PeopleSoft®

EnterpriseOne Tools 8.94 PeopleBook: Delta Process

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

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements Used in PeopleBooks

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

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

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

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

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

Blank: Batch is unposted and pending approval.

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

D: The batch posted successfully.

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

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

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

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

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

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

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

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

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

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

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010)

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne Delta Process Preface

This preface discusses the Delta Process PeopleBook.

PeopleSoft Products

This PeopleBook refers to this PeopleSoft product line: PeopleSoft EnterpriseOne Tools. The delta process determines the development changes that have occurred in translation tables. To use Delta Process to work with your PeopleSoft EnterpriseOne application, you must have a valid PeopleSoft EnterpriseOne user account.

PeopleSoft Delta Process

This PeopleBook covers Delta Process, a member of the PeopleSoft EnterpriseOne Tools suite. Use the delta process to determine the development changes that have taken place in translation tables. Its chapters describe the tool in general and the describes how to set up Delta Process and how to use its features and functionality.

CHAPTER 1

Getting Started with PeopleSoft Tools Delta Process

This chapter provides an overview on preparing to use Delta Process.

PeopleSoft Tools Delta Process Overview

The delta process determines the development changes that have occurred in translation tables.

Implementing Delta Process

To use Delta Process to work with your PeopleSoft EnterpriseOne application, you must have EnterpriseOne installed, and you must have a valid EnterpriseOne user account.

CHAPTER 2

Working with the Delta Process for Translation Tables

This chapter provides an overview of the delta process and discusses how to:

- Set up a database instance.
- Copy the data from a prior release.
- Work with the delta process.
- Work with delta process advanced options.

Understanding the Delta Process

The delta process determines the development changes that have occurred in translation tables. The process compares the translation tables as they are at the time that you run the process with the translation tables as they were when you last ran the process. The process identifies the changes and indicates to translators or developers any new development in the translation tables that they need to edit. You determine the timing of the delta process. You can run the delta process as often as necessary.

You must perform setup tasks at the beginning of each PeopleSoft software release. After you perform the setup, you can run the delta process as often as necessary. You should establish a schedule for running the delta process so that you can keep current on development changes to PeopleSoft software.

Prerequisite

You must perform these setup procedures before you run the delta process. These procedures create the appropriate database instances and environments, and populate the data from the previous PeopleSoft software release. After you finish these setup procedures, you can run the delta process.

You must complete all of these tasks before you run the delta process for the first time.

Setting Up a Database Instance

This section provides an overview of database instances and discusses how to:

- Set up a database instance.
- Add a new environment.
- Create the environments.

- Use translation tools to create an environment.
- Set up user profiles.
- Add user security.

Understanding Database Instances

Your database administrator must set up a database instance for each compare and language code page set that you use.

This table lists the possible environments or databases:

Environment	Language Group
T1B9 or T1B7333	Tier I
T2B9 or T2B7333	Tier II
T3B9 or T3B7333	Tier III
WEUB7333	Western European
CEUB7333	Central European
SCHB7333	Simplified Chinese
TCHB7333	Traditional Chinese
JPNB7333	Japanese
KORB7333	Korean
RUSB7333	Russian

Work with your database administrator to set up libraries or database instances, or both, that apply to your current system environments, depending on your operating system platform and database server.

Note. Each database has specific setup requirements for each code page. Please follow the database administration guidelines for the current release of the database and Open Database Connectivity (ODBC) setup for code pages.

Forms Used to Set Up a Database Instance

Form Name	Form ID	Navigation	Usage
Machine Search & Select	W986115E	System Administration (GH9011), Database Data Sources	Locate and copy a machine name and database.
Machine Search & Select	W986115E	System Administration (GH9011), Object Configuration Manager (OCM) W986115E	Add a new environment.
Machine Search & Select	W986115E	System Administration Environment (GH9053), Environment Master	Enter an existing compare environment. Enter a new environment name.
Work With Batch Versions - Available Versions	W98305A	Environment Administration (GH793), Create and Compare and Code Page Environment	Select the batch version that you want to run. Choose Processing Options from the Row menu.
Work With User / Role Profiles	W0092D	System Administration Tools (GH9011), User Profiles	Select a user. Set up a profile for the user.
Work with User Security	W980WSCE	Security Administration (GH9052), User Security	Find a user and add the appropriate security.

Setting Up a Database Instance

Access the Machine Search & Select form.

To set up a database instance:

1. On Machine Search & Select, click the current machine name and data source for administering environment data sources in the detail area, and then click Select.
2. On Work With Data Sources, complete the Data Source Name field in the detail area, and then click Find.
3. In the detail area, click the row for the current data source mapping, and then click Copy.
4. On Data Source Revisions, complete the Data Source Name field, and then click OK.
5. Enter the new ODBC information and click OK to deploy the ODBC driver for the new data source.
6. Repeat these steps for all database data sources.

Adding a New Environment

It is recommended that you model the processes that are outlined in the System Administration Guide and the Configurable Network Computing Guide, as well as the existing solution that is used in the PeopleSoft translation department, when adding new environments.

Access the Machine Search & Select form.

To add a new environment:

1. On Machine Search & Select, click the data source mapping environment in the detail area, and then click Select.

2. On Work With Object Mappings, click Add.
3. On Object Mapping Revisions, complete these fields and click OK:
   - Environment Name
   - Object Type
   - Primary Data Source
   - Data Source Mode
   - Allow QBE
4. Map all the tables listed in this guide to the translation compare environment.

   All other tables can be mapped according to the standard OCM setup.

Note. You should set up a translation compare environment as a login environment. The code page environment is used only for table mappings and can have one OCM mapping for the DEFAULT TBLE mapping.

Creating the Environments

You must create the environments that are needed to run the delta process. You can complete these tasks manually by using the System Administration tools or by using the Translation Tools applications.

Access the Work With Environments form.

To use System Administration tools to create an environment:

1. On Work With Environments, enter an existing compare environment in the Environment Name query by example line, and click Find.
2. Click the existing compare environment in the detail area.
3. From the Row menu, select Copy Environment to duplicate the environment.
4. Complete the New Environment field, and then select the Copy *Public Records Only option.
5. Click OK to launch the batch application to copy the current OCM mappings with the *Public records.

   Use OCM to modify the mappings of each environment to reflect your enterprise setup and the mapping for the data sources.
6. Repeat this process for all compare environments and code pages that work with languages in the compare environment.

Using Translation Tools to Create an Environment

Access the Create and Compare and Code Page Environment form.

To use translation tools to create an environment:

1. On the Processing Options form, complete these fields:
   - Compare Environment Prefix
   - Release Postfix
2. On Work With Batch Versions - Available Versions, select the version that you want to run, and then select Processing Options from the Row menu.
3. On Processing Options, complete the Language Environment Path Code field.

4. Click OK.
5. On Work With Batch Versions - Available Versions, select the version that you want to run, and then click Select.

   On Version Prompting, you can use data selection or data sequencing to further define the version that you are running. The version is set to create all of the environments. You must create the compare environment, but you can use data selection to have the batch process create only those language code page environments that you need.
6. After completing any data selection or sequencing, on the Version Prompting form, click Submit.
7. On Report Output Destination, select one of these options and click OK:
   - On Screen
   - To Printer

   You have finished creating the base language environments.
8. Use OCM to modify the mappings of each environment to reflect your enterprise setup.

Note. You must have all of the OCM mappings modified before you run the delta process.

Setting Up User Profiles

Each translator or developer needs to be set up correctly. The translators have additional setup criteria that indicate the language that they use.

Access the Work With User / Role Profiles form.

To set up user profiles for a translator:

1. On Work With User / Role Profiles, complete either of these fields and click Find:
   - User / Role
   - Address Number
2. Select a user and click Select.
3. On User Profile Revisions, select Translation Pref from the Form menu.
4. On the Translation Preferences form, complete the Language field.

   You can enter the translator type, but it is not required.
5. Click OK.
6. On the User Profile Revisions form, enter the language preference for the translator.

   Some languages require runtime language processing to edit the data.
7. Click OK.
8. Set up the user profiles for each translator.

Adding User Security

Each data source might require user security. User security acts like a proxy that transforms the current user into another user when accessing the data. User security is generally required for language setup of user profiles. A user profile often contains language information that you need to convert characters between code pages. The wrong user profile can cause data corruption or data source connection problems. User profiles must be set up correctly on each database server and in PeopleSoft software to perform user security.

Access the Work With User Security form.

To add user security:

1. On Work With User Security, complete the User ID / Role field and click Find.
2. Add all of the necessary data source connections for each user.
3. Click OK.
4. Repeat this task for each user ID that accesses the data source's setup.

Copying the Data from a Prior Release

This section provides overviews of data from a prior release, compare environment tables, and control tables for the code page environment, and discusses how to:

- Copy the data from a prior release
- Edit the language master

Understanding Data from a Prior Release

You must copy data from a prior release to the current release. You can perform this process by using database administration tools or by using a series of batch processes defined as table conversions. Translation Tools has a series of batch processes for copying the compare environment, and another series of batch processes to copy to the language code page environments. You need to run all of these batch processes.

Note. The connection of the user profile is critical when copying data between code pages. The code page conversion becomes corrupt when users connect to data sources with the wrong user profile.

See *EnterpriseOne Tools 8.94 PeopleBook: Object Management Workbench*, "Working with Logs".

Understanding Compare Environment Tables

These tables are from the compare environment, which you can access from the Status (Compare Environment) menu (GH7931):

Table Types	Table Descriptions
Control Tables	User Defined Code Types (F0004) and Language Status (F00041)
	User Defined Codes (F0005) and Language Status (F00051)
	Menu Text Override File (F0083) and Language Status (F00831)
	Task Master (F9000) and Task Relationships (F9001) and Language Status (F90021)
	Variant Description (F9005) and Language Status (F90051)

Table Types	Table Descriptions
	Variant Detail (F9006) and Language Status (F90061)
	Component Definition (F9060)
	Workspace Definition (F9061)
	Top-Level Navigation Icon Definition (F9062)
	Secondary Navigation Definition (F9063)
Data Dictionary Tables	Data Field Display Text (F9202) and Data Dictionary Row Description Language Status (F92021)
	Data Item Alpha Descriptions (F9203) and Data Dictionary Alpha Description Language Status (F92031)
	Media Objects storage (F00165) and Generic Text Language Status (F001651)
Pristine Tables	Date Title (F83100) and FASTR Date/Title Language Status (F831001)
	Column Headings (F83110) and FASTR Column Headings Language Status (F831101)
	Favorites Relationships and Properties (F91100) and Favorites Language Status (F911001)
Central Object Tables	Forms Design Aid Extracted Spec (F79751) and Forms Design Aid Extracted Text Language Status (F797501)
	Report Design Aid Extracted Spec (F79761) and Report Design Aid Extracted Spec Language Status (F797601)
	Processing Option Text (F98306) and Processing Option Text Language Status (F983061)
Service Pack Resource Tables	Resource Text Translation Work File (F7920) and Resource Text Translation Language Status (F79201)
Translation Tables	Language Master (F7901)
	Delta Table Inclusion (F7902)
	User Overrides Table (F98950)

Understanding the Control Tables for the Code Page Environments

This table lists the Code Page environments:

Table Types	Environments
Control Tables	User Defined Codes - Alternate Language Descriptions (F0004D)
	User Defined Codes - Alternate Language Descriptions (F0005D)
	Menu Text Override File (F0083)
	Task Alternate Descriptions (F9002)
	Variant Description Alternate Description (F9005D)
	Variant Detail Alternate Description (F9006D)
	Component Definition - Alternate Description (F9060D)
	Workspace Definition - Alternate Description (F9061D)
	Top-Level Navigation Icon Definition - Alternate Description (F9062D) XE Code Page environments: F9062D (Top-Level Navigation Icon Definition - Alternate Description)
	Secondary Navigation Definition - Alternate Description (F9063D)
Data Dictionary Tables	Data Field Display Text (F9202)
	Data Item Alpha Descriptions (F9203)
	Media Objects storage (F00165)
Pristine Tables	Date Title (F83100)
	Column Headings (F83110)
	Favorites - Alternative Description (F91100D)
Central Object Tables	Forms Design Aid Extracted Text (F79750)
	Report Design Aid Extracted Text (F79760)
	Processing Option Text (F98306)
Suggestion Table	Translations Suggestions (F7910)

Note. You can copy the F7910 to preserve existing suggestions or you can generate a new table without any data. You should consider the needs of each translation group when you determine the preloading of this data.

This table lists the PeopleSoft Content Builder compare environments:

Table Types	Environments
Data Dictionary Tables	Data Field Display Text (F9202) and Data Dictionary Row Description Language Status (F92021)
	Data Item Alpha Descriptions (F9203) and Data Dictionary Alpha Description Language Status (F92031)
	Media Objects storage (F00165) and Generic Text Language Status (F001651)
	Forms Design Aid Extracted Spec. (F79751) and Forms Design Aid Extracted Text Language Status (F797501)
	Report Design Aid Extracted Spec. (F79761) and Report Design Aid Extracted Spec Language Status (F797601)
	Processing Option Text (F98306) and Processing Option Text Language Status (F983061)
Code Page	Media Objects storage table (F00165) is the only table included in the Code Page or workspace.

Forms Used to Copy the Data from a Prior Release

Form Name	Form ID	Navigation	Usage
Work With Batch Versions - Available Versions	W98305A	From the Delta Environment Administration menu (GH793), copy the data from both the Compare and Code Page environments and data sources.	Select a code page to copy. Select the version that you want to run and submit it.
Translation Tools Language Master	W7901A	Delta Administration (GH792) menu, Language Master	Edit the language master and verify that the values are correct.

Copying Data from a Prior Release

Access the Work With Batch Versions - Available Versions form.

To copy the data from a prior release:

Note. The table mappings in Object Configuration Manager should be based on the standard location, except for the tables in the Content Builder compare environment. The tables in the Content Builder compare environment should always be mapped to the compare environment and the code page environments. The naming convention of the environment and data source should be synonymous.

---

1. Select the compare environment or Code Page environment that you want to copy and right-click.
2. Select Prompt For, and then click Version.
3. On Work With Batch Versions - Available Versions, select the version that you want to run.
4. From the Row menu, select Processing Options.

5. On Processing Options, complete these fields on the Environments tab:
   - From Environment

     Enter the language environment name from the prior software release.
   - To Environment

     Enter the language environment name of the current software release.
6. Select the Conversion Process tab and complete these fields:
   - Conversion Program Name

     The system populates this field, but you can overwrite it with the name of any of the language table conversion batch applications.
   - Program Version

     The system populates this field, but you can overwrite it with any of the language table conversion batch application versions, as long as it applies to the conversion program name.
7. Click OK.
8. On Work With Batch Versions - Available Versions, select the version that you want to run, and then click Select.
9. On the Version Prompting form, click Submit.
10. On Report Output Destination, select one of these options and click OK:
    - On Screen
    - To Printer

You have finished copying production data from the prior PeopleSoft software release to the current release.

Note. Content Builder uses this same process to track source changes in text. After software developers enter initial glossaries, content developers use the environment and database to track editing changes. The content developers are ultimately responsible for the glossary. The tables that are required in a Content Builder compare environment are a subset of Translation Compare.

Editing the Language Master

The language master is an integral part of the delta process and translation tools. The delta process uses the language master to define which status records are maintained during the change process. To use all of the necessary tools, you also need code page mapping information and other setup information.

Access the Translation Tools Language Master form.

To edit the language master:

1. On Translation Tools Language Master, edit the records for the appropriate languages that match the status records in the compare environment.

   Any languages that are missing status records, or any status record without a language master corrupts the database when you run the delta process.

   During the copy, languages should exist from the data for the previous release.
2. Verify and edit the correct record or records for these fields, and then click OK:
   - Code Page

     This value comes from user-defined code table H79/CP.

- L
- MS Word Language ID
- Code Page

  This value is the code page data source.

Note. Complete all of the preceding tasks before you run the delta process for the first time. You should verify the environments and data sources for accuracy, especially code page conversions for all languages. Ensure that users are able to enter the compare environment and edit changes before running the delta process.

Working with the Delta Process

This section provides an overview of the delta process and translation tables, and discusses how to:

- Add translation tables to the delta process.
- Revise translation tables included in the delta process.
- Run the delta process.
- View the progress of the delta process.
- Use jde.log.
- Track the status of each delta process.
- Use preview functionality.

Understanding the Delta Process and Translation Tables

The delta process is a batch application. These tasks explain how to create the batch version for the delta process (which includes selecting translation tables), run that version, and then debug that version, if necessary.

This task explains how to select the translation tables that you want to include in the delta process. The delta process uses batch versions to group the translation tables. You initially define the batch version in the translation tools; this definition indicates the translation tables that you want to include. You also must add the version to the system using the Batch Versions application.

These translation tables are included in the delta process:

- F0004
- F0005
- F00165
- F0083
- RF7920
- F79750
- F79760
- F83100
- F83110
- F9000

- F9005
- F9006
- F9060
- F9061
- F9062
- F9063
- F91100
- F9202
- F9203
- F98306

Forms Used to Work with the Delta Process

Form Name	Form ID	Navigation	Usage
Work with Delta Table Inclusions	W7902A	Delta Process Administration (GH792), Delta Inclusion	Add a translation table to the delta process.
Work with Delta Table Inclusions	W7902A	Delta Process Administration (GH792), Delta Inclusion	Choose the delta table that you want to revise, and revise it.
Work With Batch Versions - Available Versions	W98305A	Delta Process Administration (GH792), Delta Process Batch Submission	Choose the delta process that you want to run. Verify that the information in the processing option is accurate. Submit the batch to run.
Work with Delta Table Inclusions	W7902A	Delta Process Administration (GH792), Delta Inclusion	Choose the delta process for which you want to view progress. Review the status description information.
Work With Batch Versions - Available Versions	W98305	Delta Process Administration (GH792), Status Report	Track the status of each delta process.
Work with Delta Table Inclusions	W79028	Translation Delta Process Administration (GH792), Delta Inclusion	Preview the functionality.

Adding Translation Tables to the Delta Process

Access the Work with Delta Table Inclusions form.

To add translation tables to the delta process:

1. On Work with Delta Table Inclusions, click Add to create a new version, or click Select to edit an existing version.
2. On Delta Table Inclusion, edit the appropriate tables to be included as part of each version.
3. Complete these fields:

- Version

  Enter the name of a version (for example, *XJDE0001*).

  Note. When you create this version using the Batch Versions application, you need to use this name.

- Delta Source Environment

  Enter the name of the environment from which the delta process reads the source files.

- Delta Destination Environment

  Enter the name of the environment from which the delta process writes or updates the destination files.

- Delta Include

  Enter *1* to include the table or *0* (zero) to exclude the table when you run the delta process.

- Delta Table

  Enter the name of a delta table.

4. Click OK.
5. On Work with Delta Table Inclusions, click Find to view the delta tables that you added.
6. Add the version using the Batch Versions application.

   You must use the same version name in the Translation Tools and in the Batch Versions applications.

   Note. All batch applications working with the delta process use the delta inclusion table information. Data selection for every delta batch application works with the version information that is defined in the delta inclusion application. Depending on the administrator requirements, you can enable or disable all tables. To add the version, see Creating a Batch Version in the Foundation Guide.

Revising Translation Tables Included in the Delta Process

Access the Work with Delta Table Inclusions form.

To revise translation tables included in the delta process:

1. On Work with Delta Table Inclusions, click Find to view any versions for the delta process.
2. On Work with Delta Table Inclusions, select the delta table that you want to revise, and then click Select.
3. On Delta Table Inclusion, complete the Delta Include field to indicate whether you want to include the delta table the next time that you run the delta process.

   If you exclude a delta table, the delta process does not run over the table. This exclusion does not delete the delta table from the delta process version; it merely disables it. Use the options of the Form menu for Yes and No to quickly change all tables.
4. When you finish including and excluding tables, click OK.
5. On Work with Delta Table Inclusions, click Find to view the revision that you made.
6. To delete a delta table, click a delta table row in the detail area, and then click Delete.

Running the Delta Process

This task explains how to verify the delta process processing options and run the delta process. You should verify the processing options first, and then run the version.

Note. You should always run the batch application locally. The Form Design Aid (FDA) and Report Design Aid (RDA) contain binary large objects (BLOB) that can be interpreted only on a Windows client computer.

Standard Procedures for Running the Delta Process

You should complete these procedures when you run the delta process:

1. Send an announcement message that includes the scheduled start date and time and the estimated end date and time.
2. Verify the OCM mapping of the source environment and target environment.

   Incorrect mappings cause database corruption.
3. Verify that the delta administrator is signed into the target environment.

   Translators use this same environment.
4. Use the Universal Table Browser to verify each data source and table.

   Data source connection problems might corrupt the database.
5. Begin the delta process at the scheduled time.

   A delta process might take as long as ten hours when the compare environment has multiple languages.
6. Make a backup copy of the compare environment.

   The delta process does not affect any code page data. The delta process compares only source and destination tables, making appropriate source record changes and updating status records in the compare environment.

Running the Delta Process

Access the Work With Batch Versions - Available Versions form.

To run the delta process:

1. On Work With Batch Versions - Available Versions, in the detail area, click the version that you want to run, and then select Processing Options from the Row menu.
2. On Processing Options, verify the information in these fields:
   - Delta Source Environment

     Enter the name of the environment to override where the delta process reads the source files.
   - Delta Destination Environment

     Enter the name of the environment to override where the delta process writes or updates the destination files.
   - Maximum Cache Size

     Enter the maximum size, in megabytes, for source and destination caches. If the maximum cache size is reached, the delta process stops.
   - Maximum Consecutive Errors

     Enter the maximum number of consecutive errors that you want the delta process to allow before the process stops. For example, you can have the delta process stop automatically if it processes five errors in a row. However, if five or more errors occur during the process, but they are not consecutive, the delta process continues.

- Compare Source and Destination records

  If the delta source and destination records reside on different types of computers, enter *1* in this field to disable the caching capability of the delta process. For example, if the source records reside on an AS/400 and the destination records reside on an HP9000, enter *1* in this field. If you do not disable the caching, the respective caches fill to their maximum cache size, and the delta process stops.

  If the source and destination records reside on the same type of computer, such as AS/400s, leave this field blank to allow for caching, which results in faster performance of the delta process.

3. On the Processing Options form, click OK.
4. On the Work With Batch Versions - Available Versions form, in the detail area, select the version that you want to run, and then click Select.
5. On Version Prompting, click Submit.

   If the Processing Options form prompts for editing, click OK; the system displays the Report Output Destination form.
6. On Report Output Destination, click one of these options, and then click OK:
   - On Screen
   - To Printer

     The delta process runs, comparing the source and destination files and identifying any differences between them. The report lists these changes.
7. At the end of the delta process, the system runs a secondary synchronized batch process, the System Code Status Record Update program (R79803).

   The System Code Status Record Update program updates product or system code information in the status records. The tables containing this information must be mapped to the correct source environment.

   The system code tables include:
   - F9001
   - F9200
   - F9860

     Note. You can run the System Code Status Record Update program at any time. It is not a task menu item. To run it, the delta administrator must start the Batch Versions program by entering *BV* in the Fast Path, entering the batch application number (*R79803*), selecting a version, and launching it. The table selection works with the delta inclusion application information.

Viewing the Progress of the Delta Process

This task explains how to view the progress of the delta process, which includes the status of the process.

Access the Work with Delta Table Inclusions form.

To view the progress of the delta process:

1. On Work with Delta Table Inclusions, click Find to view any versions for the delta process.
2. Review the Status Description field for these status messages:
   - *Unknown Error*

     Indicates that the delta process has stopped running.

- *Fatal Error*

  Indicates that the delta process has stopped running.

- *Minor Error*

  Indicates that the delta process has stopped running because the number of errors that occurred consecutively matches or exceeds the value that you entered in the processing option for the maximum number of consecutive errors.

- *Processing*

  Indicates that the delta process is still running. This status message continually updates during the delta process.

- *Complete Success*

  Indicates that the delta process completed successfully.

Note. With a successful backup copy, users can enter the compare environment to continue working. It is better to have no users in the system, and the translation tools application limits access to data based on the current status of the delta process. In the event of data corruption, the data should be restored from the backup copy.

Using jde.log

Use the jde.log file to follow the progress of the delta process and to identify errors that might have occurred. PeopleSoft software automatically uses the jde.log file to track the progress and any errors of the delta process; no setup is required. While the delta process is running, you can access the jde.log file to view the progress.

When viewing the jde.log file, locate any delta process information by searching for the word *delta* or for the B7900022 business function.

The delta keeps a one-to-many relationship between the source records and status records. The language master defines the one-to-many relationship. Any time that a status record is missing, the delta attempts to insert all records. An insert failure might inadvertently result from keeping the one-to-many relationship.

Using jdedebug.log

Use the jdedebug.log file to identify process errors that might occur during the delta process. You need to set up jdedebug.log by using the jde.ini file if you want to use the log file for debugging the delta process.

Tracking the Status of Each Delta Process

This task explains how to report the changes for each delta process. The delta inclusion saves the last historical information by default. You can export this information from the detail area for reporting purposes.

If you need more historical information, you can run the Translation Compare Status report (R79810) for statistics. You should run this report at the completion of every delta process. The report displays the total changes over the compare environment. You can use the report to analyze delta problems and concerns that you might have after you run the Delta Purge and Rebuild Process program (R79801).

Access the Work With Batch Versions - Available Versions form.

To run the Translation Compare Status report:

1. In the detail area of Work With Batch Versions - Available Versions, select the version that matches the table selection for the delta inclusion version, and click Select.

2. On Version Prompting, click Submit.
3. On Processing Options, enter the language selection to limit the size of the report.

   When the language selection is blank (the default value), all languages in the compare environment print on the report.
4. Click OK.

Using Preview Functionality

Many of the translation tools have a preview feature that is built into the application. The preview feature uses local specifications to retrieve current source and target text changes to preview the current delta changes.

You must download specifications to each client machine before processing the preview functionality. The delta process keeps the compare environment synchronized with the objects in a path code, but the delta does not update local machine specifications. Translation Tools has implemented the Advanced Get feature from Object Management Workbench (OMW) to perform previews.

If the items have changed, Translation Tools automatically retrieves the specifications based on untranslated status items.

Access the Work with Delta Table Inclusions form.

To use preview functionality:

1. On Work with Delta Table Inclusions, select Constants from the Form menu to edit the necessary information for the preview feature.
2. On Delta Constants, complete these fields:
   - Path Code

     OMW activity rules must be set up to access the objects in this path code.
   - Release

     Enter the current release that matches your path code.
3. Click any of these options, and then click OK:
   - Forms Design Aid (FDA)
   - Report Design Aid (RDA)
   - Processing Options (PO)
   - Data Dictionary (DD)

   Note. The options are disabled until you enter a path code and release.

Working with Delta Process Advanced Options

This section provides an overview of delta process advanced options, and discusses how to:

- Purge and rebuild delta tables.
- Fix status record problems.
- Use Content Builder batch applications.
- Create non-BLOB FDA specifications.

- Update FDA and RDA tables with translated text.

Understanding Delta Process Advanced Options

The environments and database contain a large set of data that could become corrupt. The delta process includes a suite of batch applications to help keep the compare and code page environments intact.

Forms Used to Work with Delta Process Advanced Options

Form Name	Form ID	Navigation	Usage
Work With Batch Versions - Available Versions	W98305A	Purge and Rebuild (GH7922) menu, Purge and Rebuild Batch Submission	Purge and rebuild delta tables.
Work With Batch Versions - Available Versions	W98305A	Purge and Rebuild menu (GH7922), Check Delete Status Batch Submission Language Mastering Administration menu (GH7933), FDA Blob Update	Check delete status with text records.
Work With Batch Versions - Available Versions	W98305A	Language Mastering Administration menu (GH7933), FDA Blob Update	Update FDA and RDA tables with translated text.

Purging and Rebuilding Delta Tables

When the compare and code page environments are out of synchronization, use the Delta Purge and Rebuild Process (R79801) to identify and fix problems. You should rebuild at the beginning of the translation lifecycle, but purge before mastering the software.

The purge process deletes these types of records:

- Status and language records that are marked for deletion (status = 99).
- Language records that do not have a corresponding status record.

  This means that the language record is extraneous because, without a corresponding status record, it does not match any of the English records. The translation record has become an orphan.
- All untranslated language records (status = 20).

  This removes bad translations. Untranslated text is a better result than a bad translation.

The rebuild process performs these tasks:

- Checks certain status records for missing translation records or untranslated text.
- Compares all status records that are complete (status = 11) for matching language records.
- Changes the status of the corresponding status record to either untranslated (status = 20) or new item (status = 40) for each language record that meets these conditions:
  - Record does not exist.
  - Record is blank.

- Record contains English (you need to set a processing option for this function).

Access the Work With Batch Versions - Available Versions form.

To purge and rebuild delta tables:

1. On Work With Batch Versions - Available Versions, select the Purge and Rebuild version in the detail area and then select Processing Options from the Row menu.
2. On the Processing Options form, complete these fields on the Process tab:
   - Language

     Enter the language code, such as *W* for Swedish, for the language records that you want to purge and rebuild.
   - Translation Compare Environment

     Enter the compare environment or leave this processing option blank to use the default compare environment. The wrong compare environment can cause corruption in the database.
   - Code Page Environment

     Enter the language code page environment or leave this processing option blank to use the default code page environment. The wrong code page environment can cause corruption in the database.
   - Purge

     Leave this processing option blank to run the purge process. Enter *1* in this processing option to prevent the purge process from running.
   - Rebuild

     Leave this processing option blank to run the rebuild process. Enter *1* in this processing option to prevent the rebuild process from running.
   - Duplicate English

     Enter *1* in this processing option to run a process that checks language records for any source English that also appears in the source English records. Any duplicate source English changes the corresponding status record to untranslated (status = 20). Generally, translation memory problems cause English text to appear in translated software, and this process can reset the status appropriately.
3. Click OK.
4. On Work With Batch Versions - Available Versions, in the detail area, select the version that you want to run, and then click Select.

   The data selection is defined by the delta inclusion application.

   If the Processing Options form prompts for editing, click OK; the system displays the Report Output Destination form.
5. Click one of these options, and then click OK:
   - On Screen
   - To Printer

     The batch process runs.

Note. The purge and rebuild process also rebuilds information in the code page records. Tables such as F0005D, F7920, and F98306 contain information from the source records. This process fixes translation or mastering issues.

Fixing Status Record Problems

Sometimes, status records are not updated appropriately. These records are often missing the English source and have become orphaned. You can run the Check Status with Text Records program (R79802) to fix these problems. This process runs in the compare environment and works with all language status records that are missing a source record.

Access the Work With Batch Versions - Available Versions form.

To check delete status with text records:

1. On Work With Batch Versions - Available Versions, select the version in the detail area and select Processing Options from the Row menu.
2. On the Processing Options form, complete these processing options and click OK:
   - Update Delete Status Records

     The report displays the totals for the records that will be purged from the system.
   - Delete Status
3. On Work With Batch Versions - Available Versions, in the detail area select the version that you want to run, and then click Select.

   The data selection is defined by the delta inclusion application.

   If the Processing Options form prompts for editing, click OK; the system displays the Report Output Destination form.
4. Click one of these options and click OK:
   - On Screen
   - To Printer

     The batch process runs.

Using Content Builder Batch Applications

Content Builder uses the delta process to track English source changes. The changes can then be edited by developers into a code page or workspace database. A tool in Content Builder enables developers to access the data dictionary to edit the delta glossary items. These edits eventually need to be synchronized with the pristine database for the purposes of translating and mastering the software:

To update the pristine and compare databases with developer edits:

1. From the Work With Delta menu (GH7941), select Delta Data Synch.
2. On the Processing Options form, complete these processing options:
   - Compare Data Source

     This data source contains the status records and the compare source English.
   - Code Page Data Source

     This data source contains the edits that the developers entered, and which need to be updated in the compare and destination data sources.
   - Destination Data Source

     This data source contains the current pristine set of data for the current release of the data dictionary.

- Synch by Status

  This option selects the status records to update, so that only edited items are replaced.
- Update Compare Status

  This option updates the status, so that the same records are not continually updated with this process.

3. Click OK.
4. On Report Output Destination, select one of these options and click OK:
   - On Screen
   - To Printer

     The batch process runs.

When Content Builder is not using the delta process to track changes, a set of non-Binary Large Object Form Design Aid (non-BLOB FDA) data is required to use the token integration tool. The non-BLOB data can be generated from the BLOB specifications to enable edits when using token integration in Content Builder.

Creating Non-BLOB FDA specifications

Access the FDA Spec Conversion.

To create non-BLOB FDA specifications:

1. On the Processing Options form, complete these processing options:
   - FDA Spec Source Environment

     This environment contains the path code information of the current FDA BLOB specifications.
   - FDA Data Destination Environment

     This environment contains the mapping to the compare environment.
   - Maximum Consecutive Errors
   - From Range - Interactive Application Name

     To limit the size of the non-BLOB specification data, enter a starting application such as Business Unit Master (P0006).
   - Thru Range - Interactive Application Name

     To limit the size of the non-BLOB specification data, enter an ending application such as Purchase Order Entry (P4310).
2. Click OK.
3. On Report Output Destination, select one of these options and click OK:
   - On Screen
   - To Printer

     The batch process runs and creates the data that is necessary to use the token integration tool for Content Builder.

Updating FDA and RDA Tables with Translated Text

This task explains how to update FDA and RDA tables with translated text. PeopleSoft software stores FDA and RDA tables in the BLOB format. The delta process converts the FDA and RDA text into Unicode, ASCII, or Extended Binary Coded Decimal Interchange Code (EBCIDIC), depending on your system. After translation is complete and before language mastering, the mastering administrator needs to run the batch processes to convert the translation text back into the BLOB format for use within PeopleSoft software.

Access the Work With Batch Versions - Available Versions form.

To update FDA and RDA tables with translated text:

1. On Work With Batch Versions - Available Versions, select the version in the detail area and then select Processing Options from the Row menu.
2. On the Processing Options form, complete these processing options:
   - Translation's Code Page Environment
   - Master's Code Page Environment
   - Language Selection

     Enter the language code, such as *W* for Swedish, for the language records that you want to purge and rebuild.
3. Click OK.
4. On Work With Batch Versions - Available Versions, select the version in the detail area, and then click Select.
5. On the Version Prompting form, click Submit.

   If the Processing Options form prompts for editing, click OK; the system displays the Report Output Destination form.
6. Select one of these options and click OK:
   - On Screen
   - To Printer

     The batch process runs.
7. Return to the Language Mastering Administration menu, and select RDA Blob Update.
8. Repeat steps 2 through 6.

Code Page Character Sets

Translation text exists in many forms of character code pages. Some of these code pages include Unicode, ASCII, or EBCIDIC, depending on your system. Unicode has different encoding sets, such as UTF-16, UTF-8, USB-2, and so on. Unicode character code pages are often converted to either ASCII or EBCIDIC code pages for processing on different platforms.

This table displays the character sets for ASCII character code pages:

Language	Description	ASCII ID	ASCII Code
AR	Arabic	AR_CP1256	720
C	Czech	EE_CP1250	852
CS	Simplified Chinese	SC_GB	936
CT	Traditional Chinese	TC_BIG5	950
DN	Danish	WE_ISO88591	437
DU	Dutch	WE_ISO88591	437
F	French	WE_ISO88591	437
FN	Finnish	WE_ISO88591	437
G	German	WE_ISO88591	437
GR	Greek	GR_CP1253	737
HU	Hungarian	EE_CP1250	852
I	Italian	WE_ISO88591	437
J	Japanese	JA_SJIS	932
KO	Korean	KO_KSC	949
NO	Norwegian	WE_ISO88591	437
P	Portuguese	WE_ISO88591	437
PO	Polish	EE_CP1250	852
RU	Russian	RS_CP1251	866
S	Spanish	WE_ISO88591	437
TR	Turkish	TK_CP1254	857
W	Swedish	WE_ISO88591	437

Language	Description	EBCIDIC ID	EBCIDIC Code
AR	Arabic	AR_EBCDIC	420
C	Czech	EE_EBCDIC	870
CS	Simplified Chinese	SC_EBCDIC	935
CT	Traditional Chinese	TC_EBCDIC	937

Language	Description	EBCIDIC ID	EBCIDIC Code
DN	Danish	US_EBCDIC	37
DU	Dutch	US_EBCDIC	37
F	French	US_EBCDIC	37
FN	Finnish	US_EBCDIC	37
G	German	US_EBCDIC	37
GR	Greek	GR_EBCDIC	875
HU	Hungarian	EE_EBCDIC	870
I	Italian	US_EBCDIC	37
J	Japanese	JA_EBCDIC	939
KO	Korean	KO_EBCDIC	933
NO	Norwegian	US_EBCDIC	37
P	Portuguese	US_EBCDIC	37
PO	Polish	EE_EBCDIC	870
RU	Russian	RS_EBCDIC	1025
S	Spanish	US_EBCDIC	37
TR	Turkish	TK_EBCDIC	1026
W	Swedish	US_EBCDIC	37

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

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

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

	PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

AR specialist — Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan — In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule — In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class — An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair — In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience — In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server — A server that is set up to verify users of the system.

base time period — In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job — In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

billing career — In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief — In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book — In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch — A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only — An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check — In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control — In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period — The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

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

See also *course.*

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

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

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

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

See also *population*and *division*.

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

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

comm key See *communication key.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *class.*

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

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

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

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

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

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

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type — In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree — In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

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

See also *population* and *cohort*.

document sequencing — A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree — A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table — A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date — A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger — Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set — In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event — In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization — In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit — In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event

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

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

event propagation process

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

exception

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

exclusive pricing

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

fact

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

financial aid term

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

forecast item

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

fund

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

gap

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

generic process type

In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table

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

GL business unit

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

See also *business unit*.

GL entry template

Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

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

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

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

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

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

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

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

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

See also *update access.*

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

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

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

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

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

joint communication

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

keyword

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

KPI

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

LDIF file

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

learner group

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

learning components

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

learning environment

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

learning history

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

ledger mapping

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

library section

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

linked section

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

linked variable

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

LMS

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

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

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

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

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

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

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

See also *3C engine*.

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

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

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

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

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

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

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

national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.

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

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

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

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

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

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

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

See also *division* and *cohort*.

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

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

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

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

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

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

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

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

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

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

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

See *record input VAT flag.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See *communication key.*
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
3C engine	Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,

and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group

Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan

A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage

In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation

In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state

In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table

A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree

The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock

In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction

In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header

Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access

In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

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

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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