



EnterpriseOne Tools 8.94

PeopleBook: Solution Explorer

November 2004

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About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- 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. |
| <i>Italics</i> | Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> . |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key. |
| Monospace font | Indicates a PeopleCode program or other code example. |
| “ ” (quotation marks) | Indicate chapter titles in cross-references and words that are used differently from their intended meanings. |

| 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 | <p>Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:</p> <p><i>Blank:</i> Batch is unposted and pending approval.</p> <p><i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.</p> <p><i>D:</i> The batch posted successfully.</p> <p><i>E:</i> The batch is in error. You must correct the batch before it can post.</p> <p><i>P:</i> 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.</p> <p><i>U:</i> 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.</p> |
| 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 | <p>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.</p> <p>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.</p> |

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.

PeopleSoft EnterpriseOne Preface

This preface discusses the Solution Explorer PeopleBook.

PeopleSoft Products

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

PeopleSoft Solution Explorer

This PeopleBook covers Solution Explorer, a member of the EnterpriseOne Tools suite. Solution Explorer is used to access EnterpriseOne applications, to create tasks views and tasks, and to assign roles. Its chapters describe the tool in general and how to use its features and functionality.

CHAPTER 1

Getting Started

This chapter provides an overview of preparing to use Solution Explorer.

PeopleSoft Tools Solution Explorer

Solution Explorer provides you with a convenient method for accessing Windows-based EnterpriseOne applications, and creating/maintaining EnterpriseOne task views for Web or Windows.

Solution Explorer is comprised of the following three modes:

- Menu Design Mode

Use the Menu Design Mode to set up menus, tasks, task views, and task view roles.

- Menu Filtering Mode

Use the Menu Filter Mode to enable and disable tasks users assigned a certain role can perform.

- Task Launching Mode

Use the Task Launching Mode to navigate to development and administrative applications in EnterpriseOne using the Fast Path, or using the menu.

Other Sources of Information

In the planning phase of your implementation, take advantage of all the 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.

Implementing Solution Explorer

To use Solution Explorer, you must have the EnterpriseOne windows client installed, and you must have a valid EnterpriseOne user account.

CHAPTER 2

Using the Menu Design Mode

This chapter provides an overview of task views and discusses how to:

- Work with task views.
- Set up tasks.
- Work with tasks.
- Delete tasks.

Understanding the Menu Design Mode

Use the Menu Design Mode to set up menus, tasks, task views, and task view roles in Solution Explorer. Access Menu Design Mode by depressing the Menu Design Mode button located on the toolbar. Whether or not you have access to Menu Design Mode, and the type of access you have, depends on the permissions you have been assigned. You might be able to view Menu Design Mode, you might be able to make changes in Menu Design Mode, or you might not have access to it at all.

Understanding how to Set Up Task Views

Task views are groups of tasks arranged in a hierarchical tree structure. Tasks are the most discrete units in the Solution Explorer. Tasks are organized into hierarchical tree structures inside of task views. EnterpriseOne provides thousands of tasks, and you can add more of your own. When placed in a single task view, finding a specific task among thousands might be difficult and time-consuming.

Solution Explorer enables you to design many different task views, each displaying only some of the tasks in the system.

Typically, tasks are grouped in a task view because they relate to a common business system, process, or function. Logical selection and grouping of tasks in this way can help users find the functions that they need.

Working with Task Views

This section provides an overview of working with task views and describes how to:

- Create a new task view
- Change a task view

- Delete a task view

Creating a New Task View

Create a new task view when you want to create a new category of tasks that you use to insert tasks and build task relationships. The tasks views that you create, design, and filter in Solution Explorer become part of the EnterpriseOne Menus in the EnterpriseOne Web Client.

To create a new task view:

1. In Solution Explorer, choose Add New Task View from the Tools menu.
2. In Task View Revisions, complete the following fields and options, and then click OK:
 - Task View
Enter an internal ID for the task view. The ID must be between two and five digits and cannot contain alphabetic characters. If you start the ID with more than one zero, the system truncates it to a single zero. For example, if you type 005 as an ID, the system changes the ID to 05.
 - Name
 - Description
The name and the description do not have to be the same.
 - Secured Task View

Changing a Task View

You can modify an existing task view. For example, you might want to change the name of a task view so that it more accurately reflects the category of tasks in that view.

To change a task view:

1. On Solution Explorer, choose Work With Tasks from the Tools menu.
Alternately, if you want to change the current task view, right-click the top task view node and choose Task Revisions from the menu. Skip to step 5.
2. On Work with Tasks, choose Task Views from the Form menu.
3. On Work with Task Views, click Find.
Use the QBE row to refine your search.
4. Choose the task view that you want to change, and then click Select.
5. On Task View Revisions, change any of the following fields and options, and then click OK:
 - Name
 - Description
The name and the description do not have to be the same.
 - Secured Task View

Deleting a Task View

You can delete any task view from the system. Deleting a task view does not delete the tasks within the view from the system, however.

To delete a task view:

1. On Solution Explorer, choose Work With Tasks from the Tools menu.
2. On Work with Tasks, choose Task Views from the Form menu.
3. On Work with Task Views, click Find.
Use the QBE row to refine your search.
4. Choose a task view, and then click Delete.
5. On Confirm Delete, click OK.

Setting Up Tasks

This section provides an overview of task setup and discusses how to:

- Create tasks.
- Insert existing tasks.
- Apply roles to tasks.
- Change tasks.
- Delete tasks.

Understanding Task Set Up

To design and manage your system, you work with *tasks*, which are units of work that you use to build essential business processes. Tasks can be interactive programs, batch programs, constants, next numbers, and so on. You work with tasks in a Solution Explorer task view, which is a collection of related tasks that are hierarchically grouped in parent-child relationships and illustrated graphically by the task view menu. These task groups usually represent the steps in an essential business process such as Procure to Pay.

EnterpriseOne provides a large selection of tasks that are already grouped in relationships within different task views. You can modify already existing tasks and their relationships. You can also create new tasks, task relationships, and views.

Within a task view, you insert new or existing tasks and arrange the tasks in logical sequences. You create or revise tasks on an ongoing basis, and then insert them in a task view as necessary to build and enhance your business processes. The processes are fluid; that is, you can drag and drop tasks and task relationships to change the relationships and the order in which you perform tasks.

The system stores each task in a task view in the Task Master table (F9000) and assigns a unique ID to each one. Each task is a reusable object that you can insert into an existing task relationship, or you can use as a basis for creating a new task relationship. After you have inserted a task in a task view, you can move it, revise it, write documentation for it, set up processing options, set up versions, and locate it. You can accomplish any of these functions in a Solution Explorer task view by launching interactive programs or using features and functions that are included in Solution Explorer.

The following list contains a description of each of the task types:

Interactive

Use this category for interactive EnterpriseOne programs. When the user runs this task, the program runs. You can define which version of the program and even which form you want the task to launch, if desired. You can also control whether the user is prompted for processing options and in what mode (default, add, update, delete) the form opens open.

Batch

Use this category for batch EnterpriseOne programs (such as reports). When the user runs this task, the system submits the batch program for processing. You can define which version you want the task to launch. You can also control how the system prompts the user to set processing options and data selection.

URL

Use this category for web-based or system-based resources such as executable files or web pages.

Folder

Use this category to create graphical placeholders in a task view. For example, you might want to group a number of procure-to-pay batch programs within the tree structure. You can create a folder task called Procure to Pay Batch, make it the parent task, and then place all of the batch-related tasks under it.

User Defined Code

Define a task as a User Defined Code to access the Work with User Defined Codes form (W0004AA). The parameters that you define for this task type (product code and UDC) are passed to the form so that the user can work with the UDC set that you specify.

EnterpriseOne Workflow

Use this category to define a workflow.

Finding Solution Explorer Task and Task Relationship Changes in Object Management Workbench

When you change tasks or task relationships in Solution Explorer, the change is logged in Object Management Workbench (OMW). If you have added or deleted tasks or task relationships, the information is stored in OMW so that you and others can easily find the tasks and task relationships that have changed. If you changed task properties from within the Work With Tasks program (P9000), the task is logged in OMW.

Note. For your changes to be logged in OMW, your system administrator must have turned on OMW logging in the Security Workbench program (P00950) for your user ID. To determine whether your OMW logging is turned on, double-click the padlock button on the Solution Explorer status bar.

See Also

[Chapter 2, “Using the Menu Design Mode,” Creating a New Task View, page 4](#)

[Chapter 2, “Using the Menu Design Mode,” Applying Roles to a Task, page 9](#)

Creating a Task

The tasks in task views are reusable objects that add to the flexibility of the Solution Explorer. Tasks reside in the Task Master table (F9000).

You can create a new task directly in the Solution Explorer by inserting a new task in a task view menu. You define the task using the Task Revisions form. When you create a task, you automatically create a relationship between the new child task and the parent task under which you inserted the new task.

Access Solution Explorer.

To create a task:

1. From Menu Design mode, right-click a folder and click Insert New Task from the menu.

The Task Revisions application displays.

2. In Task Revisions, complete the Task Name field.
3. Choose the Common tab, and then complete the following fields:

- Product Code
- Jargon
- Country Code

Leave this field blank if you want this task to be available for all users, regardless of their country codes. Otherwise, enter the country code that must be assigned to users before they can access this task.

4. Choose the Executable tab, and then choose one of the following task type options:

- Interactive

Select this option for a task that launches an interactive EnterpriseOne program.

- Batch

Turn on this option for a task that launches a EnterpriseOne batch program.

- URL

Turn on this option for a task that launches a web-based executable.

- Folder

Turn on this option for a task to be used as an activity or nonsoftware placeholder in a task view. This task does not execute a function, but might have accompanying documentation that describes the activity.

- User Defined Code

Turn on this option for a task that launches a program that enables a user to modify UDC tables.

- EnterpriseOne Workflow

Turn on this option for a task that displays workflow processes.

5. If you turned on the Interactive option, complete the following fields:

- Application

Enter the object name of the program.

- Version

Complete this field only if you want to launch a specific version of a program. Click the Visual Assist to search for a version.

- Form

This is an optional field. To open a specific form in the program, enter the form ID. Click the Visual Assist to search for a form.

- Option Code

- Form Mode
 - Application Type
6. If you turned on the Batch option, complete the following steps:
 - Application
 - Version

This is an optional field. To launch a specific version of a batch program, enter the version.
 7. Choose one of the following options:
 - No Processing Options

Turn on this option to execute the batch program without processing options.

 - Blind Execution

Turn on this option to execute the batch program without displaying its processing options.

 - Prompt for Version

Select this option if you want to prompt the user to select which version of the batch program to run at execution.

 - Prompt for Values

Select this option if you want to prompt the user to enter processing option values at execution.

 - Data Selection

Select this option if you want to prompt the user to enter data selection at execution.

 - Data Selection and Values

Select this option if you want to prompt the user to enter data selection and processing option values at execution.
 8. If you turned on the URL option, complete the URL fields.
 9. If you turned on the User Defined Code option, complete the following fields:
 - Product Code
 - User Defined Codes
 10. To apply roles to the task, choose Roles from the Form menu.
 11. On Task Where Used, choose the role that you want to apply to the task, and then choose Change Status from the Row menu.

A check mark appears to indicate that the role is applied to the task. To remove a check mark, choose Change Status from the Row menu again. To apply all roles to the task, choose Enable All from the Form menu.
 12. Click Close.
 13. On Task Revisions, click OK.

Inserting an Existing Task

When you insert a task and thereby create a task relationship, the system stores the parent-child relationship that you create in the Task Relationships table (F9001). The system also stores the task view into which you inserted the task.

Because tasks are reusable objects, you can insert the same task into multiple task views.

Access a task view in Solution Explorer.

To insert an existing task:

1. In a task view of Solution Explorer, choose a task that will be the parent of the task that you want to insert.
2. Right-click the parent task, and then choose Insert Existing Task from the menu.

The Task Relationship Revisions form appears. The form displays the parent task ID and all tasks that are children of the parent task that you chose.

3. On Task Relationship Revisions, click a new line, and complete the following required fields:

- Child Task ID
- Presentation Sequence

If you want the task that you are inserting to appear in a position other than last in the presentation sequence, change the number.

4. Complete any of the optional fields.

Applying Roles to a Task

You apply roles to tasks so that the tasks will be filtered properly in role-based task views. You can apply one or more roles to each task.

When a user launches a role-based task view, the system applies his or her login role to the view. If the system administrator has applied other roles to that user, he or she can view the task view by any of those roles to see a different set of tasks.

For example, a user might have two roles, General Accounting Clerk (the user's sign on role) and Accounts Payable Clerk. When the user launches a role-based task view, the system displays only those tasks to which the General Account Clerk role has been applied, such as Autoreconcile Void Payments, Autoreconcile Void Receipts, and Refresh Reconciliations File. The user can apply the Accounts Payable Clerk role to the task view, and the system displays only those tasks to which the Accounts Payable Clerk role has been applied, such as Speed Status Change, Create Payment Groups, and Work with Payments.

Users can switch roles only if they sign on to Solution Explorer with the *ALL role. If a user signs on with the *ALL role and then accesses a role-based task view, then the user can view all tasks that are visible to any of the roles assigned to the *ALL role.

For example, the *ALL role contains Role1 and Role2, but not Role3. When a user accesses a role-based task view, Solution Explorer displays all of the tasks that are available in Role1 or Role2. Tasks that are only available to Role 3 do not appear.

To apply roles to a task:

1. Choose the task to which you want to apply roles.
2. Right-click the task, and then choose Task Revisions.
3. On Task Revisions, choose Roles from the Form menu.
4. On Task Where Used, click Find.
5. Choose the parent of the task to which you want to apply roles, and then click Select.
6. On Role Definition, choose the role to which you want to apply to the task, and then choose Change Status from the Row menu.

A check mark appears to indicate that a role is applied to the task. To remove a check mark, choose Change Status from the Row menu again. To apply all roles to the task, choose Enable All from the Form menu.

7. Click Close.
8. On Task Revisions, click OK.

Changing a Task

When you change a task using this process, you affect all instances of the task in all task views where it resides.

Access a Solution Explorer task view.

To change a task:

1. In Menu Design Mode, select the task that you want to change.
2. Right-click the task, and then choose Task Revisions from the pop-up menu.
3. On Task Revisions, complete any changes that you want to make to the task, and then click OK.

Deleting Tasks

You can delete an instance of a task from a task view menu. However, performing this action does not delete the task itself; it merely eliminates the task from the task view. To delete a task from the system entirely, you must use the Work With Tasks program (P9000) to locate the task and then delete it from the Task Master table (F9000). You can delete a task from a task view. Doing so deletes the task only from the task view; it still exists in the Task Master table (F9000) and in any other relationship in which it has been inserted. Furthermore, you can still insert it into other task menus.

Deleting an Instance of a Task

To delete an instance of a task:

1. In Solution Explorer, open the task view that contains the task relationship that you want to delete.
2. Right-click the task that you want to delete, and then choose Delete Relationship from the menu.
3. On Delete Relationship, click OK.

Deleting a Task from the Task Master Table (F9000)

To delete a task from the system completely, you must delete it from the Task Master table. Before you can do so, however, you must first delete all of the relationships for the task. This is equivalent to deleting the task in each task view menu in which it appears.

To delete a task from the Task Master table (F9000):

1. In Solution Explorer, choose Work With Tasks from the Tools menu.
2. Click Find.
Use the QBE row to refine your search.
3. Choose the task that you want to delete, and then choose Where Used from the Row menu.
4. On Task where Used, search for the parent of the current task by clicking Find.
The task might have more than one parent. If so, all of the parents appear.
5. Choose the parent of the task that you want to delete, and then click Select.
6. On Task Relationship Revisions, choose the task that you want to delete, and then click Delete.

7. On Confirm Delete, click OK.
8. Click OK.
9. Repeat steps 5-8 for each parent of the task in the list.
10. On Task where Used, click Close.
11. On Work With Tasks, choose the task that you want to delete, and then click Delete.
12. On Confirm Delete, click OK.

CHAPTER 3

Using the Menu Filtering Mode

This chapter provides an overview of menu filtering and discusses how to:

- Filter menus.
- Define task view roles.
- Change roles.

Understanding Menu Filtering

Menu Filtering is the process that you use to selectively enable or disable tasks by role in a task view.

Access Solution Explorer.

To filter menus:

1. In Solution Explorer, depress the Menu Filtering button.
2. Select the task view that you want to refine
The system changes the task view menu display to indicate enabled and disabled tasks. Enabled tasks are indicated by a green check mark; disabled tasks are indicated by a red X
3. Expand the task tree in the task view to find a task that you want to enable or disable, and then select a task.
4. Click either the Enable or Disable button on the Toolbar.

You can also double-click the task to toggle between the enabled and disabled conditions.

5. Repeat steps 2-3 for each task you want to enable or disable.
6. When you have finished refining the task list, click the Save button on the toolbar.

Saving your configuration saves your changes to the Master Task Relationship table (F9001), so your changes will be available to all users who access that same database. Solution Explorer will prompt you to choose the role to which your changes apply.

If you fail to save the changes, your changes will not remain when you exit from the Solution Explorer and then launch it again later.

7. Click the Show All in Menu Design mode to toggle between hiding and displaying disabled tasks in the current task view menu for the currently selected role. This role is displayed beside the root node of the task view.

Understanding Task View Roles

You can use roles to customize certain task views or parts of task views for specific user groups. Roles define a subset of the tasks in the original task view. They enable you to customize and simplify task views for the end user.

Roles apply only to users who have access to those roles.

You can use roles to make different versions of task objects available to users, and you can vary the descriptions of the tasks, as well.

Filtering a Task View by Role

To filter a task view by role, you refine the task view using the Menu Filtering mode, and then save the results. You define the role or based on your needs analysis of the users.

To define a task view role:

1. In a task view of Solution Explorer, click the Menu Filtering button on the Toolbar.
2. Choose a parent task and expand the task tree to expose tasks that you want to disable.
3. Choose each task that you want to disable, and then click the Disable button.
4. After you have disabled all of the tasks that you do not want to appear in the role, choose the parent task.
5. Right-click and then choose Save Role, or click the Save button on the tool bar.
6. On Save Role, choose an existing role and then click Select, or create a new role.

Note. For information about creating a new role, see Adding a User Role in the System Administration Guide.

Changing a Role's View of a Task View

By modifying roles, you can control users' task view. Changing the name and version for the role helps you and other users understand the difference between different roles. The changes that you make to the role, such as assigning new task names, apply only to that role. The system preserves the properties that define the default task view. You are not replacing the original view; you are creating an alternative view to be used in specific situations that your business requires.

To change a role:

1. In a Solution Explorer task view, click the Menu Filtering button on the Toolbar.
2. Right-click any task in the task view, and then choose View By Role from the menu.
3. On View by Role, select the role to which you want to change, and then click Select.
4. Double-click a task to make its relationship active or inactive, or right-click a task in the task view and choose Override Name to change the task name.
5. Right-click any task and choose Save Role.
6. Choose the role, and then click Select.

CHAPTER 4

Using the Task Launching Mode

The Task Launching Mode is the default mode for Solution Explorer. Use the Task launching mode to navigate to the windows applications either through the menu or through the Fast Path.

Glossary of PeopleSoft Terms

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| 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, |

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| | PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process. |
| action template | In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition. |
| activity | <p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p> |
| 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 |

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| | courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement. |
| AR specialist | Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items. |
| arbitration plan | In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced. |
| assessment rule | In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action. |
| asset class | An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification. |
| attribute/value pair | In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree. |
| 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. |

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| business event | <p>In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.</p> <p>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).</p> |
| 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. |

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| class | <p>In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.</p> <p>See also <i>course</i>.</p> |
| Class ChartField | <p>A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i>.</p> |
| clearance | <p>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.</p> |
| clone | <p>In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.</p> |
| cohort | <p>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.</p> <p>See also <i>population</i> and <i>division</i>.</p> |
| collection | <p>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.</p> |
| collection rule | <p>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.</p> |
| comm key | <p>See <i>communication key</i>.</p> |
| communication key | <p>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 <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.</p> |
| compensation object | <p>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.</p> |
| compensation structure | <p>In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.</p> |
| condition | <p>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.</p> |
| configuration parameter catalog | <p>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.</p> |
| configuration plan | <p>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.</p> |

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| 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 | <p>In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.</p> <p>In PeopleSoft Enterprise 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.</p> <p>In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.</p> |
| control table | Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data. |
| cost profile | A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book. |
| cost row | A cost transaction and amount for a set of ChartFields. |
| course | <p>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.</p> <p>See also <i>class</i>.</p> |
| 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 | <p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p> |
| dataset | A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles. |
| delivery method | In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides |

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

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| event | <p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p> |
| event propagation process | <p>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.</p> |
| exception | <p>In PeopleSoft Receivables, an item that either is a deduction or is in dispute.</p> |
| exclusive pricing | <p>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.</p> |
| fact | <p>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.</p> |
| financial aid term | <p>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.</p> |
| forecast item | <p>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.</p> |
| fund | <p>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.</p> |
| gap | <p>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.</p> |
| generic process type | <p>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.</p> |
| gift table | <p>In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> 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.</p> |
| GL business unit | <p>Abbreviation for <i>general ledger business unit</i>. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.</p> <p>See also <i>business unit</i>.</p> |
| GL entry template | <p>Abbreviation for <i>general ledger entry template</i>. 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</p> |

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

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| GL Interface process | Abbreviation for <i>General Ledger Interface process</i> . 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 | <p>In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).</p> <p>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.</p> |
| 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 | <p>In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.</p> <p>See also <i>update access</i>.</p> |
| 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 | <p>In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).</p> <p>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.</p> <p>In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.</p> |
| item shuffle | In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment. |

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| 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 <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined. |
| LDIF file | Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data. |
| learner group | In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office. |
| learning components | In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity. |
| learning environment | In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them. |
| learning history | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs. |
| ledger mapping | You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table. |
| library section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it. |
| linked section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section. |
| linked variable | In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable. |
| LMS | Abbreviation for <i>learning management system</i> . 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. |

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| load | In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment. |
| local functionality | In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu. |
| location | Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address. |
| logistical task | In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider. |
| market template | In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category. |
| 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 <i>3C engine</i> . |
| match group | In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values. |
| MCF server | Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration. |
| merchandising activity | In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic. |
| meta-SQL | Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <code>SQLExec</code> 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. |

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| 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 <i>need analysis</i> . |
| node-oriented tree | A tree that is based on a detail structure, but the detail values are not used. |
| pagelet | Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content. |
| participant | In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process. |
| participant object | Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> . |
| partner | A company that supplies products or services that are resold or purchased by the enterprise. |
| pay cycle | In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation. |
| 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. |

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| 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 <i>division</i> and <i>cohort</i> . |
| 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 |

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| | 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. |

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| 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 <i>record input value-added tax flag</i> . 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 <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> . |
| 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 <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework. |
| requester | In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders. |

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| 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. |

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| session | <p>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.</p> <p>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.</p> |
| 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 <i>communication key</i> . |
| 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. |

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| step | In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run. |
| storage level | In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels. |
| subcustomer qualifier | A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles. |
| Summary ChartField | You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters). |
| summary ledger | An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting. |
| summary time period | In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total. |
| summary tree | A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built. |
| syndicate | To distribute a production version of the enterprise catalog to partners. |
| system function | In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger. |
| TableSet | A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same. |
| TableSet sharing | Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier. |
| target currency | The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes. |
| 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 <i>Communications, Checklists, and Comments engine</i> . 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.

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| 3C group | Abbreviation for <i>Communications, Checklists, and Comments group</i> . 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 <i>locked</i>) 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 <i>inquiry access</i> . |
| 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). |

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| variable | In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section. |
| VAT exception | Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension. |
| VAT exempt | Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery. |
| VAT exoneration | Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization. |
| VAT suspension | Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT. |
| warehouse | A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions. |
| work order | In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order. |
| 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 <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery. |

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