



PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook

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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.
<i>Italics</i>	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 <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

See Appendix A, “ISO Country and Currency Codes,” ISO Country Codes.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix A, “ISO Country and Currency Codes,” ISO Currency Codes.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and Don't Run

Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager

Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor

Click to access the Process List page, where you can view the status of submitted process requests.

Run

Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Request ID

An ID that represents a set of selection criteria for a report or process.

User ID

An ID that represents the person who generates a transaction.

SetID

An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

Short Description

Enter up to 15 characters of text.

PeopleSoft Enterprise Policy and Claims Presentment Preface

This preface discusses:

- PeopleSoft Enterprise CRM application fundamentals.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleSoft Enterprise PeopleTools documentation.

PeopleSoft Enterprise CRM Application Fundamentals

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

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

There are six parts to the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*:

- PeopleSoft Enterprise CRM Multi-Product Foundation.

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

- Workforce Management.

This part discusses the administration of the worker component used to perform tasks such as customer support or field service in PeopleSoft Enterprise CRM. This part also includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

This part discusses interaction management and the administration of the 360-Degree View, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

This part discusses the set up, administration, and use of self-service applications for customers and workers.

- Relationship Management.

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

- Entitlement Management.

This part discusses setting up agreements and warranties.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals

The *PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook* consists of important topics that apply to many or all industry-specific applications within the PeopleSoft Enterprise CRM product suite. Whether you are implementing a single application or multiple PeopleSoft Enterprise CRM applications, you should be familiar with the contents of this central PeopleBook.

There are four parts to the *PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook*:

- Application Security.

This part discusses setting up security including the security matrix and navigation security.

- Financial Accounts.

This part discusses administration of financial accounts, legacy account systems integrations, product applications, and account default set up.

- Churn Management.

This part discusses churn scoring, churn scores, and churn rules as applied to financial accounts. This chapter also covers churn scripts and automated churn.

- Accounts Receivable and 360 - Degree View Integration.

This part discusses the integration between an Accounts Receivable system and PeopleSoft Enterprise CRM.

See Also

PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook

PeopleSoft Enterprise CRM Automation and Configuration Tools

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

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

- Correspondence management.

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

- Automation tools.

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

- Configuration tools.

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

- Knowledge management.

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

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM 8.9 Services Foundation

The *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise FieldService and the PeopleSoft Enterprise Call Center applications (PeopleSoft Enterprise Support, PeopleSoft Enterprise HelpDesk, and (PeopleSoft Enterprise HelpDesk for Human Resources).

There are three parts to the *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook*:

- Entitlement management.

This part discusses how solution management enables users to establish a set of predefined solutions that call center agents and field service technicians use to resolve customer problems.

- Transaction Billing Processor Integration.

This part discusses how PeopleSoft Transaction Billing Processor enables PeopleSoft Enterprise FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. Also covered is how this integration enables PeopleSoft Enterprise CRM users to bill and book revenue for recurring, one-time, and on demand service.

- Environmental Systems.

This part covers the Research Institute (ESRI) integration. The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities through the Map Dashboard.

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook

PeopleSoft Enterprise PeopleTools Documentation

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

CHAPTER 1

Getting Started with PeopleSoft Enterprise Policy and Claims Presentment

This chapter provides an overview of PeopleSoft Enterprise Policy and Claims Presentment and discusses:

- PeopleSoft Enterprise Policy and Claims Presentment business processes.
- PeopleSoft Enterprise Policy and Claims Presentment integrations.
- PeopleSoft Enterprise Policy and Claims Presentment implementation.

PeopleSoft Enterprise Policy and Claims Presentment Overview

PeopleSoft Enterprise Policy and Claims Presentment utilizes the power of PeopleSoft Enterprise CRM and provides industry-specific functionality to meet your business needs. PeopleSoft Enterprise Policy and Claims Presentment enables you to provide full-featured support for all the products and services you offer to customers.

Note. This PeopleBook focuses on the set up and usage of PeopleSoft Enterprise Policy and Claims Presentment functionality and does not discuss core PeopleSoft Enterprise CRM setup or usage. It is highly recommended that you review the references that appear in each chapter before beginning the implementation.

PeopleSoft Enterprise Policy and Claims Presentment Business Processes

The following summarizes PeopleSoft Enterprise Policy and Claims Presentment business processes:

- Policy management
- Claims management.
- Self-service transactions.

We discuss these business processes in the business process chapters in this PeopleBook.

Policy Management

PeopleSoft Enterprise Policy and Claims Presentment enables users to:

- Work with covered assets.
- Manage policies, including relationships, terms and conditions, address history, asset details, manage billing history and payment history.

- Make policy changes.

Claims Management

PeopleSoft Enterprise Policy and Claims Presentment enables users to:

- Manage first notice of loss (FNOL) reporting through a customer service representative.
This includes initiating a first notice of loss (FNOL) and confirming policy details.
- Work with First Notice of Loss (FNOL).
This includes associating a first notice of loss (FNOL) to related claims.
- Work with claims, including viewing claims and claim details.

Self-Service Transactions

PeopleSoft Enterprise Policy and Claims Presentment enables self-service users to:

- Perform customer care transactions, including creating a first notice of loss (FNOL), searching for solutions, and viewing frequently asked questions and troubleshooting guides.
- Make policy changes.
- Select and apply for products.
- Report a first notice of loss (FNOL).
- View claims.

PeopleSoft Enterprise Policy and Claims Presentment Implementation

The PeopleSoft Enterprise Policy and Claims Presentment implementation can be divided into two phases: core and industry-specific.

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

This section discusses how to:

- Implement PeopleSoft Enterprise CRM cross-product functionality.
- Set up PeopleSoft Enterprise Policy and Claims Presentment products.
- Set up PeopleSoft Enterprise Policy and Claims Presentment customers.
- Automate and configure PeopleSoft Enterprise Policy and Claims Presentment.

Implementing PeopleSoft Enterprise CRM Cross-Product Functionality

Follow these steps to implement cross-product functionality. For more detailed steps, refer to the getting started chapter in the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Getting Started with PeopleSoft Enterprise Customer Relationship Management 8.9 Applications”.

Step	Reference
1. Set up PeopleSoft Enterprise CRM global application tables.	<i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “Setting Up General Options”
2. Define customers.	<i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Defining Person Business Objects,” Defining Consumer Information
3. Set up the customer 360 degree view.	<i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “Setting Up the 360-Degree View”
4. Set up customer self-service.	<i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “Setting Up Customer Self-Service”
5. Set up integrations.	<i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “Managing PeopleSoft Customer Relationship Management Integration Points”
6. Set up PeopleSoft common components.	<i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “CRM Multi-Product Foundation”

Setting Up PeopleSoft Enterprise Policy and Claims Presentment Products

Follow these steps to set up PeopleSoft Enterprise Policy and Claims Presentment products. For more detailed steps, refer to the getting started chapter in the *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*.

Step	Reference
1. Define products.	<i>PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook</i> , “Setting Up Products,” Defining Products
2. Define product packages.	<i>PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook</i> , “Setting Up Products,” Defining Product Package Components
3. Define product relationships.	<i>PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook</i> , “Setting Up Products,” Managing Product Relationships
4. Set up actions.	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Working with Active Analytics Framework,” Configuring Actions in Policies

Setting Up PeopleSoft Enterprise Policy and Claims Presentment Customers

Follow these steps to set up PeopleSoft Enterprise Policy and Claims Presentment customers. For more detailed steps, refer to the getting started chapter in the *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*.

Step	Reference
1. Set up asset types.	Chapter 3, “Working with Policies,” Establishing Insurance Asset Types, page 19
2. Set up consumers.	<i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Defining Person Business Objects,” Defining Consumer Information
3. Set up companies.	<i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Defining Company Business Objects”
4. Set up contacts.	<i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Defining Person Business Objects,” Defining Information for Business Contacts
5. Set up partnerships.	<i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Defining Company Business Objects,” Partner Companies
6. Set up alternate capacities.	<i>PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook</i> , “Working with Financial Accounts”

Automating and Configuring PeopleSoft Policy and Claims Presentment

Follow these steps to further automate and configure the application. For more detailed steps, refer to the getting started chapter in the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Getting Started with PeopleSoft CRM Automation and Application Configuration Tools”.

Step	Reference
1. Define correspondence management.	<ul style="list-style-type: none"> <i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i>, “Defining General Settings for Correspondence” <i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i>, “Defining Settings for Template-Based Correspondence” <i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i>, “Setting Up Correspondence Templates”
2. Define workflow actions and workflow email templates.	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Setting Up PeopleSoft CRM Workflow”
3. Define business projects.	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Setting Up Business Projects”
4. Define scripts.	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Defining Scripts”

Step	Reference
5. (Optional) Define the Active Analytics Framework (AAF).	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Working with Active Analytics Framework”
6. (Optional) Configure search pages.	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Configuring Search Pages”
7. (Optional) Configure toolbars.	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Configuring Toolbars”
8. Link into the PeopleSoft Enterprise Advanced Configurator application.	<i>PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook</i>
9. (Optional) Configure attributes.	<i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Configuring Attributes”

CHAPTER 2

Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment

This chapter discusses the:

- Policy creation enterprise integration point (EIP).
- Policy application EIP.
- Billing history EIP.
- Payment history EIP.
- Change policy EIP.
- First notice of loss (FNOL) EIP.
- Claim header EIP.
- Claim detail display EIP.

EIPs for PeopleSoft Policy and Claims Presentment

PeopleSoft Enterprise Policy and Claims Presentment delivers a number of EIPs that are designed for the Insurance industry.

Policy Creation EIP

The legacy system creates the policy and performs all the checks and business processes that are required. The legacy system sends a message to the Integration Broker. Translation is not required for the incoming message, but a subscription code is required to read the message content and create the business transaction in the PeopleSoft Enterprise CRM table structure. The code uses the policy number to determine whether this is a new or existing policy. For a new policy, the system inserts new sets of data into the CRM table. For existing policies, the system issues an update statement on the account and deletes and reissues policy header and data in the remaining tables. The message structure includes policy information, covered assets, covered asset details, coverages, deductibles, options, and limits.

EIP Name	Description	Message Name	Direction of Integration	Technology
Create Policy	Receive policy information.	RBI_POLICY	CRM < --- External System	Integration Broker

Policy Application EIP

The policy application EIP is used to send the information captured in the application process to the legacy system where the policy is created.

EIP Name	Description	Message Name	Direction of Integration	Technology
Request Policy Creation	Request accepted quote to legacy system for policy creation.	RBF_SALES_ENTRY	CRM --- > External System	Integration Broker

Billing History EIP

Billing data is stored and maintained in an external system. The billing history EIPs request and receive billing history information from external systems.

EIP Name	Description	Message Name	Direction of Integration	Technology
Billing History	Synchronous request to obtain the billing history from external system.	RBI_BILLING_HISTORY_REQ	CRM --- > External System	Integration Broker

EIP Name	Description	Message Name	Direction of Integration	Technology
Billing History	Synchronous reply to billing history request from external system.	RBI_BILLING_HISTORY_RES	External System --- > CRM	Integration Broker
Billing History	Populate table when integration broker flag is 'Off' for 'Default for Account' under Setup CRM >Product Related > Financial Services > FSI Options This is an asynchronous message.	RBI_BILLING_HISTORY	External System --- > CRM	Integration Broker.

Payment History EIP

Payment data is stored and maintained in an external system. The payment history EIPs request and receive payment history information from external systems. Payment history is available in the Financial Account record.

EIP Name	Description	Message Name	Direction of Integration	Technology
Payment History	Synchronous request to obtain payment history from external system.	RBI_PAYMENT_HISTORY_REQ	CRM --- >External System	Integration Broker

EIP Name	Description	Message Name	Direction of Integration	Technology
Payment History	Synchronous Reply to payment history request from external system.	RBI_PAYMENT_HISTORY_RES	External System --- > CRM	Integration Broker
Payment History	Populate table when integration broker flag is 'Off' for 'Default for Account' under Setup CRM >Product Related > Financial Services > FSI Options This is an asynchronous message.	RBI_PAYMENT_HISTORY	External System --- > CRM	Integration Broker

Change Policy EIP

The change policy EIP is used to communicate the policy modification messages to the legacy system. If the Policy Modification requires re-quoting, the a Quote is generated and then it follows the sales entry process.

EIP Name	Description	Message Name	Direction of Integration	Technology
Change Policy Request	Asynchronous request to change policy to external system.	RBF_SALES_ENTRY	CRM --- > External System	Integration Broker
Update Change Policy Status	Asynchronous reply to Policy change request from external system.	RBI_CHANGE_POLICY_STATUS	External System --- > CRM	Integration Broker

FNOL EIP

The FNOL EIP is used to publish the message when a FNOL is saved to the claims system. The message consists of the FNOL number, policy number, and the questions and answers from the branch script or application form. The FNOL number is stored and mapped to a claim in the PeopleSoft Enterprise CRM system.

EIP Name	Description	Message Name	Direction of Integration	Technology
Publish FNOL Details	Sends the first notice of loss information from the PeopleSoft CRM system to the claims administration system.	RBI_ISSUE_PUBLISH	CRM --- > External System	Integration Broker

Claim Header EIP

The claim header EIP is used to create the claim header in the PeopleSoft Enterprise Policy and Claims Presentment system. This one-way message creates the claims from the FNOL and returns the claim header. One or more claims may be generated from a FNOL. The subscription code creates the claim header records and establishes the relationship between the FNOL and the claim.

EIP Name	Description	Message Name	Direction of Integration	Technology
Get Claim Header	Receive claim header information.	RBI_CLAIM_HDR	CRM < --- External System	Integration Broker

Claim Detail Display EIP

The claim detail display EIP retrieves claims data from the claims system and displays the data on the View Claim page. The synchronous message retrieves the claim header number and claim detail.

EIP Name	Description	Message Name	Direction of Integration	Technology
Get Claim Details	Synchronous request to obtain claim details from external system.	RBI_CLAIMNO_RES	CRM < --- External System	Integration Broker

EIP Name	Description	Message Name	Direction of Integration	Technology
Get Claim Details	Synchronous reply to claim details request from external system. This is a synchronous message and gets realtime claims information.	RBI_CLAIMNO_SYNC	External System --- > CRM	Integration Broker
Get Claim Details	Populate table when integration broker flag is 'Off' for 'Default for Account' under Setup CRM >Product Related > Financial Services > FSI Options. This is an asynchronous message.	RBI_CLAIM_DETAILS	External System --- > CRM	Integration Broker

CHAPTER 3

Working with Policies

This chapter provides overviews of insured items and discusses how to:

- Work with policies.
- Change policies.

Understanding the Policy Data Model in PeopleSoft Policy and Claims Presentment

A *policy* is an insurance contract that states what is being insured, by whom, and for how much. It contains data that both the policyholder and the insurance company need to understand what the policyholder is insured for, the insured item, what coverages apply, for how long the insurance is effective, and how much the policyholder agrees to pay in premiums. In PeopleSoft Enterprise Policy and Claims Presentment, an insurance policy is a type of financial account.

A *financial account* represents a holding by the customer of a product that an insurance company provides. The financial account presents information from various legacy systems in a consistent interface. The financial account maps to the product, inheriting the terms and conditions from the product that the customer purchased.

The legacy administration systems create the financial account record and its sub-records. These accounts are not created in the PeopleSoft Enterprise CRM system. The Product Sales functionality queues up a transaction to the legacy system, which starts the process of creating a new account header record and its sub-records; the legacy system performs the actual creation of these records, and a message comes back from the legacy system to create the data structure in the PeopleSoft Enterprise CRM system.

Each financial account record represents one policy. If a business contact has two policies, there will be one financial account instance in the database for each. You can attach coverage at several levels in the data model. Coverage can be at either the policy or the covered asset level.

Use the Financial Account pages to view general account information, insurance account details, and policy information. Use the View Policy pages to view covered assets, including coverages, deductibles, limits, and options.

Understanding Insured Items

This section provides an overview of insured items and discusses:

- Covered assets in property and casualty (P&C).
- Policy changes.

Insured items, or *covered assets*, are related to a policy as the specific thing insured against loss. Policies may be written for many insured items, or for only one. For example, usually, a life policy has one insured item for a person's life while a household policy insures many items. Some companies write a car insurance policy that includes many vehicles, while other companies create a one-to-one policy to insured items. For group policies, there are many insured items.

Insured items can be a person, a place, or a thing. You must collect specific information regarding the item that is to be insured. This data includes the specific attributes that make up the item to avoid confusion regarding what or who is insured, and so you can price the policy accurately. Based on the type of insured item, you may need different types of information.

Each insurance policy has at least one covered asset. In property and casualty (P&C) lines of business, these assets are the items that the policy insures. In life or health policies, the covered asset is the insured person or persons. Covered assets can be of different types, and each can have different attributes. For example, when a car is insured, you must capture the vehicle identification number (VIN), whereas when a person is insured, you must capture the social security number. You can view a given policy's details, such as insured items for P&C, coverage, dollar limits, deductibles, options, and exclusions. The data elements that appear depend on the policy type.

Covered Assets in P&C

For P&C, insured items are assets. These assets may include a car, a boat, a home, a wine collection, and so on. Assets have a value, and the purpose of insuring them is to protect the use or enjoyment of the asset. Covered assets are insured against loss by the policy.

Generally, P&C covered assets or insured items include:

- Personal vehicles, including cars, minivans, pickup trucks, and sport utility vehicles.
- Commercial vehicles, including trucks, commercial vans, tractors, and combines.
- Boats, including sail, motor, and yachts.
- Commercial boats, including fishing boats.
- Mobile homes.
- Personal real estate, including single-family dwellings such as apartments, condominiums, townhouses, houses, duplexes, triplexes, and four-unit or fewer apartments where the owner also lives.
- Commercial real estate, including major apartment buildings, office buildings, commercial stores, shopping centers, and undeveloped, raw land.
- Personal property, including art work, jewelry, furs, computers, and wine collections.
- Commercial property, including equipment, machinery, and aircraft.

Insured items share some common characteristics. Each item:

- Is either owned or leased for use and is associated in some way to a business contact as owner, primary user, or lessor.
- Is related to insurance policies (a type of financial contract).
- Has a dollar value.
- Has a location or primary location.

For example, a boat is moored at an address, a car is garaged at an address, a house has an address, an apartment building has an address, equipment is located in a primary location (an address or maybe a site), and personal property is either at one's home or in a safe deposit box, both of which would have an address or location.

- Has attributes that are necessary to describe the item for authentication.

For example, the VIN, make, model, type, and year uniquely describe a car. A home's particular location, address, or housing tract number in the county records uniquely authenticates a house (title insurance information). The name of the producer, vineyard, or estate name; country of origin; and the year of vintage authenticate a bottle of wine.

- Can have additional attributes to provide more detail to the description.

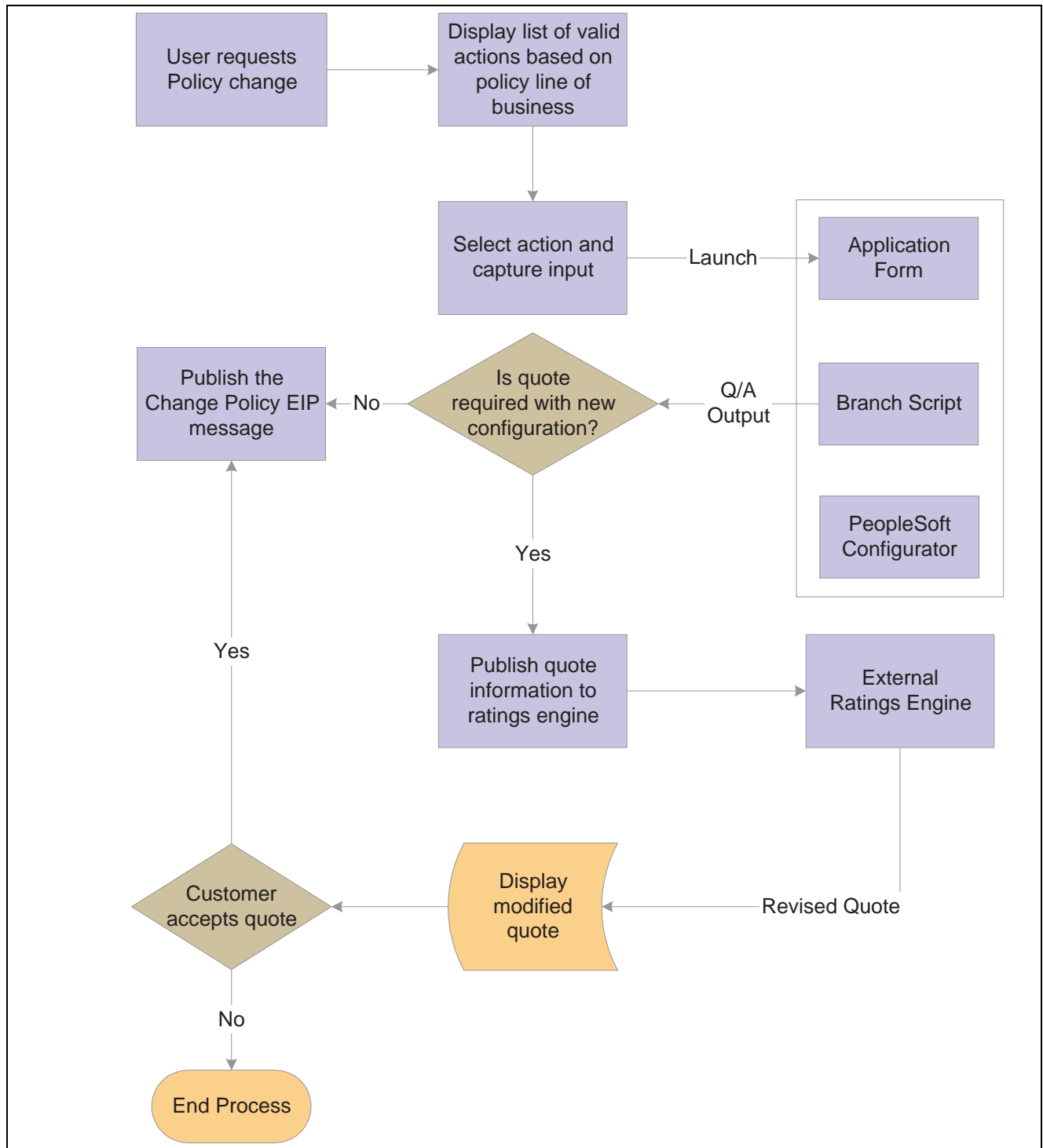
For example, attributes that may be related to risk, help the insurance company determine ratings or assess risk.

Policy Changes

An insurance policyholder may request a change to the policy. The PeopleSoft Enterprise CRM system captures all of the modification information and transmits it to the legacy system. Modifications to the policy may or may not require a quote, depending on the requested change. For example, changing the beneficiary on a life insurance policy does not require a quote because it does not impact the premium; however, a change in coverage on an automobile policy does require a quote because the premium may change. If a quote is required because of the requested change, the system returns the quote that the legacy system generates. If the user chooses to continue with the new quote, a message is sent to legacy system requesting the modification. The actual modification takes place in the legacy system.

Modification options are product-specific. The owner of an auto insurance policy may want to add a driver to the policy; however, this is not an option for a life insurance policy. Each modification is set up as an action type, and the actions are linked to the product itself. When you link the action to the product, that modification option becomes available to the policyholder. Set up the allowable actions in the Action component (for example, adding a driver is a valid action that can be linked to auto insurance product).

This diagram illustrates the process flow for policy changes:



Policy change process flow

Working with Policies

This section discusses how to:

- Establish insurance asset types.
- View insurance financial accounts.
- View relationships.
- View terms and conditions.
- View address history.
- View policies.
- View asset details.
- View billing history.
- View payment history.

Pages Used to Work with Policies

Page Name	Object Name	Navigation	Usage
Asset Type	RBI_ASSET_TYPE	Set Up CRM, Product Related, Financial Services, Asset Type	Establish categories of assets for insurance policies.
Financial Account	RBF_FIN_ACCOUNT	Customer Accounts, Review Financial Accounts, Financial Account	View detailed information about the customer's financial account for insurance.
Financial Account - Relationships	RBF_ACCT_RELATIONS	Customer Accounts, Review Financial Accounts, Financial Account, Relationships	View relationships for the financial account. The account relationship message may be used to create relationships with the policy or policy owner. For example, you can establish a beneficiary relationship to the policy or you can relate the insured to the policy owner.
Terms and Conditions	RBF_ACCT_ATTR	Customer Accounts, Review Financial Accounts, Financial Account, Terms and Conditions	View the terms and conditions that are associated with the policy.
Address History	RBF_ACTADR_HIST	Customer Accounts, Review Financial Accounts, Financial Account, Address History	View the customer's address history.
View Policy	RBI_POLICY	Customer Accounts, Review Financial Accounts, Financial Account Click the View Policy button on the navigation toolbar.	View details on covered assets, coverage, deductibles, limits, and options for the policy.
Asset Details	RBI_ASSET_DETAILS	Click the Details link on the View Policy page.	View specific details of a covered asset such a property name and value.
Billing History	RBI_BILL_HIST	Select the Billing History tab in the View Policy component.	View the policy's billing history. You can define the date range for the data that the legacy system returns.
Payment History	RBI_PAY_HIST	Select the Payment History tab in the View Policy component.	View the policy payment history. Policy payment history data can be viewed by a date range for the data that the legacy system returns.

Establishing Insurance Asset Types

Access the Asset Type page.

Asset Type	
Asset Type Information	
Type	PERS
*Description	INSURED PERSON

Asset Type page

Type Short description for asset type. These are the types of assets associated with insurance policies.

Description Long description for asset category.

Viewing Insurance Financial Accounts

Access the Financial Account page.

Financial Account		Relationships	ATM Cards	Terms and Conditions	Fees	▶
Account Information						
System Source Code	BSCS	Billing Account				
Named Insured	William Brown	Status Open				
Partner Name		Partner Contact				
Description	Personal Auto	End Date 02/01/2003				
Begin Date	02/02/2002	Last Statement Date 07/30/2002				
Account Type	Insurance	TIN Type Social Security Number				
Registration Type	Individual	Tax ID 134-56-0987				
Registration Name	Auto Insurance Policy	Currency Code USD				
New Nickname	Policy	Revenue Basis				
Last Refresh YTD Revenue	07/31/2002 1:17PM	Where Held				
Last Year's Revenue						
Address						
*Asset Type 1	<input type="text"/>					
*Asset Type 2	<input type="text"/>					
Asset Type 3	<input type="text"/>					

Financial Account page (1 of 3)

Insurance Account	
Policy Type	Auto Insurance
Policy Status	Policy is issued and available for change
Insured Name	William Brown
Premium Amount	660.00
Carrier Name	PROGRESSIVE
Product Code	
NAIC Code	
Beneficiary Name	Jennifer Brown
Policy Name	AUTO
Policy Version	1
State	CA
Payment Terms	Monthly
Payor Name	William Brown
Line of Business Code	Automobile - Personal
Line of Business Subcode	Comprehensive General Liability

Financial Account page (2 of 3)

▼ Policy Information	
Current Term Amount	13000.00
Billing Method Code	Agency Billed
Producer Code Group ID	454
Signed Date	01/02/2002
Language Code	
Payor Code	Insured
Signed by Code	Insured or Applicant
Renewal Payor Code	Insured
Renewal Term Duration	
Total Paid Loss Amount	2000.00
Number of Years Loss Info	1
Branch Code	
Contract Term Duration	
Contract Term Effective Date	02/02/2002
Contract Term Expiry Date	02/02/2003
Customer Servicing Code	Agency Responsibility
Original Inception Date	01/02/2002
Mailing Responsibility Code	Agency Responsibility
Rate Effective Date	01/02/2002
Other Insurance Company Code	No
Renewal Billing Method Code	Renew Automatically
Renewal Term Effective Date	02/02/2003
Renewal Term Expiration Date	02/02/2003
Total Number of Losses	1

Financial Account page (3 of 3)

Account Type	Displays the type of account. Values are <i>Checking</i> , <i>Savings</i> , <i>Credit</i> , <i>Insurance</i> , and <i>Investment</i> .
Registration Type	Displays the account registration type. Under personal accounts, the values are <i>Individual</i> , <i>Joint with rights of survivorship</i> , <i>Tenants in common</i> , <i>Community property</i> , <i>Named beneficiary</i> , <i>Custodial account for minor</i> , and <i>Trust</i> . Under business accounts, the values are <i>Corporation</i> , <i>Partnership</i> , and <i>LLC</i> .
Registration Name	Displays the name that the insurer gave to the account while registering it.
Asset Type	Displays the type of assets linked with the account.
Status	Displays the policy's status.
Begin Date and End Date	Display the policy's beginning and end dates.
Last Statement Date	Displays the issue date of the last statement.
Tax Ident. Number Type (tax identification number type)	Displays the taxpayer identification type. Values are <i>SSN</i> and <i>Federal Employer ID</i> .
Tax ID	The customer's tax identification number entered in the Consumer component.

Policy Type	Displays the specific insurance-policy type.
Policy Status	Displays the policy's current status. Values are <i>Issued and available for change</i> , <i>Not in force</i> , <i>Has been rated</i> , <i>Quoted and awaiting review</i> , <i>Submission has been quoted but not bound</i> , <i>Non renew</i> , and <i>Cancel</i> .
Insured Name	Displays the insured's name. The customer may not be the insured but a beneficiary or a contact of the insured.
Premium Amount	Displays the premium for the policy.
Carrier Name	Displays the policy carrier's name.
Product Code	Displays a company-unique code that indicates the policy's product classification.
LOB Code (line of business code)	Displays a code that identifies the line of business classification. This element uses the line of business code list.
Policy Name	Displays the name that the insurer gave to the policy.
Policy Version	Displays a number or other identifier with which the company identifies this version of the policy.
State	Displays the state in which the policy was issued.
Payment Terms	Displays the time frame such as monthly, semiannual, or annual for the premium payment.
Payor Name	Displays the name of the person or entity who is paying for the policy.
NAIC Code	Displays an industry code that uniquely identifies an organization that is chartered under state or provincial laws to act as an insurer.
LOB Subcode (line of business subcode)	Displays the line of business subcode, if applicable.
Current Term Amount	Displays the total gross amount including premiums, plus taxes, fees, discounts, surcharges, and so on for the current term. When a policy is issued for its normal full term, this value is the full term amount at inception.
Contract Term Duration	Displays the contract's duration in units.
Contract Term Effective Date	Displays the period for the contract, policy, binder, and so on.
Contract Term Expiry Date	Displays the period for the contract, policy, binder, and so on.
Bill Account Number	Displays the account number that is used for billing purposes. The billing entity assigns this billing number.
Billing Method Code	Displays a code that identifies whether the policy is to be billed directly (by company) or through an agency.
Group ID	Displays the identifier for the group or association for a policy that is written as part of group or association business.
Customer Servicing Code	Displays a code that identifies who services customer calls for the associated policy.
Signed Date	Displays the date when the application form was signed.

Original Inception Date	Displays the date when this insurer first issued a policy to the insured.
Language Code	Displays a code that indicates the language in which the policy is written.
Mailing Responsibility Code	Displays a code that identifies the organization that is responsible for mailing the policy and any related materials to the insured.
Payor Code	Displays a code that identifies the entity who is paying for the policy.
Rate Effective Date	Displays the rate's effective date.
Signed by Code	Displays a code that identifies or certifies that the signature-required application or endorsement has been signed and that the agent has the signed document.
Other Insurance Company Code	Displays a code that indicates if the insured is known to have other insurance policies with the insurer on this policy, and if additional information is available.
Renewal Payor Code	Displays a code that identifies the person or entity who is paying for the policy renewal.
Renewal Billing Method Code	Displays a code that indicates whether the renewed policy is to be billed directly (by company) or through an agency.
Renewal Term Duration	Displays the renewal policy's term.
Renewal Term Expiration Date	Displays the date that coverage under the renewal policy ends.
Renewal Term Effective Date	Displays the date that coverage under the renewal policy begins.
Total Number of Losses	Displays the total number of losses that occurred for the past number of years as you specify in the Number of Years Loss Info field. This field applies to P&C.
Total Paid Loss Amount	Displays the total amount paid for the losses that are incurred during the period that you define in the Number of Years Loss Info field. This field applies to P&C.
Number of Years Loss Info	Displays the number of years of loss information that the insurer requires. This field applies to P&C.

Note. System administrators can use Insurance Translate Values to define valid prompt values for various fields in the application. The navigation is Set Up CRM > Product Related > Financial Services > Insurance Translate Values. This enables administrators to add, remove, or change values without logging into PeopleSoft Application Designer. This applies to both Financial Account and Policy pages (Agent-facing and Self-Service). The component name is RBI_XLAT_VALUE_INS.

Viewing Relationships

Access the Financial Account - Relationships page.

Financial Account > Relationships > ATM Cards > Terms and Conditions > Fees > D

Role

Left View Right View

View Detail View Detail

Maintain Roles

Financial Account - Relationships page

The Relationships page displays the relationship between —financial account and other business objects.

Viewing the Terms and Conditions

Access the Financial Account - Terms and Conditions page.

Financial Account > Relationships > Terms and Conditions > First Notices of Loss > Claims > D

Insurance - General

Features Auto insurance will safeguard your investment in your automobile, pay for medical expenses in case of an accident, provide financial protection from lawsuits, cover losses caused by uninsured drivers, pay for damage due to theft, vandalism, etc.

Terms and Conditions Coverage descriptions are general information and not statements of contract because policy provisions, endorsements, limits and requirements vary by state.

Financial Account - Terms and Conditions page

The system displays the terms and conditions associated with the financial account.

Viewing the Address History

Access the Address History page.

Relationships > Terms and Conditions > First Notices of Loss > Claims > Address History > Cases

Address History

No Address History found.

Address History page

The system displays the address that is associated with the financial account.

Viewing Policies

Access the View Policy page.

View Policy

Billing History

Payment History

Covered Assets

Find

First

1-2 of 2

Last

Asset Type

VEHICLE

Details

Asset Description

SPRINT BOAT

Asset Type

DRIVER

Details

Asset Description

DRIVER 1

View Policy page

The system displays details about coverage of policy assets or insured items. The policy creation EIP populates the fields.

Asset Type	Displays the type of covered asset or insured item.
Details	Click to view details about the covered asset.
Asset Description	Displays a description of the covered asset.
Coverage Code	Displays the coverage type. This information comes from the Product table.
Start Date and End Date	Displays the beginning and end dates for the coverage.
Current Term Amount	Displays the current coverage under the policy.
Rate	Displays the rate for this coverage. The rate for each coverage is included in the total premium.
Premium Basis Code	Displays a code that indicates the basis for determining the premium.
Territory Code	Displays the territory that is applicable to the coverage. The territory may be used in determining the rate or premium.
Iteration Number	Displays the iteration of the coverage information.

The system displays the details of deductibles, limits, and options for each policy asset in the Deductibles/Limits/Options group box.

Deductible Amount	Displays the portion of the claim that is not insured under the policy. The insurer is responsible for the amount over the deductible up to the policy limit. The deductible applies to each covered loss that appears in the Deductible Applies to Code column.
Currency Code	Displays the currency that is used for the deductible or limit amount.
Deductible Basis Code	Displays the deductible's basis, such as per loss or per year.
Deductible Type Code	Displays the deductible type.
Deductible Applies to Code	Displays the specific claim to which the deductible applies.
Limit Amount	Displays the limit of the coverage.
Limit Basis Code	Displays the limit's basis, such as the total limit of liability.
Limit Applies to Code	Displays to what the limit applies, whether it is the specific coverage or the entire policy.

Valuation Code	Values are <i>Appraisal</i> , <i>Comparable Sales</i> , and <i>Sales Receipt</i> .
Option Code	Displays the option that is associated with the coverage.
Option Type Code	Displays the option type.
Option Value	Displays the value of the option.

Note. System administrators can use Insurance Translate Values to define valid prompt values for various fields in the application. The navigation is Set Up CRM > Product Related > Financial Services > Insurance Translate Values. This enables administrators to add, remove, or change values without logging into PeopleSoft Application Designer. This applies to both Financial Account and Policy pages (Agent-facing and Self-Service). The component name is RBI_XLAT_VALUE_INS.

Viewing Asset Details

Access the Asset Type Details page.

Property Name	Value of Property
MAKE	SPRINT
MODEL	WAVE98P
YEAR	1992

Asset Details page

Property Name This is the description of the type of property. Every insured asset has some properties.

Value of Property Property values of the associated insured asset.

Viewing Billing History

Access the Billing History page.

Billing History page

From Date and To Date Enter the date range for the billing history information.

Get Billing History Click to retrieve the billing history.

Bill ID Displays the bill ID from the legacy system.

Bill Status Displays the bill status from the legacy system.

Viewing Payment History

Access the Payment History page.

Payment History page

Start Date and End Date	Enter the date range for the payment history.
Get Payment History	Click to generate the payment history.
Payment ID	Displays the company ID that is used for the payment.
Payment Status	Displays the payment status.
Payment Method	Displays the payment method.

Changing Policies

Policy owners can modify their policies. Policy changes can be made by the customer service representative through the 360-Degree View or by the policy owner as a self-service transaction.

This section discusses how to:

- Set up actions.
- Change policies.
- Run policy change scripts.

Pages Used to Change Policies

Page Name	Object Name	Navigation	Usage
Action	RBT_ACTION	Set Up CRM, Product Related, Order Capture, Action	Define the action or changes that can be performed on specific coverages, and select the appropriate application method for the change.
Change Policy	RBI_CHG_POLICY	Select Change Policy on the 360-Degree View page and click Go.	Select the policy number and the modification type for the change.

Setting Up Actions

Access the Action page.

Action

Application Detail

SetID INS01

Action ID 4

Action Code FNOL

***Action Name** Create FNOL Issue

***Action Type** Insurance ☐ **Re-Quote**

Action Reference

Application Method

Application Method Application Form

Form Name Create First Notice of Loss

Action page

Action Code	Displays the action code that you entered on the search page.
Action Name	Enter the name of the action or change.
Action Type	Select an action type.
Re-Quote	Select whether the action requires a re-quote for a changed premium.
Action Reference	This does not apply to insurance.
Application Method	Select the application method to be associated with the change. Values are <i>Application Form</i> , <i>Configurator</i> and <i>Branch Script</i> .
Script Name	The script associated with the change when the application method value of <i>Branch Script</i> is selected.
Form Name	The form associated with the change when the application method value of <i>Application Form</i> is selected.
Description	The configurator model associated with the change when the application method value of <i>Configurator</i> is selected.

Changing Policies

Access the Change Policy page.

Change Policy History Select One...

360 360-Degree View | Send Correspondence | [Personalize](#)

Policy Owner William Brown

Policy Information

*Account Number

*Modification Type

[Change Policy](#)

* Required Field

Change Policy page

Policy Number

Select the policy number to be changed. The system displays only those policies that the customer owns.

Modification Type

Select the change request for the policy. Modification types are the action types that are attached to the policy.

Go

Click to launch the associated branch script, PeopleSoft Enterprise Advanced Configurator link, or application form.

Running the Change Policy Script

Access the Execute Script page.

1 General **2 Driver** **3 Vehicle** **4 Coverages** **5 Summary**

General Information Navigate to ... ▾

* Denotes a required field

About You

What state do you live in?* >> GA ▾

How did you hear about us? - Dealership ▾

Do you have a valid drivers license?* ☒ No ☒ Yes

Has your license ever been suspended?* ☒ No ☐ Yes

Vehicle Overview

Zip code where you park your vehicles overnight* 30344

Are any vehicles parked overnight at a location other than the above zip code?* ☒ No ☐ Yes

Are all vehicles registered to you and/or your spouse/domestic partner?* ☐ No ☒ Yes

Current Insurance

Years of Continuous Insurance* 3

Who is your current automobile insurance company? > Not currently insured ▾

What type of home policy do you have? > Not currently insured ▾

Number of claims for losses such as fire, theft, glass, or vandalism in the last 7 years* 0

Execute Script page

The Execute Script page displays the application form, PeopleSoft Enterprise Advanced Configurator link, or branch script that is associated with the policy change. This example shows a sample model, but any change model may be used.

See *PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook*.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Running Scripts”.

CHAPTER 4

Working with Claims

This chapter provide overviews of claims in PeopleSoft Enterprise Policy and Claims Presentment, first notice of loss (FNOL), claims submission, and claims management, and discusses how to:

- Report FNOL through a customer service representative.
- Work with FNOL.
- View claims.

See Also

Chapter 5, “Working with PeopleSoft Enterprise Policy and Claims Presentment Self-Service,” page 43

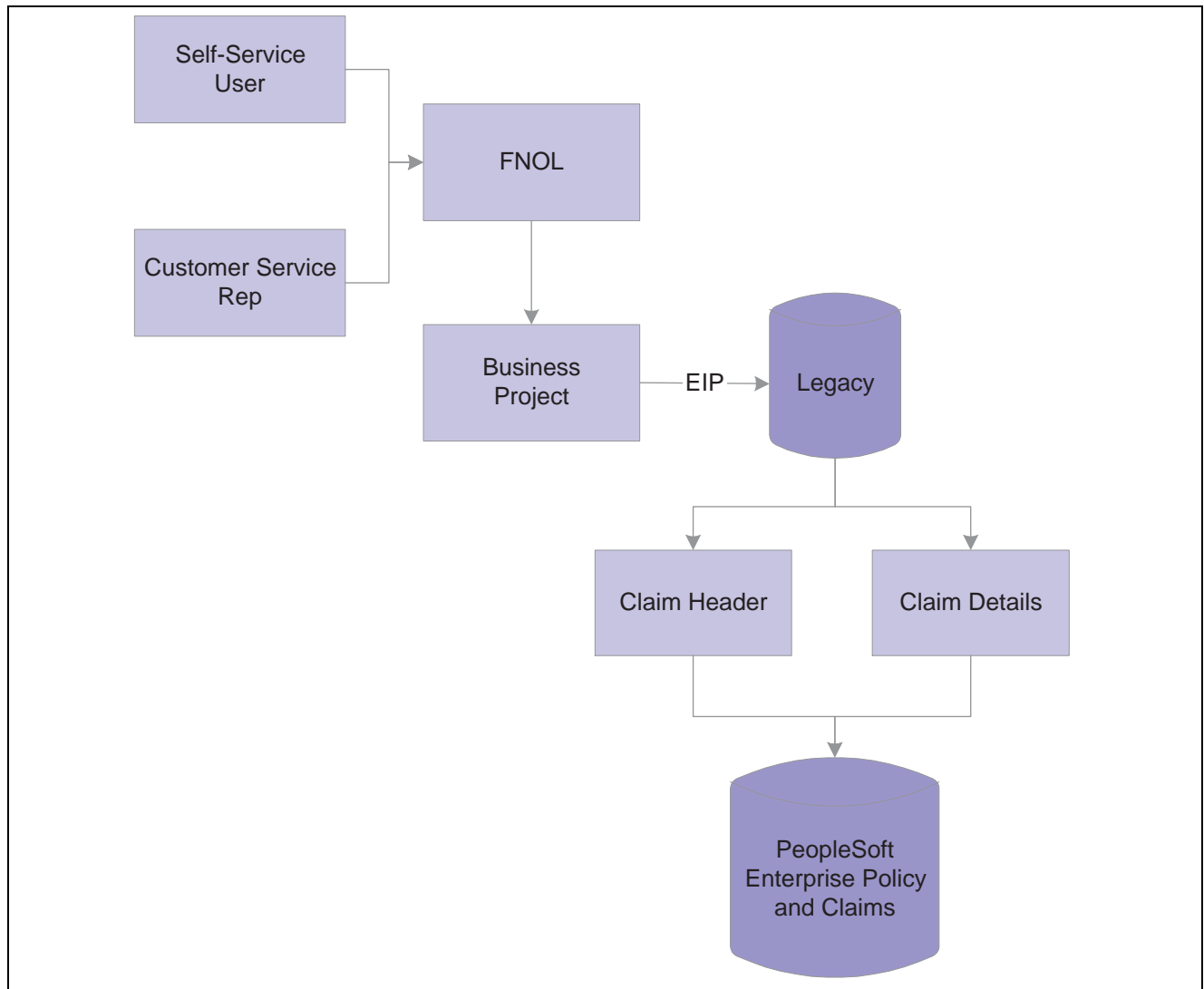
Understanding Claims in PeopleSoft Enterprise Policy and Claims Presentment

In PeopleSoft Enterprise Policy and Claims Presentment, self-service users and customer service representatives can file claims. FNOL initiates the claims process by capturing the event information that eventually triggers a business project. At the end of the business project, a message is sent to the legacy system with all of the captured information.

The legacy system creates, stores, and maintains claim details. Each claim has a header and a detail section. The claim header is stored in the PeopleSoft Enterprise CRM system and is created by an asynchronous message from the legacy system to the PeopleSoft Enterprise CRM system. Claim details can be either fetched from the legacy system on request using synchronous messaging or stored in the PeopleSoft Enterprise CRM system using Asynchronous Messaging functionality.

The customer service representative can view the FNOL, claim header, and claim details.

This diagram illustrates the claims process:



Overview of the claims process

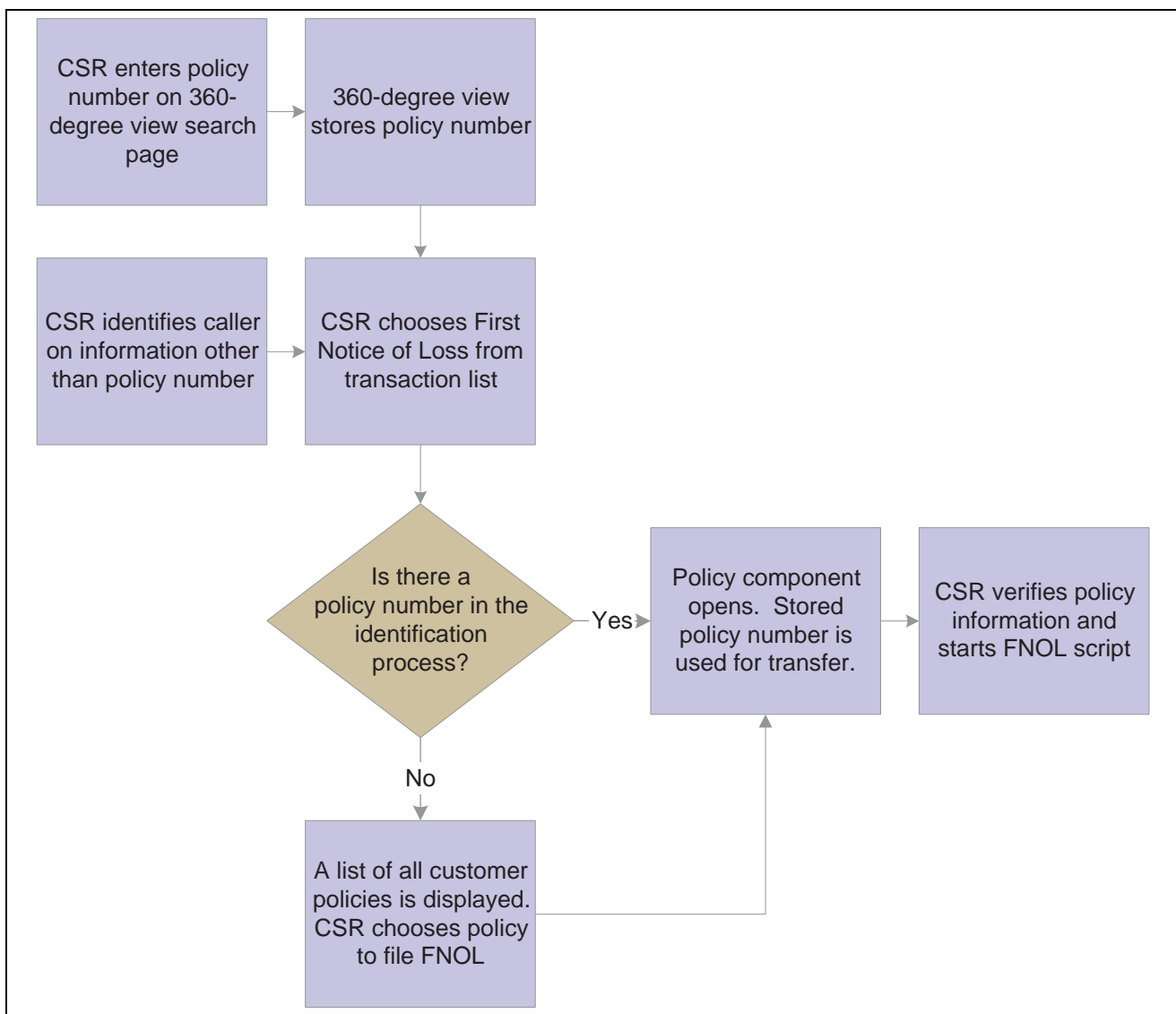
Understanding FNOL

The FNOL initiates the claims process. A policy owner can create a FNOL using a customer care transaction, or a customer service representative can do so through the 360-Degree View.

For the FNOL transaction option to be available, you must associate an action of *First Notice of Loss* (code *FNOL*) with the product of the policy for all of the setIDs. If you do not, you cannot launch a claim. You establish association between the policy type and the mechanism application form or branch script in the product action definition. Each action is also setID driven; for each setID, you must associate this action code with the product.

A FNOL results in one or more claims and the Claim Header enterprise integration point (EIP) establishes the relationship between the FNOL and claims.

This diagram illustrates the FNOL process:



FNOL process

See Also

Chapter 2, “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” page 7

Understanding Claims Submission

Claims processing takes place in the legacy system; PeopleSoft Enterprise Policy and Claims Presentment gathers claims data through the FNOL process and triggers a business project before data is sent to the legacy system.

This section discusses:

- FNOL business projects.
- FNOL business project modifications.

FNOL Business Projects

Once a FNOL is created, a business project is instantiated. You may have many procedural tasks to be performed before submitting FNOL for claim processing. The business project RBI BP FNOL is targeted for this purpose.

PeopleSoft Enterprise Policy and Claims Presentment supplies the business project as system data. The business project is triggered when the FNOL is created. Use standard AAF to instantiate business projects. The delivered business project contains at least one manual task that must be completed before publishing the FNOL message to claims administration. You can add or modify steps and phases to meet your business needs. However, the delivered step that publishes the message must be the business project's last step.

Note. The FNOL business project is delivered disabled and must be enabled to initiate the FNOL process and publish the message.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Business Projects”

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Business Projects”

Business Project Modifications

You can add logic to the Active Analytics Framework (AAF) as needed for the implementation:

- Define the business project.
- Define the AAF to identify the condition on which the business project will be instantiated.

PeopleSoft Enterprise Policy and Claims Presentment delivers a simplified AAF rule to initiate the business project upon save.

- Use a PeopleSoft Application Engine program to publish the message.

This program publishes the message with data from the branch script or application form and the policy number to the third-party system.

Understanding Claims Management

Once the FNOL data has been submitted to the legacy system and a claim has been processed, the customer service representative can access the claim header and claim details. All claims processing and administration takes place in the legacy system. The claim header is stored in PeopleSoft Enterprise CRM; claim details are either retrieved from the legacy system through the use of synchronous messaging or stored in PeopleSoft Enterprise CRM system using an asynchronous message.

Managing FNOL Through a Customer Service Representative

This section discusses how customer service agents:

- Initiate FNOL.
- Confirm policy details.

- Create FNOL.
- Review FNOL.

See Also

Chapter 5, “Working with PeopleSoft Enterprise Policy and Claims Presentment Self-Service,” page 43

Pages Used to Manage FNOL Through a Customer Service Representative

Page Name	Object Name	Navigation	Usage
360-Degree View	RB_TD_AGENT_VIEW	Enter the customer’s name, contact’s name, social security number or tax identification number, or policy number on the 360-Degree View search page	Review customer information.
View Policy,	RBI_POLICY	On the 360-Degree View page, select a <i>Policy</i> from the Policies grid Customer Accounts, Review Financial Accounts, View Policies	Confirm the details of the policy, including covered assets, coverages, limits, deductibles, and options before creating FNOL.
First Notice of Loss,	RBI_FNOL_PG	On the 360-Degree View page, select <i>Add First Notice of Loss</i> from the Go To field and click Go. Financial Services, First Notice of Loss	Report a new FNOL including loss details.

Initiating FNOL

Access the 360-Degree View page.

360-Degree View | Relationship Viewer | Tasks

*Role: Individual Consumer | Go To: | Go

Summary

Name William Brown
Address 2316 Main St., Atlanta, GA, 30344, USA
Phone 001-770/343-4654
Email crmqqa@yahoo.com
Customer Value Gold ★★★★★

Activities

*Date Filter: 6 - Last Year | First | Previous | Next | Last | Left | Right

Overview of - William Brown

- Recommendations - (0)
- Billing Accounts - (1)
- Policy Modifications - (0)
- First Notice of Loss - (4)
- Support Cases - (1)
- Quotes - (1)
- Claims - (0)
- Leads - (0)
- Opportunities - (0)
- Marketing Contacts - (0)
- Interactions - (13) [View All](#)

Recommendations

No Recommendations to display.

Accounts

No Accounts found.

Policies

Policy	Description	Premium
POL5001	Personal Auto	573.34 USD
21016	Personal Auto	50.00 USD
21017	Personal Auto	75.00 USD

Log Interaction

Recent Transactions (Interaction ID:300253)

Sequence number	Description	Comments
1	Policy	Viewed/Updated Policy 000000000002832
2	Policy	Viewed/Updated Policy 21016

360-Degree View page

Go To Select *Add First Notice of Loss* to access the Policy Details page to confirm details. Click the Create FNOL button on the toolbar to access the FNOL script.

First Notice of Loss Click the First Notice of Loss link in the Activities tree to access an existing FNOL.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Using the 360-Degree View”.

Confirming Policy Details

Access the View Policy page.

View Policy | Billing History | Payment History

Covered Assets Find First 1-4 of 4 Last

Asset Type VEHICLE	Details
Asset Description LEXUS GS 300	
Asset Type VEHICLE	Details
Asset Description FORD F150	

View Policy page

A customer service representative can view the covered assets on the policy, with details on assets, coverages, deductibles, limits, and options.

Creating FNOL

Access the Create First Notice of Loss page.

Create First Notice of Loss

1 — 2 Next

Personal Details

Policy Information

Policy Number 21017

Policy Name AUTO POLICY

Policy Status ISSUED

Beneficiary Name JENNIFER PEPPER

Insured Name STAN PEPPER

Registration Name Pepper Auto Acct

Owner Name William Brown

State CA

Create First Notice of Loss page (1 of 2)

Create First Notice of Loss

1 — 2 Previous

Additional Information

Driver and Loss Information

Driver's License A0000000

Expire Date 05/05/201 31

Accident Date 01/12/200 31

Details Single vehicle accident. Slick pavement due to wet road conditions. No injuries reported.

Create First Notice of Loss page (2 of 2)

Note. These screen shots are examples. You must set up an application form or branch script to create a FNOL.

On the Personal Details page, the system displays customer and policy information.

Policy Number Enter the policy number, which comes from the Financial Account component.

Policy Name	Enter the policy name, which comes from the Financial Account component.
Policy Status	Enter the policy status, which comes from the Financial Account component.
Beneficiary Name	Enter the beneficiary who is designated for the policy, if applicable.
Insured Name	Enter the name of the insured, who may or may not be the policy owner.
Registration Name	Enter the name that the insurer gave to the account while registering it.
Owner Name	Enter the policy owner’s name.
State	Enter the state of issue for the policy.
Policy Number	Enter the policy number, which comes from the Financial Account component.
Save for Later	Should not be used when creating a FNOL.
Driver’s License	Enter the insured driver’s license number.
DL Expiry Date (driver’s license expiry date)	Enter the driver’s license expiration date.
Accident Date	Enter the date of the accident.
Details	Enter details of the loss.

Note. The fields on the Additional Information page are delivered as sample data. You can modify the form to meet the business needs.

Reviewing FNOL

Access the First Notice of Loss page.

First Notice of Loss

Refresh

Send Correspondence

360 360-Degree View

Personalize

FNOL Number 300005

Status Open

Customer William Brown

Transaction Information

Transaction Type First Notice of Loss

Policy Number 21017

Transaction Status Open

Review Information

Related Actions

CustomizeFindView All

First1 of 1Last

Type	Description	Status	Datetime Added
First Notice of Loss	Default BP for FNOL	In Process	05/03/2004 4:20PM PDT

First Notice of Loss page

Transaction Type	Indicates type of transaction such as First Notice of Loss
Policy Number	Policy number associated with the FNOL
Transaction Status	Indicates the status of the FNOL

Review Information	Link to application form or branch script completed to create this FNOL.
Related Actions	Business Project and actions associated with the claim.
Claims	Claims created as a result of this FNOL being created.

Viewing Claims

This section discusses how customer service representatives:

- Review claims.
- View claim details.

Pages Used to Review Claims

Page Name	Object Name	Navigation	Usage
Review Claim	RBI_CLAIM_HEADER	Click the Claim link on the 360-Degree View page. Financial Services, Review Claim	View basic claim information including claims resulting from reported FNOL. Retrieve claim header information from the legacy system using the claim detail EIP. The claim header is saved in the PeopleSoft Enterprise CRM system.
Review Claim Details	RBI_CLAIM_HEADER	Click View Claim Details link on the Claim page.	View current details about the claim. Retrieve claim details from the legacy system through asynchronous messaging using the claim details EIP.

Reviewing Claims

Access the Review Claim page.

Claim Details		Claim Notes
Claim Header		
Claim Number	GC-647-89	Claim Date 09/09/2002
Status	Open	Description Claim filed for auto accident
Account Number	100001	Auto Insurance Policy
Customer	William Brown	
Contact Name		
First Notice of Loss		
No First Notice of Loss Found		
View Claim Details		

Review Claim page

Claim Number	Displays the unique identifier for the claim.
Status	The system displays the current status for the claim. The claim status is updated by the EIP. Claim status is set up in Set Up CRM, Product Related, Financial Services, Claim Status. Delivered values are <i>Open</i> , <i>Closed</i> , and <i>Paid</i> . These values are system data and must not be deleted.
Account Number	Displays the policy number for the claim.
Customer	Displays the customer's name. This should be the policy owner.
Contact Name	Displays the name of the contact who represents the customer, if applicable. This could be a contact for a consumer, company, partnership, or alternate capacity.
Claim Date	Displays the date when the claim was filed.
Description	Displays a brief description of the claim.
First Notice of Loss	FNOL which triggered the creation of the claim.
View Claim Details	Click to view detailed information about the claim.

Viewing Claim Details

Access the Review Claim Details page.

Review Claim

Claim Header

Claim Number

GC-647-89

Claim Date

09/09/2002

Status

Open

Description

Claim filed for auto accident

Account Number

100001

Auto Insurance Policy

Customer

William Brown

Contact Name

First Notice of Loss

No First Notice of Loss Found

View Claim Details

Details

Find | View All

First 1 of 1 Last

CLAIM STATUS DATE: 04-04-2002
REPORTED DATE: 01-23-2002
LOSS DATE: 01-22-2002
LOSS TIME: 11:30 AM
WHERE OCCURRED: Northbound I-93 Burlington exit ramp.
PREVIOUSLY REPORTED: No
INCIDENT DESCRIPTION: Vehicle 1 driven by insured party John Smith struck Vehicle 2 driven by Matthew Jones at the north bound Interstate 93 exit ramp in Burlington, MA. Vehicle 1 sustained front-end body and engine damage, and driver 1 sustained a broken right leg. Vehicle 2 sustained rear-end body damage and suspension and drive train damage. Driver 2 was not apparently injured. State Police were notified. Both vehicles were towed to Al's Body Shop in Arlington. Driver 2 claims that personal property he left in his car was missing when he went back to the body shop to retrieve it.
ADDITIONAL CLAIM INDICATOR: Yes
VIOLATIONS/CITATIONS INDICATOR: Yes
PROBABLE INCURRED AMOUNT: 32000 USD

ADJUSTER SECTION: (Section may repeat)
Adjuster ID 1: HC-9938
Kirk Mulholland
412-B Market Street
Arlington, MA 01167

Review Claim Details page

This page includes claim details, adjuster information, and payment information. The claim details EIP retrieves the information from the legacy system. The setup of the claim details EIP determines what information appears on the Review Claim Details page.

See Chapter 2, “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” page 7.

CHAPTER 5

Working with PeopleSoft Enterprise Policy and Claims Presentment Self-Service

This chapter provides an overview of PeopleSoft Enterprise Policy and Claims Presentment Self-Service and discusses how to:

- Work with PeopleSoft Enterprise Policy and Claims Presentment Self-Service transactions.
- Change policies.
- Report a First Notice of Loss (FNOL).
- View claims.

Understanding PeopleSoft Enterprise Policy and Claims Presentment Self-Service

This section lists prerequisites and discusses:

- Self-service access.
- Self-service management.

Self-Service Access

Two types of self-service users can access the site:

- Guest users.
- Registered users.

Guest User Access

When users first access the site, they are automatically logged in using the INSGUEST ID that is identified in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access.

Then, users can sign in with their own user ID and password to further identify themselves and get additional access. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics, such as the site language.

If you have more than one guest ID, users can switch to a different one by selecting a value from the drop-down list box on the page. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics.

Registered User Access

Visitors can register as personal users by clicking the Personal User Registration link and establishing a personal user ID. This prompts the system to create a consumer record for that person, and the registration causes the system to create a user ID that is associated with the new consumer record and that the visitor can use to sign in on subsequent visits to the site. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options, and in some cases, page appearance depend on the user's role or roles.

Users who forget their passwords can click the Password Hint link to request a new password.

Self-Service Management

The self-service menu enables the self-service user to perform these transactions:

Menu Item	Description
Policy Administration	Modify policies.
Browse Catalog	View product catalogs, view information about product offerings, and request quotes online.
Profile	Change the username, password, default address, phone number, and email address; view and maintain an address book; and view internal contact information.
Customer Selection	Select the role for the current transaction.
Contact Us	Create an email that will be directed to the appropriate area in the organization.
Customer Care	Create FNOL, update claims, and log complaints.

Prerequisites

Self-service functionality for PeopleSoft Enterprise Policy and Claims Presentment is based on core functionality for case and product catalog. Detailed information on setting up and managing self-service is available in these PeopleBook chapters:

Process	Details	More Information
Setting up customer self-service	<ul style="list-style-type: none"> Define guest IDs. Set up user registration features. Set up Contact Us features. 	See <i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “Setting Up Customer Self-Service”.
Working with customer self-service	<ul style="list-style-type: none"> Sign in to PeopleSoft self-service. Register as a personal user. Maintain name and sign-in information. Maintain a customer’s contact and address information. Maintain a customer’s address book. View internal contacts. Send messages. 	See <i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “Working with Customer Self-Service Transactions”.
Configuring self-service	<ul style="list-style-type: none"> Hide specific fields in self-service case components. Configure ‘Contact me’ notifications. Associate solutions with reasons that self-service users provide for closing cases. Update descriptions of the predefined searches that the users of self-service components use. Set up FAQs and troubleshooting guides. 	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Configuring Self-Service Applications”.
Working with self-service transactions	<ul style="list-style-type: none"> Create an FNOL. Manage existing FNOL. Search for solutions. Use FAQs and troubleshooting guides. 	See <i>PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook</i> , “Self-Service for Customers”.

Changing Policies in Self-Service

The self-service user can make changes to policies online.

This section discusses how to change policies.

Pages Used to Change Policies in Self-Service

Page Name	Object Name	Navigation	Usage
Policy Administration	RBI_CHG_POLICY_SS	Click the Policy Administration link on the main menu in self-service	Access the Change Policy component.
Change Policy	RBF_PROD_APPLY_SA	Click the Change Policy button on the Policy Administration page in self-service	Modify policies.

Administering Policies in Self-Service

Access the Policy Administration page.

Policy Administration page

Account Number	Select a policy number that is associated with the user's role. You can modify only those policies that are authorized for the user in the security matrix.
Modification Type	Select the action that is associated with the product. Defines the changes a policy owner can make to the policy.
Change Policy	Click to submit the policy change request. When the user clicks this button, more information will be captured to complete the change and a confirmation number is returned. If the Policy change requires re-quoting, a new quote provided. After the quote is accepted and purchased, a change policy request is sent to the legacy system to modify the policy. The legacy system updates the policy and sends the changes back to the PeopleSoft Enterprise CRM system. The PeopleSoft Enterprise CRM system subscribes to the published changes to the policy and eventually updates the policy.

Reporting a FNOL in Self-Service

Access the policy through the My Policy pagelet to create a FNOL.

This section discusses how self-service users:

- Review financial account information.

- Review insurance policy details.
- Report FNOL.

Pages Used to Report a FNOL in Self-Service

Page Name	Object Name	Navigation	Usage
Financial Account	RBF_FIN_ACCOUNT_SS	Click the policy number link on the My Policies pagelet in self-service	Review policy details.
Insurance Policy	RBI_POLICY_SS	Click the View Policy button on the Financial Account page in self-service	Review covered assets, coverages, deductibles, limits, and options for the selected policy.

Reviewing Financial Account Information in Self-Service

Access the Financial Account page.

Financial Account

View Policy

View Claim Summary

Account Information

System Source Code

BSCS

Billing Account

Status

Open

Named Insured

William Brown

Partner Name

Lopez and Lee LLP

Description

Personal Auto

Begin Date

Account Type

Insurance

Last Statement Date

Registration Type

Individual

TIN Type

Social Security Number

Registration Name

Auto Policy acct

Tax ID

102003000

New Nickname

My Auto Policy

Currency Code

USD

Last Refresh

03/30/2004 8:16PM

Revenue Basis

YTD Revenue

346.45

Where Held

PeopleBank

Last Year's Revenue

345.34

Address

3445 Amador Plaza Road,Dublin,CA,USA

Insurance Account

Policy Type

Auto Insurance

Policy Name

WILLIAM BROWN AUTO

Policy Status

Policy is issued and available for change

Policy Version

1

Insured Name

William Brown

State

CA

Premium Amount

573.34

Payment Terms

Monthly

Carrier Name

All State Indemnity Company

Payor Name

Product Code

Line of Business Code

Automobile - Personal

NAIC Code

Line of Business Subcode

Comprehensive General

Financial Account page

View Policy

Click to access the Insurance Policy page.

View Claim Summary Click to access the Claim Summary page.

Note. System administrators can use Insurance Translate Values to define valid prompt values for various fields in the application. The navigation is Set Up CRM > Product Related > Financial Services > Insurance Translate Values. This enables administrators to add, remove, or change values without logging into PeopleSoft Application Designer. This applies to both Financial Account and Policy pages (Agent-facing and Self-Service). The component name is RBI_XLAT_VALUE_INS.

See [Chapter 3, “Working with Policies,” page 13](#).

Reviewing Insurance Policy Details in Self-Service

Access the Insurance Policy page.

Insurance Policy page

- View Billing History** Click to access detailed billing history by date range.
- View Payment History** Click to access detailed payment history by date range.
- Change Policy** Click to initiate a policy modification request such as changing an address or adding an authorized driver.
- Create First Notice of Loss** Click to create a new FNOL.
- Details** Click to access asset information details.

Reporting FNOL in Self-Service

Access the Create First Notice of Loss Page

Create First Notice of Loss

1 2 Next

Personal Details

Policy Information

Policy Number 21017

Policy Name AUTO POLICY


Policy Status ISSUED

Beneficiary Name JENNIFER PEPPER

Insured Name STAN PEPPER

Registration Name Pepper Auto Acct

Owner Name William Brown

State CA 

Create First Notice of Loss page (1 of 2)


Create First Notice of Loss


1 2 Previous

Additional Information

Driver and Loss Information

Driver's License A0000000

Expire Date 05/05/201 

Accident Date 01/12/20 

Details Single vehicle accident. Slick pavement due to wet road conditions. No injuries reported.

Create First Notice of Loss page (2 of 2)

Note. These screen shots are only examples. You must set up an application form or branch script for self-service users to be able to create a FNOL.

Policy Number	Enter the policy number, which comes from the Financial Account component.
Policy Name	Enter the policy name, which comes from the Financial Account component.
Policy Status	Enter the policy status, which comes from the Financial Account component.

Beneficiary Name	Enter the beneficiary who is designated for the policy, if applicable.
Insured Name	Enter the name of the insured, who may or may not be the policy owner.
Registration Name	Enter the name that the insurer gave to the account while registering it.
Owner Name	Enter the policy owner's name.
State	Enter the state of issue for the policy.
Save for Later	Should not be used when creating a FNOL.
Driver's License	Enter the insured driver's license number.
DL Expiry Date (driver's license expiration date)	Enter the driver's license expiration date.
Accident Date	Enter the date of the accident.
Details	Enter details of the loss.

Viewing Claims in Self-Service

The self-service user can view claims information using the Claims link on the self-service homepage.

This section discusses how to review claim details.

Pages Used to View Claims in Self-Service

Page Name	Object Name	Navigation	Usage
Review Claim	RBI_CLAIMHDR_SS_PG	Click the claim number link on the My Claims pagelet in self-service	Review claim details and access the FNOL that is associated with the claim.

Reviewing Claim Details in Self-Service

Access the Review Claim page.

Review Claim

Claim Header

Claim Number

GC-647-89

Claim Date

09/09/2002

Status

Open

Description

Claim filed for auto accident

Account Number

100001

Auto Insurance Policy

Customer

William Brown

Contact Name

First Notice of Loss

No First Notice of Loss Found

View Claim Details

Details

Find | View All First 1 of 1 Last

CLAIM STATUS DATE: 04-04-2002
REPORTED DATE: 01-23-2002
LOSS DATE: 01-22-2002
LOSS TIME: 11:30 AM
WHERE OCCURRED: Northbound I-93 Burlington exit ramp.
PREVIOUSLY REPORTED: No
INCIDENT DESCRIPTION: Vehicle 1 driven by insured party John Smith struck Vehicle 2 driven by Matthew Jones at the north bound Interstate 93 exit ramp in Burlington, MA. Vehicle 1 sustained front-end body and engine damage, and driver 1 sustained a broken right leg. Vehicle 2 sustained rear-end body damage and suspension and drive train damage. Driver 2 was not apparently injured. State Police were notified. Both vehicles were towed to Al's Body Shop in Arlington. Driver 2 claims that personal property he left in his car was missing when he went back to the body shop to retrieve it.
ADDITIONAL CLAIM INDICATOR: Yes
VIOLATIONS/CITATIONS INDICATOR: Yes
PROBABLE INCURRED AMOUNT: 32000 USD

ADJUSTER SECTION: (Section may repeat)
Adjuster ID 1: HC-9938

Review Claim page

Claim Number	Displays the unique identifier for the claim.
Account Number	Displays the policy number for the claim.
Customer	Displays the customer's name. This should be the policy owner.
Contact Name	Displays the name of the contact who represents the customer, if applicable. This could be a contact for a consumer, company, partnership, or alternate capacity.
Claim Date	Displays the date when the claim was filed.
Description	Displays a brief description of the claim.
First Notice of Loss	FNOL which triggered the creation of the claim.
View Claim Details	Click to view detailed information about the claim.

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	Azerbaijani 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 Franc
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	Maldiva 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	<p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p>

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 <i>receivables specialist</i> . 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 <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
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	<p>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.</p> <p>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.</p>
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	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
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	<p>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.</p> <p>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.</p>
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 <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft 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	<p>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.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
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 <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
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 <i>1</i> —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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft 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	Metastings are special expressions included in SQL string literals. The metastings, 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 <i>compensation object</i> .
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 <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	<p>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.</p>
record output VAT flag	<p>Abbreviation for <i>record output value-added tax flag</i>.</p> <p>See <i>record input VAT flag</i>.</p>
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 <i>real-time event notification server</i> 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 <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft 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 <i>value-added tax exception</i> . 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 <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft 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 <i>zero-rated value-added tax</i> . 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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