PeopleSoft®

PeopleSoft 8 SP1
Gradebook PeopleBook

August 2002

PeopleSoft 8 SP1
Gradebook PeopleBook
SKU SA8SP1SGR-B 0802

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Printed in the United States.

Contents

About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements 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.

See *Using 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 Website, http://www.peoplesoft.com/corp/en/login.asp

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 PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
`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.

Typographical Convention or Visual Cue	Description
. . . (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 (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below 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.

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.

A note that is preceded by *Important!* 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.

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.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Gradebook Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or it is documented with common elements for the section, chapter, playbook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft 8 SP1 Gradebook PeopleBook* provides you with implementation and processing information for your PeopleSoft Gradebook system. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

The *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook* consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft Student Administration Solutions and Contributor Relations Solutions product lines. Whether you are implementing only one application , some combination of applications within the product line, or the entire PeopleSoft Student Administration and Contributor Relations Solutions system, you should be familiar with the contents of this central playbook. It is the starting point for fundamentals, such as setting up control tables and administering security.

In addition to the *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook,* you should review the *PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook.* This playbook provides an overview of the Campus Community setup tables, and describes many features that are basic building blocks for both PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "PeopleSoft Campus Community Preface"

CHAPTER 1

Getting Started With PeopleSoft Gradebook

This chapter provides an overview of PeopleSoft Gradebook business processes and discusses PeopleSoft Gradebook implementation tasks.

PeopleSoft Gradebook Business Processes

The PeopleSoft Gradebook application offers the following business processes:

- Class Assignments
- Grade Entry
- Grade Export
- Assignment Review
- Grade Review

PeopleSoft Gradebook Implementation

This section discusses tasks to perform when preparing to implement PeopleSoft Gradebook.

Setting Up Core PeopleSoft Gradebook Tables

The steps that are discussed in this section provide the order in which you define information in the core PeopleSoft Gradebook tables.

Setting up these core tables prepares the system for self-service grading.

Step	Reference
1. Define assignment categories.	Chapter 2, "Using the Self-Service Gradebook," Defining Assignment Categories, page 12
2. Define Gradebook Uniform Resource Locators (URL's).	Chapter 2, "Using the Self-Service Gradebook," Defining Gradebook URLs, page 14
3. (Optional) Define course assignment default values.	Chapter 2, "Using the Self-Service Gradebook," Defining Course Assignment Defaults, page 15

CHAPTER 2

Using the Self-Service Gradebook

This chapter provides an overview of PeopleSoft Gradebook and discusses how to:

- Review dates and grade calculations in PeopleSoft Gradebook.
- Access PeopleSoft Gradebook.
- Define assignment categories.
- Define PeopleSoft Gradebook Uniform Resource Locators (URLs).
- Create class assignment data.
- Enter grades.
- Export grades.
- Review class assignments.

Note. PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations offer self-service applications that are licensed separately. If you have licensed the PeopleSoft Gradebook application, you can use the self-service pages that are described here.

See Also

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook, "Introducing Collaborative Applications"

Understanding PeopleSoft Gradebook

This section lists prerequisites and common elements and provides an overview of PeopleSoft Gradebook.

PeopleSoft Gradebook is a collaborative, self-service application for instructors and students.

Instructors can use this application to set up class assignments and due dates, enter grades for individual assignments, submit midterm grades for deficiency reporting, communicate with students, and submit final grades.

Students can use this application to check their current assignments, view their grades, review personal comments from their instructor, and view their midterm and final grades.

PeopleSoft Gradebook Users and Functions

The users and functions of the PeopleSoft Gradebook are as follows:

- Staff members create assignment categories.
- Staff members define PeopleSoft Gradebook URLs.
- (Optional) Staff members create course catalog assignment default values.
- Instructors create class assignments.
- Instructors enter, import, and update grades.
- Instructors export grades to a local drive.
- Students review class assignments and grades.

Prerequisites

Before instructors and students can use the self-service PeopleSoft Gradebook, a power user must:

- Understand the way that the system calculates grades in the PeopleSoft Gradebook.
- Create assignment categories on the Gradebook Category Page.

  Assignment categories are high level groups of assignments that an instructor might track (for example, homework, extra credit, quizzes, tests, midterm, final, and so on.) Instructors cannot set up assignment categories through the self-service application, although they can access the page through PeopleSoft Campus Portal or through regular database access if you grant them security. Traditionally, administrators, not instructors, set up assignment categories.
- Ensure that each instructor has appropriate grade roster access for the PeopleSoft Gradebook classes.

  The following table explains the three levels of access:

Grade Roster Access	Add and Delete Class Assignments	Modify Class Assignments	Enter Grades	Update Grades to Grade Roster	Set Grade Roster To
Grade	No	Yes	Yes	Yes	Ready for Review
Approve	Yes	Yes	Yes	Yes	Approved
Post	Yes	Yes	Yes	Yes	Approved

- Ensure that each instructor and student that needs to use PeopleSoft Gradebook has the appropriate security access.
- Ensure that the instructors have activated the PeopleSoft Gradebook information for their class (by accessing the Course Assignments component and saving it), so that students who are enrolled in a class can access the gradebook data.
- (Optional) Define your institution’s PeopleSoft Gradebook File Transfer Protocol (FTP) server and URL address so that if an instructor wants to export grades to a Microsoft Excel spreadsheet, the system has a temporary place for the file.

- (Optional) Set up class assignment defaults at the course catalog level on the Course Assignments - Assignments Page, the Course Assignments - Category Weight Page, and the Course Assignments - Grading Scale Page. Class assignment defaults are especially advantageous for classes that are always taught with the same curriculum, because you set up the assignments once at the catalog level, and the system populates the values to the class level when an instructor first accesses the Gradebook for his or her class. You can also use this component to specify assignments, such as a final examination, that are required by the institution.

Common Elements Used in This Chapter

Assessed
Select to specify that the assignment can be graded. Any assignment can be assessed, whether or not it is set to *Required*. If you clear this check box, no grade input field appears on the Class Gradebook page or the Grade by Assignment page.

Description
Enter the description for the assignment, assignment category, or location.

Grade
Select a grade for each mark. Grade values are entered in your system as translate values and assigned to grade bases on the Grading Scheme Table page.

Mark
Select the minimum percentage for the grade that is earned. The system uses this value to calculate the final grade (which the instructor can override). Students must have a percentage that is equal to or greater than a specific mark to receive the corresponding grade. One grade value should have a blank mark value (such as a Fail grade). No duplicate marks are allowed.

Maximum Points
Enter the maximum points for the assignment. This value is used in all weighted average calculations. The student's grade for an assignment is Grade/Maximum Points.

Required
Select to specify that this assignment is not optional but is required of all students unless it is overridden on a student-by-student basis. If you clear this check box, students are not penalized if they are missing a grade for this assignment. Instructors can use this check box to differentiate between required and optional, extra-credit assignments.

Note. If a category has no required assignment, the category, including extra-credit assignments is not calculated in the grade

---

Required by Institution
Select to specify that this assignment is an institutional requirement for the course. Assignments that have this check box selected appear by default on the class Assignments page and cannot be deleted by the instructor. The system limits instructor changes.

Short Description
Enter a short description of the assignment or assignment category.

Weight% (weight percentage)
Enter a weight percentage value for each assignment category. The total of all weight percentage values for a component must equal 100. This value determines how each assignment category contributes to the midterm and final (current) grades. If the total percentage is not 100, an error message appears.

Weight in Points
Enter the weight in points for the assignment. For example, if a quiz that contributes its full points (on a one-to-one basis) toward the cumulative

grade, enter the same value as the maximum points value. If the quiz counts double, double the maximum points value and enter the result as the Weight in Points value. The system populates this field with the value from the Maximum Points field.

Reviewing Dates and Grade Calculations in PeopleSoft Gradebook

PeopleSoft Gradebook allows for complicated grade calculations, but it also accommodates simple, straightforward averages. The simplest way to calculate grades is to have only one category and have the maximum points for each assignment equal the assignment weight. The result is a simple average.

On the other hand, you can define multiple assignments that are organized in different assignment categories (for example, homework assignments in the Homework category, quizzes in the Quiz category, and so on). That way each assignment can have its own maximum points and weight (in points), and the assignment category itself can have a specific percentage of the overall grade. For example, the assignments that make up the homework category overall can comprise 25 percent of the final grade, and the Quiz category overall can comprise 50 percent of the overall grade.

This section discusses how the system calculates grades.

How the System Calculates Grades

The system calculates weighted grades for individual assignments as follows:

(Student's Grade in Points × Assignment Weight) / Maximum Grade in Points for the Assignment

The system calculates cumulative assignment category grades as follows:

Total of Assignment Weighted Grades / Total Weight of Assignments that Count for the Category (not including extra credit)

The system excludes ungraded assignments from calculation until the due date. The system also excludes an assignment from the calculation if either of the following is true:

- The assignment is designated as optional, and the assignment has not been graded.
- The assignment, graded or ungraded, is excluded for specific students on the Class Gradebook page.

Calculation Examples

A class grade is based on 30 percent homework, 30 percent tests, 30 percent class presentations, and 10 percent final examination.

There are 5 homework assignments, each worth 10 points, and the weight of each is 10 points.

There are three tests, each with a maximum of 100 points: The second test is weighted at 200 points, and the other two are weighted at 100 points.

There is one presentation: The maximum grade is 20 points, and the weight is the same. The final examination is one test, for 200 points and weighted at 200 points.

David's grades are:

- Homework: 8, 7, 9, 9, 8.
- Tests: 85, 93, 90.
- Presentation: 19.
- Final examination: 167.
- His homework grade is calculated as:

  [(8 * 10 / 10) + (7 * 10 / 10) + (9 * 10 / 10) + (9 * 10 / 10) + (8 * 10 / 10)] / (10 + 10 + 10 + 10 + 10) = 41 / 50 = 82%.
- His test grade is calculated as:

  [(85 * 100 / 100) + (93 * 200 / 100) + (90 * 100 / 100)] / (100 + 200 + 100) = 361 / 400 = 90.25%.
- His presentation grade is calculated as:

  (19 * 20 / 20) / 20 = 95%.
- His final examination grade is calculated as:

  (167 * 200 / 200) / 200 = 83.5%.
- His total grade is calculated as:

  [(82 * 30 / 100) + (90.25 * 30 /100) + (95 * 30 / 100) + (83.5 * 10 / 100)] / 100 = (24.6 + 27.075 + 28.5 + 8.35) / 100 = 88.53%.
- If the system calculates the grade before the final is due, the final category is ignored:

  [(82 * 30 / 100) + (90.25 * 30 / 100) + (95 * 30 / 100)] / 90 =(24.6 + 27.075 + 28.5) / 90 = 89.08%.

Grades Over Time

The above grades reflect the grade at or toward the end of the class. Consider Lisa's grades for another class, at different dates:

Maximum grades are:

- Homework assignment - 10 points.
- Quiz - 100 points.
- Class presentation - 20 points.
- Final grade -100 points.

For this example, the assignment weights equal the maximum points.

This class grade is also based on 30 percent homework, 30 percent tests, 30 percent class presentations, and 10 percent final examination.

Assignment	Due Date	Grade
Homework 1	02/11/2001	10

Assignment	Due Date	Grade
Quiz 1	02/15/2001	80
Homework 2	03/01/2001	8
Class Presentation 1	03/05/2001	20
Quiz 2	03/30/2001	90
Class Presentation 2	04/10/2001	0 (never submitted)
Quiz 3	04/15/2001	85
Homework 3	04/30/2001	7
Homework 4	05/01/2001	9
Final	05/15/2001	96

Assuming that all the assignments were graded on the due date:

On March 1, 2001, the assignments due include Homework 1, Homework 2, and Quiz 1. The categories of Class Presentations and Final do not count because no assignments for these categories are due:

- Homework grade: (10 /10 / 10 + 8 /10 / 10) / 20 = 90%.
- Quiz grade: (80 / 100 / 100) / 100 = 80%.
- Final grade: [90 / 30 / 100 + 80 / 30 / 100] / 60 = 85%.

On April 30, 2001, the assignments due include Homework 1, 2, and 3, Quizzes 1 and 2, and Class Presentations 1 and 2. Class Presentation 2 was never submitted, so after the due date, the grade is 0. The final grade for this date includes homework, quizzes, and class presentations:

- Homework: (10 * 10 / 10 + 8 * 10 / 10 + 7 * 10 / 10) / 30 = 83.33%.
- Quizzes: (80 * 100 / 100 + 90 * 100 / 100 + 85 * 100 / 100) / 300 = 85%.
- Class Presentations: (20 * 20 / 20 + 0 * 20 / 20) / 40 = 50%.
- Final: [83.33 * 30 / 100 + 85 * 30 / 100 + 50 * 30 / 100] / 90 = 72.78%.

The final grade on May 15, 2001 includes Homework 4 and the final grade.

- Homework: (10 * 10 / 10 + 8 * 10 / 10 + 7 * 10 / 10 + 9 * 10 / 10) / 40 = 85%.
- Quizzes: (80 * 100 / 100 + 90 * 100 / 100 + 85 * 100 / 100) / 300 = 85%.
- Class Presentations: (20 * 20 / 20 + 0 * 20 / 20) / 40 = 50%.

- Final: (96 * 100 / 100) / 100 = 96%.

On May 15, 2001, the final grade will be:

[85 * 30/100 + 85 * 30/100 + 50 * 30/100 + 96 *10/100] / 100 = 75.6%.

An instructor can change an assignment due date for a specific student. The date that the system uses in the calculations is the student's assignment due date.

Note. When an instructor changes a due date for an assignment to a later date or adds an extended due date, the system assigns the later due date to the student record the next time the instructor accesses PeopleSoft Gradebook.

The dates and grading for open entry and open exit classes work the same way, taking into account the student's own due dates.

Accessing PeopleSoft Gradebook

This section discusses how to:

- Access the Class Assignments component to create, review, or edit class assignments; access the Gradebook component to enter or review grades and comments, export grades to Microsoft Excel, or update grades to the grade roster for posting.
- Access the View My Assignments page to view summary information about class assignments and cumulative grades and link to pages containing greater detail.

There are three primary users of PeopleSoft Gradebook. The following table shows these users and their possible modes of access.

User	Component	Direct Menu Navigation	Gradebook Homepage	Learning Management Homepage	Learner Services Homepage
Administrator	Gradebook Category	Yes	No	No	No
	URL Maintenance	Yes	No	No	No
	Course Assignments	Yes	No	No	No
Instructor	Access Gradebook	Yes	Yes	Yes	No

User	Component	Direct Menu Navigation	Gradebook Homepage	Learning Management Homepage	Learner Services Homepage
	Class Assignments	Yes	Yes	Yes	No
Student	View My Assignments	Yes	Yes	No	Yes

Administrators access the Gradebook Category Page directly through the system's menu navigation to create high-level assignment categories that instructors can use to cluster their assignments (for example, Homework, Quizzes, Tests, Participation, and so on). This is setup data that you must create before instructors can use PeopleSoft Gradebook.

The Gradebook Category page is not designed for self-service. In addition, administrators can, as an option, access the Course Assignments - Assignments Page, the Course Assignments - Category Weight Page, and the Course Assignments - Grading Scale Page, to set up course assignments at the catalog level that the system populates to the class level by default. Finally, an administrator must define an FTP server and URL address if you want to enable instructors to export grades to an Excel spreadsheet on their local drive.

Instructors access PeopleSoft Gradebook to create assignments and enter grades. They can do this through:

- Instructor Gradebook homepage.
- Learning Management homepage.
- Menu navigation.
- PeopleSoft Campus Portal (licensed separately from PeopleSoft Gradebook).

Students access PeopleSoft Gradebook to review their assignments, due dates, and current grades. They can do this through:

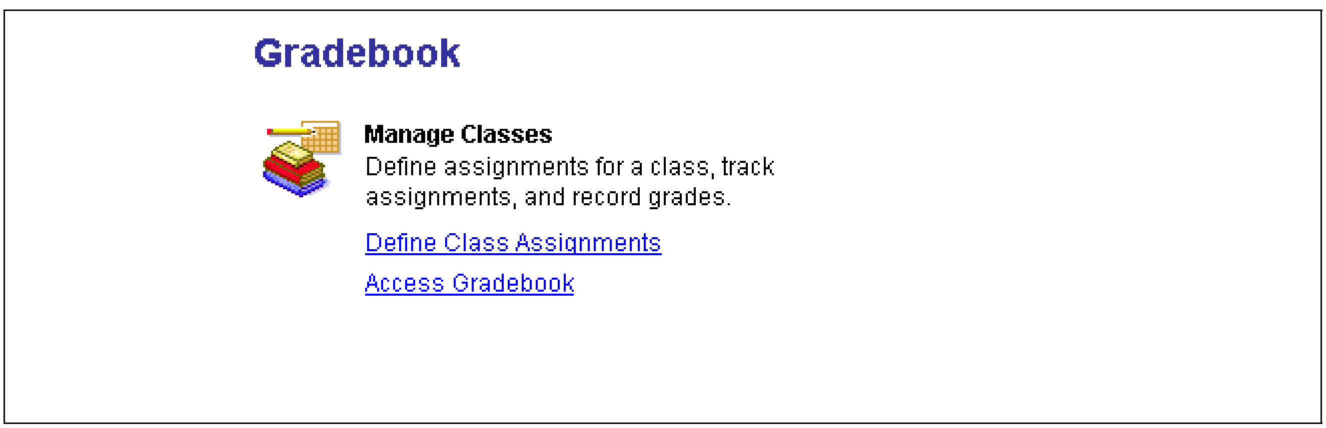
- Student Gradebook homepage.
- PeopleSoft Learner Services homepage.
- Menu navigation.
- PeopleSoft Campus Portal (licensed separately from PeopleSoft Gradebook).

Pages Used to Access PeopleSoft Gradebook

Page Name	Object Name	Navigation	Usage
Instructor Gradebook	LAM_GRADEBK_INSTR	SA Self Service, Gradebook, Home, Gradebook, (Instructor) Gradebook	Create, review, or edit class assignments. Enter or review grades and comments, export grades to Microsoft Excel, or update grades to the grade roster for posting. The alternative way for instructors to access the gradebook pages is through the Learning Management homepage, menu navigation, or through the PeopleSoft Campus Portal.
Student Gradebook	LAM_GRADEBK_STDNT	SA Self Service, Gradebook, Home, Gradebook, (Student) Gradebook	Review summary information about class assignments and cumulative grades and link to pages containing greater detail. The alternative ways for students to access the gradebook pages is through the Learner Services homepage, a link on the View My Schedule page in PeopleSoft Learner Services, menu navigation, or through the PeopleSoft Campus Portal.

Accessing the Class Assignments or Gradebook Component

Access the Instructor Gradebook homepage.



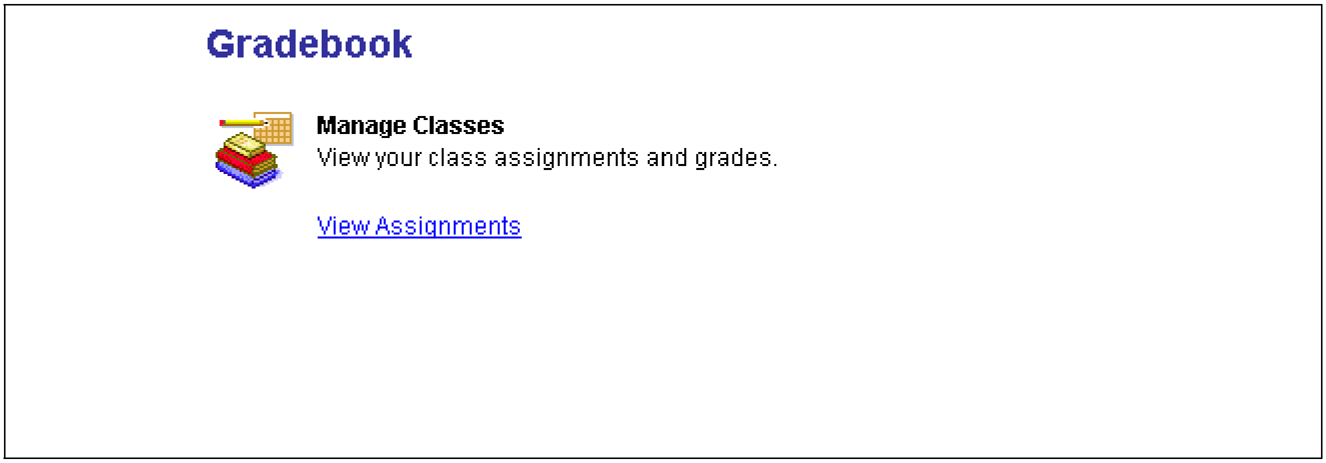
Instructor Gradebook homepage

Define Class Assignments Click the link to access the Class Assignments component, where you can create, review, or edit your class assignments.

Access Gradebook Click the link to access the Gradebook component, where you can enter or review grades and comments, export grades to Microsoft Excel, or update grades to the grade roster for posting.

Accessing the View My Assignments Page

Access the Student Gradebook homepage.



Student Gradebook homepage

Students can click the View Assignments link to access the View My Assignments Page, where they can view summary information about their class assignments, their cumulative grades, and link to pages of greater detail.

Defining Assignment Categories

Before instructors can set up their Gradebook data, a power user needs to define assignment categories. Assignment categories are high level groupings of assignments that an instructor might track (for example, homework, extra credit, quizzes, tests, midterm, final, and so on.) Traditionally, administrators, not instructors, set up assignment categories.

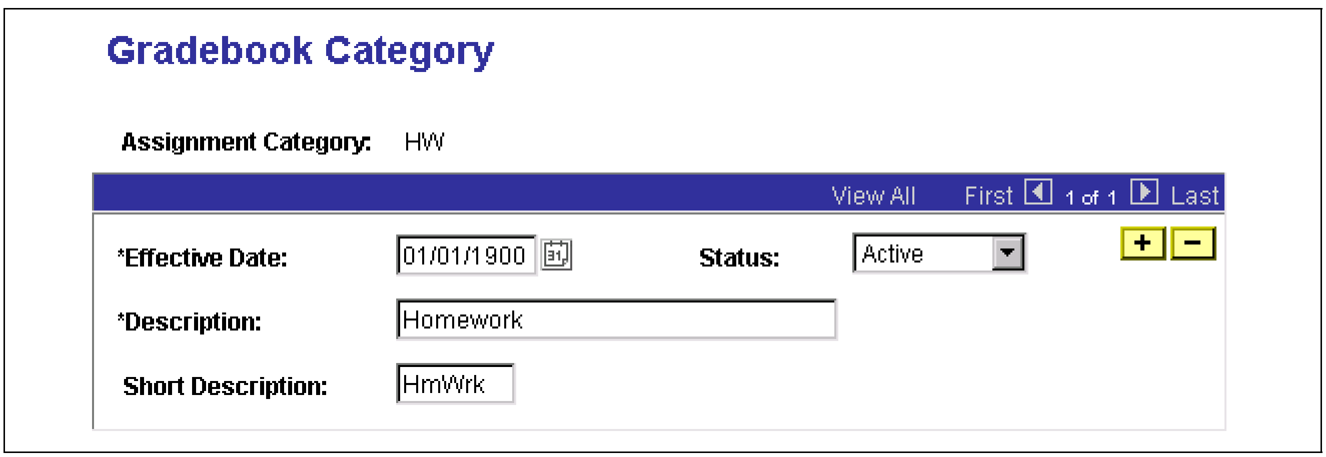
This section discusses how to define assignment categories.

Page Used to Define Assignment Categories

Page Name	Object Name	Navigation	Usage
Gradebook Category	LAM_TYPE	Manage Student Records, Establish Courses, Setup, Gradebook Category, Gradebook Category	Define assignment categories. When you access the page, enter an alphanumeric Assignment Category (1 to 10 characters in length). Instructors cannot set up assignment categories through the self-service application, although they can access the page through PeopleSoft Campus Portal or through regular database access if you grant them security.

Defining Assignment Categories

Access the Gradebook Category page.



Gradebook Category page

Effective Date

Enter an effective date for the assignment category. The assignment category must be active as of the course an class component effective date to which the assignment is attached.

Status

Select a status for the assignment category. Values are:

Active: Select when adding a new assignment category.

Inactive: Select only if your institution no longer uses the assignment category. In particular, do not inactivate assignment category values that are assigned to ungraded class components. Doing so would orphan gradebook data.

Defining Gradebook URLs

Instructors can export PeopleSoft Gradebook data to their local drive. PeopleSoft Gradebook provides an export utility; to use it, you must first define an FTP server and URL address for the extract file.

This section provides a prerequisite and discusses how to define an FTP server and URL address.

See Also

Chapter 2, "Using the Self-Service Gradebook," Exporting Grades, page 38

Prerequisite

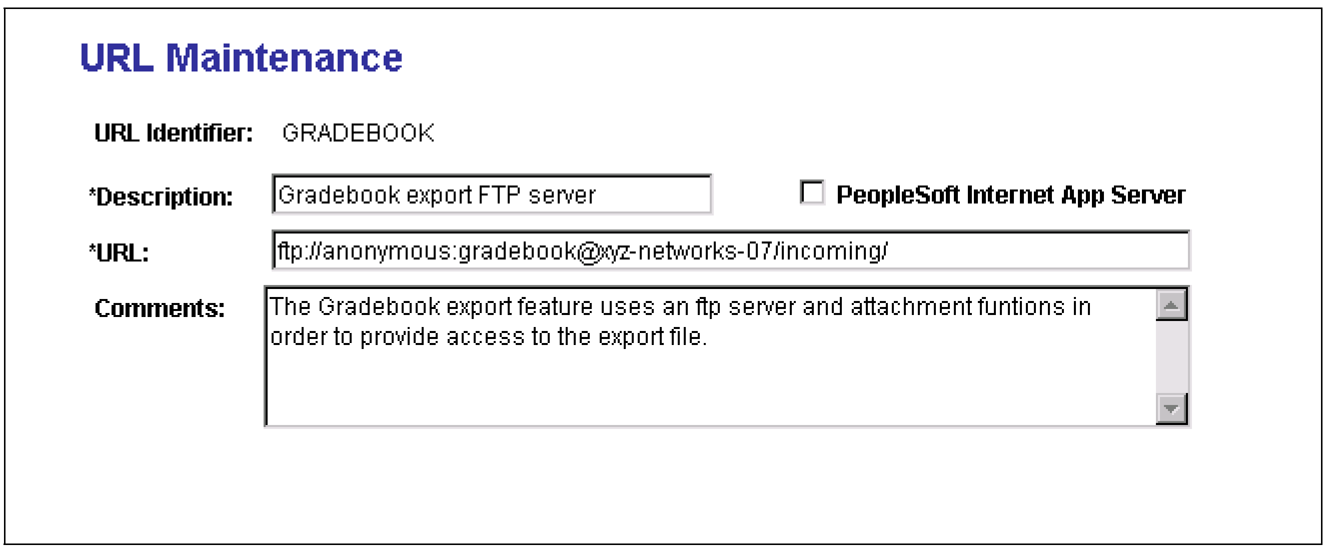
Set up the FTP server and confirm its full FTP address.

Page Used to Define Gradebook URLs

Page Name	Object Name	Navigation	Usage
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Use, URL Maintenance	Define an FTP server and URL address.

Defining an FTP Server and URL Address

Access the URL Maintenance page.



URL Maintenance page

URL Identifier Define this value in Add mode. Enter *GRADEBOOK* in uppercase letters, American English, for all versions.

PeopleSoft Internet App Server (PeopleSoft internet application server) Select to indicate whether the URL is pointing to a PeopleSoft application server or a different type of server. For the *GRADEBOOK* URL, do not select this check box.

URL Enter the FTP location that your institution uses to store temporary file attachments. When the instructor clicks the Export button on the Class Gradebook page, the system exports the class grades to the server in csv format and prompts the instructor to save the file to his or her local directory (where the file can be launched in Microsoft Excel).

Comments Make notations and comments that do not appear elsewhere.

See Also

PeopleSoft PeopleTools PeopleBook

PeopleCode Developer's Guide

Defining Course Assignment Defaults

Use the Course Assignments component to set up course assignments at the catalog level that the system populates to the class level. The values appear as defaults in the Class Assignments component (where the instructor can edit them) when the instructor first accesses the Gradebook component for their class. You can use this component to specify course assignments that are required by the institution.

This section lists a prerequisite and discusses how to:

- Define default assignments for each course.
- Define default weight values for each class assignment category.
- Define default marks and grades for course grading schemes.

Prerequisite

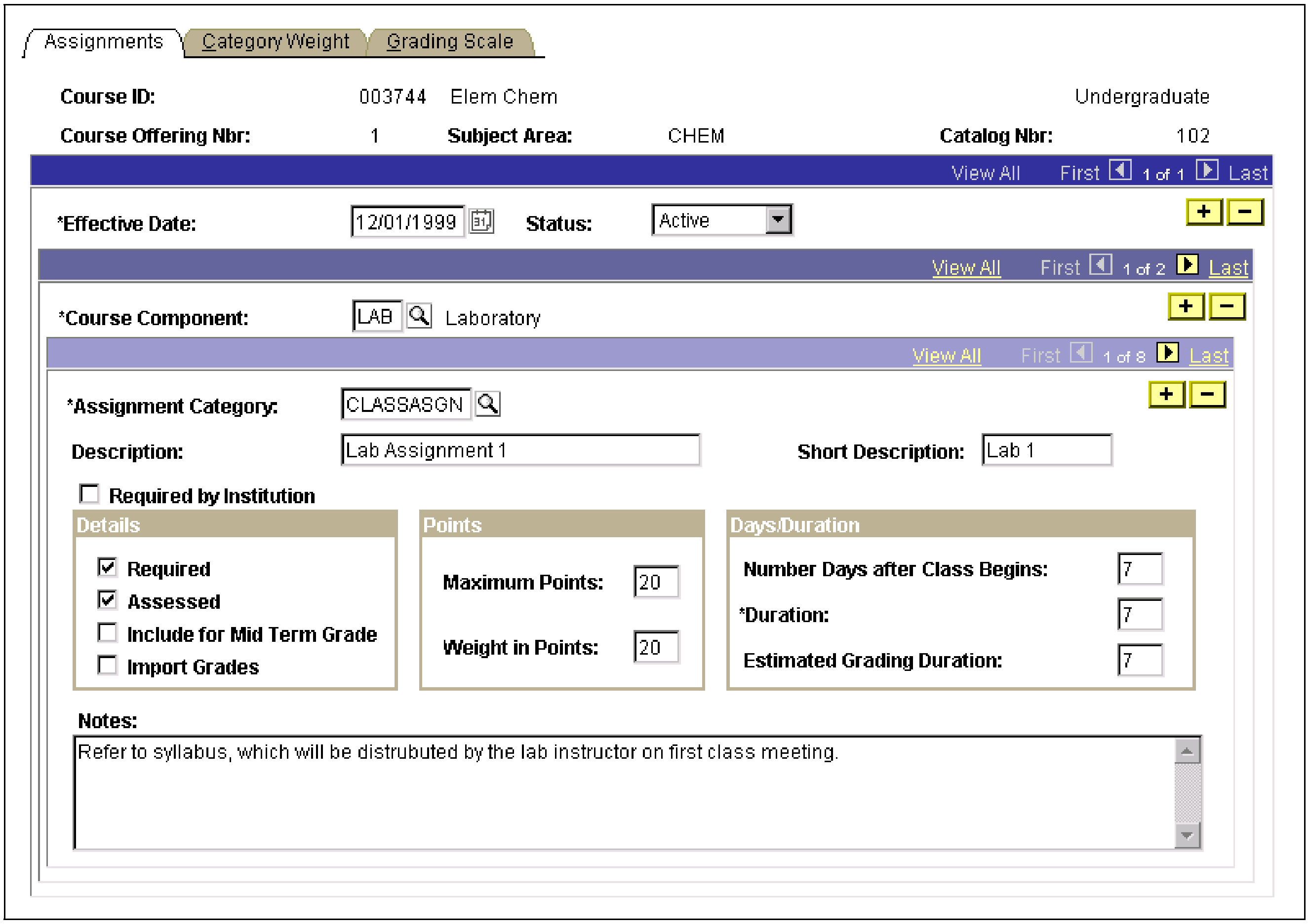
Create assignment categories on the Gradebook Category page.

Pages Used to Define Course Assignment Defaults

Page Name	Object Name	Navigation	Usage
Course Assignments - Assignments	LAM_CRSE_COMP	Manage Student Records, Establish Courses, Use, Course Assignments, Assignments	Define assignments that the system populates to the class Assignments page.
Course Assignments - Category Weight	LAM_CRSE_TYPE_PER	Manage Student Records, Establish Courses, Use, Course Assignments, Category Weight	Define default weight percentage values for each class assignment category in a component.
Course Assignments - Grading Scale	LAM_CRSE_COMP_SCL	Manage Student Records, Establish Courses, Use, Course Assignments, Grading Scale	Define default marks and grades for course grading schemes.

Defining Assignments

Access the Course Assignments - Assignments page.



Course Assignments - Assignments page

Effective Date	Enter an effective date for the course component default data. This date determines when the status that you select is valid.
Status	Select a status for the course component default data. Select *Active* when adding a new course assignment. Select *Inactive* only if your institution no longer wants the system to populate this data by default.
Course Component	Select the course component for this assignment.
Assignment Category	Select an assignment category for your first default course assignment. For example, select an assignment category of *HW* if you are going to create a homework assignment.
Include for Mid Term Grade	Select if you want the assignment to count toward the cumulative midterm grade.
Import Grades	Select to define this assignment as an import target. If instructors select this check box, they can import grades from another class component in to this assignment (almost as a placeholder). For example, because only one component can be graded, you can import the final grade from the ungraded

laboratory component gradebook into an assignment for the graded lecture component. We recommend that you assign the target assignment to its own assignment category. Also, when you select the Import Grades check box, the system populates the Maximum Points and Weight in Points field with *100* and makes the Weight in Points field unavailable for entry.

Number Days after Class Begins

Enter the number of days after the student begins the class that he or she must start the assignment. For regular classes, the system uses this value to calculate the assignment start date, adding the number of days to the class start date. For open entry/open exit classes, the system uses this value to calculate the assignment begin date for each student based on the student's start date. This value is visible (as a start date) to students for non-open entry/open exit classes through an Assignment link in the student Gradebook.

Duration

Enter the number of days (including the begin date) that the student has to complete the assignment. For regular classes, the system uses this value in conjunction with the class begin date. For open entry/open exit classes, the system uses this value in conjunction with the student's start date to generate a due date. The due date is calculated as assignment start date, plus duration. For open entry/open exit classes, this date is based on the student's individually calculated start date. This value is visible (as an end date) to students for non open entry/open exit classes through an Assignment link in the student Gradebook.

Estimated Grading Duration

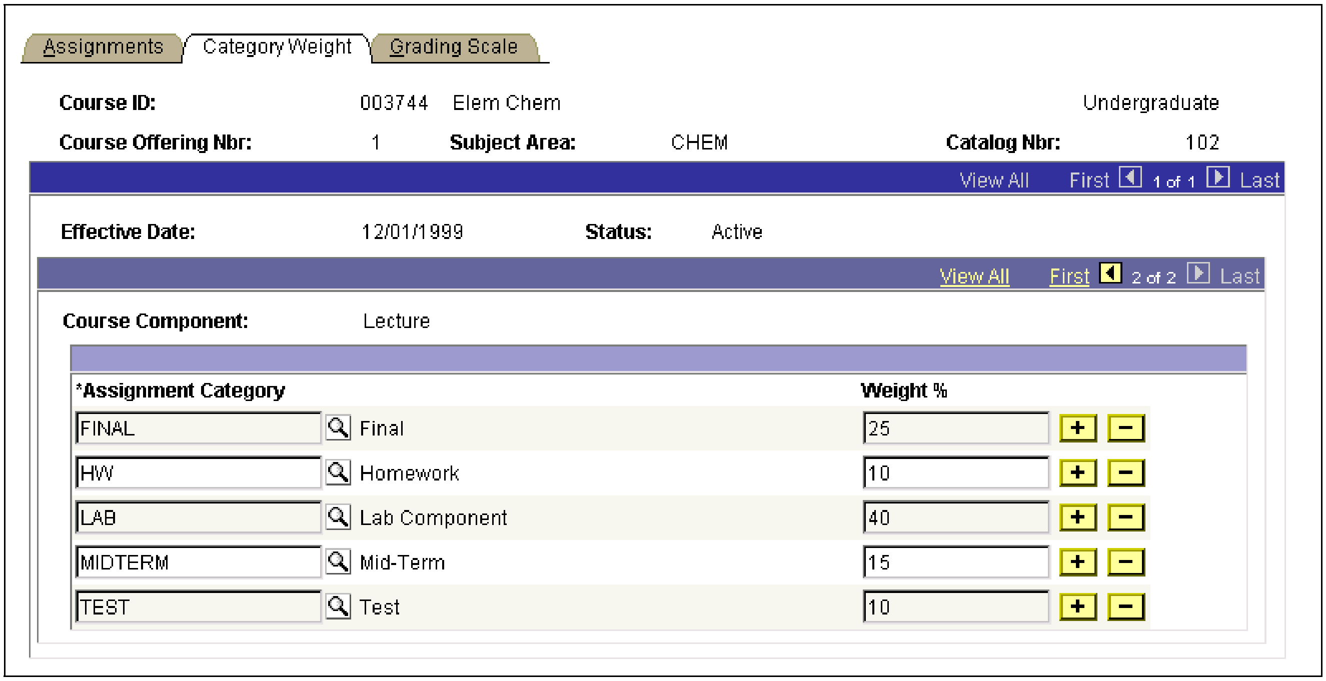
Enter the estimated grading duration to let students know when they can expect to see their grade for the assignment. The system uses this value in conjunction with the assignment start date to determine the date on which the student can expect to see her grade. This value is visible to students through an Assignment link in the student Gradebook.

Notes

Enter any notes that the instructor might want to communicate to students about this assignment.

Defining Default Weight Values

Access the Course Assignments - Category Weight page.



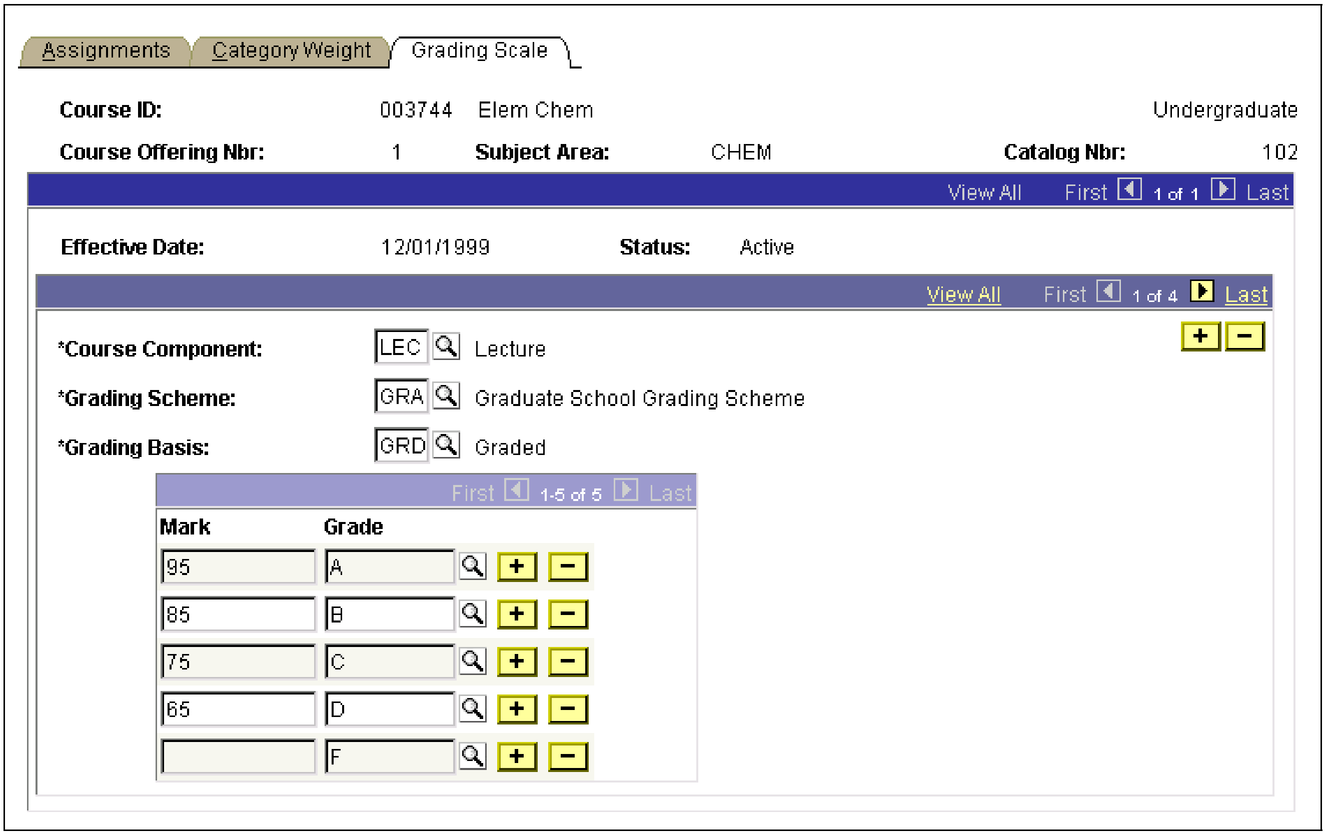
Course Assignments - Category Weight page

Assignment Category

Enter an assignment category that corresponds to each assignment category that you enter on the Assignments page. If the instructor attempts to save the page where there is an assignment, but the corresponding assignment category does not appear on this page, a warning message appears.

Defining Default Marks and Grades for Course Grading Schemes

Access the Course Assignments - Grading Scale page.



Course Assignments - Grading Scale page

You need to enter data only for the graded component.

Course Component Select the course component for which you want the system to use as the default for the grading scale and grading basis information.

Grading Scheme Select the grading scheme that you want the system to use as the default for this component. You can create as many rows as you need to cover all grading scheme values for all components.

Grading Basis Select the grading basis that you want the system to use as the default for this component and grading scheme. You can create as many rows as you need to cover all grading basis values for all components.

Creating Class Assignment Data

Instructors use the Class Assignment component to create, view, or edit their class assignments. They can create each assignment, including its assignment category, maximum points, and due date. Instructors can even define an extended due date for an assignment or specify whether a student sees the assignment grade when accessing the student's view of PeopleSoft Gradebook. When accessing the Class Assignment component, the system prompts instructors with choices that help them identify the class that they want to edit.

Here's how to define class assignments:

1. Search and identify the class for which you want to create assignments.
2. Describe the class assignments and define the class assignments on the Assignments page.
3. Create weight values for each category on the Category Weight page.
4. Create grading scales for the class on the Grading Scale Page.

Prerequisites

Before you can create class assignment data:

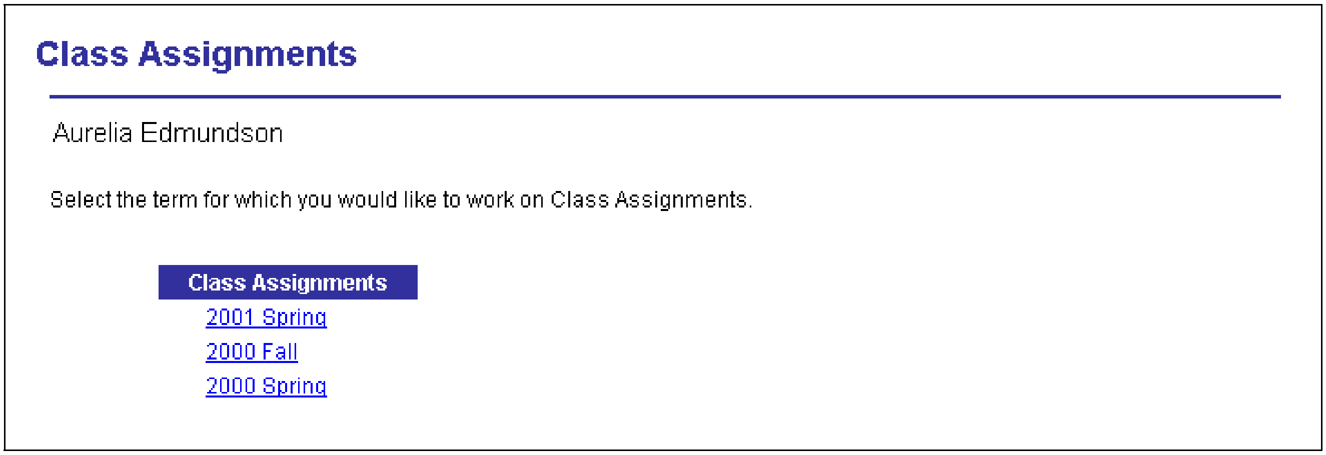
- To define class assignments, instructors must have grade roster access of *Approve* or *Post* for the class.
- Instructors with *Grade* access can only enter grades and modify existing assignments.
- To select a class within a term, first create assignment categories on the Gradebook Category page.
- To set weight values, first define assignment categories.
- To define marks and grades for class grading schemes, first define grading schemes and grading bases.

Pages Used to Create Class Assignment Data

Page Name	Object Name	Navigation	Usage
Class Assignments - Class Assignments	SS_LAM_ASSIGN_TERM	• SA Self Service, Gradebook, Gradebook, Class Assignments • SA Self Service, Learning Management, Management, Class Assignments	Select the term for which you want to review a class.
Class Assignments - Select Class for Class Assignments	SS_LAM_ASSIGN_LST	• SA Self Service, Gradebook, Gradebook, Class Assignments, Select Class for Class Assignments • SA Self Service, Learning Management, Management, Class Assignments, Select Class for Class Assignments	Select the class within the term for which you want to review assignments.
Class Assignments - Assignments	LAM_CLASS_ACTIVITY	• SA Self Service, Gradebook, Gradebook, Class Assignments, Assignments • SA Self Service, Learning Management, Management, Class Assignments, Assignments	Create, define, and cluster assignments by category.
Class Assignments - Category Weight	LAM_CLASS_TYPE_PER	• SA Self Service, Gradebook, Gradebook, Class Assignments, Category Weight • SA Self Service, Learning Management, Management, Class Assignments, Category Weight	Set weight values for each class assignment category.
Class Assignments - Grading Scale	LAM_CLASS_GRD_SCL	• SA Self Service, Gradebook, Gradebook, Class Assignments, Grading Scale • SA Self Service, Learning Management, Management, Class Assignments, Grading Scale	Define marks and grades for each class's grading schemes.

Selecting the Term

Access the Class Assignments - Class Assignments page.


Class Assignments

Aurelia Edmundson

Select the term for which you would like to work on Class Assignments.

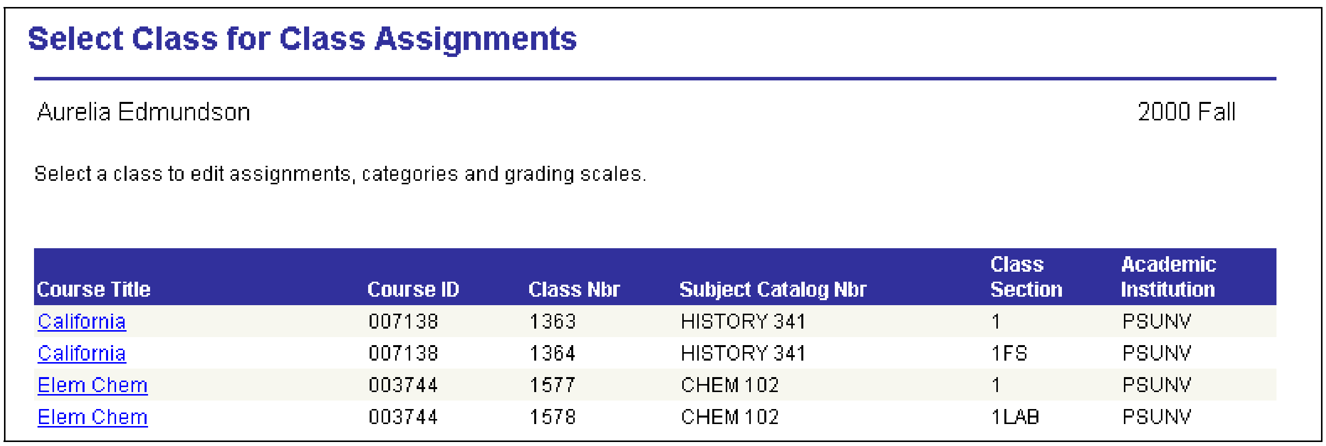
Class Assignments
2001 Spring
2000 Fall
2000 Spring

Class Assignments - Class Assignments page

Instructors can click the Term link to access the Select Class for Class Assignments page, where they can view and select from the classes that they teach for the term.

Selecting the Class

Access the Class Assignments - Select Class for Class Assignments page.


Select Class for Class Assignments

Aurelia Edmundson 2000 Fall

Select a class to edit assignments, categories and grading scales.

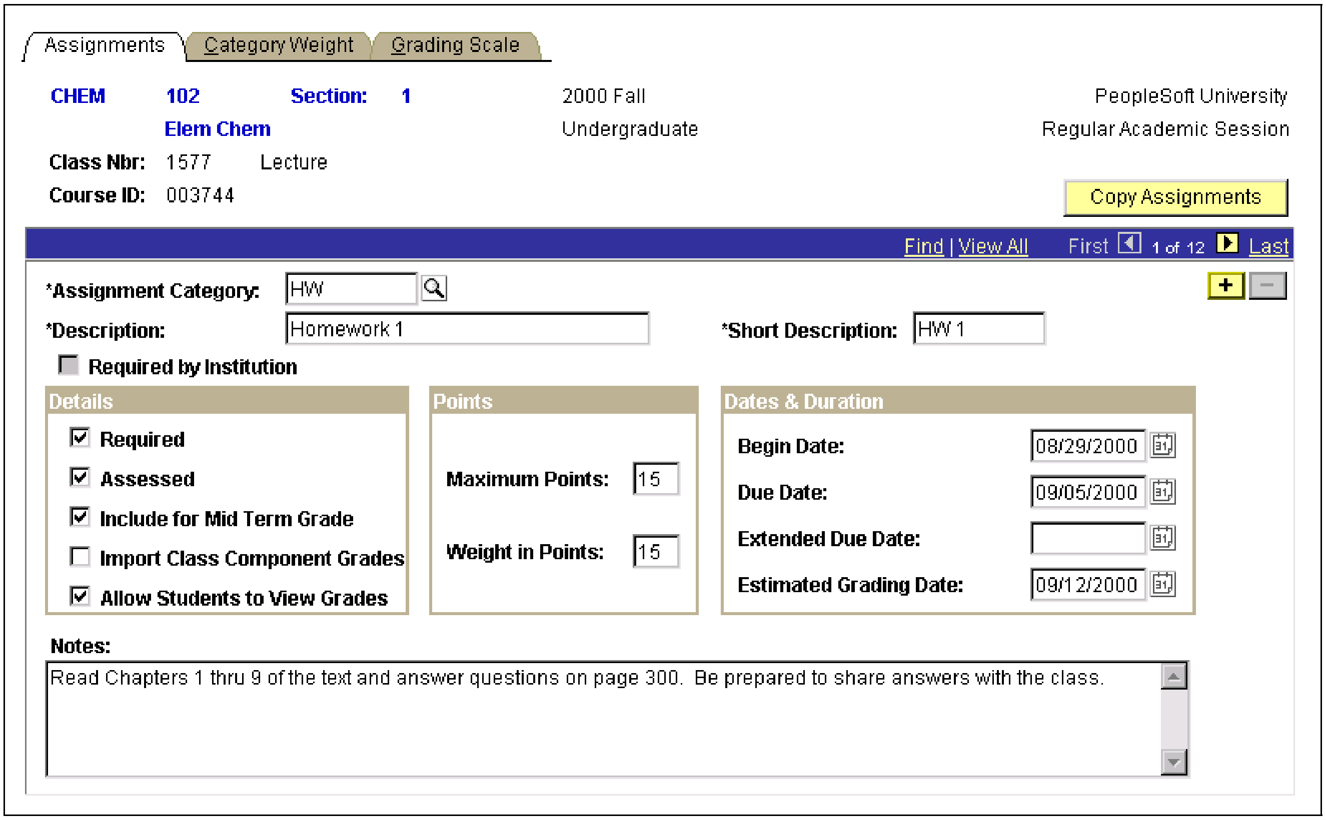
Course Title	Course ID	Class Nbr	Subject Catalog Nbr	Class Section	Academic Institution
California	007138	1363	HISTORY 341	1	PSUNV
California	007138	1364	HISTORY 341	1FS	PSUNV
Elem Chem	003744	1577	CHEM 102	1	PSUNV
Elem Chem	003744	1578	CHEM 102	1LAB	PSUNV

Class Assignments - Select Class for Class Assignments page

Instructors can click the Course Title link to access the applicable Assignments page, where they can edit, view, or create class assignments.

Creating, Defining, and Clustering Assignments by Category

Access the Class Assignments - Assignments page.



Class Assignments - Assignments page

Note. You cannot delete an assignment that is required by the institution or that has been graded.

Copy Assignments	Click this button to copy the assignments from another class to the current class. Assignments can be copied only from other classes that are taught by the instructor of the current class. The copied assignments add to, rather than replace, any existing assignments on the current class.
Assignment Category	Select an assignment category for the class assignment. For example, select the user-defined assignment category *HW* to create a homework assignment.
Include for Mid Term Grade	Select if you want the assignment to count toward the midterm grade, for midterm deficiency reporting purposes.
Import Class Component Grades	Select to define this assignment as an import target. If instructors select this option, they can import grades from another class component into this assignment (almost as a placeholder). For example, because only one component can be graded, you can import the final grade from the ungraded laboratory component gradebook into an assignment for the graded lecture component. We recommend that you assign the target assignment to its own assignment category. Also, when you select the Import Grades check box, the system populates the Maximum Points field and Weight in Points field with *100* and makes the Weight in Points field unavailable for entry.
Allow Students to View Grades	Select if you want the system to display the student's grade for this assignment through the student gradebook view. Instructors may want to leave this check

box clear until they have entered grades for all students in a class. That way one student does not see an assignment grade before another student sees it.

Note. If the instructor enters a grade, the system calculates it into the category average, midterm, or final grade, regardless of whether this check box is selected. If you do not select this check box, students see a course grade that is calculated differently than the grade that the instructor sees. The student's class grade does not include this hidden assignment, whereas the instructor's view includes all grades.

Begin Date

For non-open entry/open exit classes, enter the date that the assignment begins (such as when a thesis paper is assigned) or the date of the assignment (such as the date of an exam). This date is visible to students through the student Gradebook.

Due Date

For non-open entry/open exit classes, enter the date that the assignment is due. This date is visible to students through the student Gradebook. For the assignment to count, the system date must be equal to or later than this date. This field is neither required nor available for entry for open entry/open exit classes.

Extended Due Date

For non-open entry/open exit classes, enter the extended due date for this assignment if and when the instructor decides to extend the due date for the class. This value is also visible to students through the student Gradebook.

Estimated Grading Date

For non-open entry/open exit classes, enter the estimated grading date to let students know when they can expect to see their grade for the assignment. This value is visible to students through the student Gradebook.

Number Days after Class Begins

For open entry/open exit classes, enter the number of days after the student begins the class that they must start the assignment. The system uses this value in conjunction with the student's start date.

Duration

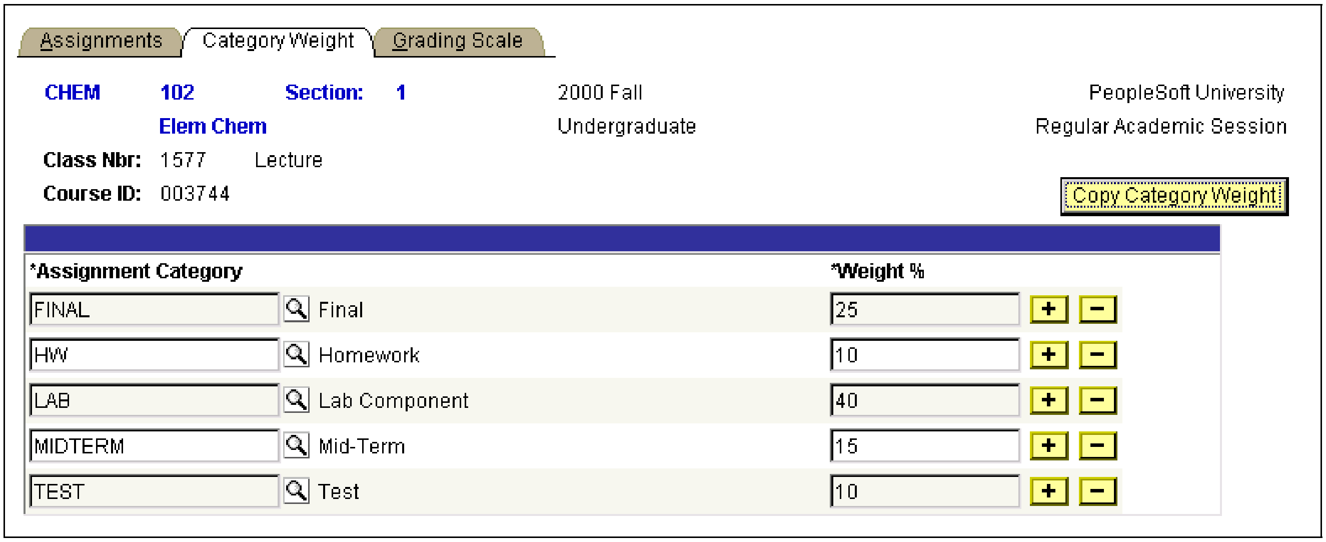
For open entry/open exit classes, enter the number of days (including the begin date) that the student has to complete the assignment. The system uses this value (in conjunction with the student's begin date) to dynamically generate a due date.

Notes

Enter any notes that the instructor might want to communicate to students about this assignment.

Setting Weight Values

Access the Class Assignments - Category Weight page.



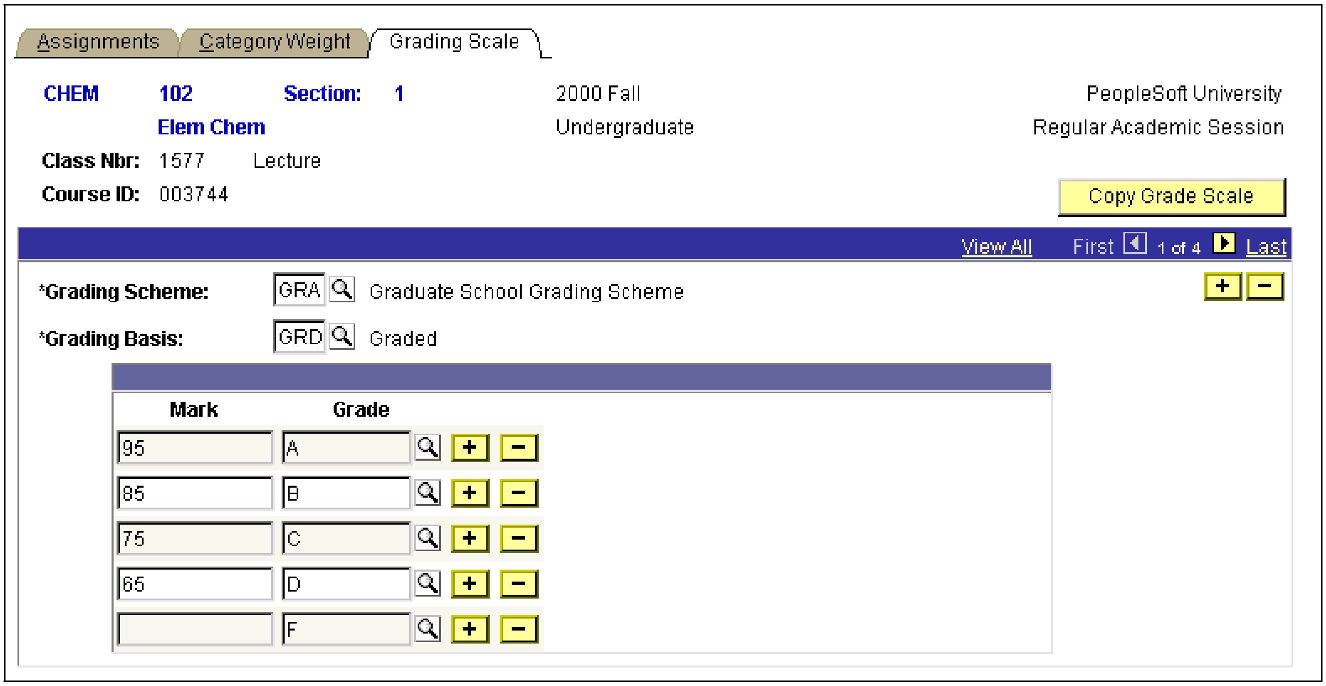
Class Assignments - Category Weight page

Copy Category Weight
Click to copy the assignment categories and weight percentage values from another class that you are assigned to as an instructor. Once you copy the category data, you can modify it. The system overwrites any existing category weight values with the copied category weight values.

Assignment Category
Enter an assignment category that corresponds to each of the assignment categories that you entered on the Assignments page. If the instructor attempts to save the page where there is an assignment, but the corresponding assignment category does not appear on this page, a warning appears.

Defining Marks and Grades for Grading Schemes

Access the Class Assignments - Grading Scale page.



Class Assignments - Grading Scale page

Note. If there are no assignments, category weights, or grading scales, the system populates those fields with the values on the Course Assignments - Grading Scale page. Also, the system creates grading scheme and grading scale records to match the grading scheme and grading scale on the Class Association page, in conjunction with any values at the course level. If the grading basis is optional, the system creates grading basis records to match the linked grading bases.

Copy Grade Scale

Click to copy the grade scale information from another class to which the instructor is assigned. The system overwrites existing grade scale values with the copied grade scale values.

Grading Scheme

The system populates this field with the course's grading scheme (as assigned on the Course Assignments - Grading Scale page). If there are no values on the Grading Scale page, the system populates this field with the default grading scheme for the career of the course. You can modify or add values. Do not delete the grading scheme values that are associated with students in your class, as this prevents the percentage grades from mapping to corresponding letter (or pass/no pass) grades. In cases where your institution uses the grading basis remapping feature, you might need to enter grade scales that are linked to grading schemes that are not normally associated with this class.

Grading Basis

The system populates this field with the course's grading basis (as defined on the Course Assignments - Grading Scale page). You can modify or add values. If there are no values on the Grading Scale page, the system populates this field with the grading basis on the Class Associations page. Do not delete the grading basis values that are associated with students in your class, as this would prevent the percentage grades from mapping to corresponding letter or pass/no pass grades. In cases where your institution uses the grading basis remapping feature, you might need to enter grading bases that are not normally associated with this class.

Entering Grades

This section provides an overview of the grading process, lists prerequisites, and discusses how to:

- Select the term for which you want to enter grades for a class.
- Select the class for which you want to enter grades.
- Enter points for each assignment and mark certain assignments for exclusion from cumulative grades.
- Enter grades for each student by assignment, exclude grades from calculation, and edit the due date and date submitted values on a student-by-student basis.
- View cumulative grades for each assignment; view or edit automatically generated midterm and current grades; update midterm and final grades; send grades to the roster for posting.
- Enter notes about students and communicate information that students can view.
- Enter requirement designation grades.
- Import grades from an ungraded component into an assignment in the graded component.
- Select the class from which you want to import grades.
- View the results of your class search.
- View further details about a class.

Understanding the Grade Entering Process

Once an instructor creates assignments and reviews the student assignments, the instructor can enter grades for the student assignments. Specific student assignments can be excluded from calculation if the instructor chooses. The instructor can also enter notes or comments for each student, override midterm and final grades, update the midterm grades to the roster for deficiency analysis and reporting, or send final grades to the grade roster for official posting.

Here's how to enter, import and update grades.

1. Search and identify the class for which you want to enter grades.
2. Enter individual assignment grades (in numeric format) on the Class Gradebook page or the Grade by Assignment page.
3. Override midterm or final grades on the Cumulative Grades page (leave blank to use the system-generated values).
4. (Optional)Write private instructor comments for each student through the Notes link on the Cumulative Grades page.
5. Enter requirement designation grades if applicable, on the Requirement Designation page.
6. Import grades from other component assignments on the Import Component Grades page.
7. Update midterm or final grades to the official grade roster by clicking the Update button on the Cumulative Grades page.

Prerequisites

Before the instructor can enter, import, update, or export grades:

- The instructor must be assigned to teach a class for the term, and he or she must have a grade roster access of *Grade, Approve,* or *Post.*
- Instructors must define class assignments.
- A system administrator must define the GRADEBOOK URL for your FTP server.

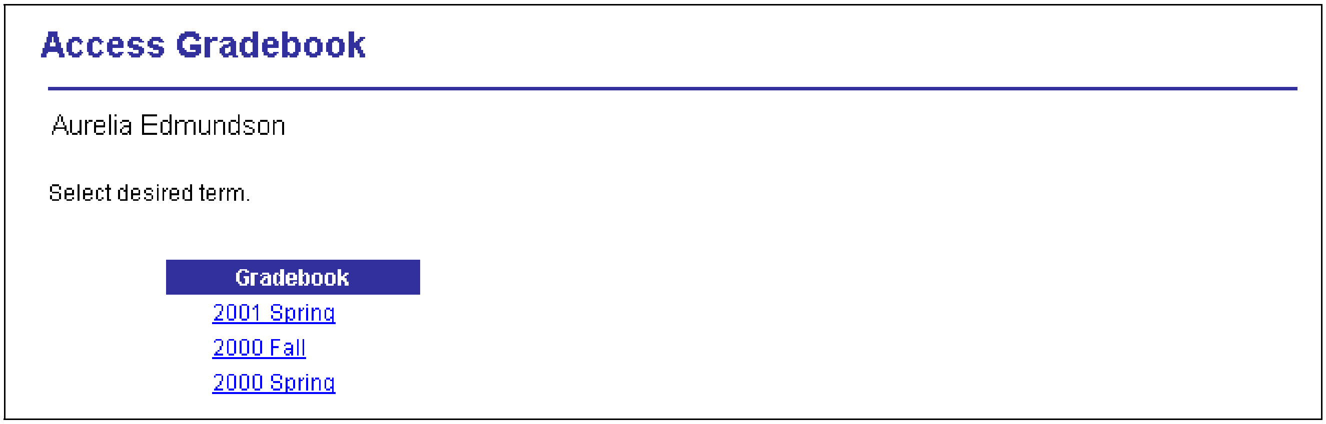
Pages Used to Enter, Import, Update and View Grades

Page Name	Object Name	Navigation	Usage
Access Gradebook	SS_LAM_GRDBK_TERM	• SA Self Service, Gradebook, Gradebook, Access Gradebook • SA Self Service, Learning Management, Management, Access Gradebook	Select the term for which you want to enter grades.
Select Class for Gradebook	SS_LAM_ASSIGN_LST	Click the Term link on the Access Gradebook page.	Select the class for which you want to enter grades.
Class Gradebook	LAM_CLASS_GRADES	• SA Self Service, Gradebook, Gradebook, Access Gradebook, Class Gradebook • SA Self Service, Learning Management, Management, Access Gradebook, Class Gradebook	Enter points for each assignment and mark certain assignments for exclusion from cumulative grades.
Grade by Assignment	LAM_CLASS_GRD_DATE	• SA Self Service, Gradebook, Gradebook, Access Gradebook, Grade by Assignment • SA Self Service, Learning Management, Management, Access Gradebook, Grade by Assignment	Enter grades for each student by assignment. Exclude grades from calculation. Edit the due date and date submitted values on a student-by-student basis.
Cumulative Grades	LAM_CLAS_GRADE_TOT	• SA Self Service, Gradebook, Gradebook, Access Gradebook, Cumulative Grades • SA Self Service, Learning Management, Management, Access Gradebook, Cumulative Grades	View the cumulative grades for each assignment category. View or edit the generated midterm and current grades. Update midterm and final grades. Send grades to the roster for posting.

Page Name	Object Name	Navigation	Usage
Gradebook Notes	LAM_GRADE_NOTE	Click the Notes link on the Cumulative Grades page.	Enter notes about the student and communicate information that the student can view on the Instructor Comments page.
Requirement Designation	LAM_CLAS_GRD_REQ_D	• SA Self Service, Gradebook, Gradebook, Access Gradebook, Requirement Designation • SA Self Service, Learning Management, Management, Access Gradebook, Requirement Designation	Enter requirement designation grades.
Import Component Grades	LAM_CLASS_COPY_GRD	• SA Self Service, Gradebook, Gradebook, Access Gradebook, Import Component Grades • SA Self Service, Learning Management, Management, Access Gradebook, Import Component Grades	Import grades from an ungraded component into an assignment in the graded component. The import grades feature is particularly useful for multiple component classes that have only one graded component, but where the instructor wants grades from all components to contribute to gradebook calculations for the final class grades.
Import Component Grades - Class Search	CLASS_SRCH_BASIC	Click the Import Grades button on the Import Component Grades page.	Select the class from which you want to import grades.
Import Component Grades - Class Search Results	CLASS_SRCH_RSLT	Click the Search button on the Import Component Grades - Class Search page.	View the results of your class search.
Import Component Grades - Class Search Detail	CLASS_SRCH_DETL	Click the Class Detail button on the Import Component Grades - Class Search Results page.	View further details about a class.

Selecting the Term

Access the Access Gradebook page.

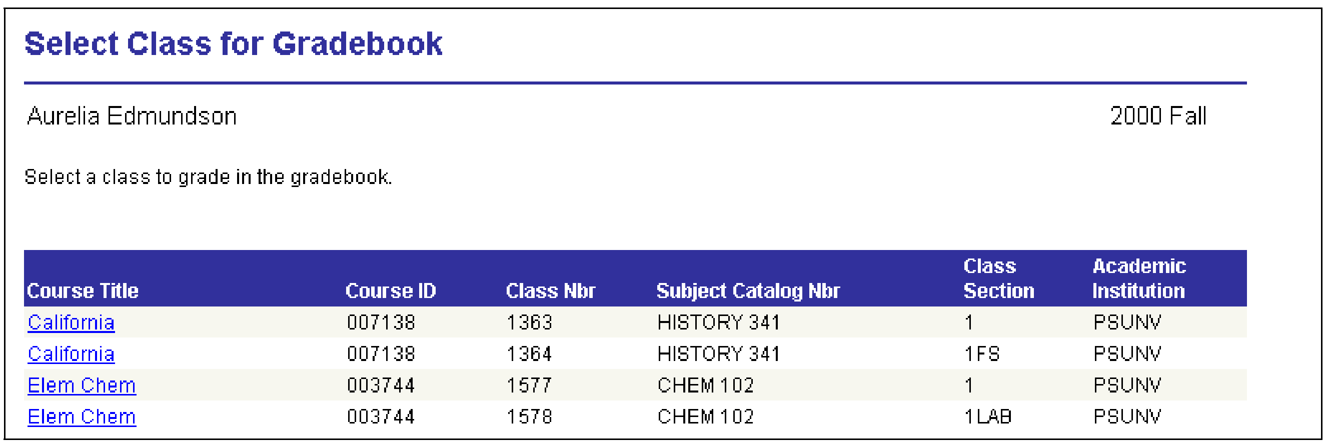


Access Gradebook page

Instructors can click the Term link to access the Select Class for Gradebook page, where they can view and select from the classes that they teach for the term.

Selecting the Class

Access the Select Class for Gradebook page.



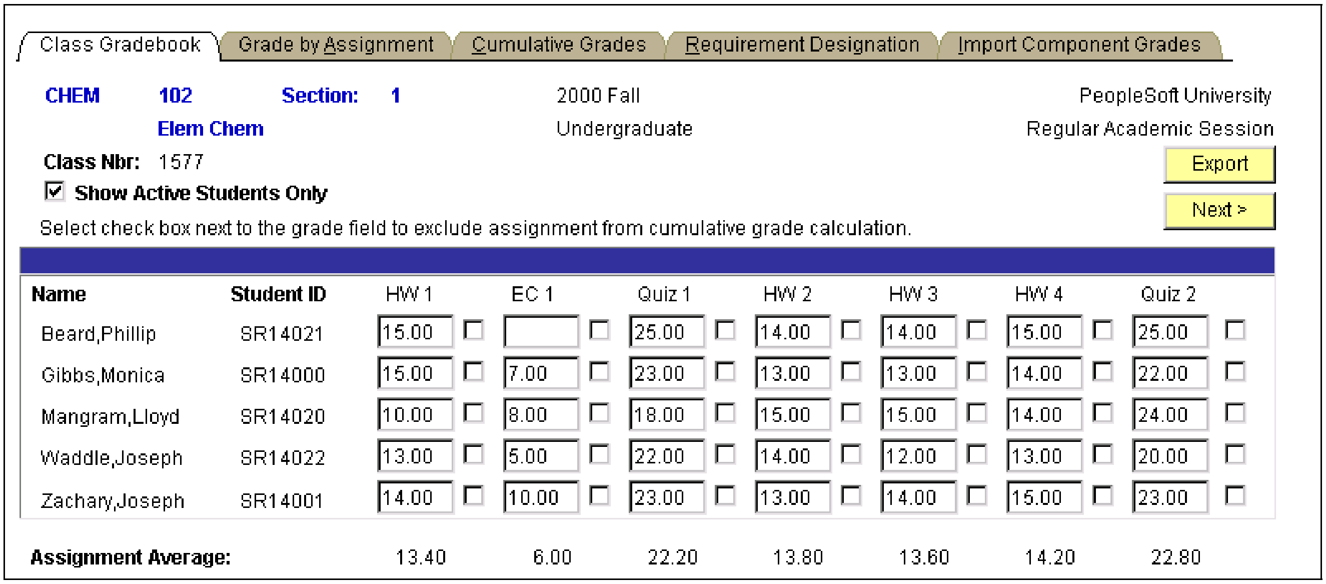
Course Title	Course ID	Class Nbr	Subject Catalog Nbr	Class Section	Academic Institution
California	007138	1363	HISTORY 341	1	PSUNV
California	007138	1364	HISTORY 341	1FS	PSUNV
Elem Chem	003744	1577	CHEM 102	1	PSUNV
Elem Chem	003744	1578	CHEM 102	1LAB	PSUNV

Select Class for Gradebook

Instructors can click the Course Title link to access the applicable Class Gradebook page, where they can enter grades.

Entering Points for Assignments

Access the Class Gradebook page.



Class Gradebook page

Note. This page uses deferred processing. Click the Refresh button or the Save button to update assignment average values.

Show Active Students Only Select for the system to exclude students who have withdrawn from the class.

(Grade) A column of fields appears for each assignment that has the Assessed check box selected on the Assignments page. This is a grade field. Enter the points that each student earns for the assignment in this field.

(Exclude Grade) A column of check boxes appears for each assignment that has the Assessed check box selected on the Assignments page. Select this check box to exclude a particular assignment grade from all cumulative grades (including assignment averages) for a specific student. The grade field becomes unavailable for entry.

Assignment Average The system calculates and displays a class assignment average for all graded assignments.

Next> and **<Previous** Click this button to view the next or previous additional assignments. This button acts as a horizontal scroll bar.

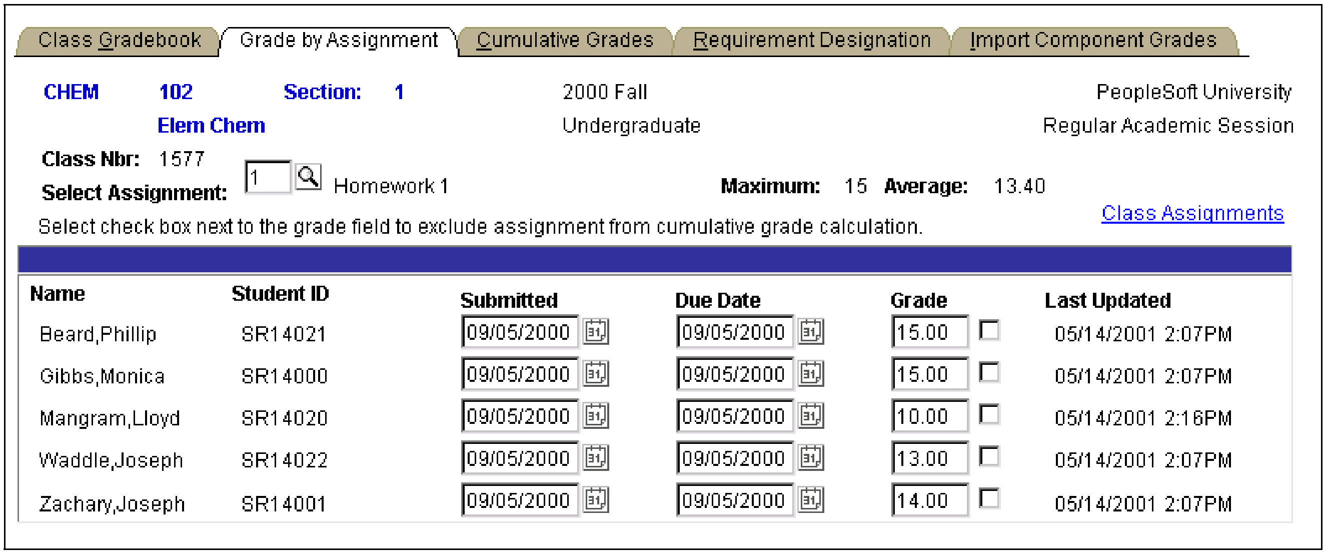
Export Click this button to export your class grades to a temporary location, such as your C drive. You can export grades as many times as you want.

See Also

Chapter 2, "Using the Self-Service Gradebook," Exporting Grades, page 38

Entering Grades by Assignment

Access the Grade by Assignment page.


Class Gradebook | Grade by Assignment | Cumulative Grades | Requirement Designation | Import Component Grades

CHEM 102 Section: 1 2000 Fall PeopleSoft University

Elem Chem Undergraduate Regular Academic Session

Class Nbr: 1577

Select Assignment: 1 Homework 1 Maximum: 15 Average: 13.40

Select check box next to the grade field to exclude assignment from cumulative grade calculation. Class Assignments

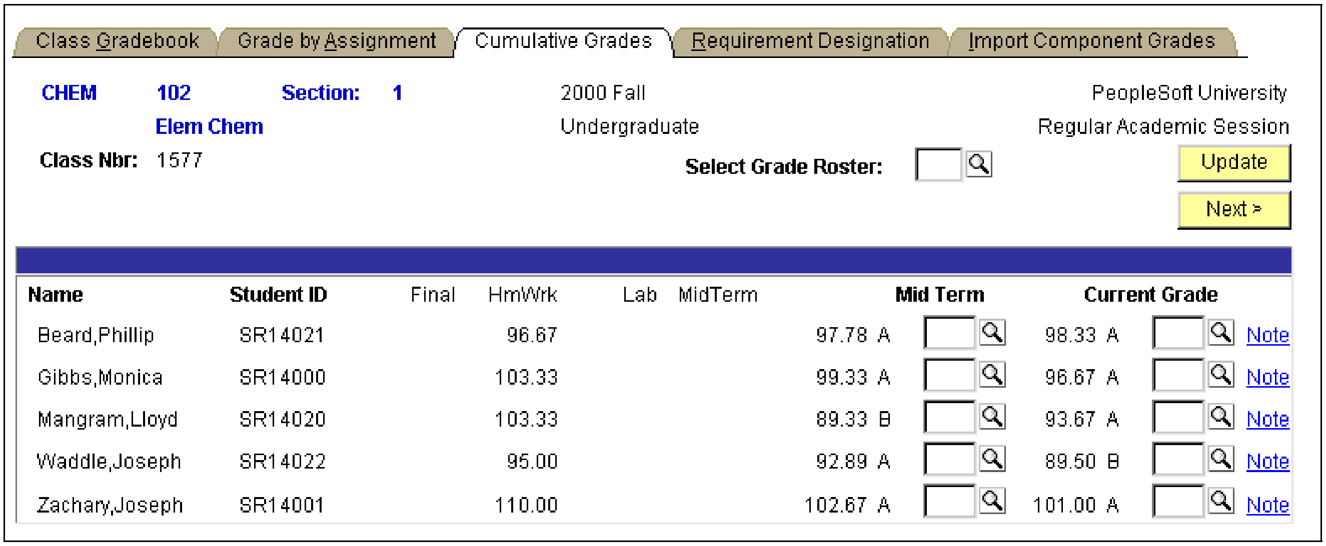
Name	Student ID	Submitted	Due Date	Grade		Last Updated
Beard,Phillip	SR14021	09/05/2000	09/05/2000	15.00	☐	05/14/2001 2:07PM
Gibbs,Monica	SR14000	09/05/2000	09/05/2000	15.00	☐	05/14/2001 2:07PM
Mangram,Lloyd	SR14020	09/05/2000	09/05/2000	10.00	☐	05/14/2001 2:16PM
Waddle,Joseph	SR14022	09/05/2000	09/05/2000	13.00	☐	05/14/2001 2:07PM
Zachary,Joseph	SR14001	09/05/2000	09/05/2000	14.00	☐	05/14/2001 2:07PM

Grade by Assignment page

Select Assignment	Enter the assignment for which you want to record the assignment submission date or grade. This refreshes the page.
Submitted	Enter the date that the student submitted the assignment. The system populates this field with the date that you enter a grade. You can change this value. The submitted date appears in the Date Rec'd (date received) field on the Student Assignment Dates page.
Due Date	Enter the due date of the assignment. The system populates this field with the due date that the instructor sets up on the Assignments page. If the instructor defines an extended due date on the Assignments page, the system displays that value. If the due date or extended due date is greater than the student due date, the system displays the latest of the three dates.
Grade	Enter the points that the student earns for the assignment.
(Exclude Grade)	A column of check boxes appears for each assignment that has the Assessed check box selected on the Assignments page. Select this check box to exclude a particular assignment grade from all cumulative grades (including assignment averages).
Last Updated	The system populates this field with the date and time that a user last modified any of the following fields: Submit Date, Grade, Exclude Grade, or Grade(s) copied from another assignment through an Import.
Class Assignments	Click this link to access the Class Assignments - Assignments page, where you can view or edit the class assignment. This is helpful if you forget the point range, or some other piece of information about an assignment. If you make changes on the Assignments page through this link, the system does not display them on the Gradebook unless you leave and reenter the component.

Reviewing Cumulative Grades and Posting Grades

Access the Cumulative Grades page.



Cumulative Grades page

Select Grade Roster

If you are preparing to update midterm or current (final) grades, select the target grade roster.

Update

Click to send the midterm or current (final) grades to the grade roster. Clicking this button does not post student grades for the course. A system administrator must post the grade roster before the students' grades are official.

Note. If you click the Update button and there is a missing Current Grade value for a student, the system presents you with a warning that grades have not been assigned for all students. You can cancel to go back and enter any missing grades, or you can proceed with the update. The update will set the grade roster to a status of *Partial Post.*

Conversely, if you click the Update button and all current grades are complete, the system sets the grade roster approval status value according to the instructor's access (as defined on the Meetings page). If the instructor's access is *Graded,* the system sets the approval status to *Ready to Review.* If the instructor's access is *Approve* or *Post,* the system sets the approval status to *Approved.*

Next> and **<Previous**

Click to view the next or previous cumulative category grades. This button acts as a horizontal scroll bar.

Mid Term

Enter a value in this field if you want to override the midterm grade that the system calculates. If you leave this field blank, the system-generated grade is sent to the grade roster when you click the Update button (with a target roster of Mid Term).

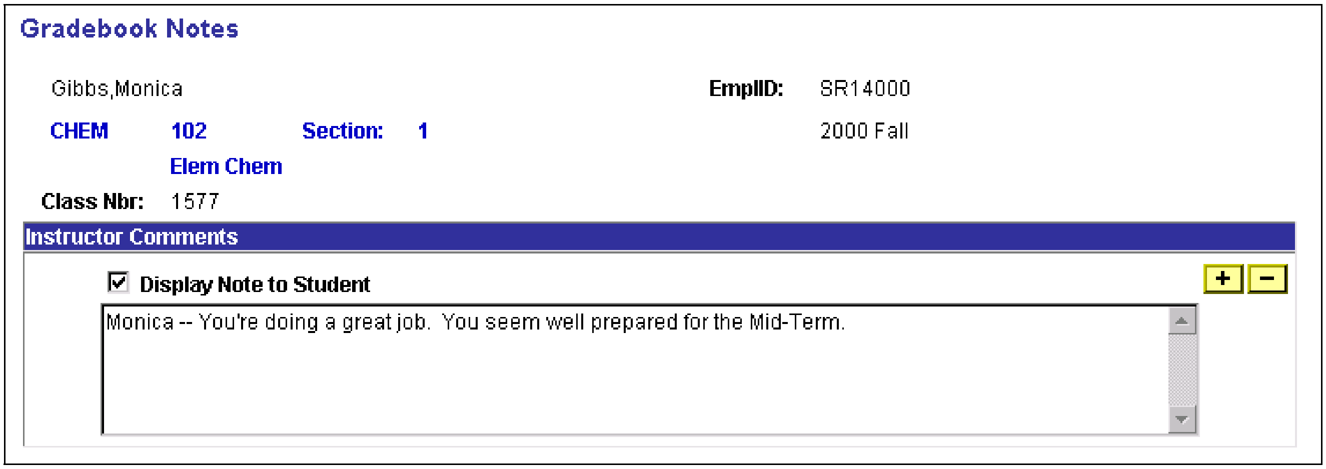
Current Grade

Enter a value if you want to override the current grade that the system calculates. If you leave this field blank, the system generated current grade is sent to the grade roster as the final grade when you click the Update button (with target roster of Final).

Note Click to access the Gradebook Notes page, where you can enter notes for each student. Optionally, the student can be permitted to view notes through the student Gradebook. Only the specific student for whom the note is written can see the note.

Entering Notes for Students

Access the Gradebook Notes page.

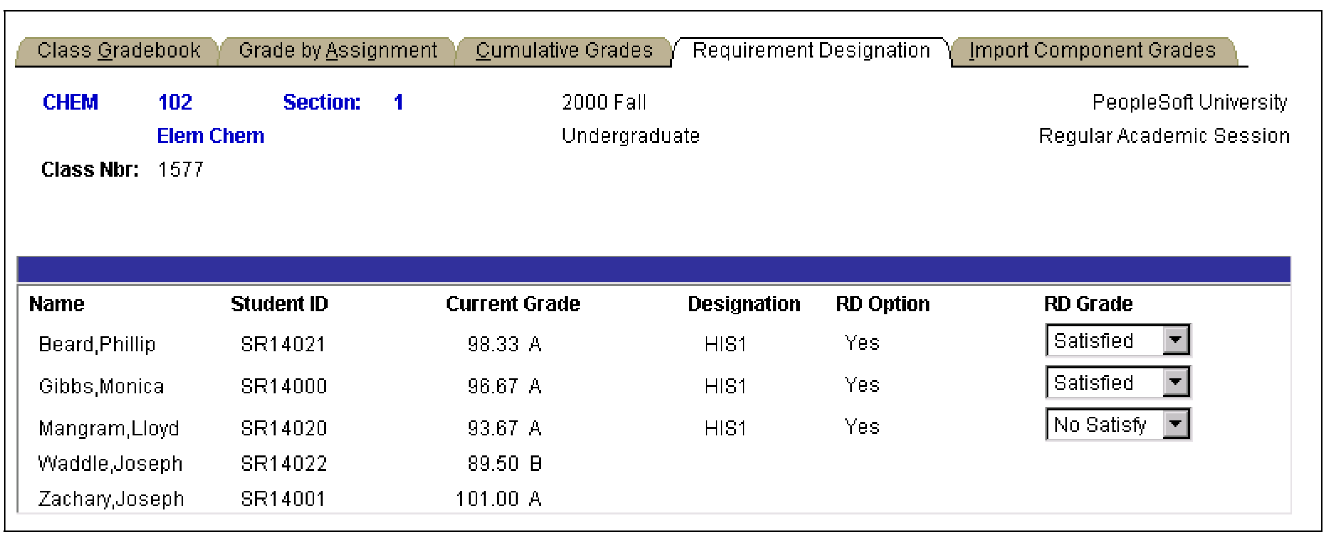


Gradebook Notes page

Display Note to Student Select for the student to view the note through the student Gradebook. The system selects this check box by default. Clear this check box to hide the note from the student's view. For example, you might want to enter notes to yourself about the student.

Entering Requirement Designation Grades

Access the Requirement Designation page.



Name	Student ID	Current Grade	Designation	RD Option	RD Grade
Beard,Phillip	SR14021	98.33 A	HIS1	Yes	Satisfied
Gibbs,Monica	SR14000	96.67 A	HIS1	Yes	Satisfied
Mangram,Lloyd	SR14020	93.67 A	HIS1	Yes	No Satisfy
Waddle,Joseph	SR14022	89.50 B			
Zachary,Joseph	SR14001	101.00 A			

Requirement Designation page

If the class does not have a requirement designation that requires a separate grade, the fields on this page are unavailable for entry.

Current Grade The system displays the current grade for each student. At the end of the class, this is the student's final grade.

Designation The system displays the code for the requirement designation that the student is attempting.

RD Option (requirement designation option) The system displays whether the student is attempting the requirement designation or not. The value that appears for students attempting the requirement designation is *Yes*. Otherwise, no information appears.

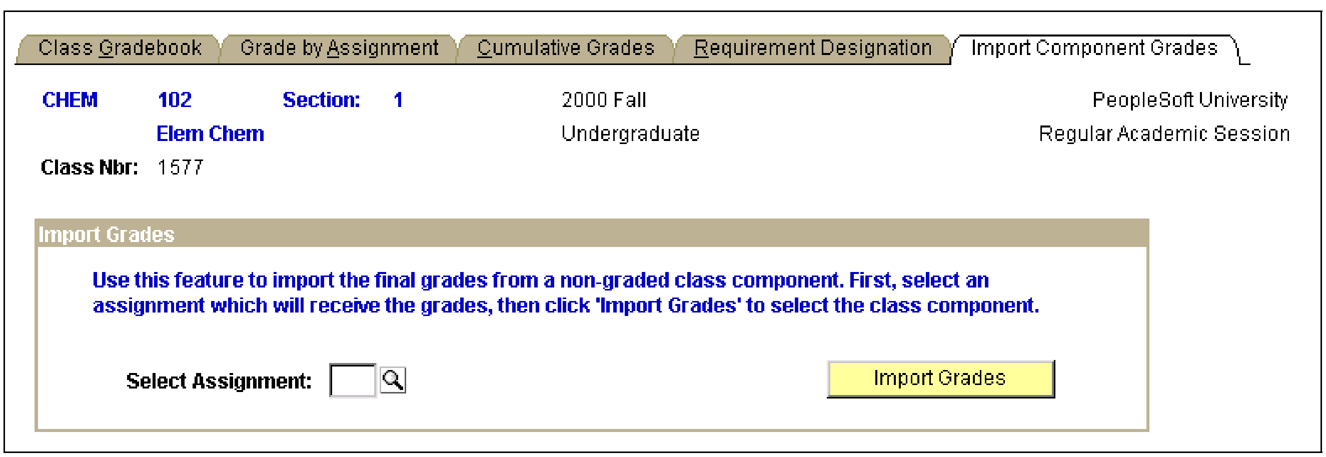
RD Grade If the requirement designation requires a separate grade, select a grade of *Satisfied* or *No Satisfy.* If a separate grade is not required for this requirement designation, this field is unavailable for entry. Where no separate grade is required, the system determines whether the requirement designation is satisfied or not satisfied based on whether the student earns credit for the class. If the student receives a final grade that earns credit, the requirement designation is satisfied. If the student does not earn credit for the class, the requirement designation is not satisfied.

See Also

PeopleSoft 8 SP1 Student Records PeopleBook, "Preparing for the Course Catalog and Schedule of Classes," Understanding Requirement Designations

Importing Component Grades

Access the Import Component Grades page.



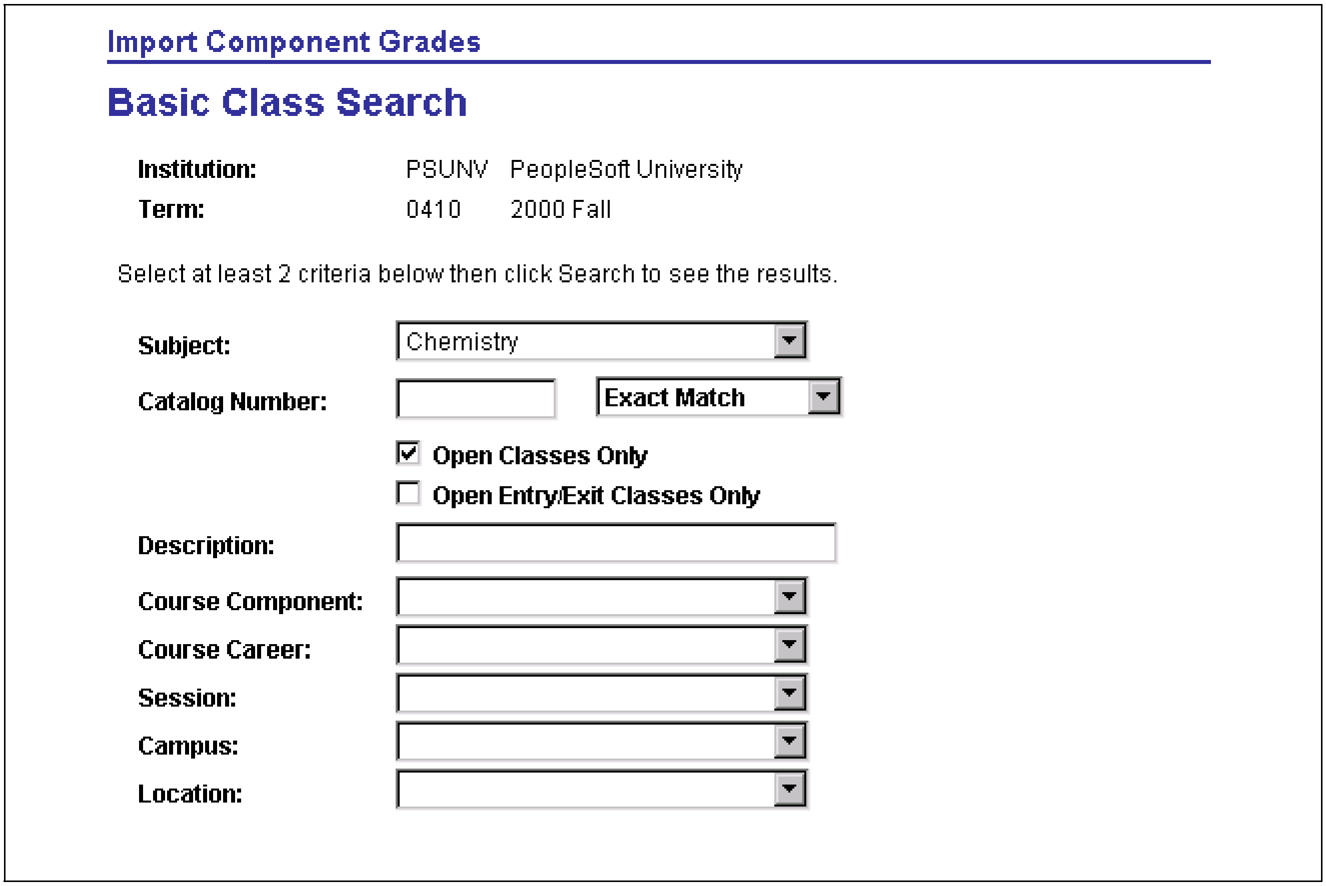
Import Component Grades page

Select Assignment Select the assignment that will receive the grade import. You must set up this assignment in advance of the import, and the assignment must have the Import Class Component Grades check box selected on the Assignments page.

Import Grades Click to access the Import Component Grades - Basic Class Search page, where you can select the class component from which you want to import grades. Only classes from the current term where you are one of the instructors are available. When you import the final grades, the system converts the grade percent into points (the maximum of which is 100) and displays the result in the target assignment on the Class Gradebook page and the Grade by Assignment page. You can edit the grades once you import them.

Selecting the Class From Which to Import Grades

Access the Import Component Grades - Class Search page.



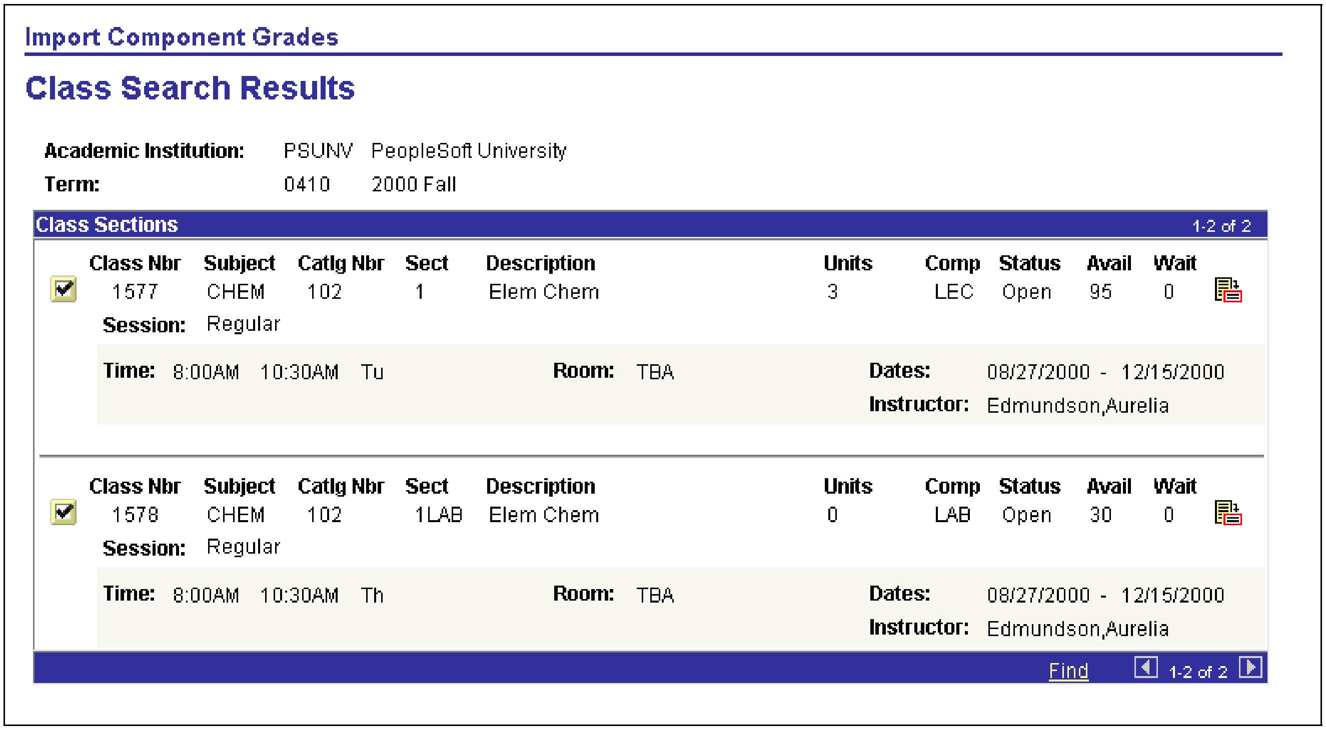
Import Component Grades - Class Search page

Note. The instructor of the graded component must also be entered as an instructor of the ungraded components to import grades from those class components (the instructor does not need to have grade roster access for the ungraded component). Also, assignment grades for another component must exist.

Use the fields on this page to specify your class search parameters.

Viewing the Results of the Class Search

Access the Import Component Grades - Class Search Results page.



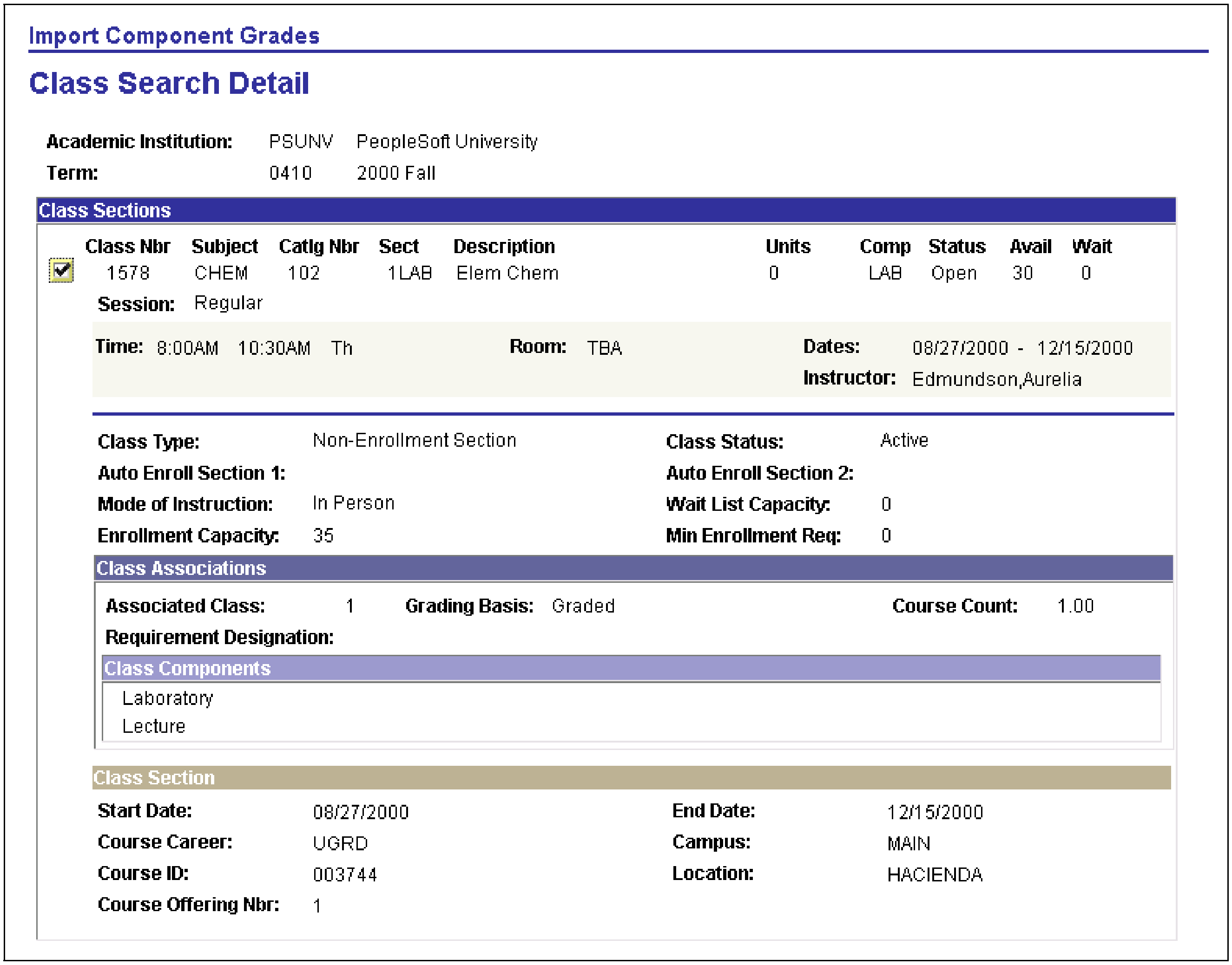
Import Component Grades - Class Search Results page

If the system returns more than one class, click the Check Box button to specify the class from which you want to import grades.

Click the Class Detail button to access the Import Component Grades - Class Search Detail page, where you can view further detail about the class.

Viewing Further Details of the Class Search

Access the Import Component Grades - Class Search Detail page.



Import Component Grades

Class Search Detail

Academic Institution: PSUNV PeopleSoft University

Term: 0410 2000 Fall

Class Sections

Class Nbr	Subject	Catlg Nbr	Sect	Description	Units	Comp	Status	Avail	Wait
1578	CHEM	102	1LAB	Elem Chem	0	LAB	Open	30	0

Session: Regular

Time: 8:00AM 10:30AM Th Room: TBA Dates: 08/27/2000 - 12/15/2000

Instructor: Edmundson,Aurelia

Class Type: Non-Enrollment Section Class Status: Active

Auto Enroll Section 1: Auto Enroll Section 2:

Mode of Instruction: In Person Wait List Capacity: 0

Enrollment Capacity: 35 Min Enrollment Req: 0

Class Associations

Associated Class: 1 Grading Basis: Graded Course Count: 1.00

Requirement Designation:

Class Components

Laboratory

Lecture

Class Section

Start Date: 08/27/2000 End Date: 12/15/2000

Course Career: UGRD Campus: MAIN

Course ID: 003744 Location: HACIENDA

Course Offering Nbr: 1

Import Component Grades - Class Search Detail page

Click the Check Box button to select the class and populate the assignment grade for students that exist in both classes. You can repeat this process and import from different classes, if you have one large lecture section with multiple laboratories or discussions.

Exporting Grades

Instructors can export class grades to a temporary location, such as their C drive. Instructors can export grades as many times as they want.

Here's how to export grades:

1. Click the Export button on the Class Gradebook page.
2. Wait for the export process to complete.
3. If your browser prompts you with the option to open the file from its present location or to save it to your local computer's hard drive, choose the latter.

4. Specify the location on your directory where you want the system to place your class gradebook csv file, and detach the file.
5. Launch your spreadsheet program (for example, Microsoft Excel).
6. Navigate to the directory that you specified, locate your csv file, and launch it.
7. Use the csv file to view or manipulate data locally, or save the file as a Microsoft Excel file and use it for your manipulations.

Prerequisite

Before you can export grades, you must define an FTP URL address for your system on the URL Maintenance page.

See Also

Chapter 2, "Using the Self-Service Gradebook," Defining Gradebook URLs, page 14

Chapter 2, "Using the Self-Service Gradebook," Entering Points for Assignments, page 30

Reviewing Class Assignments

If an instructor sets up a class for PeopleSoft Gradebook, students in the class can access information about the class and their progress to date through the student Gradebook. The student Gradebook is accessible through the Student Gradebook homepage, the Learner Services homepage, and PeopleSoft Campus Portal.

This section lists prerequisites and discusses how to:

- Select the term for which you want to review your assignments and grades.
- Select the course for which you want to review your assignments and grades.
- View summary information about your assignments and grades.
- View assignments in detail.
- View total points for each category.
- View the class grade scale that applies to you.
- View due dates and grades for assignments.

Prerequisites

Before a student can use the gradebook pages:

- The student must be enrolled in a class that has gradebook data.
- The instructor must have activated PeopleSoft Gradebook information for the class.

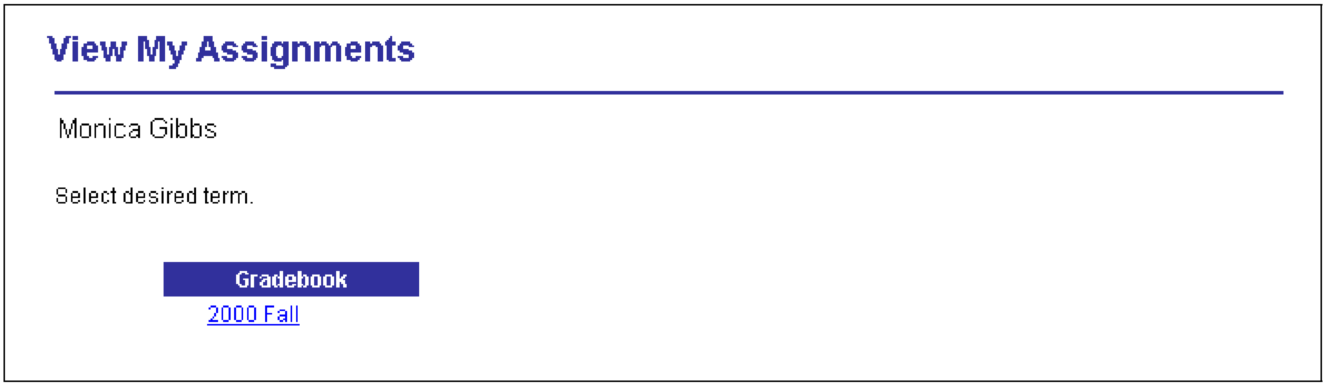
  The instructor does this by accessing and saving the Course Assignments component.

Pages Used to View Class Assignments

Page Name	Object Name	Navigation	Usage
View My Assignments	SS_LAM_STD_GR_TERM	• SA Self Service, (Student) Gradebook, Assignment, View My Assignments • SA Self Service, Learner Services, Academics, View My Assignments	Select the term for which you want to view assignments.
View Assignments and Grades	SS_LAM_STD_GR_LST	• SA Self Service, (Student) Gradebook, Assignment, View My Assignments • SA Self Service, Learner Services, Academics, View My Assignments	Select the course for which you want to view your assignments and grades.
Class Grades - View My Assignments	LAM_STDNT_GRADES	• Manage Student Records, Establish Courses, Inquire, Students Class Grades, Student Grades • SA Self Service, (Student) Gradebook, Assignment, View My Assignments, Student Grades • SA Self Service, Learner Services, Academics, View My Assignments, Student Grades	View summary information about your class assignments and cumulative grades.
Assignment Details	LAM_STDNT_CLAS_ACT	Click the link for an assignment in the Assignment column on the Class Grades - View My Assignments page.	View each assignment in detail.
Assignment Categories	LAM_STDNT_CATEGORY	Click the Assignment Category link on the Class Grades - View My Assignments page.	View total points for each category.
Class Grade Scale	LAM_STDNT_GRAD_SCL	Click the Grade Scale link on the Class Grades - View My Assignments page.	View the class grade scale that applies to you.
Instructor Comments	LAM_STDNT_GRD_NOTE	Click the Instructor Comments link on the Class Grades - View My Assignments page.	View notes from your instructor.
Student Assignment Dates	LAM_STDNT_DATES	Click the Student Assignment Dates link on the Class Grades - View My Assignments page.	View due dates and grades for each assignment.

Selecting the Term

Access the View My Assignments page.

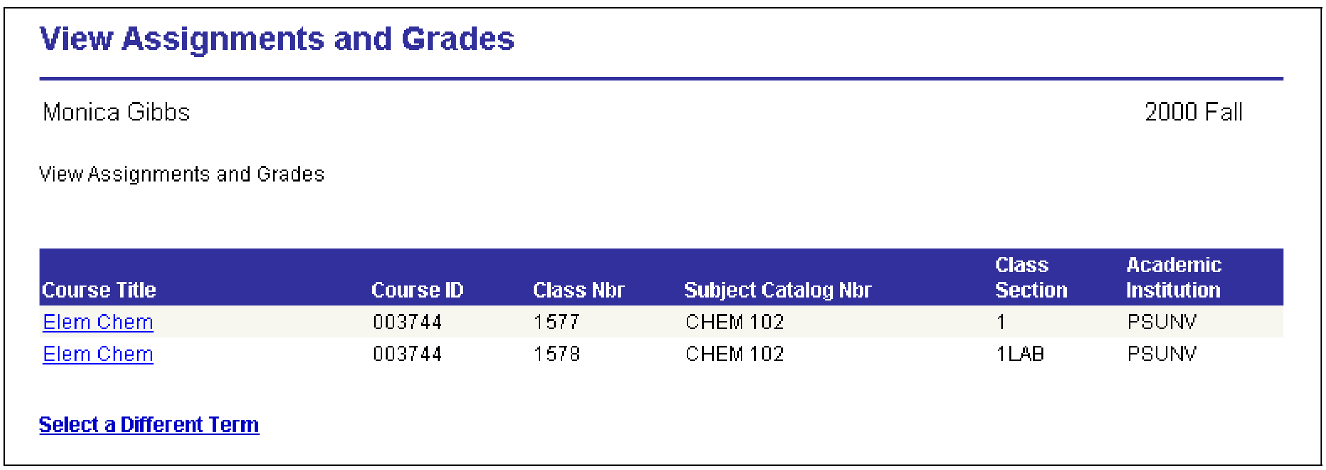


View My Assignments page

Students can click the Term link to access the View Assignments and Grades page, where they can view their assignments and grades.

Selecting the Course

Access the View Assignments and Grades page.

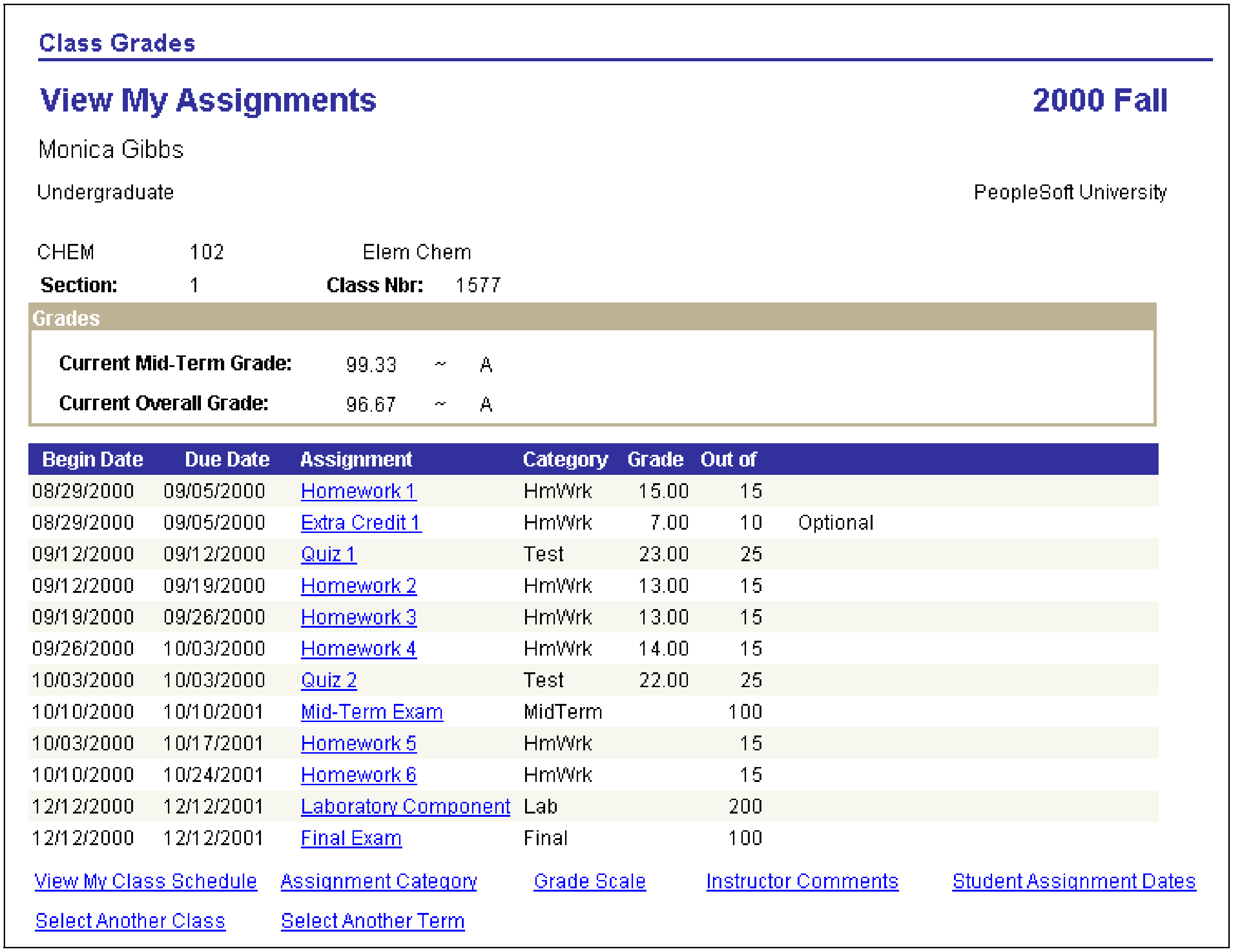


View Assignments and Grades

Students can click the Course Title link to access the View My Assignments page, where they can view information about their class assignments and their cumulative grade.

Viewing Summary Information About Assignments and Grades

Access the Class Grades - View My Assignments page.



Class Grades

View My Assignments 2000 Fall

Monica Gibbs

Undergraduate PeopleSoft University

CHEM 102 Elem Chem

Section: 1 **Class Nbr:** 1577

Grades

Current Mid-Term Grade: 99.33 ~ A

Current Overall Grade: 96.67 ~ A

Begin Date	Due Date	Assignment	Category	Grade	Out of	
08/29/2000	09/05/2000	Homework 1	HmWrk	15.00	15	
08/29/2000	09/05/2000	Extra Credit 1	HmWrk	7.00	10	Optional
09/12/2000	09/12/2000	Quiz 1	Test	23.00	25	
09/12/2000	09/19/2000	Homework 2	HmWrk	13.00	15	
09/19/2000	09/26/2000	Homework 3	HmWrk	13.00	15	
09/26/2000	10/03/2000	Homework 4	HmWrk	14.00	15	
10/03/2000	10/03/2000	Quiz 2	Test	22.00	25	
10/10/2000	10/10/2001	Mid-Term Exam	MidTerm		100	
10/03/2000	10/17/2001	Homework 5	HmWrk		15	
10/10/2000	10/24/2001	Homework 6	HmWrk		15	
12/12/2000	12/12/2001	Laboratory Component	Lab		200	
12/12/2000	12/12/2001	Final Exam	Final		100	

View My Class Schedule Assignment Category Grade Scale Instructor Comments Student Assignment Dates

Select Another Class Select Another Term

Class Grades - View My Assignments page

Current Mid Term Grade — The student's current midterm grade, including the weighted points and letter grade to date. Only assignments for which the Include for Mid Term Grade check box is selected contribute to this percentage.

Current Overall Grade — The student's current overall grade, including the points and letter grade to date for all assignments that have grades to date. All assignments (except those that are specifically excluded or not yet due) contribute to this percentage.

Begin Date — The start date of the assignment. Typically, this is the date of the activity or the date that the instructor assigns the assignment.

Due Date — The date that the assignment is due. The system includes all grades that were entered by this date in the cumulative grades. If the due date or extended due date is less than or equal to the system date, a missing grade counts as 0.

Assignment — The description of the assignment, as entered by the instructor. Students can click an Assignment link to access the Assignment Details Page, where they can review each assignment in detail.

Category — The category of the assignment, as defined by the instructor.

Grade — The points that the student earns for the assignment.

Out of — The maximum points that the assignment is worth.

View My Class Schedule — If PeopleSoft Learner Services is licensed, you can click this link to access the View My Schedule Page, where you can view their schedule for the term.

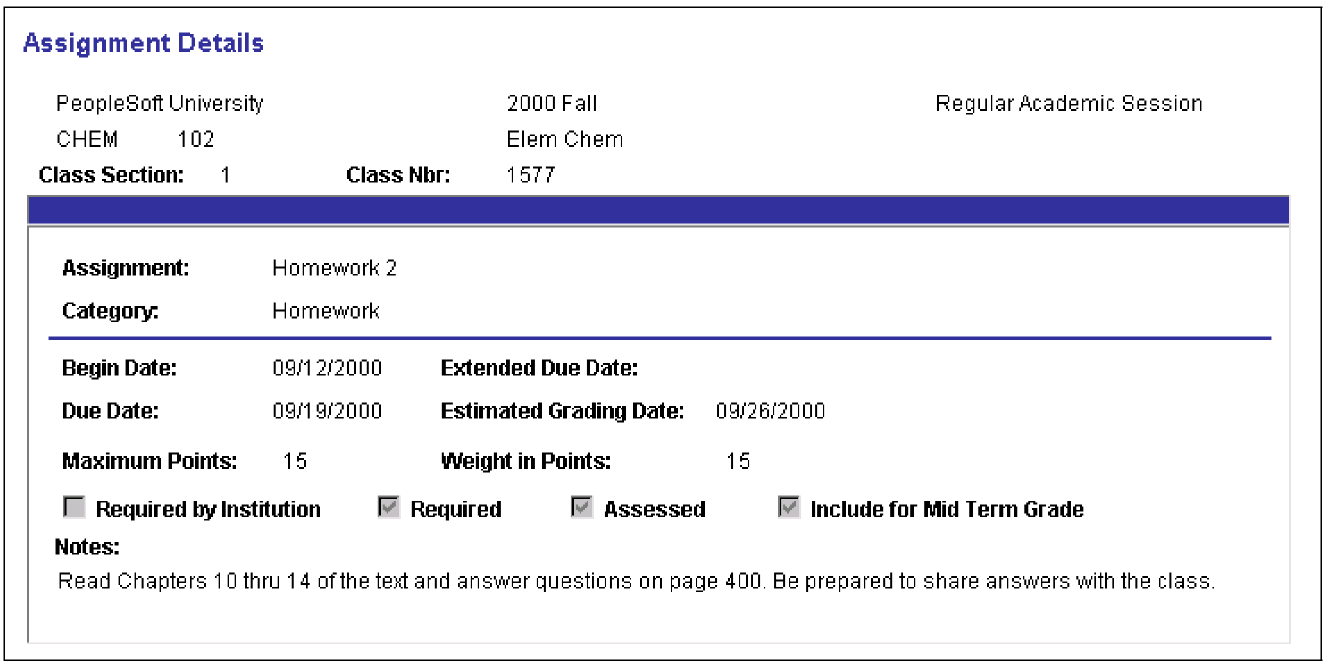
Assignment Category, Grade Scale, Instructor Comments, and **Student Assignment Dates** — Click any link to access the page where you can view information about the linked topic.

Select Another Class — Click this link to access the View Assignments and Grades page, where you can select a different class to view for the term.

Select Another Term — Click this link to access the View My Assignments page, where you can select a different term.

Viewing Assignments in Detail

Access the Assignment Details page.



Assignment Details page

Viewing Total Points for Each Category

Access the Assignment Categories page.

Assignment Categories

Monica Gibbs

PeopleSoft University 2000 Fall Regular Academic Session

CHEM 102 Elem Chem

Class Section: 1 **Class Nbr:** 1577 **Course ID:** 003744

Grades

Current Mid-Term Grade: 99.33 ~ A

Current Overall Grade: 96.67 ~ A

Category	Weight %	Mid-Term Total	Out of	Mid-Term Grade	Category Total	Out of	Category Grade
Final	25						
Homework	10	48.00	45.00	106.67	62.00	60.00	103.33
Lab Component	40						
Mid-Term	15						
Test	10	23.00	25.00	92.00	45.00	50.00	90.00

Assignment Categories page

Viewing Your Class Grade Scale

Access the Class Grade Scale page.

Class Grade Scale

Monica Gibbs

PeopleSoft University 2000 Fall Regular Academic Session

CHEM 102 Elem Chem

Class Section: 1 **Class Nbr:** 1577 **Course ID:** 003744

Grades

Current Mid-Term Grade: 99.33 ~ A

Current Overall Grade: 96.67 ~ A

Mark	Grade
90	A
80	B
70	C
60	D
	F

Class Grade Scale page

Viewing Notes From Your Instructor

Access the Instructor Comments page.

Instructor Comments

Monica Gibbs

PeopleSoft University 2000 Fall Regular Academic Session

CHEM 102 Elem Chem

Class Section: 1 **Class Nbr:** 1577 **Course ID:** 003744

Grades

Current Mid-Term Grade:	99.33	~	A
Current Overall Grade:	96.67	~	A

Instructor Comments

Monica -- You're doing a great job. You seem well prepared for the Mid-Term.

Instructor Comments page

Viewing Assignment Due Dates and Grades

Access the Student Assignment Dates page.

Student Assignment Dates

Monica Gibbs

PeopleSoft University 2000 Fall Regular Academic Session

CHEM 102 Elem Chem

Class Section: 1 **Class Nbr:** 1577 **Course ID:** 003744

Grades

Current Mid-Term Grade:	99.33	~	A
Current Overall Grade:	96.67	~	A

Begin Date	Due Date	Assignment	Date Rec'd	Grade	Last Updated	
08/29/2000	09/05/2000	Homework 1	09/05/2000	15.00	05/14/2001	
08/29/2000	09/05/2000	Extra Credit 1	05/14/2001	7.00	05/14/2001	Optional
09/12/2000	09/12/2000	Quiz 1	05/14/2001	23.00	05/14/2001	
09/12/2000	09/19/2000	Homework 2	09/19/2000	13.00	05/14/2001	
09/19/2000	09/26/2000	Homework 3	05/14/2001	13.00	05/14/2001	
09/26/2000	10/03/2000	Homework 4	05/14/2001	14.00	05/14/2001	
10/03/2000	10/03/2000	Quiz 2	10/03/2000	22.00	05/14/2001	
10/10/2000	10/10/2001	Mid-Term Exam			05/14/2001	
10/03/2000	10/17/2001	Homework 5			05/14/2001	
10/10/2000	10/24/2001	Homework 6			05/14/2001	
12/12/2000	12/12/2001	Laboratory Component			05/14/2001	
12/12/2000	12/12/2001	Final Exam			05/14/2001	

Student Assignment Dates page

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.

account — You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

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 entry — A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

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 anotherand 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.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

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.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
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.
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 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).
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.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
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.

child — In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.

Class ChartField — A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

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

collection — To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

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.

configuration parameter catalog — Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan — In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference — Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context — In 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.

corporate account — Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.

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.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If youre working with Japanese or other Asian employees, you can enter the employee’s name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values 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 job	Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
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.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
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	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
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.
key	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.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See *activity.*
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
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	The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.
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 addressesfor 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 locationindicated by a *1*is the address you use most often and may be different from the main address.
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.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage 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.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
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 *participant object.*
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
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 an 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.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
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 contextif 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 section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
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.
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.

private view A user-defined view that is available only to the user who created it.

process See *Batch Processes.*

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 an SQR, a COBOL 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.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record definition A logical grouping of data elements.

record field A field within a record definition.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

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

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

See *record input VAT flag.*

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

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

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

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.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
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.
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.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.
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.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
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 activitycharacteristics 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.

sibling A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

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.

SQR See *Structured Query Report (SQR).*

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.

Structured Query Report (SQR) A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

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 tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

table — The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).

TableSet sharing — Specifies control table data for each business unit so that redundancy is eliminated.

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.

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 loading process — In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.

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.

transaction type — In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.

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.

uniform resource locator (URL) — In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

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.

URL — See *uniform resource locator (URL).*

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.

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

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.

workflow — The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

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.

zero-rated VAT — Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

Index

N

P

R

S

T

U

V

W