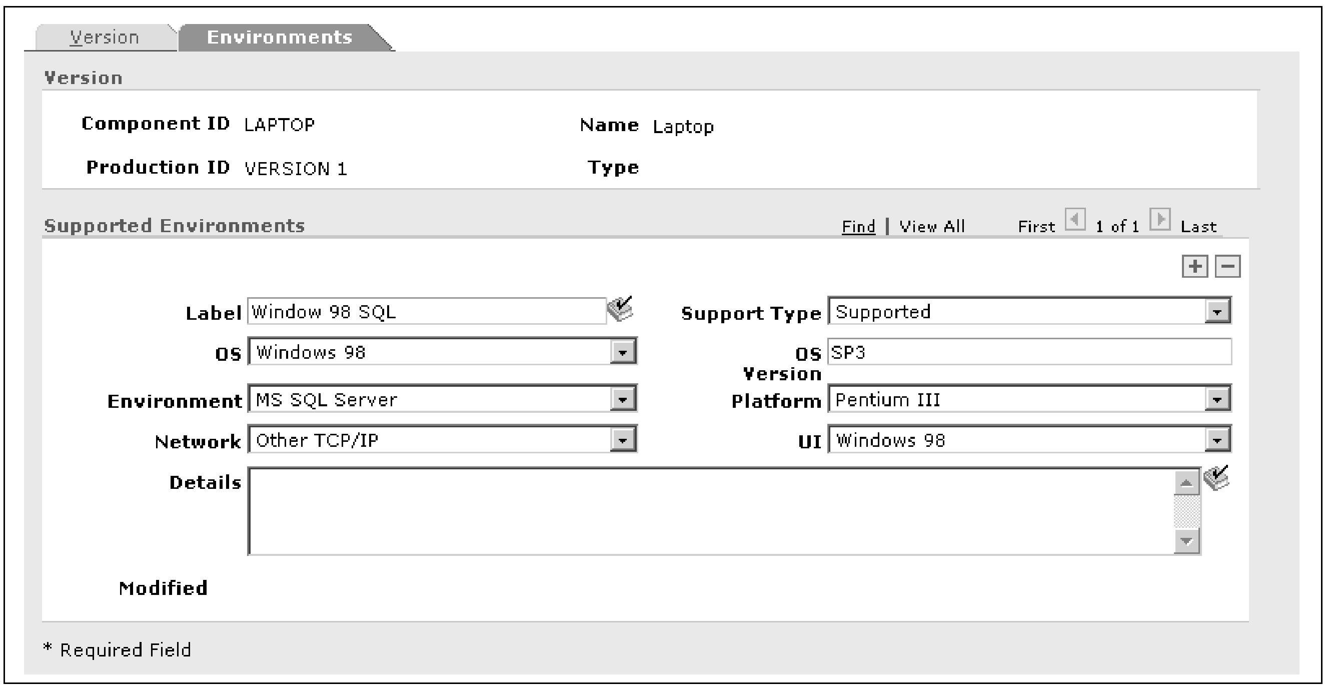
Responsible Parties

Generally, *responsible parties* are the team members charged with maintaining a product's quality and components. Responsible-party information entered here automatically transfers to the Defect page when the version is selected on that page.

Contact Name	Select the names of responsible parties.
Type	Select the responsible party's role.

Defining Version Environments

Access the Environments page.



Environments page

Component version environments relate only to software products and describe technical details needed to identify problems and fixes. Environment information entered here automatically transfers to the Defect page when the corresponding version is selected. This page is not needed for nonsoftware products.

Label	Describe the component version environment.
Support Type	Select whether the software version has service support.
OS (operating system) and **OS Version** (operating system version)	Select the software operating system and version.
Environment, Platform, and **Network**	Select the database management system environment (for example, Microsoft SQL Server or Oracle), hardware platform, and network protocol within which the software operates.
UI (user interface)	Select the user interface that the software uses.

CHAPTER 4

Managing Defects and Fixes

This chapter provides an overview of defect and fix tracking and discusses how to:

- Enter defects.
- Record fixes and link them to defects.
- Search for solutions.

Understanding Defect and Fix Tracking

This section lists common elements and discusses defects and fixes.

Common Element Used in This Chapter

Last Modified	Displays the date when this page was last modified, and the user ID of the modifier.

Defects and Fixes

Flaws and functional shortcomings can occur in all products. Within PeopleSoft Quality Management, both product flaws and proposed enhancements are *defects,* and resolutions to both are *fixes.*

Use PeopleSoft Quality Management to track reported defects and enhancement requests and to record how requests are resolved. Automated worklist assignments and notifications move the defect through the resolution process. Managers, engineers, call center operators, and others can use the search tool to quickly identify and access records.

Use PeopleSoft Quality Management to:

- Identify defects associated with particular products or components.
- Monitor the progress of defects as they move forward to resolution.
- Advise support personnel and customers about fixes that have not yet been applied.
- Identify component problems affecting multiple products or versions.
- Log product enhancement requests made by customers and quality assurance engineers.
- Monitor requirements for quality certification processes such as ISO 9000.
- Measure product quality, identify defect trends, and assess customer satisfaction.

You can maintain a record of fixes to facilitate quick resolutions to similar defects and related cases.

Use the record of fixes to:

- Reduce the possibility of fixing the same problem twice.
- Provide links to other defect records and quickly identify similar problems.
- Provide a detailed history of when a defect was fixed, the effort involved, and the versions affected.

Entering Defects

This section discusses how to:

- Define defects.
- Add notes and attachments to a defect.
- Link defects to fixes.
- Identify affected products.
- Link related cases.
- View related defects.
- Link related defects.
- Identify tested environments.
- View workflow history.

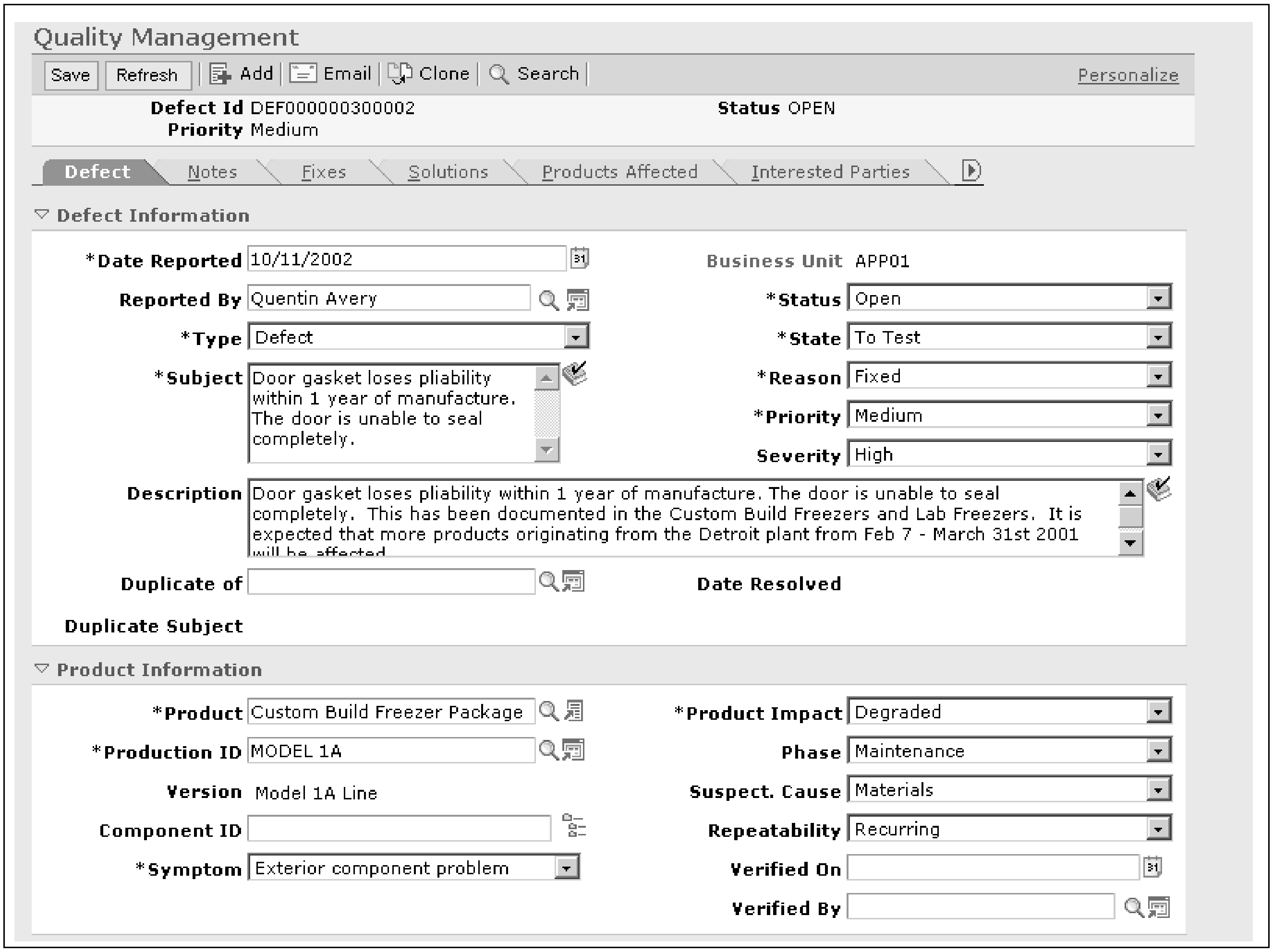
Pages Used to Enter Defects

Page Name	Object Name	Navigation	Usage
Defect	RQ_DEFECT_MAIN	Quality Management, Create a Defect, Defect Quality Management, Search Defects, Defect	Enter detailed information about the defect, product, responsible parties, interested parties, environment, and defect resolution.
Notes	RQ_DEFECT_NOTE	Quality Management, Create a Defect, Notes Quality Management, Search Defects, Notes	Add notes and attachments to a defect, forward notes to other parties on an ad-hoc basis, and generate ad-hoc email messages.
Fixes	RQ_DEFECT_FIX_LNKS	Quality Management, Create a Defect, Fixes Quality Management, Search Defects, Fixes	Link new or existing fixes to a defect.
Products Affected	RQ_DEFECT_AFFD_PRD	Quality Management, Create a Defect, Products Affected Quality Management, Search Defects, Products Affected	Identify and enter information about additional products that are affected by the defect. You can list multiple products.

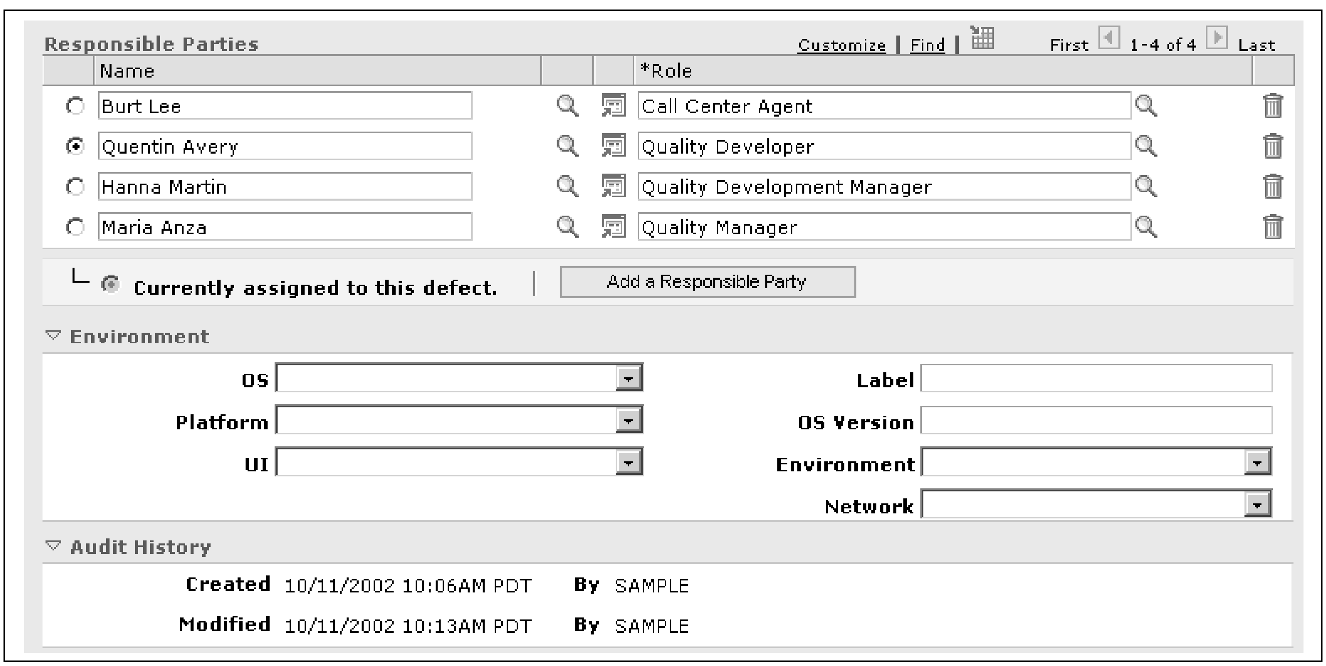
Page Name	Object Name	Navigation	Usage
Interested Parties	RQ_DEFECT_INTR	Quality Management, Create a Defect, Interested Parties Quality Management, Search Defects, Interested Parties	Identify people who wish to be notified regarding defect resolution progress.
Related Actions	RQ_DEF_CASE_LNK	Quality Management, Create a Defect, Related Actions Quality Management, Search Defects, Related Actions	Link the defect to related support or help-desk cases.
Related Defects	RQ_DEF_RELATIONS	Quality Management, Create a Defect, Related Defects Quality Management, Search Defects, Related Defects	View information about related defects, associate defects that can be resolved by the same fix, and identify defects that must be resolved in a particular sequence.
Relate Existing Defect - Relationship	RQ_REL_TYPE_SEC	Quality Management, Related Defects.Click the Relate Existing Defect button.	Specify how defects are related to one another.
Tested Environments	RQ_DEFECT_TEST_ENV	Quality Management, Create a Defect, Tested Environments Quality Management, Search Defects, Tested Environments	Identify and enter information about the environments in which the defect is tested.
Workflow History	RQ_WL_ACTN_HISTORY	Quality Management, Create a Defect, Workflow History Quality Management, Search Defects, Workflow History	View workflow status and priority history resulting from worklist notifications.

Defining Defects

Access the Defect page.



Defect page (1 of 2)



Defect page (2 of 2)

The Defect page contains information relevant to problem reporting and resolution. As the defect moves through to the resolution process, track its status on this page.

Defect Information

Date Reported Enter the date on which the defect or enhancement request is reported.

Reported By Select the name of the person reporting the defect or enhancement request. The name of the user who opened the defect issue appears by default.

Type Select a type. Values are:

Defect: Relates to a problem or malfunction. The standard response to a defect is a fix.

Enhancement: Relates to a request for new functionality. The standard response to a request is an enhancement.

Subject Enter details about the defect being reported.

Status Select the status of the defect or enhancement request. *Open* and *Closed* are delivered with the system. You may define other options during setup.

State Select a state that more fully describes your status selection. The system delivers several options; you can change these options or define others during setup. Available states are dynamic depending on the selected status.

Reason Select a reason that further describes the status and state selections. Available reasons are dynamic depending on the selected status and state.

Priority Select a priority for the defect. *High*, *Low*,and *Medium* are delivered with the system.

Severity Select the severity of the defect. *High*, *Low*,and *Medium* are delivered with the system.

Duplicate of If similar defect or enhancement requests already exist, select the principal defect here, to designate the current defect as a duplicate of the principal defect. For example, if, after creating a new defect record, you find that a defect has already been reported but not described in quite the same way, specify the current record as a duplicate of the previous record and change the status of the current record to closed.

Product Information

Product Select the product that the defect or enhancement request relates to.

Note. Only products with a valid version definition, established in PeopleSoft Quality Management setup, appear in the search. If a product does not appear, a version for that product must be established in setup.

Production ID Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.

Version Once a production ID is selected, the version label will be automatically displayed.

Component Click the Component Hierarchy button to access the Component Descriptions page, and select the appropriate component.

Product Impact Describe the effect of the defect on your component. Values are: *Affected - Use Workaround, Degraded, Unaffected,* and *Unusable.*

Phase Select the production phase in which the product failure or enhancement request occurred. Values are: *Alpha, Analysis/Design, Beta, Concept, Implementation, Maintenance, Production, Requirements,* and *Retirement.*

Suspect. Cause (suspected cause) and **Symptom** Select a suspected cause and symptom of the defect. Define suspected causes and symptoms in PeopleSoft Quality Management setup.

Repeatability Select the regularity with which the failure can be reproduced. Values are: *Intermittent, One time occurrence, Recurring,* and *Reproducible.*

Responsible Parties

Responsible parties are those who take the lead for one or more steps in the defect resolution process and are linked to the product version definition during version setup. These values are automatically populated when the product version is selected. You can add or delete responsible parties as needed.

Information about responsible parties can be used to control search functions and role-related workflow. Modify workflow processing through the Component Event Model.

Assigned To Select the check box to the left of a responsible party's name to indicate who is responsible for the defect's progress at any point. For example, if the current state of the defect resolution is *To Test,* the person assigned would be the quality analyst. When defined, the system sends workflow messages when the status is changed and saved.

Note. Selecting an assignment is a manual process. Only one name can be selected as the responsible party at any point. As the defect-resolution process progresses, the responsible party changes.

Environment

Env. Label (environment label) Displays the environment information linked to the version during version setup. Selecting a version automatically populates this and all other fields in the Environment group box.

Note. If there are multiple environment sets linked to a version, a Select an Environment button appears.

OS (operating system) and **OS Version** (operating system version) If not automatically populated, or to modify operating system information, select the operating system and version of the environment in which the product failed.

Platform If not automatically populated, or to modify platform information, select the type of computer on which the defect was found.

Environment If not automatically populated, or to modify environment information, select the database management environment in which the defect was found.

UI (user interface) If not automatically populated, or to modify user interface information, select the type of user interface through which the defect was found.

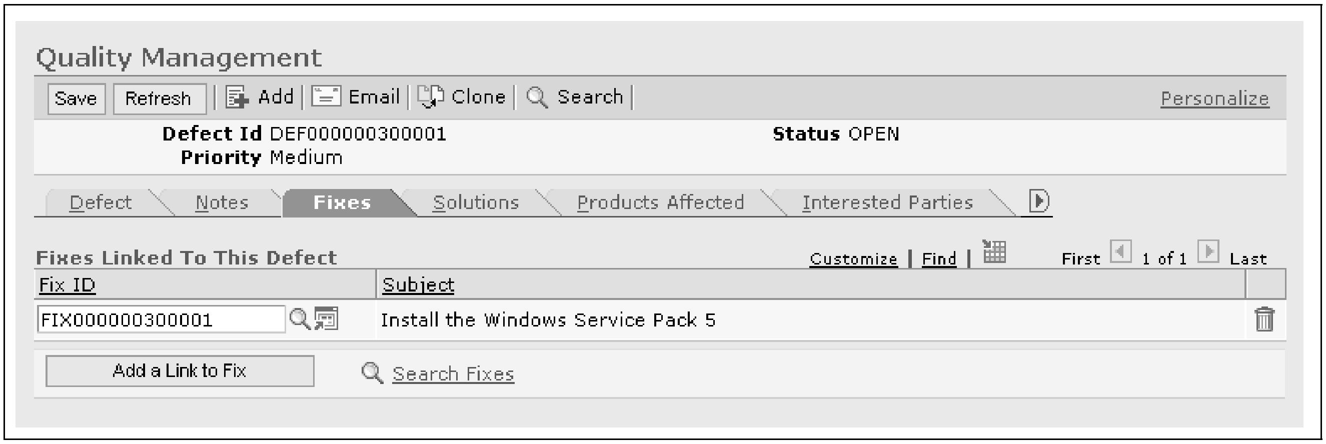
Network If not automatically populated, or to modify network information, select the type of network on which the defect was found.

Adding Notes and Attachments to a Defect

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Working with Notes and Attachments".

Linking Defects to Fixes

Access the Fixes page.



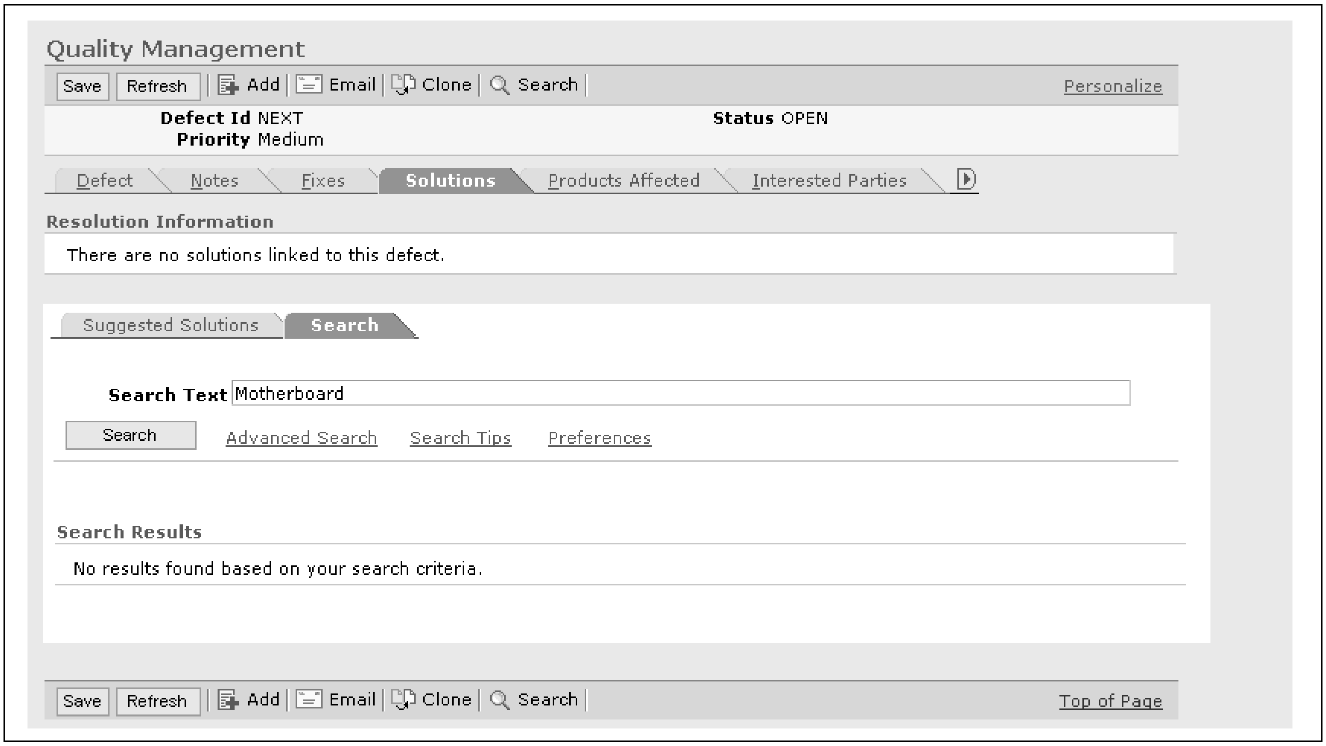
Fixes page

As fixes are implemented to resolve the defect, use the Defects and Enhancements - Fixes page to both create a fix and link the defect to the fix. This provides an immediate link to all fixes that resolve the defect in full or in part. Alternately, link the defect to the fix using the Fix - Defects page. Having fix information linked to a defect record enables call center operators to refer customers to available fixes that might not have been installed.

Subject Displays the subject description associated with the fixes linked to this defect. The system populates this field with the subject information that you entered on the Fixes - Fix page.

Working with Solutions

Access the Solutions page.



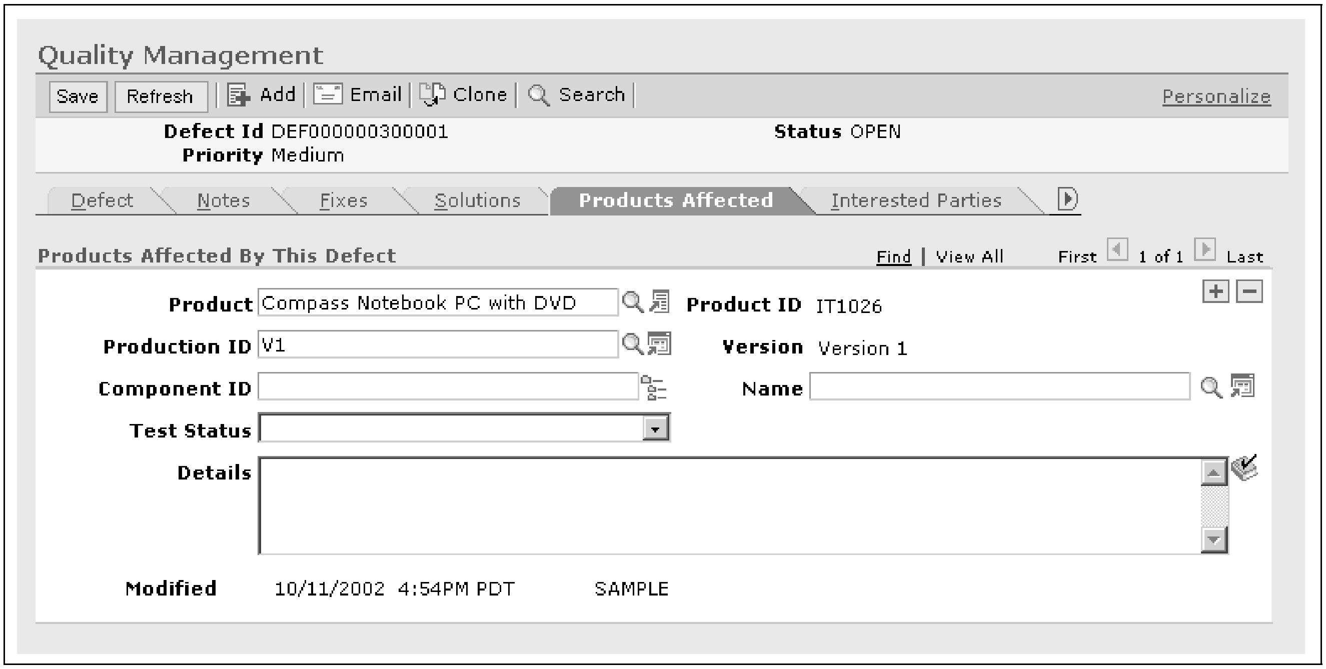
Solutions page

PeopleSoft Customer Relationship Management (CRM) call center, field service and quality management applications enable you to track both the final solution—the one that resolved the caller's problem—and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

See *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook*, "Using Solutions".

Identifying Affected Products

Access the Products Affected page.



Products Affected page

Complete this page if this defect or enhancement affects other products or components. For example, if you have a code object that more than one program uses, use this page to list all programs that contain the object.

Product — Select the product in which the defect is found.

Production ID — Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.

Version — Once a production ID is selected, the version label will be automatically displayed.

Component — Select the appropriate component for this product and version.

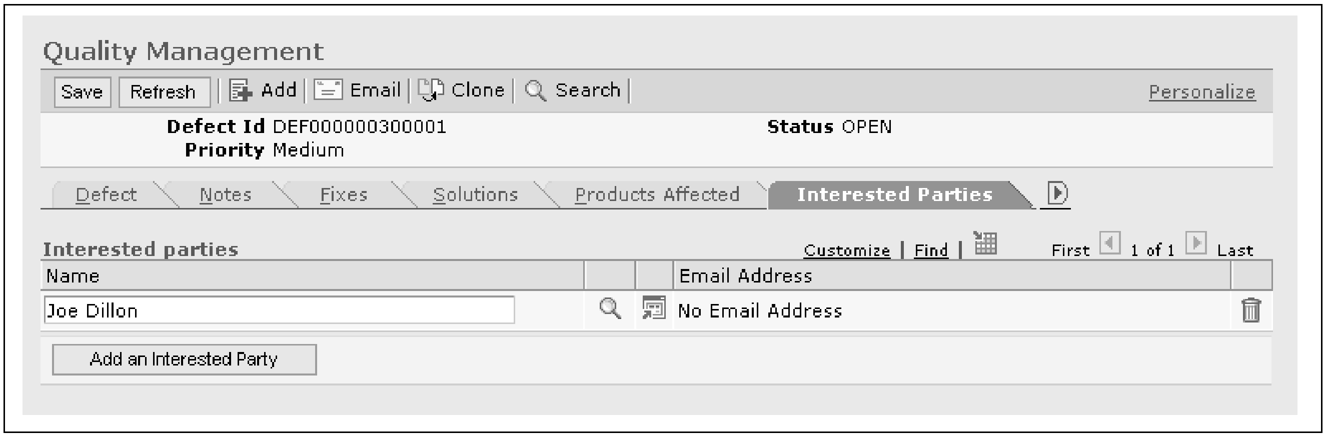
Name — Select the name of the person who found the defect.

Test Status — Select the test status. Values are: *Failed*, *Not Tested*, and *Passed.*

Description — Describe the effect of the defect on the component.

Adding Interested Parties

Access the Interested Parties page.

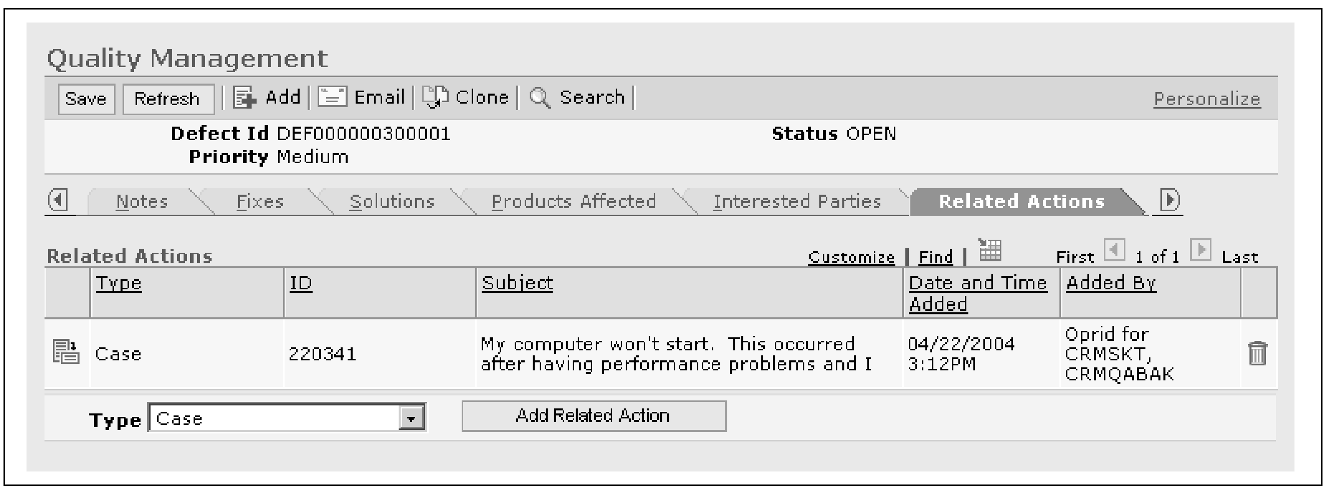


Interested Parties page

Interested parties want to be notified regarding the defect resolution progress, but are not designated as responsible parties. Interested parties can be either employees or nonemployees—for example, customers. As with responsible parties, information pertaining to interested parties controls role-related workflow.

Linking Related Cases and Change Requests

Access the Related Actions page.



Related Actions page

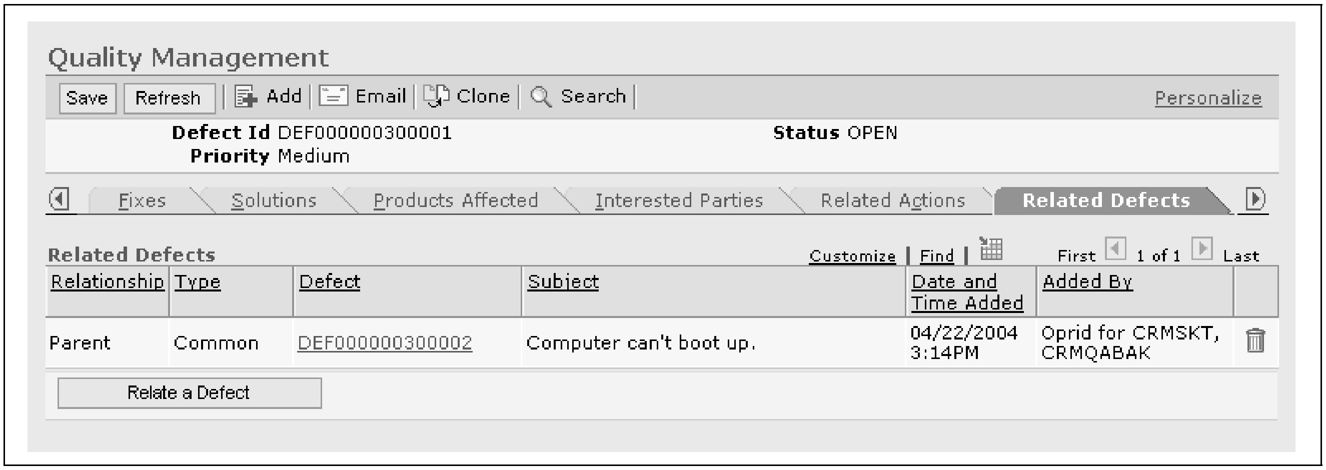
Linking a defect to related help-desk cases enables call center agents to track a defect throughout the resolution process and to track cases that can be resolved by the same fix. This also enables quality assurance analysts to gain additional information about a case.

Type	Displays the type of related action.
ID	Displays the ID of the related action.
Subject	Displays the details of the action.
Date and Time Added	Displays the date and time when the action and the defect were linked.
Added By	Displays the name of the person who linked the action to the defect.

Type	Select the type of action to relate. Values include *Case*, *Change Request*, and*Create Change Request* . Selecting *Create Change Request* and clicking the Add Related Action button will bring you to the Change Request page.

Viewing Related Defects

Access the Related Defects page.



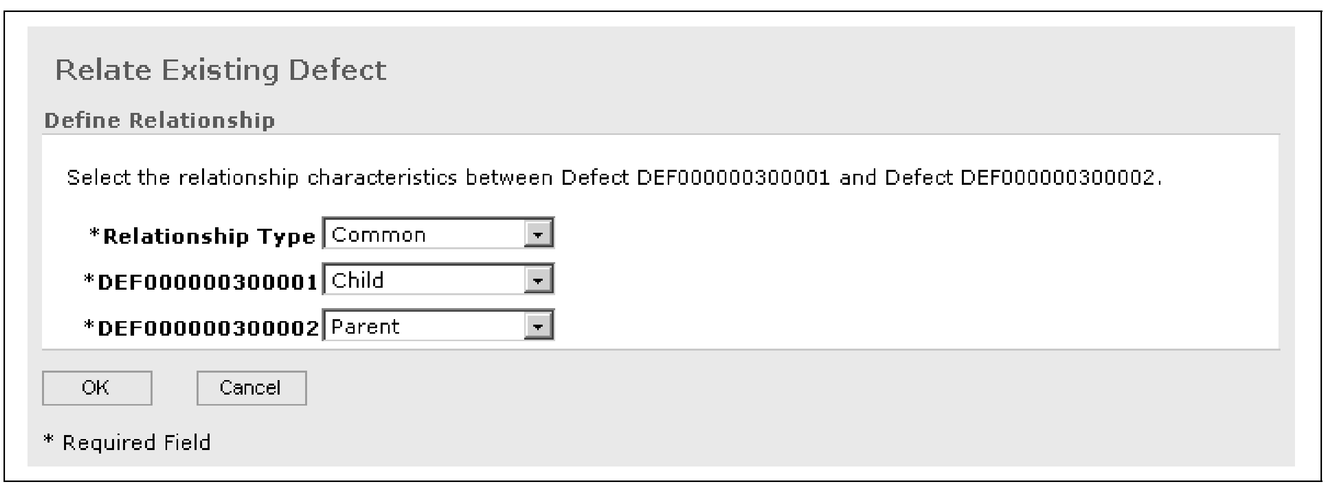
Related Defects page

Use the Related Defects page to view other defects that have been linked to the subject defect. Also, link new defects by clicking the Relate Existing Defect button.

Relate a Defect	Click to access the Relate Existing Defect page and link an existing defect record to the new defect. Select the defect to link to the specified defect.

Linking Related Defects

Click the Relate a Defect button on the Related Defects page to access the Relate Existing Defect page.



Relate Existing Defect page

Link related defects to see how this defect affects or is affected by other defects. For example, the hard drives on the new computer model that you are building can't be accessed. The floppy drives on the new model can't be accessed either. As the engineers study the problems, they find that the controller module on the motherboard is designed incorrectly and is responsible for the drive problems. The engineers enter a third defect record and link the two drive defect records as children to the motherboard defect.

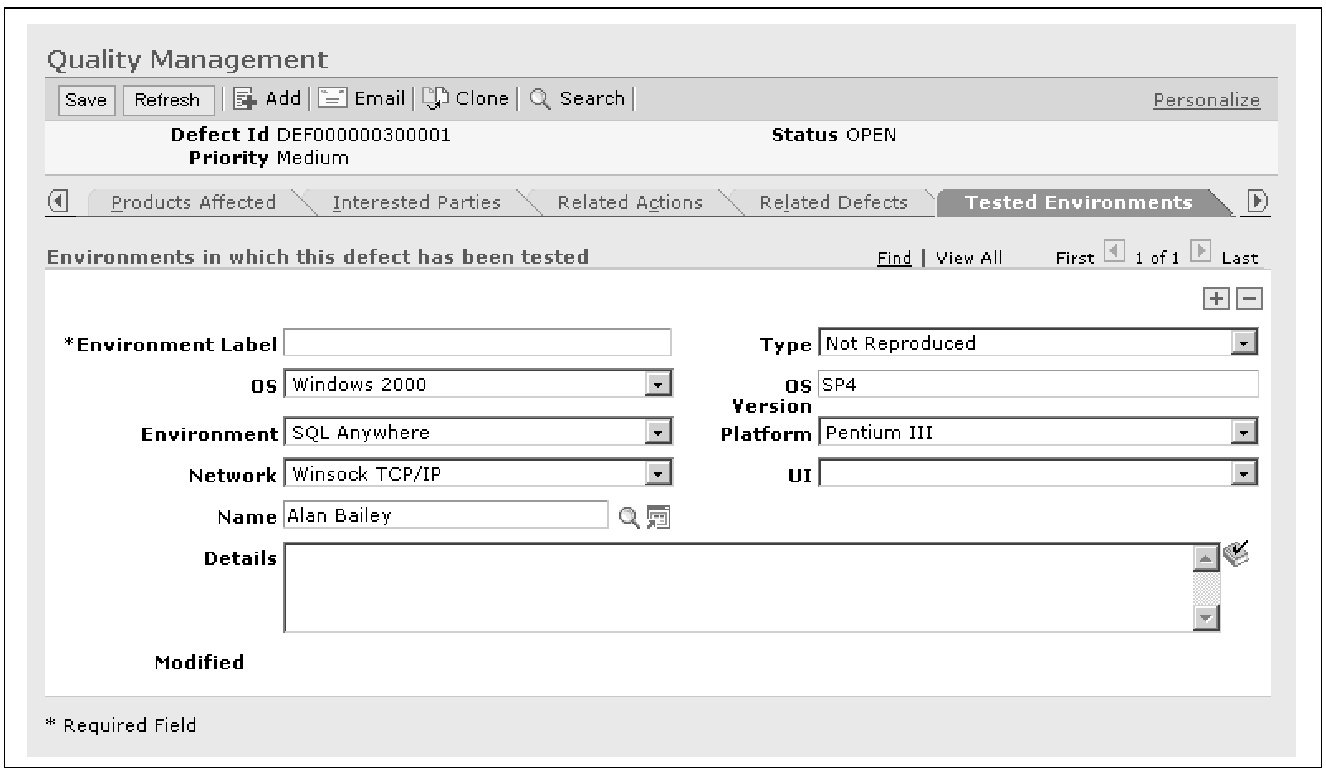
Relationship Type Select the appropriate relationship type to describe the relationship between the defects. Relationship types are defined in setup. Sample values are provided. Change them or add new values to fit your needs. Also, select the labels that describe the role of each defect in the relationship.

For example, use a relationship type of *Common* to indicate that a defect in one component causes a defect in another component. In this example, the defect in the first component that causes the problem in the second component is the *Parent*, while the second defect is the *Child*. If problems in two or more components are caused by the same defect but there is not a parent and child relationship, the relationship type is *Equivalent* and all linked defects are *Equal*.

Note. All relationship-type labels that are established under a particular setID appear. However, you can select and save labels appropriate to the specified relationship type only.

Identifying Tested Environments

Access the Tested Environments page.



Tested Environments page

For software defects, it is important to know in which environments defects occur. Enter details about as many environment combinations as needed.

Environment Label Enter a name to identify the tested database management system environment.

Env. Type (environment type) Select an environment type, which relates to reproduction status. Values are: *Not Reproduced, Partially Reproduced*, and *Reproduced.*

OS (operating system) and **OS Version** (operating system version) Select the operating system and version of the test environment.

Environment Select the database management system environment in which the test component resides.

Platform Select the computer processor type.

Network Select the type of network on which users utilize the product.

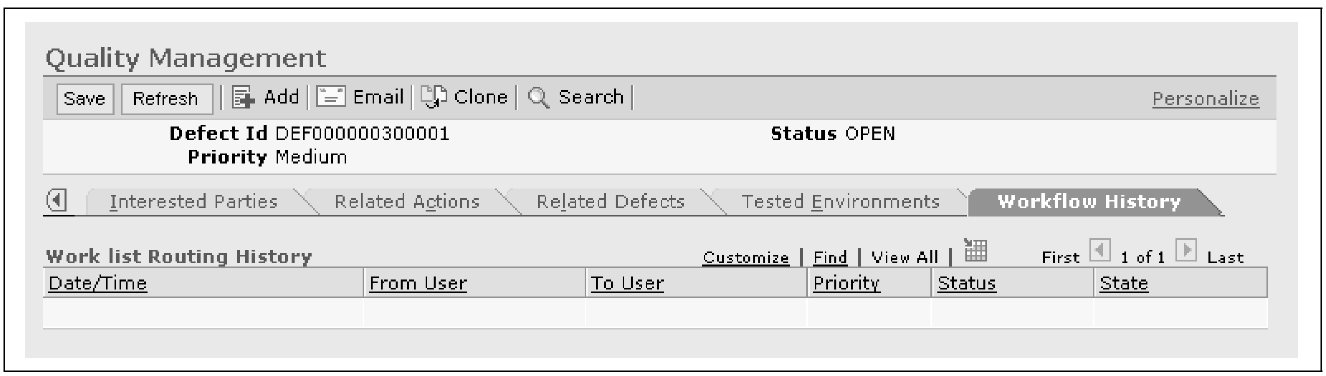
UI (user interface) Select the type of user interface through which users access the component.

Name Select the person who conducted the testing in the stated environment.

Description Describe the testing environment or the tests that were conducted.

Viewing Workflow History

Access the Workflow History page.



Workflow History page

The Worklist Routing grid displays a record of all workflow related to defect record status changes.

Date/Time Displays the date and time when a worklist notification was saved.

From User and **To User** Displays the users who triggered and received the worklist notification.

Priority, Status, and **State** Displays the priority code, status, and status state of the defect when the worklist notification was saved.

Refresh Grid Click to reflect recent changes to workflow history.

Recording Fixes and Linking Them to Defects

This section discusses how to:

- Enter and update fix information.

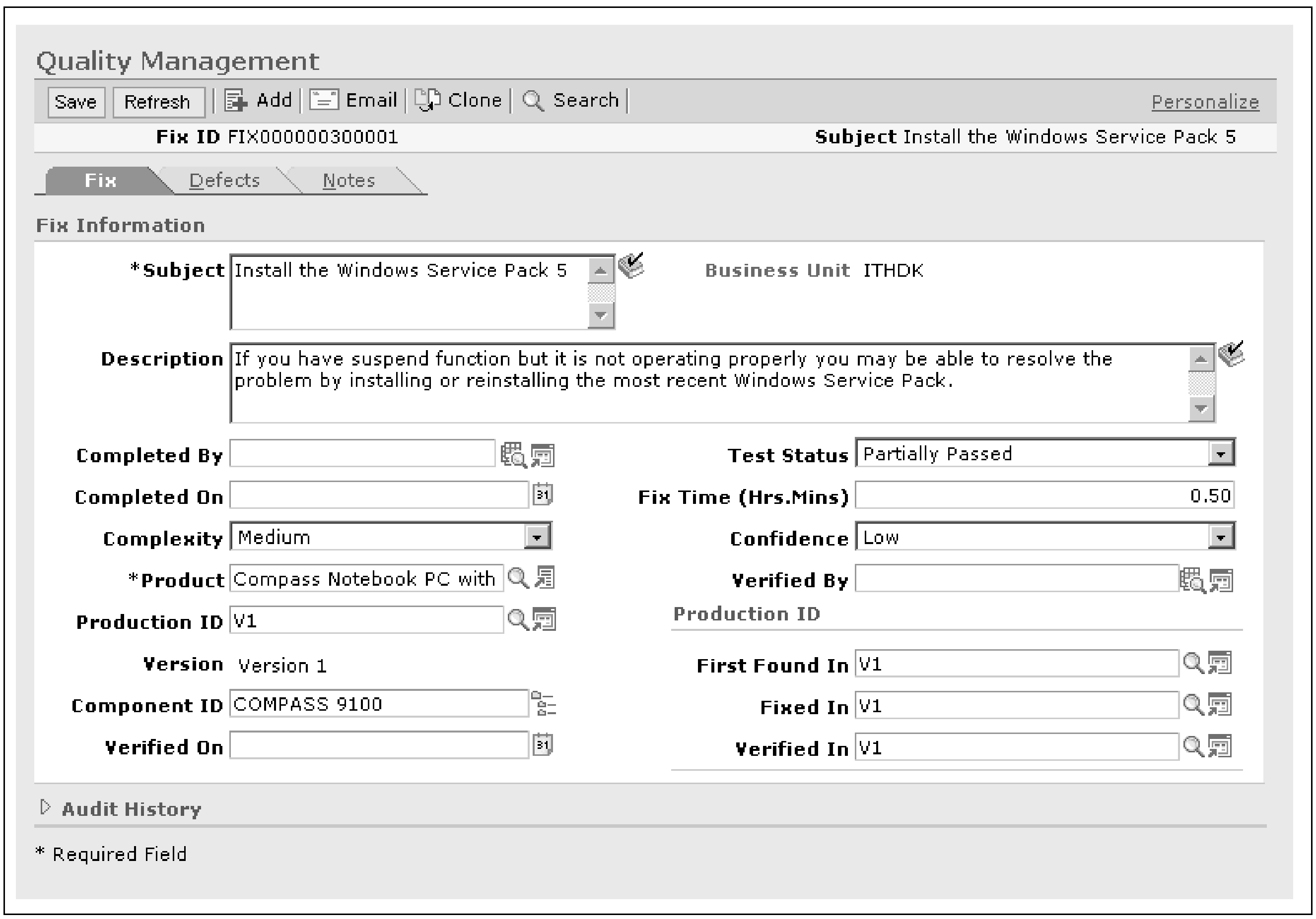
- Link defects to fixes.
- Add notes and attachments to a fix.

Pages Used to Record Fixes and Link Them to Defects

Page Name	Object Name	Navigation	Usage
Fixes - Fix	RQ_FIX_MAIN	Quality Management, Fixes, Fix	Enter and update detailed information about a fix.
Fixes - Defects	RQ_FIX_DEFECT_LNKS	Quality Management, Fixes, Defects	Link defects with fixes. Multiple defects can be linked to a single fix.
Fixes - Notes	RQ_FIX_NOTE	Quality Management, Fixes, Notes	Add notes and attachments to a fix, forward notes to other parties on an ad-hoc basis, and generate ad-hoc email messages.

Entering and Updating Fix Information

Access the Fix page.



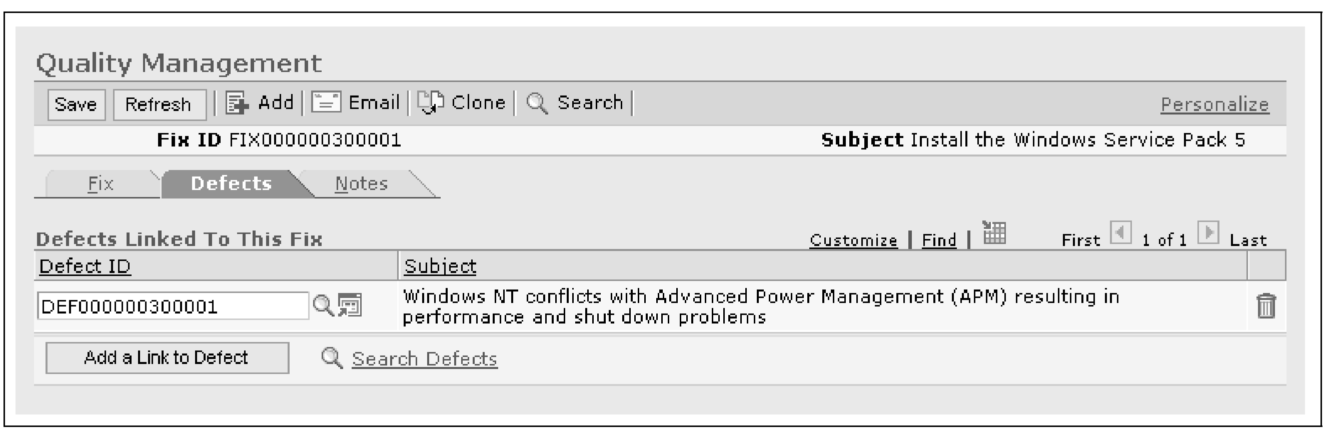
Fix page

Subject	Categorize the fix briefly.
Completed By	Select the person who completed the fix.
Test Status	Select the testing status of the fix. Values are: *Failed, In Progress, Partially Passed, Passed,* and *Pending.*
Fix Time (Hrs. Min) (fix time [hours and minutes])	Enter the approximate time required to complete the fix.
Complexity	Select the level of fix complexity. Values are: *Easy, Medium, Trivial,* and *Very Complex.*
Confidence	Select the level of confidence in the fix. Values are: *High, Low,* and *Medium.*
Product	Select the product to which the fix applies.
Production ID	Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.
Version	Once a production ID is selected, the version label will be automatically displayed.
Component	Select the component for which the fix applies.
First Found In	Select the product version in which the defect was first reported.
Fixed In	Select the product version in which the fix was first successfully applied.
Fix Verified In	Select the product version in which the fix was first successfully tested.
Fix Verified By and **Fix Verified On**	Select the name of the person who verified that the fix was successful, and the date of verification.

Note. Several of the fields on this page enable you to distinguish between product versions. For example, a flaw in a piece of software code might be introduced into a program in one version (the Introduced In field) but not discovered until a later version (the First Found In field). That same flaw might not be fixed until an even later version (the Fixed In field) is issued. By noting the program version in which the problem was introduced, you know to provide the fix to customers who are still using earlier versions.

Linking Defects to Fixes

Access the Defects page.



Defects page

As fixes are implemented, use the Defects page to link the fix to one or more defects. This provides an immediate link to all reported defects resolved in full or in part by the fix. Alternately, link the fix to the defect using the Fixes page in the Defects component.

Subject	Displays the subject of the selected defect.
Refresh Grid	Click to clear all linked defects.

Adding Notes and Attachments to a Fix

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook,* "Working with Notes and Attachments".

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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