PeopleSoft®

EnterpriseOne Tools 8.94 PeopleBook: Development Tools: Event Rules and System Functions

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EnterpriseOne Tools 8.94 PeopleBook: Development Tools: Event Rules and System Functions
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Contents

About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

PeopleSoft Application Prerequisites

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

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Additional Resources

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

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in PeopleBooks

Address Book Number Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code

Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number

Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date

Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status

Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant

Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit

Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code

Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company

Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code

Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company

Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

	If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.
Document Number	Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.
Document Type	Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated: *P:* Accounts payable documents. *R:* Accounts receivable documents. *T:* Time and pay documents. *I:* Inventory documents. *O:* Purchase order documents. *S:* Sales order documents.
Effective Date	Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates: • The date on which a change of address becomes effective. • The date on which a lease becomes effective • The date on which a price becomes effective. • The date on which the currency exchange rate becomes effective. • The date on which a tax rate becomes effective.
Fiscal Period and **Fiscal Year**	Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010)
G/L Date (general ledger date)	Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

Event Rules Preface

This preface discusses the Event Rules PeopleBook.

PeopleSoft Products

This PeopleBook refers to this PeopleSoft product line: PeopleSoft EnterpriseOne Tools.

PeopleSoft Event Rules

This PeopleBook covers Event Rules (ER), a member of the PeopleSoft EnterpriseOne Tools suite. ER is the scripting language application developers use to write logical routines for their applications. Its chapters describe the ER in general and then explains how to use the Event Rules Design tool to write ER.

CHAPTER 1

Getting Started with PeopleSoft Tools Event Rules

This chapter provides an overview of preparing to use Event Rules Design.

PeopleSoft Tools Form Design Aid Overview

Use Event Rules Design to create or modify event rules (ER) in EnterpriseOne applications. Event rules are connect to certain runtime events and instruct runtime how to respond to the conditions you choose to define.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About These PeopleBooks*, with information about where to find the most current version of each.

See Also

About These PeopleBooks Preface

PeopleSoft Tools Event Rules Implementation

To use Event Rules Design to work with the EnterpriseOne applications, these tasks must be completed first:

- You must have a valid EnterpriseOne user account.

  Depending on how security has been configured, you might need one or more roles assigned to you so that you can access Object Management Workbench (OMW), the EnterpriseOne databases, and so forth.
- OMW must be configured with transfer activity rules and allowed actions so that application development can occur.
- At a minimum, you must have a default project in OMW to which you have been added in the role of Developer.

CHAPTER 2

Understanding Events, Event Rules, and Runtime Processing

This chapter discusses events, event rules, and how the runtime engine processes them.

Events

Events are activities that occur on a form, such as entering a form or exiting a field by using TAB. Events can be initiated by the user or the application. A single control might initiate multiple events. The system also initiates some events, such as **Last Grid Record Has Been Read**, when certain actions occur.

Event Rules

Event rules (ER) are logic statements that you can create and attach to events. ER is initiated when events occur at runtime. PeopleSoft EnterpriseOne software supports two kinds of Event Rules: Named Event Rules and Embedded Event Rules.

You can attach multiple event rules to one event. The various kinds of event rules include:

- Conditional statements, such as If/Else/End If.
- While loops.
- Assignments.
- Calls to business functions.
- Form or report interconnections.
- Calls to system functions.
- Table I/O operations.

Named Event Rules

A *named event rule* (NER) is a series of regular ER statements (such as assignments, business functions, system function calls, and so forth). A NER encapsulates the series of statements into one reusable component. You can call a NER the same way as calling a business function. Business functions implement customized business logic using C language; NERs implement customized business logic using event rule statements.

Embedded Event Rules

In addition to NERs, the other kind of ER is called *embedded event rules*, or simply *event rules*. Embedded ER is specific to a particular table, interactive application, or batch application. Embedded ER for a table is called *table event rules* or *table triggers*. Embedded ER for an interactive application or batch application is called *application event rules*.

Application Event Rules

You can add business logic that is specific to a particular application. Interactive applications connect ER using Form Design Aid (FDA), while batch event rules use Report Design Aid (RDA).

Table Event Rules

You can create *database triggers*, or ER that you attach to a table by using Table Design Event Rules. The logic that is attached to a table is run whenever any application initiates that a particular database event. For example, to maintain referential integrity, you might attach rules to a master table that delete all children when a parent is deleted. Any application that deletes information from that table does not need to have the parent/child logic embedded in it because that logic exists in the table.

Runtime Processing of Event Rules

Runtime processing refers to how, at runtime, the system evaluates various events (such as initializing a form, clicking a button, and using TAB to move between fields) and their attached ER. ER is attached to events, which in turn are attached to controls or forms.

FDA provides several different form types, each of which includes predefined fields and features that are specific to the form type. For example, a find/browse form automatically includes a Find menu option or tool bar button with appropriate functions attached to it. When users enter search text in a filter or query-by-example (QBE) field, and then click the Find button on the tool bar, the runtime engine processes logic to fetch a record.

To avoid generating unnecessary ER, you should understand the different field types and associated capabilities that characterize each form type.

Runtime Data Structures

Runtime data structures are structures or blocks of memory that hold data when user is working with an application. You should know what is happening to each form at runtime. You should know what is in a runtime structure at a given event point in the runtime process.

The runtime system dynamically creates runtime data structures. For example, if a form contains hidden controls, the system allocates memory for those controls even though they are not visible on the form. When you pass processing option (PO) values in a form, the system allocates memory to store the PO value.

Available Objects and Runtime Data Structures

A runtime data structure is made of a variety of objects n a form. An available object is represented by a two-character, alphabetical code that characterizes the source of data and determines how the object data is used in an interactive application at runtime. Available objects make up the runtime data structure for a form.

During runtime processing, the system stores data in memory in an internal data structure. Certain fields of the data structure temporarily store data during runtime. When no longer needed, the data is deleted so that the system can process another record.

In ER, you can access and modify available objects in order to implement business logic. For example, you can assign a value to a QBE field to set query criteria for the form.

This table lists the available objects:

Available Object Code	Description
BC	A column in the business view (BV). BCs for both the form view and the grid view appear in this list. The system fills these columns with values from the database when it performs a fetch. The system writes these values to the database during an add or update.
GC	A column in the grid. The row that the value references depends on which event is accessing the GC. During the fetch cycle, it is usually the selected row. In some circumstances, CG objects also denote a particular physical column in the grid instead of a value. An example is the **Set Grid Font** system function.
GB	The grid buffer. This buffer is one row of data that is independent of the lines that the system reads from the database and writes to the grid. The GB allows you to manipulate column data for a line that you want to insert or update without affecting the present state of the grid. You access the GB through an available GB object, which appears after the GC objects in the list of available objects in Event Rules Design. Each grid contains only one instance of each GB column.
FC	A control on the form. If the control is a database item, this field corresponds to a BC object. Furthermore, if the control is not a filter, the FC object represents the same value as the BC object, and changing one of these results in changing both.
FI	A value passed through a form interconnection. You access this object either to read values that are passed into the form or to set values to be passed back. These objects correspond to the elements of the form data structure.
PO	A value passed from a PO. These values are passed into the application when a user launches it. Any form in that application can access them. POs can either be entered by the user, or they can be set up in a particular version of an application.
QC	A cell from the QBE line in the grid. These objects represent the values in any QBE cell on the grid. They include wildcards, but do not include any comparison operators. Likewise, assignments to these objects can include wildcards, but not comparison operators. You can use a system function to set comparisons.
HC	A hypercontrol item. A hypercontrol item is a menu item or a tool bar item.
VA	ER variables. These objects represent any variables that you set up in ER.
SV	System variables. These objects represent some environment variables that are accessible to ER.
SL	System literals. These objects represent some constant system values that are accessible to ER.
TP	Tab page object.
TK	A column in the table that contains the table ER.
CO	A constant, such as the return code for an error.

Available Object Code	Description
TV	Text variables.
RC	Report constants for a batch application.
RV	Report variables (batch application).
IC	An input column (table conversion).
OC	An output column (table conversion).

BC and FC share the same internal structure if an FC is associated with a database item; filter fields are an exception.

Processing Available Objects

When an available object is changed through ER, these actions occur:

- The object in the internal runtime structure is changed.
- If the object is a form control or grid cell, row, or column, the screen is updated with the new value.

A BV form control shares the same value as the corresponding business view item. (Filter fields are an exception to this rule.) This means that:

- FC data and BC data are always identical.
- Whenever FC data is changed, BC items are changed to the same value.
- Whenever BC values are changed, the FC runtime values also changes to the same values. This change may not immediately reflected to the screen.
- On **Control is Exited** processing, the value entered into the form control is captured in both the BC and FC item for that control.

Control is Exited Processing

Control is Exited processing includes these actions:

- The value in the control is saved to internal runtime structures.
- The **Control is Exited**event is processed.

If the value has changed since the previous time that the control was exited, these steps occur:

- The system processes the**Control Exited/Changed–Inline** event.
- The system processes the**Control Exited/Changed–Async** event.
- The system validates the value using edit rules defined for the DD item.
- The form control data is formatted using format rules defined for the DD item and displayed on the screen.

Form Flow

Each form type has different properties and event flow. The system provides events for the forms so that you can insert custom logic. These events occur regardless of whether you add event rule logic for that event.

This example represents how values in the runtime structures are stored in memory compared to how they appear on the form. This example uses the find/browse form when it is called directly from a menu. The runtime engine processes events in a certain order. The next sections describe the typical events for the find/browse form and the order in which they are processed. This process flow can vary depending on specific user interaction and the event rule logic that you use.

Pre-Dialog Is Initialized

The following steps occur before the **Dialog is Initialized** event is processed and the form appears:

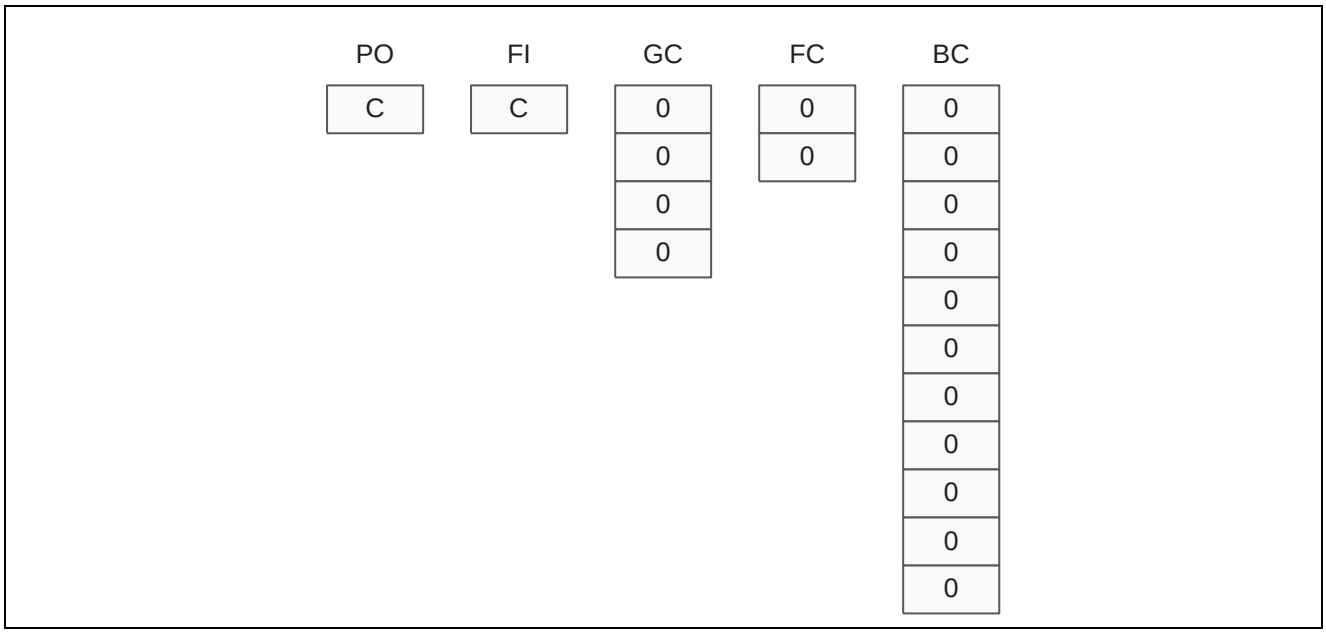
- Initialize runtime structures (or clear memory) as shown:
  - BC = null.
  - FC = null.
  - GC = null.
  - FI = Values passed from a calling form (if any).
  - PO = Values passed from processing options.
- Initialize form controls.
- Initialize error handling.
- Initialize static text.
- Initialize helps.
- Create tool bar.
- Load form interconnect data into corresponding BC columns and filter fields (if any exist).
- Initialize thread handling.

Dialog Is Initialized

The system processes all event rule logic that is attached to the **Dialog is Initialized** event. When this event starts, the runtime structures contain these values:

- BC = Any FI values passed.
- FC = Any FI values passed.
- GC = null.
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

This example represents the information in the runtime structures just before the system fires **Dialog is Initialized**:



Content of runtime structures before Dialog Is Initialized fires

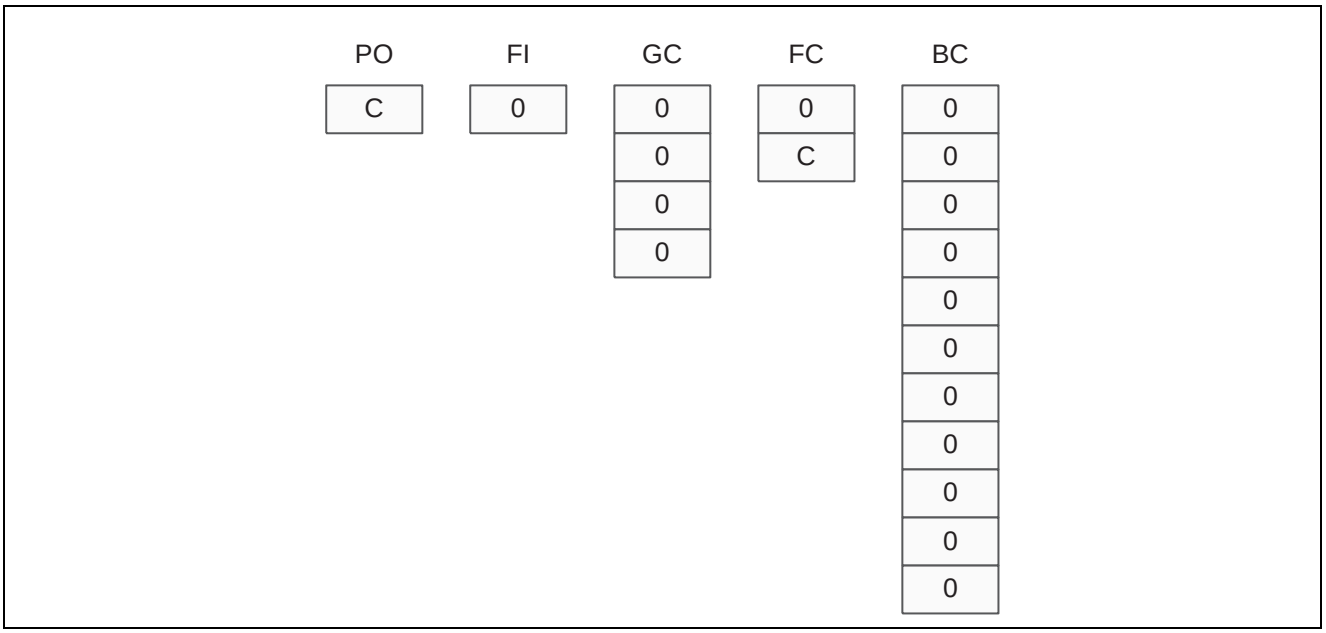
The **Dialog is Initialized** event can be used to initialize the form. After the **Dialog is Initialized** event is finished, runtime starts the **Post Dialog Is Initialized** process.

Post Dialog Is Initialized

Before the system fires the **Post Dialog is Initialized** event , the runtime structures contain these values:

- BC = null (or values already passed in).
- FC = null (or values already passed in).
- GC = null (or values already passed in).
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

This example represents the information in the runtime structures just before the system fires the **Post Dialog Is Initialized** event:



Content of runtime structures before Post Dialog Is Initialized fires

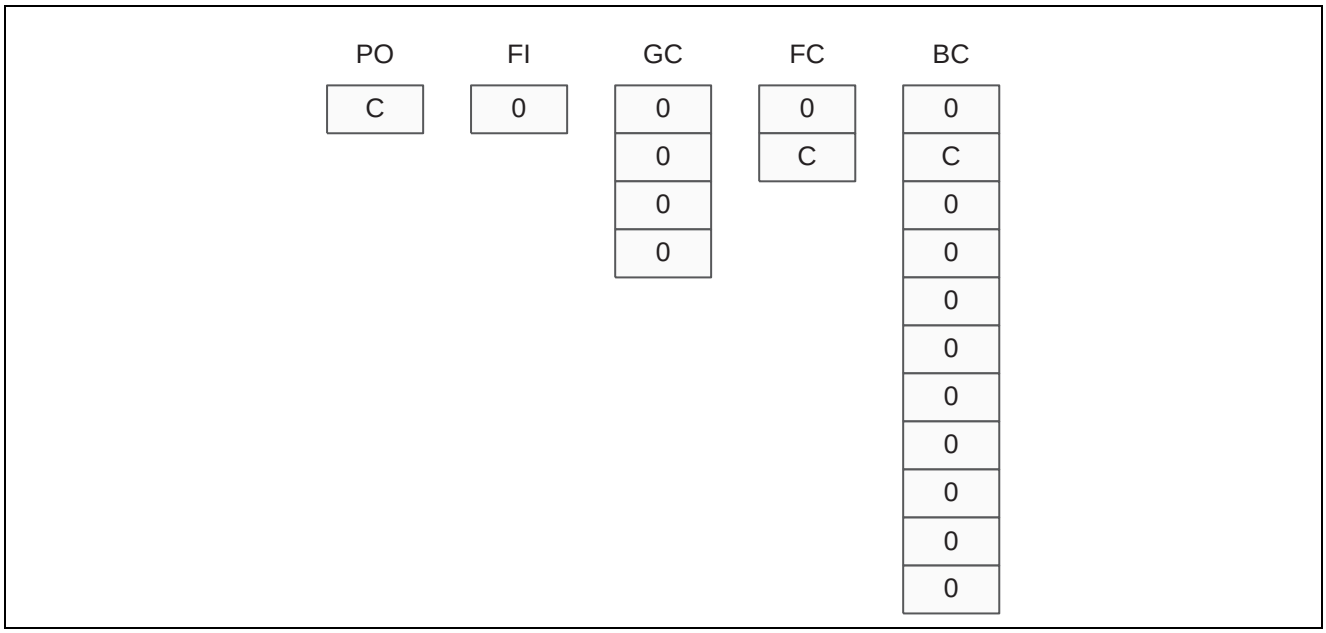
The **Post Dialog is Initialized** event is commonly used to perform these tasks:

- Load filter fields that will be used for the `WHERE` clause in the `SQL SELECT` statement.
- Load PO values into filter fields.
- Perform any one-time logic for the form, such as fetching a system date.

Building SQL SELECT

After the user clicks the Find button, the system builds a `SELECT` statement with a `WHERE` clause. The `SQL SELECT` statement includes all columns in the BV. The `WHERE` clause includes any values in the QBE or filter fields. It can also contain values passed through Set Selection and Set Lower Limit system functions. The `WHERE` clause is then used to get all records that meet the criteria.

This example represents the information that appears in the runtime structures just before the system builds the SQL statement:



Content of runtime structures before SQL Select statement builds

Fetching Records

Records are fetched one page at a time (unless page-at-a-time is disabled). The system processes each record fetched one by one and display it in the grid row.

Page-at-a-Time Processing

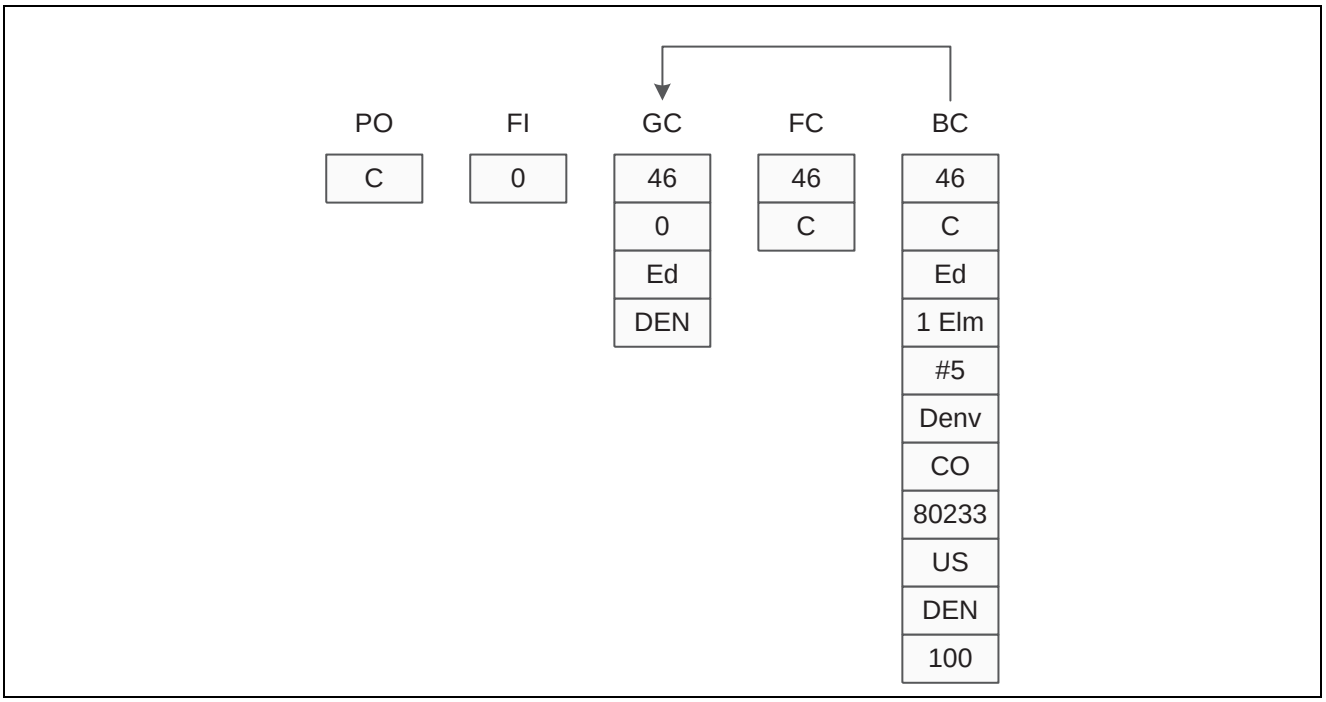
Page-at-a-time processing means that the system fetches only a single page worth of records to display. To see the next page of records, user clicks the Next button. You can customize the page size for each grid in FDA. A system administrator can also set a global page size for all grids.

Typically, page-at-a-time processing improves performance and scalability. Although it can be disabled, the PeopleSoft EnterpriseOne standards state that you should not disable it unless you have a valid business reason to do so.

BC Assigned Database Values

After the system fetches each record from the database, it copies the database values to the BC items. Values from each marked column in the table appear in the BC runtime structure elements.

This example represents the information in the runtime structures when the system reads the first record:



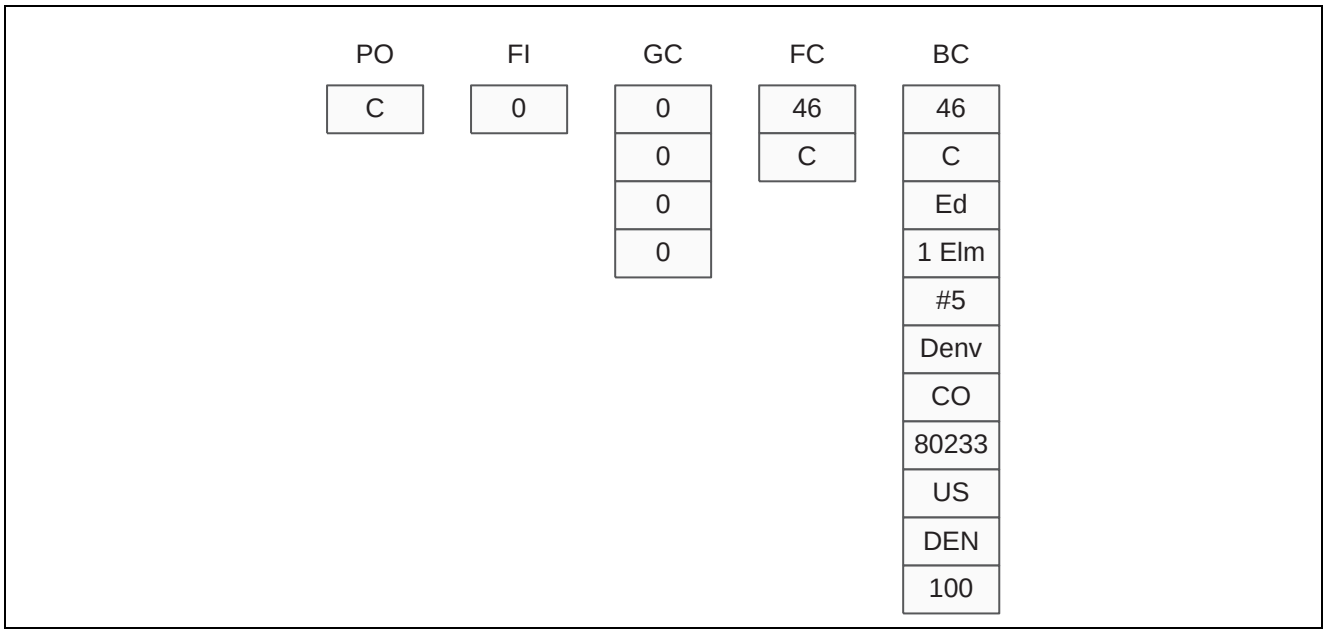
Content of runtime structures when first record read

Grid Record Is Fetched

The engine then fires the **Grid Record is Fetched** event. At this point, the runtime structures have these values:

- BC = Values from the database (for the first record read).
- FC = Values from the database (if the fields are database fields).
- GC = null.
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

This example represents the information in the runtime structures just before the system fires **Grid Record is Fetched**:



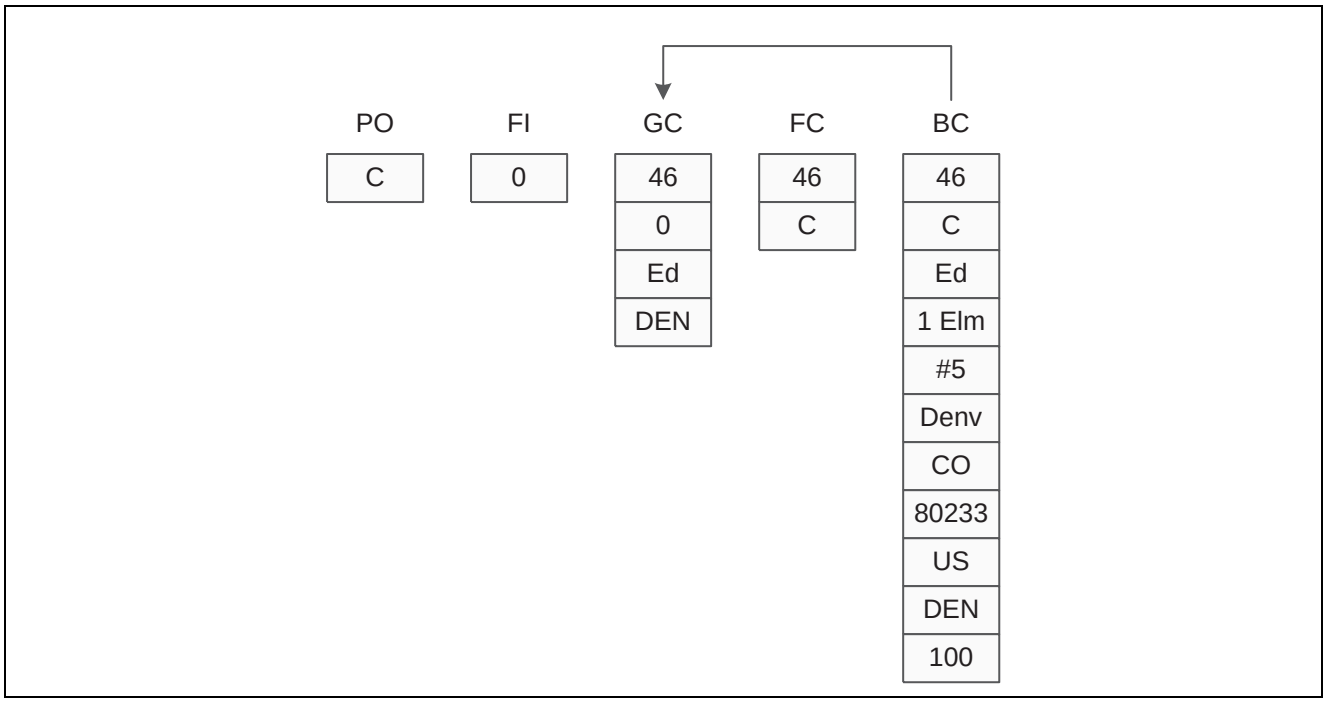
Content of runtime structures before Grid Record is Fetched fires

The **Grid Record is Fetched** event is commonly used to perform these actions:

- Calculate a value for a work field in the grid.
- Suppress a row from being written to the grid.

After the **Grid Rec Is Fetched** event fires , the BC values are copied into the GC runtime structure.

This example represents the information in the runtime structures when the system reads the first record:



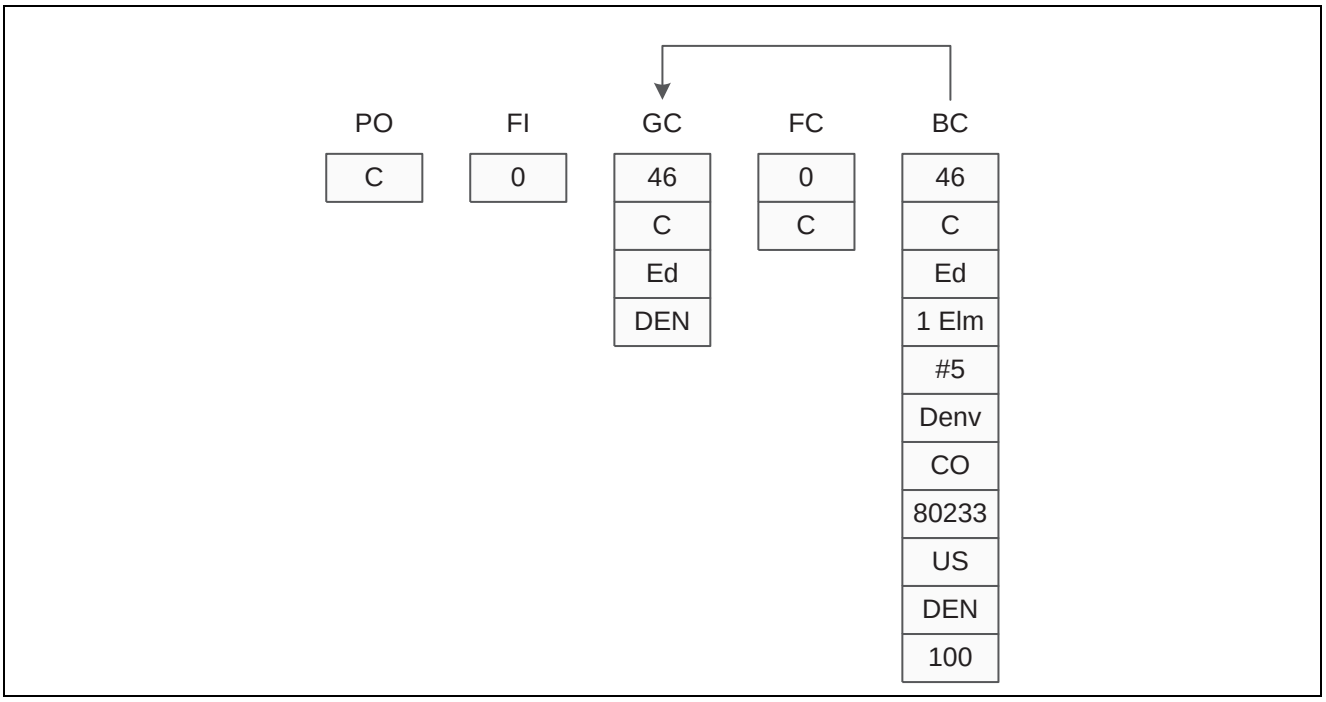
Content of runtime structures when first record is read

Write Grid Line-Before

The engine then fires the **Write Grid Line-Before** event. A this point, the runtime structures have these values:

- BC = Values from the database (from the record just read).
- FC = Values from the database (if the fields are database fields).
- GC = Values from the database (from the previous read).
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

This example represents the information in the runtime structures just before the system fires **Write Grid Line-Before**:



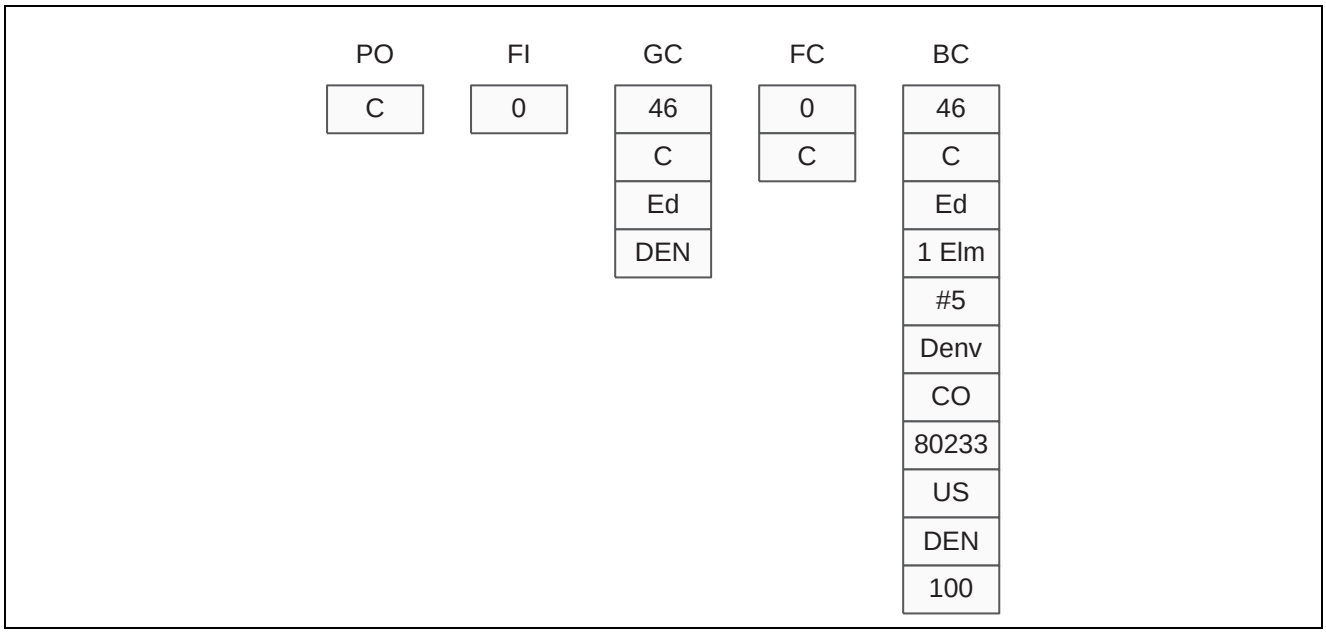
Content of runtime structures before Write Grid Line–Before fires

The **Write Grid Line–Before** event is commonly used to perform these tasks:

- Suppress a grid row from being written.
- Add logic before the user sees a row on the form.
- Change formatting of a grid column.
- Convert any grid value, such as unit of measure.
- Retrieve additional information for the grid row, such as a description, from tables that are not in the BV.

After the system processes **Write Grid Line–Before**, the GC elements, which now include the database values for the first record, are copied to the grid cells on the form.

This example represents the information that appears in the runtime structures now:



Content of runtime structures after Write Grid Line–Before fires

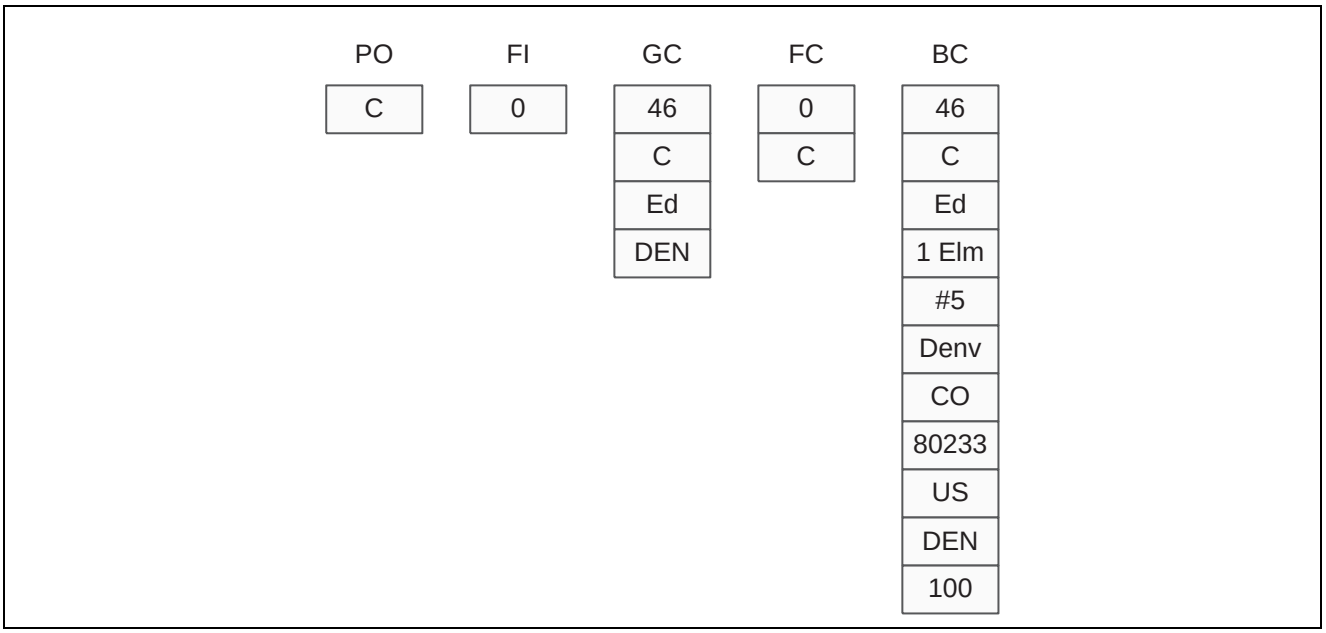
Write Grid Line–After

The engine then fires the **Write Grid Line-After** event. At this point, the runtime structures have these values:

- BC = Values from the database (from the first record read).
- FC = Values from database (if the field is a database field).
- GC = Values from the database (from the first record read).
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

The system displays the current record in the grid cells.

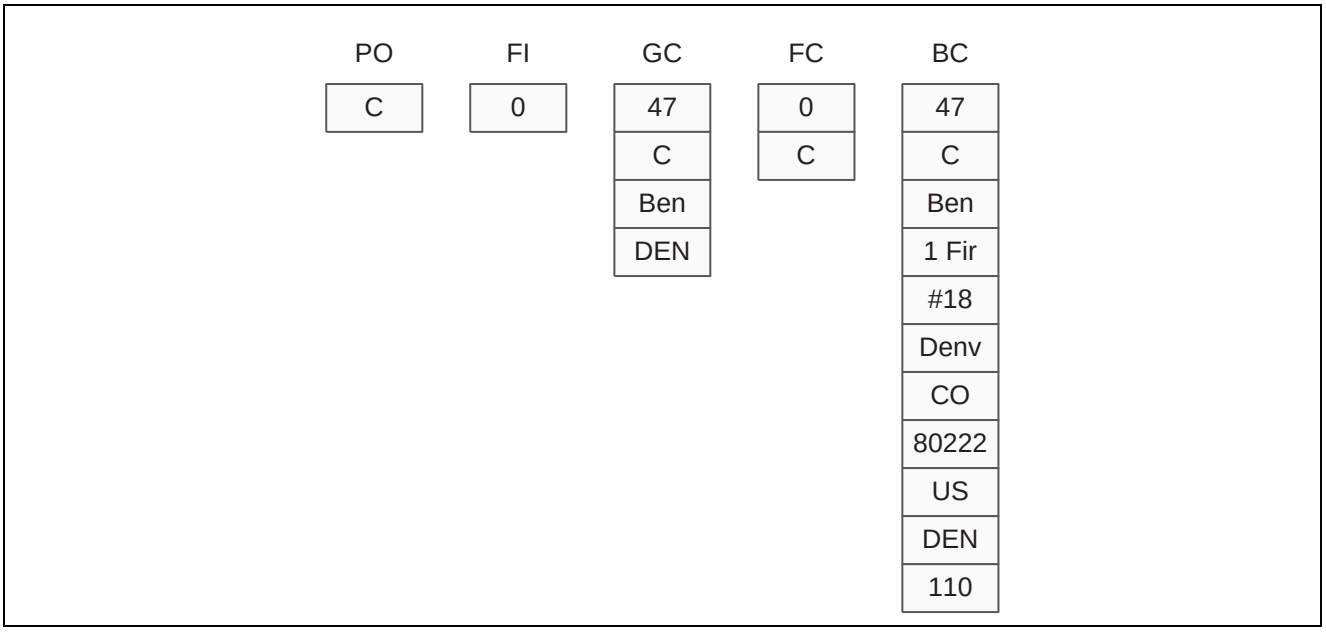
This example represents the information in the runtime structures just before the system fires **Write Grid Line–After**:



Content of runtime structures before Write Grid Line–After fires

You typically use the **Write Grid Line–After** event to add logic after the user sees a row on the form.

This example represents the information in the runtime structures after the system processes **Write Grid Line–After**:



Content of runtime structures after Write Grid Line After runs

The system continues to read records from the database and performs the same processing steps. When the system reads the next record, it performs these processing steps:

•

- Assign BC values from the database.
- Process **Grid Rec is Fetched** ER.
- Assign BC values to GC.

- Process **Write Grid Line–Before** ER.
- Display values in the grid row on the form
- Process **Write Grid Line–After** ER.

This process is repeated until there are no more records fetched.

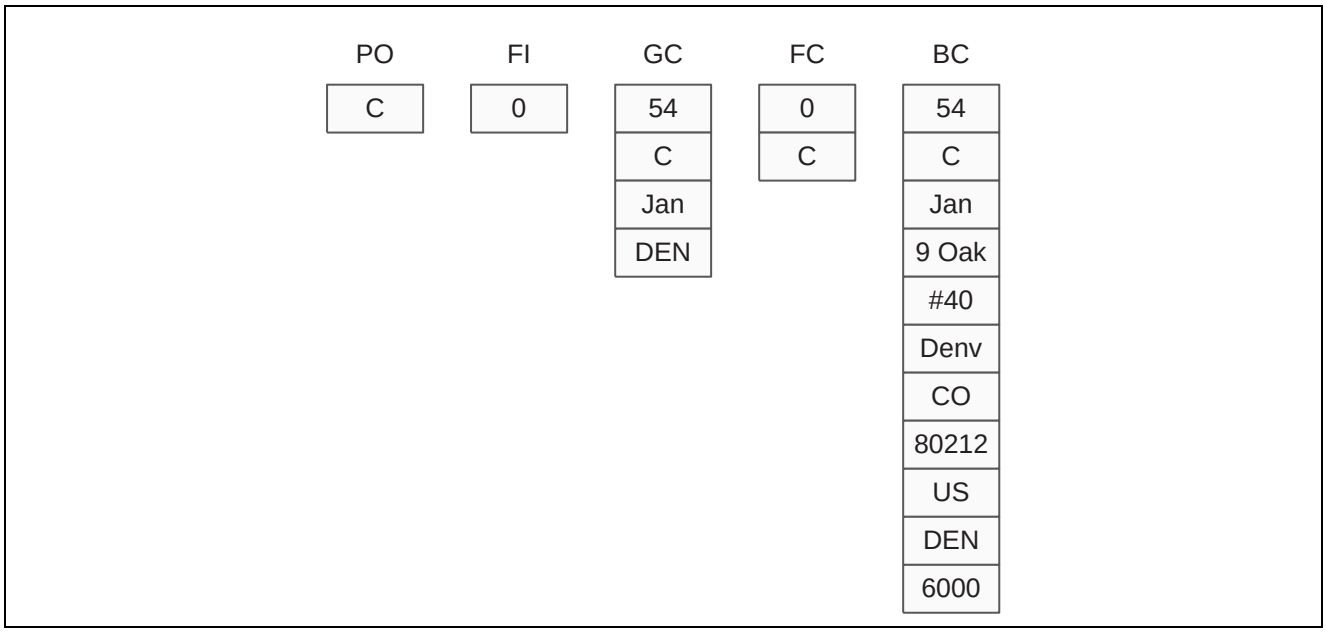
Last Grid Record Has Been Read

When there are no more records fetched from the database, the engine fires **Last Grid Record Has Been Read** event. At this point, the runtime structures contain these values:

- BC = Values from the database (from the last record read).
- FC = Values from the database (if the field is a database field).
- GC = Values from the database (from the last record read).
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

The GC values appear on the last grid row.

This example represents the information in the runtime structures just before the system runs **Last Grid Record Has Been Read**:



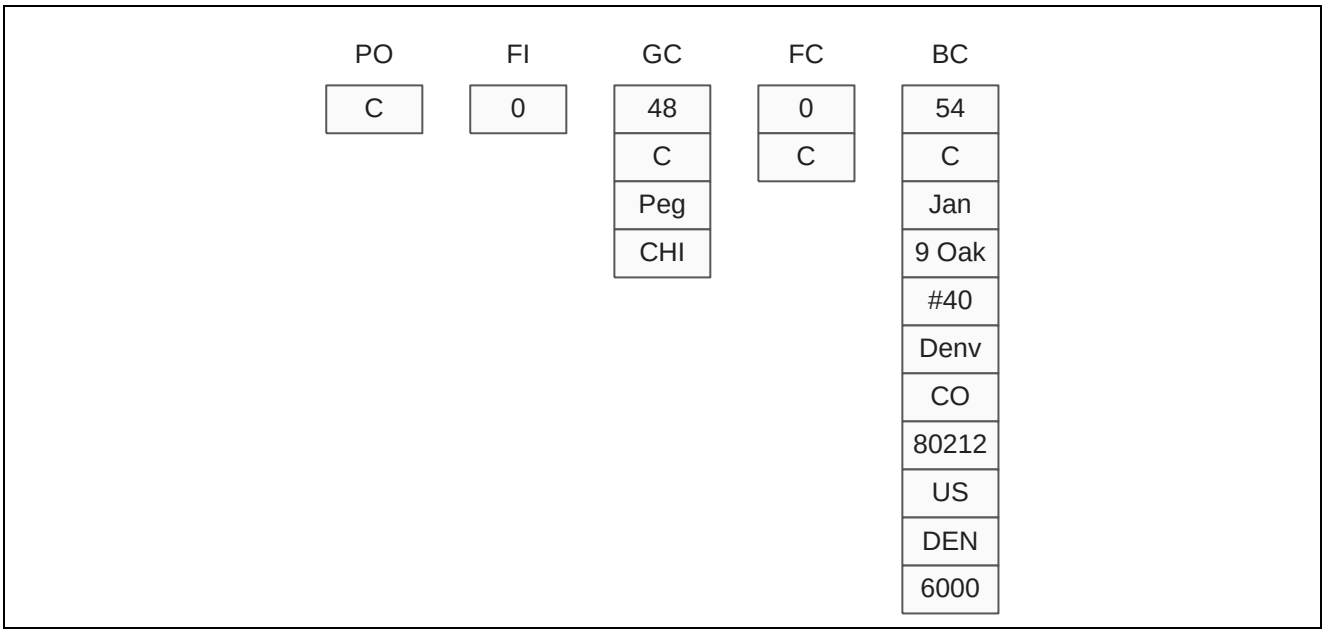
Content of runtime structures before Last Grid Record Has Been Read fires

The **Last Grid Record Has Been Read** event is commonly used to write total lines to the grid and to display totals that are based on grid values.

Select Button Processing

When a user chooses a grid row and clicks the Select button, the BC structure stays the same, however the GC structure reflects values on the row that is being selected.

This example represents the information in the runtime structures when the user chooses a grid row that is other than the last fetched row. Note that the BC and GC structures do not contain the same values:



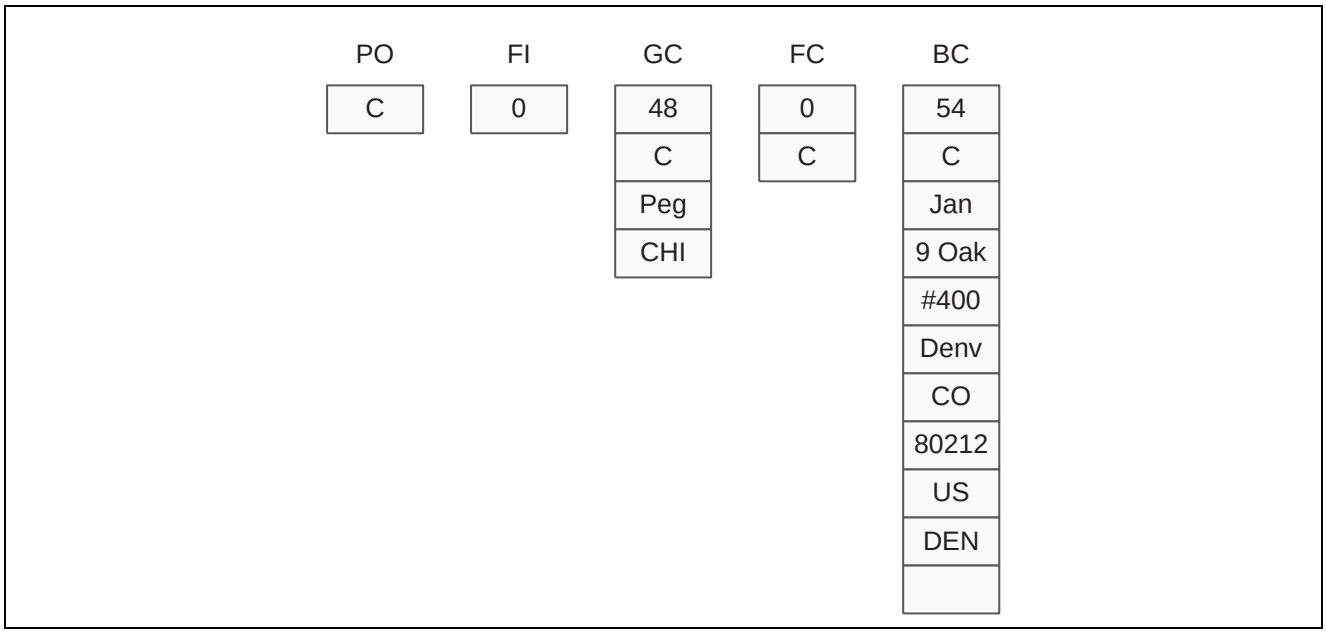
Content of runtime structures when user chooses grid row that is other than the last fetched row

Button Clicked

The engine then fires the **Button Clicked** event for the Select button. At this point, the runtime structures have these values:

- BC = Values from the database (from the last record read).
- FC = Values from the database (if the field is a database field).
- GC = Values from the selected grid row.
- FI = Values passed from a calling form (if any).
- PO = Values passed from processing options.

This example represents the information in the runtime structures just before the system fires **Button Clicked**:



Content of runtime structures before Button Clicked fires

The **Button Clicked** event is commonly used to connect to another form .

Use Repeat Business Rules for Grid to repeat ER when multiple rows are selected .

Add Button Processing

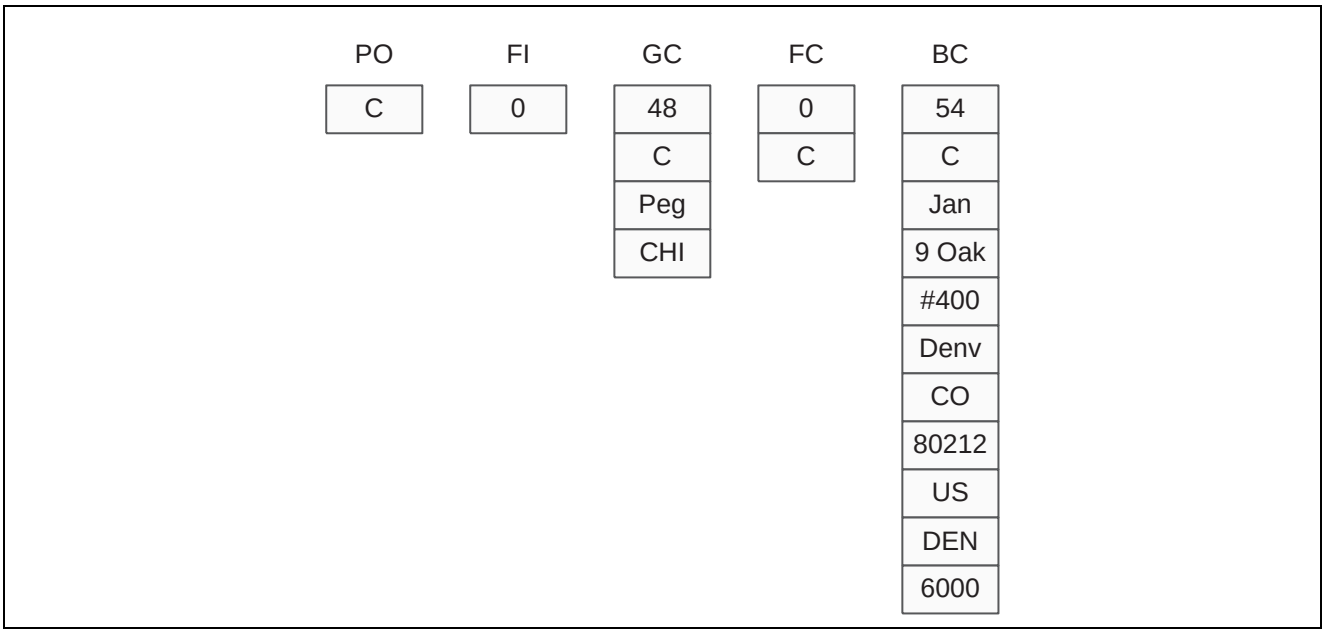
Normally, the user does not choose a row before an add action, but if a row is highlighted, the system updates the GC values to reflect the selected row values. The system does not update the database just because the user clicks the row.

The engine pauses for the **Button Clicked** event to be processed. At this point, the runtime structures have these values:

- BC = Values from the database (from the last record read).
- FC = Values from the database (if the field is a database field).
- GC = Values from the database (from the selected row).
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

Because this is an add action, the content of GC is irrelevant at this point. BC and GC do not contain the same values.

This example represents the information that is in the runtime structures just before the system fires **Button Clicked**:



Content of runtime structures before Button Clicked for Add Button fires

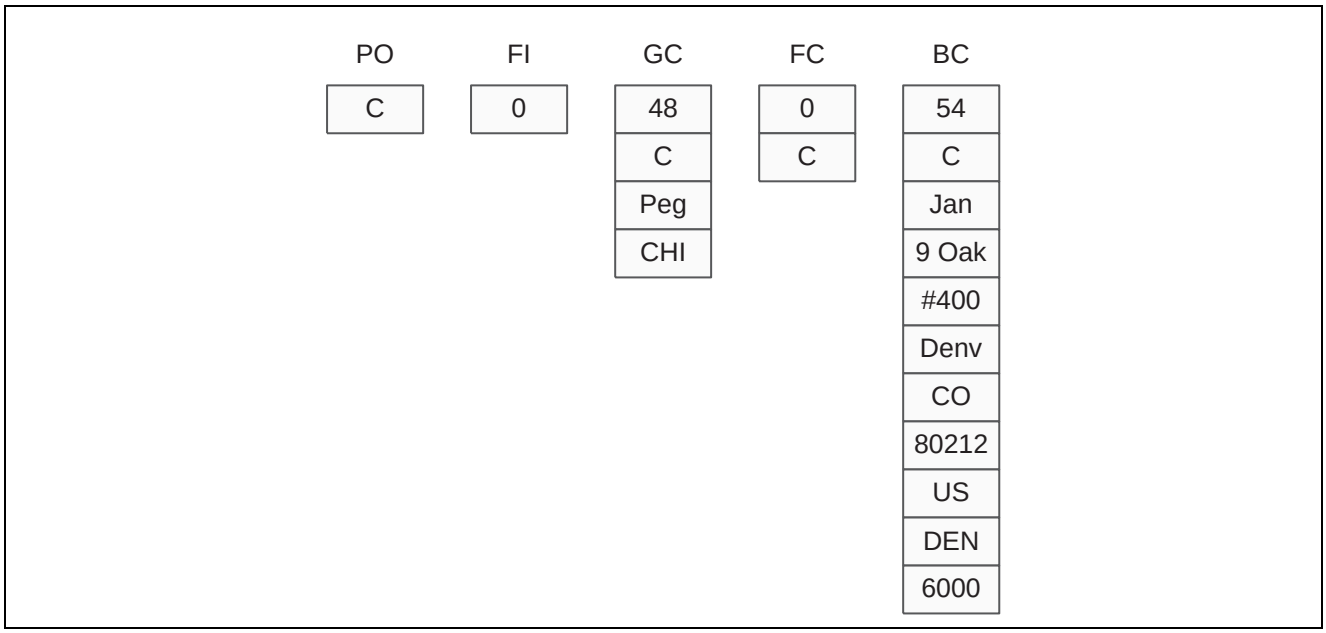
You typically use the **Button Clicked** event for Add button to interconnect to another form, such as a fix/inspect or headerless detail form on which the system actually performs the add action.

Delete Button Processing

When the user chooses a grid row and clicks the Delete button, the system does not update the database immediately. The engine first fires the **Button Clicked** event for the Delete button. At this point, the runtime structures have the following values:

- BC = Values from the database (from the last record read).
- FC = Values from the database (if the field is a database field).
- GC = Values from the database (from the selected row).
- FI = Values passed from a calling form (if any).
- PO = Values passed from POs.

This example represents the information in the runtime structures just before the system fires **Button Clicked** for the Delete button:

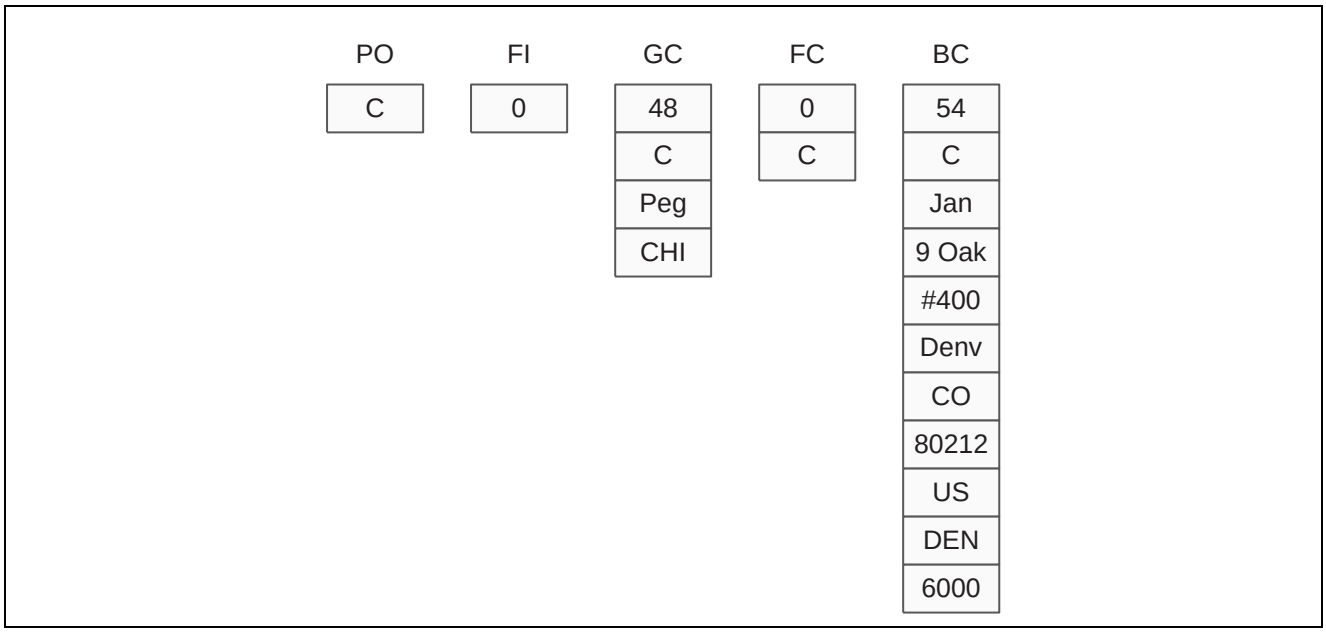


Content of runtime structures before delete Button Clicked fires

Next, the **Delete Grid Rec Verify–Before** event fires.

Delete Grid Rec Verify–Before

The engine fires the **Delete Grid Rec Verify–Before** event as shown in this example:



Content of runtime structure when Delete Grid Rec Verify–Before fires

Next, the system displays a pop up window for user to confirm the delete. If the delete is confirmed, the **Delete Grid Rec Verify–After** event fires.

Delete Grid Rec Verify–After

In the **Delete Grid Rec Verify-After** event, you might want to perform custom logic to verify that the delete is valid. For example, other tables might contain dependant records that prevent this record from being deleted as long as they exist.

The system processes the logic that is attached to this event after the user clicks the OK button in the Verify confirmation form. If the user clicks the Cancel button in the Verify confirmation form, the logic attached to this event does not occur.

Next, the **Delete Grid Rec From DB–Before** event occurs.

Delete Grid Rec From DB–Before

At this point, the runtime structure FC is blank. The system has not yet deleted the record from the database. You can use the **Suppress Delete** system function in this event to prevent the system from deleting the record.

After the system processes the **Delete Grid Rec From DB–Before** event, it builds a `SQL DELETE` statement. Then the system deletes the current record. When user selects multiple records, all selected records are deleted.

Delete Grid Rec From DB–After

After the records are deleted from the database, the system fires the **Delete Grid Rec From DB After** event You might use this event to call a business function to delete information from related tables that are not in the current BV.

All Grid Recs Deleted From DB

After all selected records are deleted, the engine fires the **All Grid Recs Deleted from DB** event. At this point, FC is blank.

CHAPTER 3

Using Event Rules Design

This chapter provides an overview of the Event Rules Design tool and discusses how to work with it.

Understanding Event Rules Design

You can use Event Rules Design to create event rule logic for forms and controls on a form. For example, assume that you want to pass data for a selected record on a find/browse form to a fix/inspect form to revise that record. To accomplish this task, you would create a form interconnection event rule (ER) and attach it to the Select button option for the **Button Clicked** event.

Use Event Rules Design to create business logic for an application. You can create event rules that perform a large number of tasks. This list is a small subset of what you can do with Event Rules Design:

- Perform a mathematical calculation.
- Pass data from a field on a form to a field on another form.
- Count grid rows that are populated with data.
- Interconnect two forms.
- Hide or display a control using a system function.
- Evaluate If/While and Else conditions.
- Assign a value or an expression to a field.
- Create variables or programmer-defined fields at runtime.
- Perform a batch process upon completion of an interactive application.
- Process table input and output, validate data, and retrieve records.

Before you create ER, consider which control (form, button, field, grid and so on) you want to add the logic in and what event you want to add the logic for. Answering these questions will help you determine which event should be used:

- Is the user initializing the form?
- Is the user clicking a button?
- Is the user exiting from a field?
- Is the user changing or exiting from a row?

After you place controls on a form, you can add Event Rules to any of the event that the control support. Remember that a form is also a control, and you can create logic that the system automatically processes whenever a form event is fired.

You create ER by clicking the buttons on the tool bar in Event Rules Design. Depending on the button that you click, a different work area appears for creating and manipulating the ER line-by-line. Specific buttons within Event Rules Design allow you to perform these tasks:

- Attach a business function or system function.
- Create an If/While statement.
- Insert an Else clause in an If statement.
- Assign a value or expression.
- Create a variable.
- Create a form or report interconnection.
- Perform table I/O.
- Find a string in a given ER.
- Add comments in the ER code.
- Print the ER code.

You can cut or copy ER and paste it in the same event, form, or application or in a different event, form, or application. You can also paste event rules into other applications, such as word processing documents. This feature is useful for documenting the project.

When you paste ER, the system resolves objects from the source as you paste them. If an object is partially resolved, the system pastes the closest matching object from the destination ER. A comment line appears above the partially-resolved line of event rules and in the status bar to indicate that the object is partially resolved. You can set paste options to display comments before and after a block of pasted ER. Some objects cannot be resolved in the destination ER. The system disables these lines of ER and displays a comment. For example, an EndIf statement is commented out if its associated If statement is missing.

For criteria statements, the paste operation adds whatever is necessary to maintain a clean, logical structure. For example, if you paste an If statement and no EndIf statement exists, the paste operation adds a matching EndIf statement to make the logic complete.

Use the System Function button to attach predefined EnterpriseOne system functions to events. For example, you can attach system functions to an event that perform these tasks:

- Hide or display a control.
- Display media objects.

You can attach an existing business function to an event. Business functions include these types of code:

- C code that you generate manually (source language C).
- Named Event Rules (NERs) (source language Event Rules).

You typically use business functions for these purposes:

- Referential integrity, such as deleting secondary records when a master record is deleted, and for editing routines.
- Large and complex calculations that might otherwise overload the runtime engine.

Prerequisites

Before you complete the tasks in this section:

- Create an application with one or more forms.
- Understand the difference between database items and data dictionary (DD) items.
- Understand the relationship between controls, events, and ER.
- Determine the purpose of each form used in the application.
- Answer the following questions:
  - What logic is required?
  - For which control are you creating logic?
  - For which event will the logic occur?
  - Which runtime structures are affected?

Understanding Event Rule Validation

When you save an application, the system automatically validates all event rules in the application. Errors will be displayed in a pop up window. You can also start the validation in FDA by selecting File, Validate Event Rules.

The error log that the system creates is stored in a file, such as b9*prod*\log\p1234.log (where *prod* is the environment). If no errors exist, the system does not generate a log.

Understanding If and While Statements

If and While statements are conditional instructions for an event rule. They evaluate conditions and dictate the flow of logic when the event rule is activated.

Use the If/While button to build conditional logic into an event. When you create an If statement, the system also automatically inserts an Else clause. However, you can use the Delete button to delete the Else clause and then reinsert it using the Insert Else button. When you delete an If or While statement, the system also deletes the associated Else and Endif or Endwhile clauses, but not the lines inside of those statements.

You can drag and drop statements line-by-line to change their sequence. Resequencing ER can result in improper syntax. When you click the Save or OK button, the system verifies the syntax. If it detects syntax errors, you can either disable the ER and continue or edit the ER to eliminate the errors.

To change a statement, double click on the line.

To delete a statement, choose the line of the statement, and then click the Delete button.

Understanding Event Rule Variables

An Event Rule Variable is a variable that you can use within the ER. You have to assign a DD item to an ER variable. The DD item defines the type and default behavior of the variable.

Use ER variables instead of hidden fields. Event rule variables use fewer system resources at runtime.

After you add an ER variable, you cannot modify it. Instead, you must delete it and create another one.

Each ER variable is available within a scope. The scope of an ER variable determines how you can use it. Different scope options are available for interactive and batch applications. For example, you can do the following:

- Reference a report variable anywhere in the report.
- Reference an ER variable only within the event in which it was created.

After you create an ER variable, it appears in the available objects list in Event Rules Design where you added it. Use the event rule variable in event rules just as you would use any available object in the list. If you create an event level variable and do not use it in event rules, FDA automatically deletes it.

The system automatically assigns to each variable one of the following prefixes, based on the specified scope:

- frm_ (Form)
- evt_ (Event)
- grd_ (Grid)
- rpt_ (Report)
- sec_ (Section)

Interactive Event Rule Variables

Interactive ER variables are available at these levels:

- Form
- Grid
- Event

Form-level variables are available at all events for all controls within the form. They are initialized when the form is initialized, and they retain values until the form is closed.

Grid-level variables are available on any form that includes a grid. They are available from all events on the form. They apply to the current row. Every new row added to the grid has the same set of variables that may contain different values. These variables are re-initialized each time a new row is added to the grid. You can use these variables as temporary work fields for the grid row. For better system performance, you should use variables instead of hidden work fields whenever possible. Although grid variables are available in all event-rule line types, you should use them only with events that are associated with grid rows.

An event-level variable is available only within the event for which it was added. The variable is re-initialized each time the event is processed for the form control.

Batch Application Event Rule Variables

Batch ER variables are available at these levels:

- Report
- Section
- Event

Working with Event Rules Design

This section provides an overview of variant ER statement types and discusses how to:

- Assign a value.
- Create an If or a While statement.
- Create an event rule variable.
- Attach a system function to an event.
- Attach a business function to an event.

Understanding Assignments

Use an assignment to assign a field with a fixed value or a mathematical expression. For example, you can create an assignment that inserts a default value when the user leaves the field. You can also use an assignment to calculate a value

When you create an expression, calculate only the data items that are of the exact same numerical scale or data type. For example, do not calculate different currencies or decimal figures that represent different decimal values because the result of these calculations might compromise data integrity.

Understanding Event Rules Design Tool Bar Buttons

The Event Rules Design form displays these tool bar buttons for generating different types of statements:

- Assignment

  Creates an assignment or a complex expression.
- Business Function

  Attaches an existing business function.
- System Function

  Attaches an existing EnterpriseOne system function.
- If/While

  Creates an If/While conditional statement.
- Report Interconnect

  Establishes a connection to a batch application or report.
- Form Interconnect

  Establishes a form interconnection.
- Else

  Inserts an Else clause, which is valid only within the bounds of If and End If.
- Variable

  Creates a programmer-defined field.
- Table I/O

Allows ER support for database access. Performs table input and output, data validations, and record retrieval.

Assigning a Value

To assign a value:

1. On Event Rules Design, select an event.
2. Click the Assignment/Expression button.
3. On Assignment, select the To Object that you want to receive the assigned value.
4. Use one of these methods to determine the From/Object Literal value:
   - Select a From Object in the right-hand column to create a simple statement: [left-hand column] = [right-hand column].
   - Type a literal expression (number, text, and so on) in the text entry box to assign a literal statement: [left-hand column] = [literal].
   - Press the *f*(X) button to create a complex expression or advanced mathematical function using Expression Manager.

Creating an If or a While Statement

To create an If or a While statement:

1. On Event Rules Design, choose an event in the Event Rules Design window and click the If/While button.

   Each cell in the Criteria Design grid represents a component of the criteria. When you choose a cell, a list of valid options appears.
2. Select either the If or While operators.
3. Select a left operand from the list of available data items.

   Right-click to sort the available data items by name or object type. If only one type exists, the sort options are unavailable. The system groups the available data items by a variety of object types.
4. Choose a logical operator comparison (is equal to, is less than, and so forth).
5. Choose a right operand from the object list.
6. To assign a literal, select <Literal>.
7. To create complex If statements, you can select the And option or the Or option, and continue the logic.

Creating an Event Rule Variable

To create an event rule variable:

1. On Event Rules Design, click the Variables button.

   The Variables form displays different scope options, depending on whether you are working with an interactive application, batch application, or NER.
2. Complete the variable naming field located under the Add button.
3. Click one of the Scope options (Form or Event) depending on the purpose for which you created the variable.
4. If you selected Form Scope and you want to use a grid variable, click the Grid option.

5. Click the DD visual assist to browse for DD items.
6. Choose the DD item to which the variable is associated and click the Add button.

   The system automatically assigns a prefix to the variable, based on the type of scope that you choose.

Attaching a System Function to an Event

To attach a system function to an event:

1. On Event Rules Design, select an event.
2. Click the *f*(S) button.
3. Select a category in the System Functions box.
4. Select the system function that you want to attach.
5. In the Available Objects list, select objects to pass to the system function.

Attaching a Business Function to an Event

To attach a business function to an event:

1. On Event Rules Design, select an event.
2. Click the *f*(B) button.

   You can view a description (if one exists) for a business function by choosing Attachments from the Row menu.
3. Select a business function and click the Select button.
4. In the Available Objects list, select objects to pass to the business function.
5. To assign a literal to a business function parameter, select <*Literal*> in the Available Objects list.
6. Enter a single value and click the OK button.

   Range and List are not valid literals to use with business function parameters.
7. Indicate the direction of data flow between Value and Data Items, and click the OK button.

   As you click the direction arrow, it toggles through the following four options:

   - Data flows from the source to the target (right-pointing arrow).
   - Data flows from the target to the source (left-pointing arrow).
   - Data flows from the source to the target, and upon exiting the target, data flows back to the source (bi-directional arrow).
   - No data flow (slashed circle).

     If the direction of the items is hard-coded in the data structure for a business function (such as when the parameters are predetermined to be input, output, or bidirectional), then this predetermined direction appears here. You must complete the required items that appear in red. The status bar indicates the state of the flow to the target.
8. Select the Include in Transaction option to include this business function for transaction processing.

   This option appears on transaction forms only.
9. Select the Asynchronously option to enable asynchronous processing.
10. Click one of these buttons to add notes:

- Business Function Notes
- Structure Notes
- Parameter Notes

CHAPTER 4

Using BrowsER

This chapter provides an overview of the BrowsER utility and discusses how to use it.

Understanding BrowsER

You can use BrowsER to view event rules (ER) and design layout for interactive and batch applications.

BrowsER displays the structure of forms within an interactive application, or sections within a batch application. The forms or sections appear in a hierarchical structure, with events and ER for each section. You can use BrowsER to disable or enable ER, and then observe the effect of the actions on the application.

You can select one of these BrowsER options to easily view or search for code:

- Expand Tree
- Expand Node
- Show Object IDs
- Hide Objects with no ER
- Filter ER Records

  Filter ER Records allows you to search ER records for certain types of code, including these:

  - Assignments
  - Business functions
  - Criterion
  - Comments
  - Form interconnections
  - Options
  - System functions

Working with BrowsER

To work with BrowsER:

1. On Object Management Workbench, select an object with ER and then click the Design button.
2. On Interactive Design, click the Design Tools tab, and then click the Browse Event Rules button.

Alternatively, you can access BrowsER directly from within Form Design Aid (FDA) or Report Design Aid (RDA) by choosing BrowsER from the View menu.

3. On Browsing, click the plus (+) and minus (–) buttons to expand or collapse the hierarchical view of events for interactive forms or batch report sections.

   Each ER appears beneath the event with which it is associated and beside a control that contains event rule logic. If it does not appear beside a control, then no event rule logic exists on that control.

4. To disable an ER line, click on the line and then click on Disable button.
5. To enable a disabled line, click on the line and then click on Enable button.

   You cannot print or modify ER from any BrowsER form.

6. To set a BrowsER option, right-click anywhere on the Browsing form and select an option from the popup menu.
7. To start a search or filter, right-click anywhere on the Browsing form and select Search or Filter ER Records from the popup menu.

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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

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

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

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

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

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

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

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

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

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

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

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

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

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

catalog item In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

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.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population*and *division*.

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

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

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

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

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

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

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

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

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides

	default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also *population* and *cohort*.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

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

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

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled

by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

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

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

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

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

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

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

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

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

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

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

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

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

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

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

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

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

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

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

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

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

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

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

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

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

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

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

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

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

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

See also *compensation object.*

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

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

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

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

PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

plan In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

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

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

portal registry In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the

	number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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.*

recname The name of a record that is used to determine the associated field to match a value or set of values.

recognition In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

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

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

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

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

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

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

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

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

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

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

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

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

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

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

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

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.

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,

	and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also *inquiry access.*
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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