
Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards EnterpriseOne PeopleBook

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Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards EnterpriseOne PeopleBook
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About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- 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 elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise 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 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 Enterprise applications. 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.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release 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
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise 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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.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

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

Once, Always, and Don't Run	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
Process Monitor	<p>Click to access the Process List page, where you can view the status of submitted process requests.</p>
Report Manager	<p>Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).</p>
Request ID	<p>An ID that represents a set of selection criteria for a report or process.</p>
Run	<p>Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.</p>
SetID	<p>An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.</p>
Short Description	<p>Enter up to 15 characters of text.</p>
User ID	<p>An ID that represents the person who generates a transaction.</p>

Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook Preface

This chapter discusses:

- Fusion Intelligence For PeopleSoft Enterprise 8.9 applications.
- Related documentation.
- Common elements used in this PeopleBook.

Fusion Intelligence For PeopleSoft Enterprise 8.9 Applications

This PeopleBook refers to these Fusion Intelligence applications:

- Fusion Financials Intelligence For PeopleSoft Enterprise
- Fusion Human Resources Intelligence For PeopleSoft Enterprise
- Fusion Supply Chain Intelligence For PeopleSoft Enterprise
- Fusion Intelligence for JD Edwards EnterpriseOne

Related Documentation

This Fusion Intelligence PeopleBook provides you with implementation information for your Fusion Intelligence 8.9 applications. Additional, essential information describing the setup and design of your system resides in companion documentation.

Note. This PeopleBook documents only the delivered, prebuilt dashboards, reports, subject areas, and security setup for Fusion Intelligence For PeopleSoft Enterprise 8.9 applications. Before reading this PeopleBook, read the Oracle Business Intelligence Enterprise Edition (OBIEE) documentation for information on the underlying architecture of Fusion Intelligence applications. Also read the PeopleSoft Enterprise Performance Management (EPM) Warehouse 8.9 PeopleBook for a more detailed, field-level explanation of the data that is used in these applications.

This table lists the books that are cross-referenced in the *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*:

Document	Description
<i>Oracle Business Intelligence Infrastructure Installation and Configuration Guide</i>	<p>This guide provides information on installing and configuring the infrastructure or platform components of Oracle Business Intelligence on approved operating system platforms and deployments. This release of the guide applies to infrastructure (platform) releases of Oracle Business Intelligence Enterprise Edition.</p> <p>Note. The Oracle Business Intelligence Infrastructure Installer installs the platform components, not the applications components. Refer to the <i>Fusion Intelligence For PeopleSoft Enterprise 8.9 Supplemental Installation Instructions</i> to install the Fusion Intelligence For PeopleSoft Enterprise applications.</p>
<i>Oracle Business Intelligence Server Administration Guide</i>	<p>This is an infrastructure guide that contains post-installation and configuration content that pertains to setting up the Oracle Business Intelligence Server (Oracle BI Server). The guide discusses how to plan, create, and administer the physical, business model and mapping, and presentation layers in the Oracle BI Repository. The guide primarily covers tasks that are performed in the Oracle BI Administration Tool utility.</p>
<i>Oracle Business Intelligence Presentation Services Administration Guide</i>	<p>This guide provides post-installation configuration and administration procedures for Oracle BI Presentation Services, Oracle BI Answers, Oracle BI Delivers, Oracle BI Interactive Dashboards, and the Oracle BI Presentation Catalog and Catalog Manager. Additionally, the guide discusses Oracle BI Presentation Services security, logging, user interface, and integrations using HTTP.</p>
<i>Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide</i>	<p>This guide is for Oracle BI report and dashboard designers and end users of Fusion Intelligence applications.</p>
<i>PeopleSoft Enterprise Performance Management Warehouse 8.9 PeopleBook</i>	<p>This book provides an overview of the PeopleSoft Enterprise Performance Management Warehouse, that serves as the data source for the Fusion Intelligence For PeopleSoft Enterprise applications.</p>
<i>Fusion Intelligence For PeopleSoft Enterprise 8.9 Supplemental Installation Instructions</i>	<p>This guide discusses how to install the components that are required to run Fusion Intelligence For PeopleSoft Enterprise applications.</p> <p>Note. Before using this guide, you must install the tools and applications that are listed in the Prerequisites section of the “Understanding Fusion Intelligence” chapter of this PeopleBook.</p>

Common Elements Used in This PeopleBook

Connection Pool

An object in the physical layer of the repository that contains information about the connection between the Oracle BI Server and the data source.

Dimensions	<p>Represents the organization of logical columns (attributes) that belong to a single logical dimension table. Examples of dimensions are time periods, products, markets, customers, suppliers, promotion conditions, raw materials, manufacturing plants, transportation methods, media types, and time of day. In dimensions, you can organize attributes into hierarchical levels. These levels represent your business reporting requirements.</p> <p>Common dimensions contain a set of dimensional attributes that can be shared by all subject areas or marts. The PeopleSoft Enterprise Performance Management functional warehouses share seven common dimensions—calendar, time, business unit, time zone, currency, unit of measure, and language.</p>
Facts	<p>A measure or calculated data, such as quantity, sales, and revenue, that can be specified in terms of dimensions. For example, you might want to determine the sum of dollars for a given product in a given market over a given time period.</p>
Filters and Prompts	<p>Filters are built into requests and are used to limit the results that appear on a dashboard. A report that appears on a dashboard shows only those results that match the filter criteria. Filters are applied on a column-level basis.</p> <p>Certain filters inherit the values that users specify in dashboard prompts. A prompt is another kind of filter that can apply to all items in a dashboard. Some prompts, such as date or period, can be common to all dashboards. Other prompts, such as commodity, are unique to a specific dashboard. Prompts are synonymous with parameters.</p> <p><i>See Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide, “Filtering Requests in Oracle BI Answers.”</i></p>
Folders	<p>In the Oracle BI Presentation Services user interface, folders provide the ability to organize an Oracle BI Web Catalog and its contents, such as reports.</p>
Fusion Intelligence For PeopleSoft Enterprise Applications	<p>Refers to these applications:</p> <ul style="list-style-type: none"> • Fusion Financials Intelligence For PeopleSoft Enterprise • Fusion Human Resources Intelligence For PeopleSoft Enterprise • Fusion Supply Chain Intelligence For PeopleSoft Enterprise
Guided Navigation	<p>A link to navigate to the transaction processing application, another dashboard, or a URL. This link can be set up to appear conditionally based on the results of a report or key performance indicator.</p>
Key Performance Indicators (KPIs)	<p>Strategic business factors that are used for reporting. KPIs are designed to monitor performance on strategic business factors such as Revenue or Operating Margin.</p>
Oracle Business Intelligence Answers (Oracle BI Answers)	<p>A component within the Oracle BI Enterprise Edition technology that is used to create ad hoc queries into an organization’s data. Oracle BI Answers provide a set of graphical tools to create and execute requests for information. Requests can be saved in the form of reports, and shared, modified, formatted, or embedded in a dashboard.</p>

**Oracle Business
Intelligence Enterprise
Edition (OBIEE)**

A comprehensive suite of enterprise business intelligence products that contain the programs, servers, and tools to support broad, self-service access across the organization. OBIEE is the foundation for Fusion Intelligence For PeopleSoft Enterprise applications.

**Oracle Business
Intelligence Delivers
(Oracle BI Delivers)**

A proactive intelligence solution that provides business activity monitoring and alerting for out-of-tolerance situations to target owners and subscribers.

**Oracle Business
Intelligence Interactive
Dashboards (Oracle BI
Interactive Dashboards)**

Collections of content that are designed to meet the needs of particular user roles. A dashboard is the user interface that provides a knowledge worker with intuitive, interactive access to information that is actionable and dynamically personalized, based on the individual's role and identity.

**Oracle Business
Intelligence Presentation
Catalog (Oracle BI
Presentation Catalog)**

A collection of subject areas that are defined in the metadata repository layer.

Requests (Reports)

The building blocks of business intelligence dashboards. Requests are created by using Oracle BI Answers to retrieve and display an organization's data. Data can be displayed in a variety of graphical formats. Links can be established in the chart or table of a report to launch another report to offer guided analysis.

Star Schema

A data warehouse schema in which a fact table is associated with a series of dimension tables.

CHAPTER 1

Getting Started with Fusion Intelligence

This chapter discusses:

- Fusion Intelligence overview.
- Fusion Intelligence integrations.

Fusion Intelligence Overview

The Fusion Intelligence For PeopleSoft Enterprise 8.9 applications contain interactive, comprehensive analytical applications that offer insight into your financials, human capital management, and supply chain operations. You can deploy all of the Fusion Intelligence For PeopleSoft Enterprise applications together for a complete, integrated analytic solution, or deploy the applications modularly to meet your specific business and budgetary requirements.

The Fusion Intelligence For PeopleSoft Enterprise 8.9 applications are based on the PeopleSoft Enterprise Performance Management Warehouse 8.9 data model. You must implement PeopleSoft Enterprise Performance Management Warehouse 8.9 before you can use Fusion Intelligence For PeopleSoft Enterprise.

The applications contain prebuilt, role-based dashboards that help you quickly analyze key performance indicators, reports, and metrics to spot trends and determine if your area of the business is on track. The applications also provide a library of prebuilt reports, prompts, and filters that present data in interactive charts, graphs, and grids. From a dashboard or report, you can drill into the source data in the transaction processing application to view transaction details and take corrective action. Security rules ensure that personalized content is generated for specific users and roles.

The dashboards are tailored for an end user's role in an organization. You can grant each role access to specific objects, such as subject areas, dashboards, and reports. Additionally, you can control access to specific data rows by using secured dimensions.

Fusion Intelligence applications include a single, prebuilt repository that contains the metadata for existing marts in the PeopleSoft Human Capital Management Warehouse, Financials Warehouse, and Supply Chain Management Warehouse. The repository consists of physical, business mapping, and presentation metadata layers that contain common definitions of metrics, hierarchies, and calculations against the data.

The servers, programs, and tools in Oracle BI Enterprise Edition provide the infrastructure foundation for Fusion Intelligence applications. The metadata repository file, and dashboard and report catalog file, are objects in Oracle BI Enterprise Edition. Oracle BI Answers, Delivers, and Interactive Dashboards are used to create the dashboards, reports, and business monitoring activity in analytic applications.

Fusion Intelligence Integrations

Fusion Intelligence For PeopleSoft Enterprise 8.9 applications seamlessly interact with multidimensional business warehouses that are part of the PeopleSoft Enterprise Performance Management suite. The PeopleSoft Performance Management warehouses capture a wealth of data from online transaction applications in PeopleSoft Enterprise, JD Edwards EnterpriseOne, and JD Edwards World, and feed the data to the Oracle Business Intelligence (BI) Repository as integrated analytic content for reporting and analysis.

These PeopleSoft Performance Management warehouses provide data to Fusion Intelligence 8.9 applications:

- PeopleSoft Enterprise Financials Warehouse
- PeopleSoft Enterprise Human Capital Management Warehouse
- PeopleSoft Enterprise Supply Chain Management Warehouse

The key integration points between Fusion Intelligence For PeopleSoft Enterprise 8.9 applications and PeopleSoft products are:

- Single signon with user identity management.

You can sign onto a Fusion Intelligence application and drill from dashboard reports into source transactions in PeopleSoft transaction applications, without encountering the PeopleSoft signon page.

- Security at the object and data level.

Fusion Intelligence applications honor the data-level security that you set up in PeopleSoft Enterprise Performance Management Warehouse 8.9. Additionally, you can set up object-level security by creating security groups in Fusion Intelligence applications to match user roles in PeopleSoft.

- Drill between dashboards and transaction applications.

You can click a link in an interactive dashboard or report to drill to a transaction page in a new browser window for more details, while maintaining the data and security.

- Synchronized data model.

A guided drill path is built into the analytic model so you can view aggregated data to understand trends. From summary reports, you can drill in place to detailed reports to investigate exceptions or problems. From there you can drill to the underlying transaction system to act upon the source data to resolve problems.

CHAPTER 2

Understanding Fusion Intelligence

This chapter lists prerequisites and discusses:

- Fusion Intelligence subject areas.
- Fusion Intelligence architecture.
- Oracle BI Administration Tool.
- Oracle BI Presentation Services.
- Roles.
- Navigation.
- Reporting tools.
- Request filters.
- Fusion Intelligence setup.
- Cache management.

Prerequisites

The following software is required to use Fusion Intelligence applications with the PeopleSoft Enterprise Performance Management database. You must complete the installation of this software before you implement Fusion Intelligence For PeopleSoft Enterprise applications:

- PeopleSoft PeopleTools 8.48, minimum.

Note. Select the *Oracle Application Server* option.

- PeopleSoft Enterprise Performance Management Warehouse 8.9.

Note. (Optional) License the PeopleSoft Enterprise Warehouses for Financials, Human Capital Management, and Supply Chain Management.

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.

Note. Select the *Oracle Application Server* option.

- Oracle Application Server.
- Oracle Application Server infrastructure components:
 - Oracle Internet Directory (LDAP Server).

- Oracle Single Signon Server

See *PeopleSoft Enterprise Performance Management 8.9 Installation Guide*.

Fusion Intelligence Subject Areas

This section provides an overview of the delivered Presentation catalogs (that are also called subject areas) in Fusion Intelligence applications.

When you click the Answers link from any location in a Fusion Intelligence application, the Oracle Answers start page appears with a list of subject areas in the workspace. A subject area contains columns and filters that represent information about the areas of your organization's business, or about groups of users within your organization. Subject area names correspond to the types of information that they contain, such as Payroll Deduction and Credit Limit.

The metadata in Fusion Intelligence subject areas maps to data in these four functional warehouses:

- Financials Warehouse
- Human Capital Management Warehouse
- Supply Chain Warehouse

Note. To fully understand subject areas, familiarize yourself with the data models in PeopleSoft Enterprise Performance Management (EPM).

See *PeopleSoft Enterprise Performance Management Warehouse 8.9 PeopleBook*, "Understanding the Performance Management Warehouse."

Financials Warehouse

The Fusion Financials Intelligence For PeopleSoft Enterprise application provides insight into information in these warehouse marts and subject areas:

Warehouse Mart	Subject Area
Advanced Cost Accounting	Cost Analyzer Driver Balance

Warehouse Mart	Subject Area
Enterprise Service Automation	Contract Amendments Contract Distributions Contract Forecast Current Contract Forecast Periodic Contract Renewals Contract Revenue Recognition Contract Transactions Current Projects Employee Forecast Expense Distributions Expense Report Approvals Periodic Projects Project Changes Project Current Activities Project Deliverables Project Issues Project Periodic Activities Project Transactions Proposals Resource Assignments Resource Rates Resource Time Reports Service Orders
General Ledger and Profitability	Aggregated Balance Journal Entries Period Balances Profitability Analysis
Global Consolidations	Consolidation Ledger Flows

Warehouse Mart	Subject Area
Payables	Account Entries Aging Process Ledger Voucher Match Exceptions Vouchers and Payments
Real Estate	Average Rental Rate by Building Budget Rent v/s Actual Rent by Building Expense Billing General Ledger Journal Entries Lease Real Estate Area Real Estate Billing Rent Tenant Sales History
Receivables	Account Entries Aging Process Credit Limit Customer and Vendor Netting Customer Ledger Days Sales Outstanding Items and Receipts

The Performance Management Warehouse PeopleBooks discuss the dimensions, facts, and metrics in Financials warehouse marts and subject areas.

See Also

Performance Management Warehouse Financials Warehouse Dimensions

Performance Management Warehouse Financials Warehouse Facts

Human Capital Management Warehouse

The Fusion Human Resources Intelligence For PeopleSoft Enterprise application provides insight into information in these warehouse marts and subject areas:

Warehouse Mart	Subject Area
Compensation	Absence Absence Accrual Absence Event Absence Request Benefit Enrollment Global Payroll Leave Accrual Payroll Deduction Payroll Deduction Balance Payroll Earnings Payroll Earnings Balance Payroll Other Earnings
Learning	Accomplishment Activity Cost Completion Current Accomplishment Current Competency Employee Appraisal Employee Review Enrollment Learning Objective Learning Resource Person Competency Program Registration Training Training Course Session Expense

Warehouse Mart	Subject Area
Recruiting	Recruitment Expenses Recruitment Tracking
Workforce	Benchmark Survey Employee Job Grievance Injury Illness Time And Labor Workforce Movement Activity Workforce Profile

The Performance Management Warehouse PeopleBooks discuss the dimensions, facts, and metrics in Human Capital Management warehouse marts and subject areas.

See Also

Performance Management Warehouse HCM Warehouse Dimensions

Performance Management Warehouse HCM Warehouse Facts

Supply Chain Warehouse

The Fusion Supply Chain Intelligence For PeopleSoft Enterprise application provides insight into information in these warehouse marts and subject areas:

Warehouse Mart	Subject Area
Spend	Voucher Voucher Line
Fulfillment and Billing	Billing Booking Billing and Backlog Bookings Kit Order To Cash Cycle Time Return Material Authorization Received Sales Order Sales Order Line Sales Order Line Ship

Warehouse Mart	Subject Area
Inventory	History Sum Ledger Inventory Cycle Count Inventory Ledger Inventory Transaction Physical Inventory
Manufacturing	Work Center Master Work Center Resource Unit Work Order Master Work Order Part List Work Order Production Cost Work Order Routing Work Order Time Transaction
Procurement	Matching Analysis Procurement Cycle Time Analysis Purchase Order Disposition Purchase Order Distribution Purchase Order Line Purchase Order Line Multiple Accounts Purchase Order Receipt and Voucher Purchase Order Receipt and Voucher Multiple Accounts Purchase Order Received Shipment Requisition Analysis Requisition Line Return to Vendor Return to Vendor Distribution
Supply Chain Planning	Inventory Inventory Transfer Production Production Capacity Purchasing Sales Actual Sales Forecast

The Performance Management Warehouse PeopleBooks discuss the dimensions, facts, and metrics in Supply Chain Management warehouse marts and subject areas.

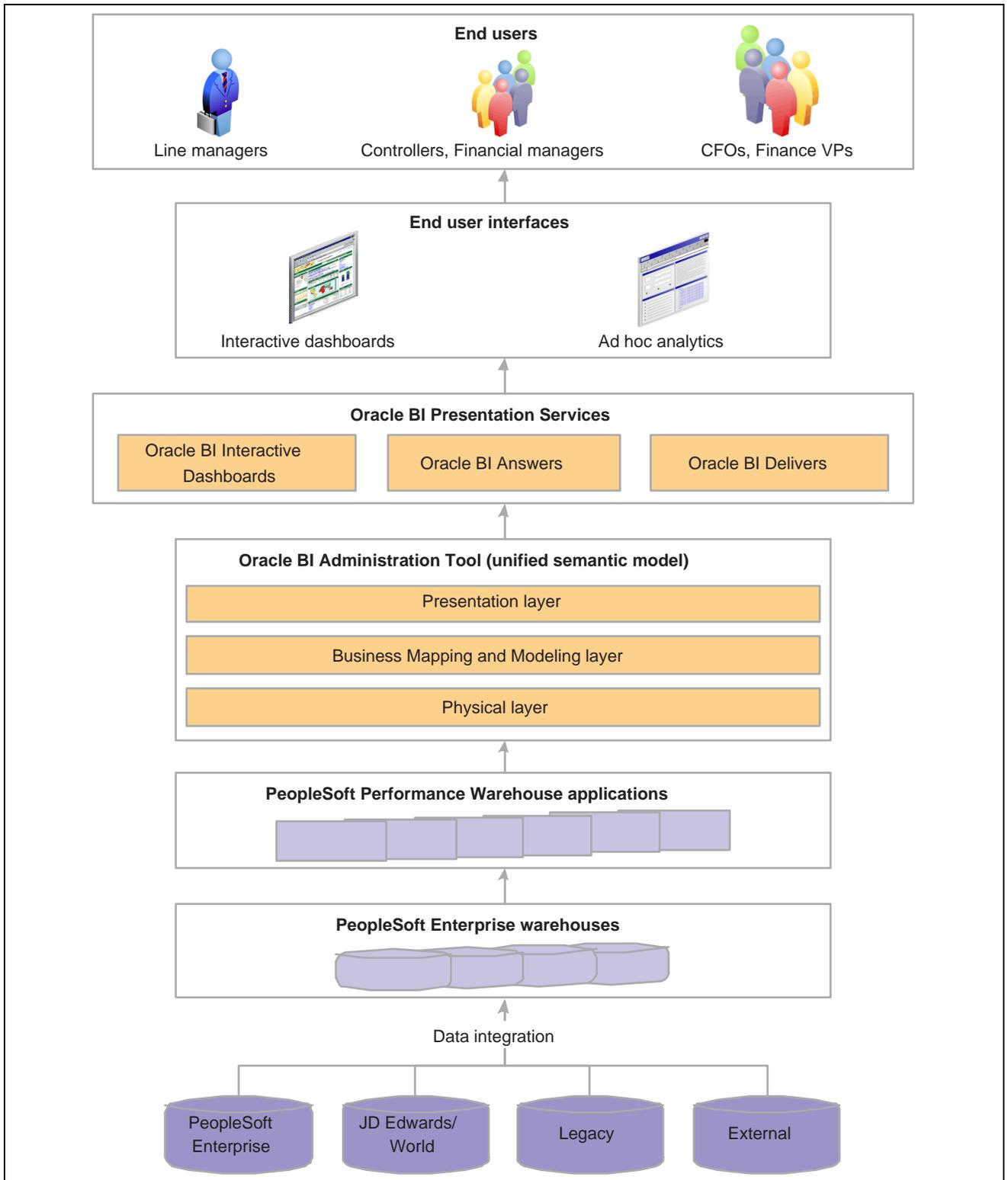
See Also

Performance Management Warehouse SCM Warehouse Dimensions

Performance Management Warehouse SCM Warehouse Facts

Fusion Intelligence Architecture

This diagram depicts the relationship between the multidimensional warehouse in PeopleSoft Enterprise Performance Management, Oracle BI components such as Oracle Answers, Oracle Delivers, and the Administrator Tool, and interactive dashboards such as the ones in Fusion Intelligence applications:



Fusion Intelligence architecture

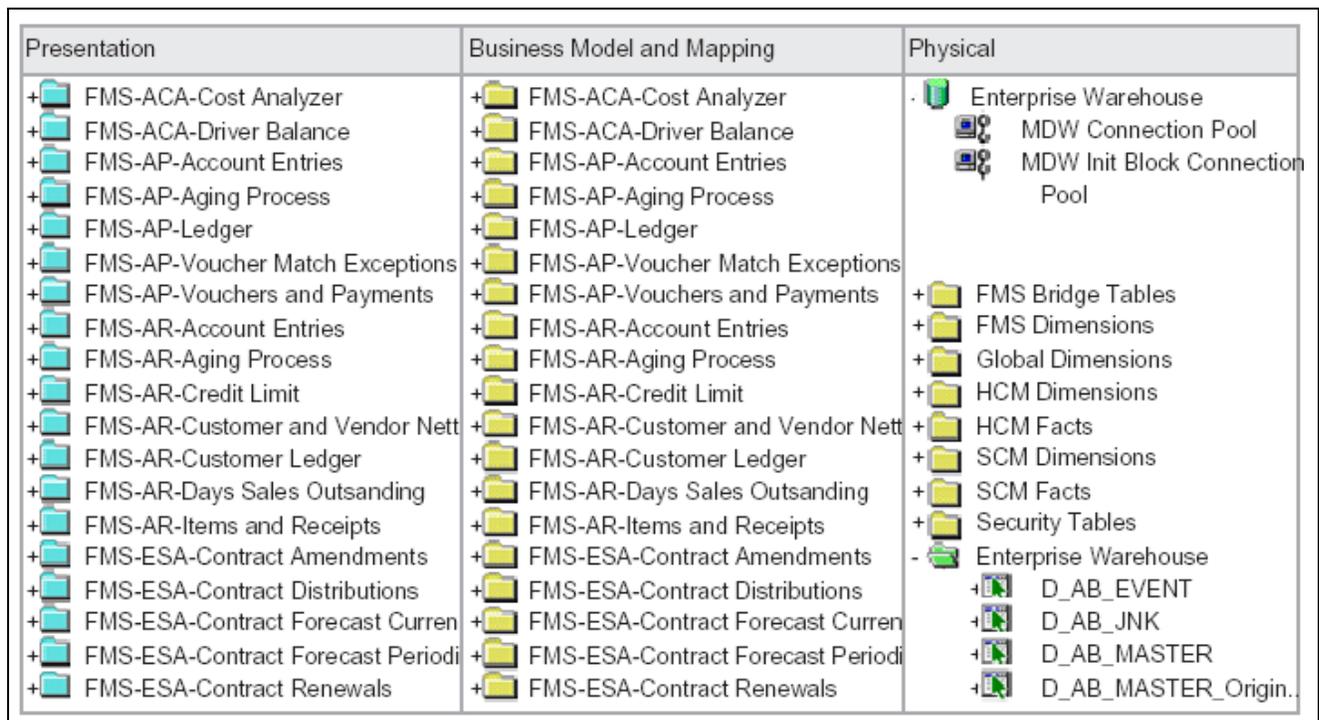
Oracle BI Administration Tool

This section discusses the:

- Repository file
- Physical layer
- Business Model and Mapping layer
- Presentation layer

Repository File

Prebuilt metadata content is maintained in the metadata repository file named *EPM89_Master.rpd* that is shared by all Fusion Intelligence For PeopleSoft Enterprise applications. The repository contains the Physical, Business Model and Mapping, and Presentation layers that are discussed in the following sections. The Oracle BI Administration Tool is the user interface into the layers in the repository, as shown in this example:



Oracle Administration Tool

Consistency Check

The *Oracle Business Intelligence Server Administration Guide* discusses consistency checks that you must perform on repository metadata before you make the repository available for queries.

Important! When you perform a global consistency check on the *EPM89_Master.rpd* repository in OBIEE, you may incur this warning message: [39028] *The features in Database 'Enterprise Warehouse' do not match the defaults. This can cause query problems.*

Please disregard this warning message for this release of Fusion Intelligence For PeopleSoft Enterprise. The resolution for this warning is in development and will be available in a subsequent product release.

Physical Layer

A Physical table is an object in the Physical layer of the Oracle BI Administration Tool that corresponds to an object in a Physical database. The Physical layer folder stores the shortcuts (references) to physical tables. Physical tables are typically imported from a database or another data source, and they provide the metadata necessary for the Oracle BI Server to access the tables. The Physical layer represents the physical structure of the data sources to which the Oracle BI Server submits queries.

A physical object in OBIEE can also be based on an SQL query.

Connection Pools

In Fusion Intelligence applications, the marts in PeopleSoft Performance Management Warehouse applications provide the data source for the Physical layer. A Physical layer can have multiple data sources. Each data source must have at least one corresponding connection pool, that contains data source information that the system uses to connect to a data source, the number of connections allowed, timeout information, and other connectivity-related administrative details. Connection pools allow multiple concurrent data source requests (queries) to share a single database connection, reducing the overhead of connecting to a database.

Fusion Intelligence For PeopleSoft Enterprise delivers two connection pools—MDW (multidimensional warehouse) Connection Pool and MDW Init Block Connection Pool. For performance reasons, the system uses the MDW InitBlock connection pool exclusively for initialization blocks. The dedicated connection pool contains these default properties:

Property	Value
Name	MDW InitBlock Connection Pool
Call Interface	Default (OCI 8i/9i)
Data Source Name	<customer specific>
Shared Logon	Yes
User Name	<customer specific>
Password	<customer specific>
Enable Connection Pooling	Yes
Parameters Supported	Yes

See *Oracle Business Intelligence Server Administration Guide*, “Creating and Administering the Physical Layer in an Oracle BI Repository,” Setting Up Connection Pools.

Initialization Blocks

The system uses initialization blocks to initialize dynamic repository variables, system session variables, and nonsystem session variables. This table lists the initialization blocks that are delivered with the Fusion Intelligence applications:

Name	Query	Variable Name	Type
Job Summary PIA page	<pre>SELECT A.URI_TEXT_PSP FROM PS_OBI_DRILL_PG_VW A WHERE A.SRC_SYS_ID => ' HCM' AND A.COMPONENT_ID=' JOB_> SUMMARY'</pre>	JOB_SUMMARY_ PG	Dynamic Repository
Journal Entries PIA page	<pre>SELECT A.URI_TEXT_PSP FROM PS_OBI_DRILL_PG_VW A WHERE A.SRC_SYS_ID => ' FSCM' AND A.COMPONENT_ID=> ' JOURNAL_ENTRY'</pre>	JOURNAL_ENTRY_ PG	Dynamic Repository
Overdue Scheduled Payments PIA page	<pre>SELECT A.URI_TEXT_PSP FROM PS_OBI_DRILL_PG_VW A WHERE A.SRC_SYS_ID => ' FSCM' AND A.COMPONENT_ID=' VNDR_> PAYINQ_OVRDUE'</pre>	VNDR_PAYINQ_ OVRDUE	Dynamic Repository
None		ROLES	Static Repository

Global Dimensions

Global dimensions are used by more than one mart within a functional warehouse, and across functional warehouses, to provide you with a consistent view of the data. The Physical layer stores global dimension tables in the Global Dimensions folder. Examples of global dimensions are calendar, time, and business unit.

System Table

The fact table named ZZZ is a logical table that is used for system purposes.

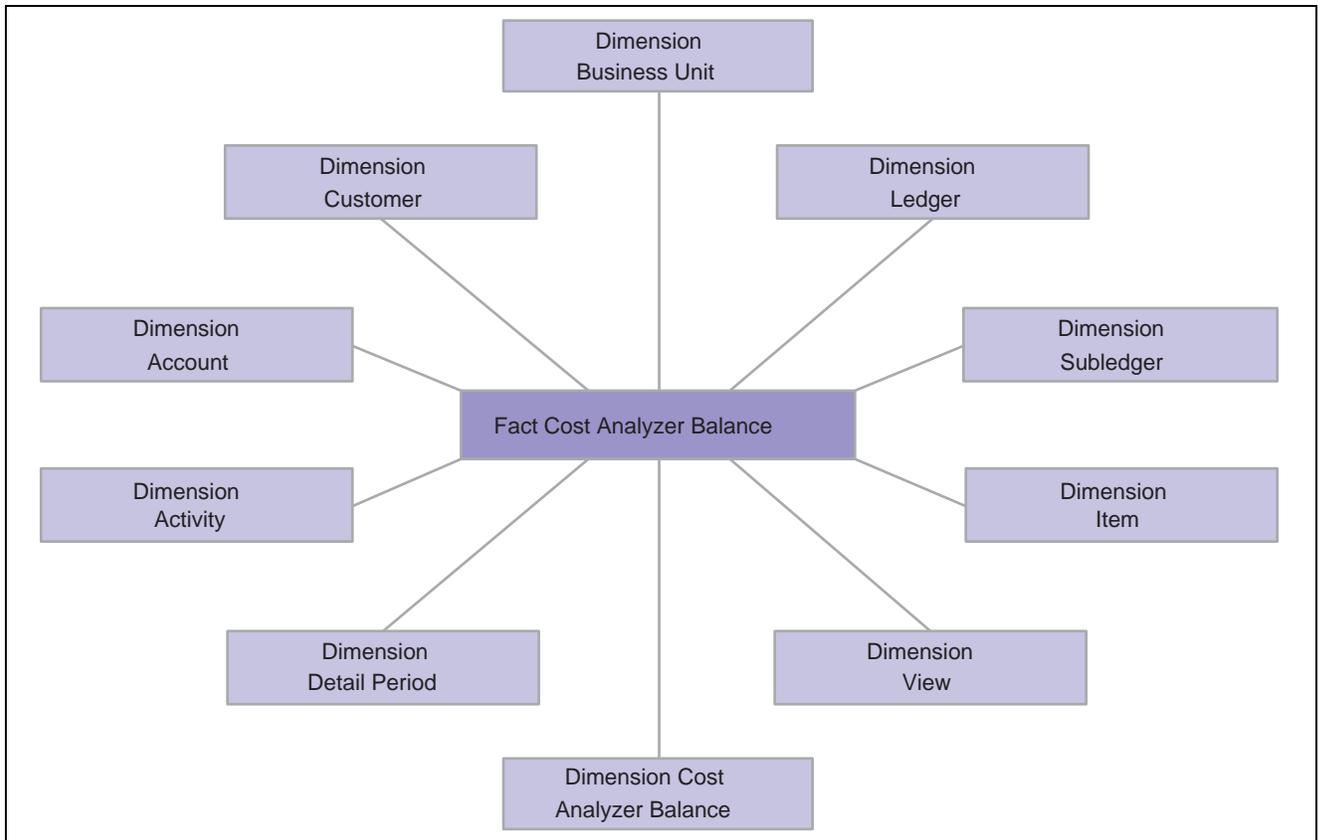
Business Model and Mapping Layer

The Business Model and Mapping layer represents the logical structure of the information in the repository. The physical schemas are simplified and reorganized based on the users' view of the data. The business models contain logical columns arranged in logical tables (logical dimension tables and logical fact tables), logical joins, and dimensional hierarchy definitions. This layer also contains the mappings from the logical columns to the source data in the Physical layer.

The Business Model and Mapping layer appears in the middle pane of the Oracle BI Administration Tool.

Generally, each logical display folder in this layer represents a business area. Each folder has a shortcut (reference) to all of the logical dimension and fact tables that are joined together in a star schema.

For example, *FMS - ACA - Cost Analyzer* is the name of a logical display folder. It contains the logical fact table named *Fact Cost Analyzer Balance*, and logical dimension tables for *Business Unit*, *Customer*, *Ledger*, *Subledger*, *Account*, *Activity*, *Item*, *View*, *Detail Period*, and *Cost Analyzer Balance*. The logical display folder should contain all of the dimensions and facts that are required for the given star schema. This is an example of the star schema for the *FMS - ACA - Cost Analyzer* logical folder:



FMS - ACA - Cost Analyzer star schema

Dimensional Hierarchies

Many of the results that appear in Fusion Intelligence applications represent hierarchical data structures. A hierarchy is a set of parent-child relationships between certain attributes within a dimension. The hierarchy attributes, called levels, roll up from child to parent. For example, months can roll up to years. Therefore, if an aggregate table exists at the month level, that table can be used to answer questions at the year level by summing all of the month-level data for a year.

The dimensional hierarchies in the Business Model and Mapping layer are either inherited from the dimensional hierarchies that exist in PeopleSoft Enterprise Performance Management data structures, or created specifically to support the delivered Fusion Intelligence dashboard functionality. Fusion Intelligence applications deliver metadata with these prebuilt hierarchies:

Warehouse	Hierarchical Dimension	Table
Financials	Account	H_ACCOUNT
	Department	H_DEPT
	Product	D_PRODUCT
	Day	D_DAY
	Business Unit	D_BUSINESS_UNIT

Warehouse	Hierarchical Dimension	Table
Human Capital Management	Department	H_DEPT
	Geography	H_GEO
	Day	D_DAY
Supply Chain Management	Commodity	D_COMMODITY
	Supplier	D_SUPPLIER
	Business Unit	D_BUSINESS_UNIT
	Day	D_DAY

Degenerate Dimensions

A fact table may contain columns that cannot be aggregated, such as Status, ID, and Currency Code, that act as dimension attributes. In the Business Model and Mapping layer, these columns reside in a separate logical dimension folder named *Dimension* <Fact table name >. The logical fact folder (named *Fact* <Fact table name >) and the logical dimension folder (named *Dimension* <Fact table name >) both use the same physical source table.

For example, the F_CST_ANLYZ_BAL fact table in the Physical layer contains these columns that cannot be aggregated:

- Transaction Currency Code
- R1 Currency Code
- R2 Currency Code
- System Source ID

In the example, the F_CST_ANLYZ_BAL fact table is represented by two logical tables in the Business Model and Mapping layer: the Fact Cost Analyzer Balance table and the Dimension Cost Analyzer Balance table. Dimension Cost Analyzer Balance is the degenerate dimension. The Dimension Cost Analyzer Balance table contains the currency code and system source columns from the F_CST_ANLYZ_BAL fact table.

The Presentation table that hosts currency attributes is called Currency Attributes. The presentation catalog that hosts other degenerate attributes is called Document Details.

Presentation Layer

The Presentation layer represents subject areas in Fusion Intelligence applications. This layer provides a way to present a customized view of a business model, known as Presentation catalog, to different sets of users. The Presentation layer appears in the left pane of the Oracle BI Administration Tool. For each subject area that appears in the Oracle Answers pane, facts appear at the top followed by degenerate dimensions, if any, and the remaining the dimensions sorted in ascending order.

The Presentation layer simplifies the business model and makes it easy for users to understand and query. It exposes only the data that is meaningful to the users, and organizes the data in a way that aligns with the way that users think about the data.

Each subject area must be populated with contents from a single business model; the contents cannot span business models. The name of the subject area is the same as the corresponding logical display folder.

Oracle BI Presentation Services

This section discusses:

- Oracle BI Answers
- Oracle BI Dashboards
- Web Catalog Folder

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*.

Oracle BI Answers

Oracle BI Answers is a user interface that is part of the Oracle BI Presentation Services component of Oracle BI Intelligence.

Oracle BI Answers is the embedded reporting tool that allows users with the appropriate permissions to build and modify reports that let end users explore and interact with information, and drill in place to source data. Fusion Intelligence applications contain prebuilt reports that are generated from metadata in the repository, that is mapped to metadata in PeopleSoft Performance Enterprise warehouse marts. You can access these reports either from the delivered dashboards, or from the Oracle Answers Catalog pane on the Oracle Answers page.

On the Oracle Answers page, you can also access the subject area folders that coincide with Oracle BI Presentation Catalog folders. The fact and dimension folders and columns appear in a subject area folder, just as they do in the Presentation Catalog.

See Also

Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide, “Basics of Working with Requests in Oracle BI Answers”

Oracle BI Dashboards

The Oracle BI Dashboards user interface is part of the Oracle BI Presentation Services component of Oracle BI Intelligence.

Interactive Dashboards provide points of access for analytics information. A dashboard is made up of sections of information that can contain items such as results from Oracle BI Answers, external Web content, HTML text, graphics, and links to other dashboards. Dashboard content is logically organized into pages. The pages appear as tabs across the top of the screen in Oracle BI Interactive Dashboards.

A dashboard page is designed to meet the needs of a particular role. For example, the Financial Performance Trend dashboard page is designed for financial executives and managers who want to analyze historical performance for various financial items on a periodic basis.

To access a dashboard, your PeopleSoft user ID must be assigned to the appropriate Presentation Catalog group in Oracle BI Intelligence. Your PeopleSoft application security settings determine the data that you can see on each dashboard. For example, managers can view performance activity only for the business units and departments for which they are responsible.

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*, “Setting Up Security.”

Every dashboard or report can have a set of prompts that determine the data that appears. When you change the value of a prompt on a dashboard, and click the Go button, the system automatically refreshes the data on the dashboard. Changing a prompt can affect the amount of data, the column headings, the KPI values, and the graph formats.

See Also

Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide, “Using Oracle BI Interactive Dashboards”

Web Catalog Folder

The Oracle BI Web Catalog stores the application dashboards and report definitions, and contains information regarding permissions and accessibility of the dashboards by groups. Prebuilt web catalog content is maintained in the folder named *EPM89_Master* that is shared by all Fusion Intelligence For PeopleSoft Enterprise applications.

Roles

A user’s role in the organization controls the user’s access to objects (such as dashboards, reports, and catalog folders) in the Oracle BI Presentation Catalog. Presentation Catalog groups are defined by the system or by a Fusion Intelligence administrator. You assign specific users to Presentation Catalog groups, and that group membership determines the users’ access to Presentation Catalog object.

This table lists the delivered sample Presentation Catalog groups, and the subject areas to which the users in those groups have full access to perform any action:

Presentation Catalog groups	Permissible Subject Area Folders
Accounts Payable Manager	Financials - Payables
Accounts Receivable Manager	Financials - Receivables
Business Analyst	Supply Chain
Commodity Manager	Supply Chain
Costing Manager	Financials - Advanced Cost Accounting
Finance Manager	Financials - General Ledger
HCM (Human Capital Management) Executive	Human Capital Management
HCM Manager	Human Capital Management
Line Manager	Human Capital Management
Project Manager	Financials - Enterprise Service Automation

Presentation Catalog groups	Permissible Subject Area Folders
Property Manager	Financials - Real Estate
Presentation Server Administrators	All

All of the Presentation Catalog groups that are listed in this table, with the exception of the Presentation Server Administrators group, have a corresponding Oracle BI Server group with the exact name. Security groups are discussed in more detail in the “Setting Up Security” chapter in this PeopleBook.

See Also

Oracle Business Intelligence Presentation Services Administration Guide, “Managing Oracle BI Presentation Services Security”

Navigation

Users with the appropriate permissions can log into Fusion Intelligence For PeopleSoft Enterprise and click links to view Dashboards, Answers, More Products, Settings, and My Account. The views that you can access are determined by your membership in a Presentation Catalog group.

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, “Using Oracle BI Interactive Dashboards,” Navigating in Oracle BI Interactive Dashboards.

From dashboards and reports, you can drill in place from summary reports to more detailed reports, and from there to source transactions in the transaction processing application. This table lists the delivered Fusion Intelligence reports from which you can drill into the PeopleSoft transaction processing application, and the target online transaction page:

Dashboard Page	Report Column	Target Online Transaction Page
HCM: Workforce Profile - Top Performer Turnover	Top Performer at Risk report - Person Name Drill column	Job Summary page (JOB_SUMMARY)
FMS: General Ledger - Actual vs Prior-Budget-Forecast	Journal Listing report - Journal ID column	Journal Entries page (JOURNAL_ENTRY)
SCM: Spend	Spend By Supplier report - Supplier ID column	Overdue Scheduled Payments page (VNDR_PAYINQ_OVRDUE)

You can set up Fusion Intelligence applications to drill to additional target pages. The “Setting Up Security” chapter in this PeopleBook discusses how to complete the setup tasks that are required to drill to PeopleSoft online transaction systems.

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*, “Setting Up Security,” Setting Up Drilling to Transaction Systems.

Reporting Tools

Fusion Intelligence For PeopleSoft Enterprise applications deliver more than forty reports that provide end users with key metrics and measures for specific, predefined subject areas. These reports are available in the Oracle BI Answers Catalog and integrated into prebuilt dashboards for Financials, Human Capital Management, and Supply Chain Management.

See Also

Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide, “Basics of Working with Requests in Oracle BI Answers”

Request Filters

During the creation of an Oracle BI request, you can use column filters to constrain the request to obtain results that answer a particular question. Together with the columns that you include on the answer, a column filter determines what the results will contain. For example, depending on the industry you work in, you can use column filters to find out who the top ten performers are, sales for a particular brand, most profitable customers, and so on.

A column filter consists of a column to filter, a value to use when applying the filter, and an operator that determines how the value is applied. You can also prevent the filter from being replaced during navigation and prompting.

An example of an Oracle BI request that is built using a filter is the Revenue Summary report that is embedded in the FMS: General Ledger dashboard: Actual vs Prior-Budget-Forecast page. The request is filtered by the Account Type column. The value that the system uses when applying the filter is *R* (Revenue account type). The *equal to / is in* operator tells the system how to apply the value. Therefore in this example, the request considers only data rows that have an account type that is equal to *Revenue*. You can further narrow the results that appear on the Revenue Summary report by using the Calendar, Financial Year, Financial Period, Business Unit, and Manager dashboard prompts that appear on the Actual vs Prior-Budget-Forecast page.

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, “Filtering Requests in Oracle BI Answers” for additional information on using column filters in an Oracle BI request.

Fusion Intelligence Setup

The high level steps that you will complete to set up Fusion Intelligence are:

1. Configure OBIEE environment for Fusion Intelligence.

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 Supplemental Installation Instructions* located on Oracle’s PeopleSoft Customer Connection website.

2. Configure PeopleSoft Enterprise Performance Management (EPM) for Fusion Intelligence.

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 Supplemental Installation Instructions*.

3. Run the delivered update SQL scripts in PeopleSoft EPM to enable the drill in place functionality to PeopleSoft applications.

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 Supplemental Installation Instructions*.

4. Set up PeopleSoft EPM data-level security.

See *PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse 8.9 PeopleBook*, “Securing EPM.”

5. Configure desired new dimensional hierarchies in OBIEE as needed.

See *Oracle Business Intelligence Server Administration Guide*, “Creating and Administering the Business Model and Mapping Layer in an Oracle BI Repository.”

6. Configure single signon between the online transaction processing application, PeopleSoft EPM, and OBIEE.

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*, “Setting Up Security.”

7. Review the delivered OBIEE dashboard data-level security and enable additional dashboard data-level security in OBIEE as needed.

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*, “Setting Up Security.”

Cache Management

For this release of the OBIEE, if you run an initial or incremental load without first clearing the query cache, it is possible that the reports that you run after the load process will reuse the cache that existed prior to the load process. This can result in inconsistencies between reports. There are several alternatives to mitigate this situation, such as:

- Configure the query cache to expire daily.
- Clear the cache tables manually as needed; for example, after you complete a load process.
- Schedule the system to clear the cache tables at same frequency as the incremental load process.

To clear cached queries:

1. Open the Oracle BI Administration Tool in online mode.
2. Access the Cache Manager page (Manage, Cache) and select all cache entries.
3. Click Action, Refresh.

To disable the cache:

1. Locate this configuration file: `<root directory>\OracleBI\server\Config\NQSConfig.INI`.
2. In the Query Result Cache Section, change the [CACHE] setting from `ENABLE = YES;` to `ENABLE = NO;`.
3. Save the NQSConfig.INI configuration file and restart the Oracle BI Server service.

See *Oracle Business Intelligence Server Administration Guide*, “Query Caching in the OracleBI Server” chapter for more information on query caching in OBIEE.

CHAPTER 3

Setting Up Security

This chapter provides an overview of security configuration types and secured dimensions, and discusses how to:

- Set up user authentication.
- Set up object-level security.
- Set up data-level security.

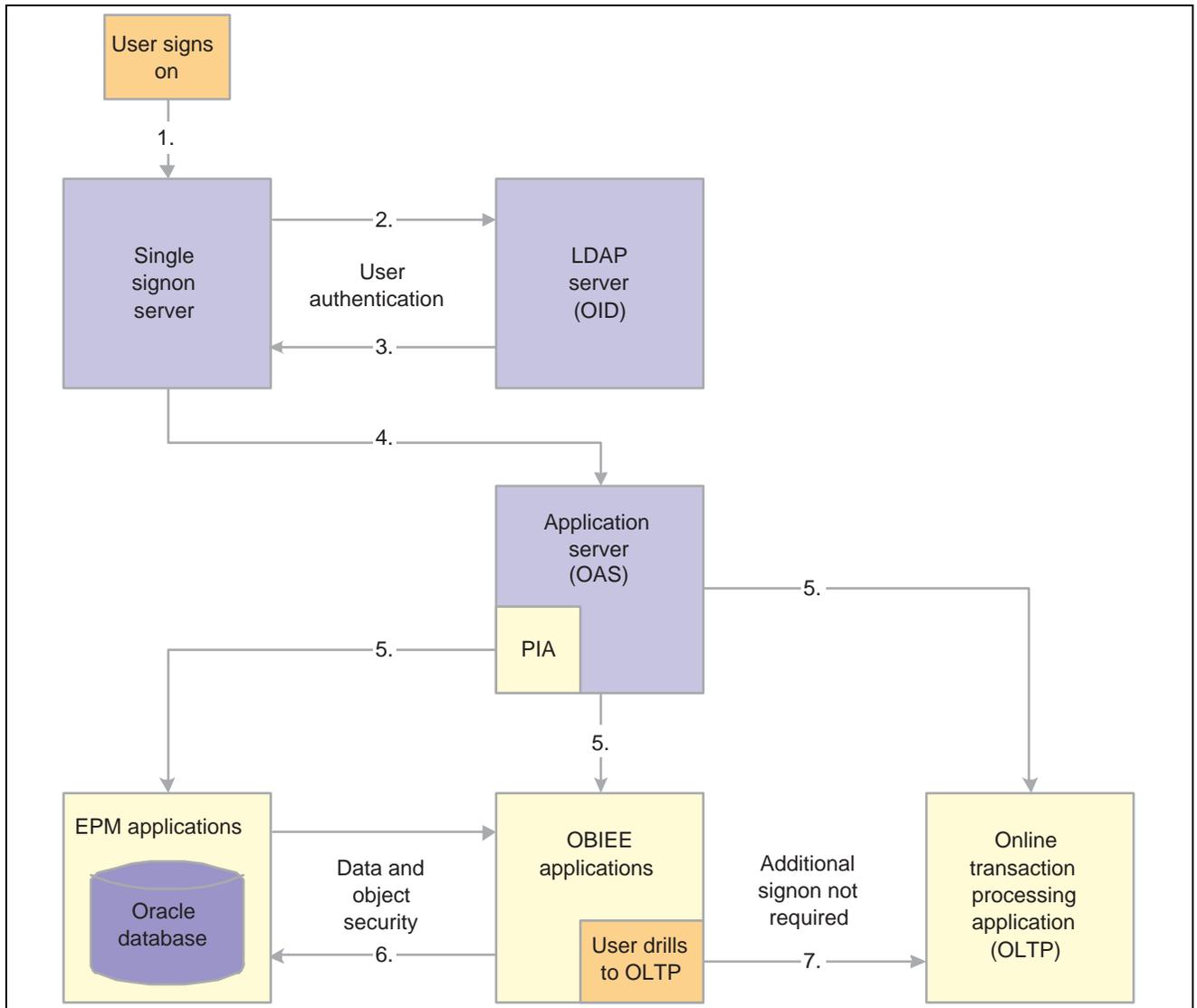
Understanding Security Configuration Types

Security in Fusion Intelligence applications can be broadly classified into three configuration types—user authentication, dashboard object security, and data access security. All three configuration types play a vital role in securing data. This table discusses the security configurations that are delivered with Fusion Intelligence For PeopleSoft Enterprise applications:

Security Configuration	Description
User authentication	When a user logs into a Fusion Intelligence application to see or build dashboards and answers, the system authenticates the user by using the Single Signon Server and the existing identity management scheme.

Security Configuration	Description
Dashboard object security	<p>The user's membership in Oracle BI Server groups controls the user's access to Oracle BI Administration Tool objects, such as subject areas, presentation tables, and presentation table columns in the repository. The user's membership in Presentation Catalog groups controls the user's access to Oracle BI Presentation Catalog objects, such as dashboards, reports, and catalog folders. When a user logs into the system, and the user's PeopleSoft security role matches an Oracle BI Server group or Presentation Catalog group, the system automatically assigns the appropriate object permissions to the user.</p> <p>Note. When you create custom dashboards in OBIEE, you can restrict access to dashboards and dashboard pages, and other Presentation Catalog objects. Use the Oracle BI Repository to restrict access to the underlying data.</p>
Data access security	<p>The user's PeopleSoft security role controls the user's access to data. Data security is synchronized between Fusion Intelligence applications and PeopleSoft Enterprise Performance Management applications by creating Oracle BI Server groups that match user roles. When a user selects a report, the data that appears is based on permissions that are granted to the user's security role, and any additional security that is applied to the Oracle BI Server group.</p> <p>If a user's security role does not match an Oracle BI Server group, when the user signs onto the system and selects a report, the data that appears is based on permissions that are granted to the user's security role.</p> <p>When an Oracle BI Server group maps exactly to a Presentation Catalog group, the Presentation Catalog group inherits the permissions from the Oracle BI Server group. The system does not require that every Oracle BI Server group map exactly to a Presentation Catalog group.</p> <p>Note. OBIEE does not honor data-level security that is setup in JD Edwards or PeopleSoft online transaction applications. OBIEE honors data-level security that is set up in PeopleSoft Enterprise Performance Management.</p>

This diagram shows the relationship of user authentication, dashboard object security, and data access security in Fusion Intelligence applications:



Fusion Intelligence security

These steps explain the flow of user authentication, dashboard object security, and data access security in Fusion Intelligence applications:

1. The user signs onto the Single Signon (SSO) Server.
2. The SSO server authenticates the user by checking into the LDAP Server.
3. The LDAP server confirms that the user is valid.
4. The Application server is configured to get the user information from the SSO server.
This eliminates the need for the user to log separately into PeopleSoft Internet Architecture (PIA) and OBIEE.
5. After the user logs in, the system applies object-level security to determine the user's access to objects such as pages, reports, and components.
Object-level security is controlled by the OBIEE Presentation Catalog security group with which the user is associated.
6. When the user clicks on a report, the system applies data-level (row-level) security.

Data-level security is controlled by the user's security role and the Oracle BI Server group with which the user is associated.

7. When the user clicks a link to drill in place to an OLTP, additional signon is not required.

Understanding Secured Dimensions

In PeopleSoft Enterprise Performance Management, you can grant users access to a particular dimension if you indicate during system setup that the dimension requires securing. Each secured dimension is associated with a security join table (SJT) in the PeopleSoft Enterprise Performance Management database that stores the security profiles for users, and the corresponding dimension values to which they have access.

This table lists the delivered, secured dimensions for Fusion Intelligence application areas:

Application Area	Secured Dimension
Financials	Business Unit Department
Human Capital Management	Department
Supply Chain	Commodity Business Unit Accounts Payable

See Also

PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse 8.9 PeopleBook, "Securing EPM"

Setting Up User Authentication

For this release of Fusion Intelligence applications, users sign directly into Oracle Business Intelligence Enterprise Edition (OBIEE) to access the Fusion Intelligence applications. By setting up single signon with user identity management, you eliminate the need to maintain multiple user ID repositories. The OBIEE system authenticates the user at signon and associates the user's role with security groups in OBIEE.

The single signon with user identity management feature also enables users to drill in place from Fusion Intelligence dashboards or reports to source data in online PeopleSoft transaction applications without encountering an additional PeopleSoft signon page.

This section discusses how to complete the following tasks to set up Oracle Single Signon with Oracle Internet Directory (OID) for Fusion Intelligence For PeopleSoft Enterprise applications:

- Configure PeopleSoft PeopleTools for LDAP authentication.
- Configure the Fusion Intelligence system to use LDAP authentication.
- Register PeopleSoft as a partner application with Oracle Single Signon Server.
- Register the Fusion Intelligence system as a partner application with Oracle Single Signon Server.

- Configure PeopleSoft for Single Signon with Oracle Application Server.
- Configure the Fusion Intelligence system for Single Signon with Oracle Application Server.

Note. PeopleSoft and OBIEE also support third-party single signon authentication systems. For more details, refer to the *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration*.

See Also

PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration

Oracle Business Intelligence Server Administration Guide

Configuring PeopleSoft PeopleTools for LDAP Authentication

To configure the PeopleSoft PeopleTools system for LDAP authentication, use the instructions in the *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration* to complete these tasks:

1. Configure the LDAP directory.

Use the Configure Directory - Directory Setup page (PeopleTools, Security, Directory, Configure Directory, Directory Setup) to specify the network information of your LDAP directory servers.

Use the Configure Directory - Additional Connect DN's (distinguished names) page (PeopleTools, Directory, Configure Directory, Additional Connect DN's) to specify connect DN's, in addition to the default connect DN specified on the Directory Setup page.

2. Cache the directory schema.

Use the Configure Directory - Schema Management page (PeopleTools, Security, Directory, Configure Directory, Schema Management) to install selected PeopleSoft-specific schema extensions into your directory.

Use the Configure Directory - Test Connectivity page (PeopleTools, Security, Directory, Configure Directory, Test Connectivity) to test the DN's and search criteria that you entered on the previous pages of the Configure Directory component, and view the results.

3. Create authentication maps.

Use the Authentication Map - Authentication page (PeopleTools, Security, Directory, Authentication Map, Authentication) to map to the directory that the PeopleSoft system uses to authenticate users.

4. Create user profile maps.

Use the User Profile Map - Mandatory User Properties page (PeopleTools, Security, Directory, User Profile Map, Mandatory User Properties) to specify the attributes that are required for signon.

Note. Skip these tasks if you have configured the PeopleSoft PeopleTools system for LDAP authentication as part of a previous installation.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration*, "Employing LDAP Directory Services," Configuring the LDAP Directory.

Verify the Configuration

To verify the correct configuration, perform these steps:

1. Sign onto Oracle's PeopleSoft Enterprise application as a user with administrative rights, such as *VPI*, password *VPI*, and select the Configure Directory component (PSDSSETUP).

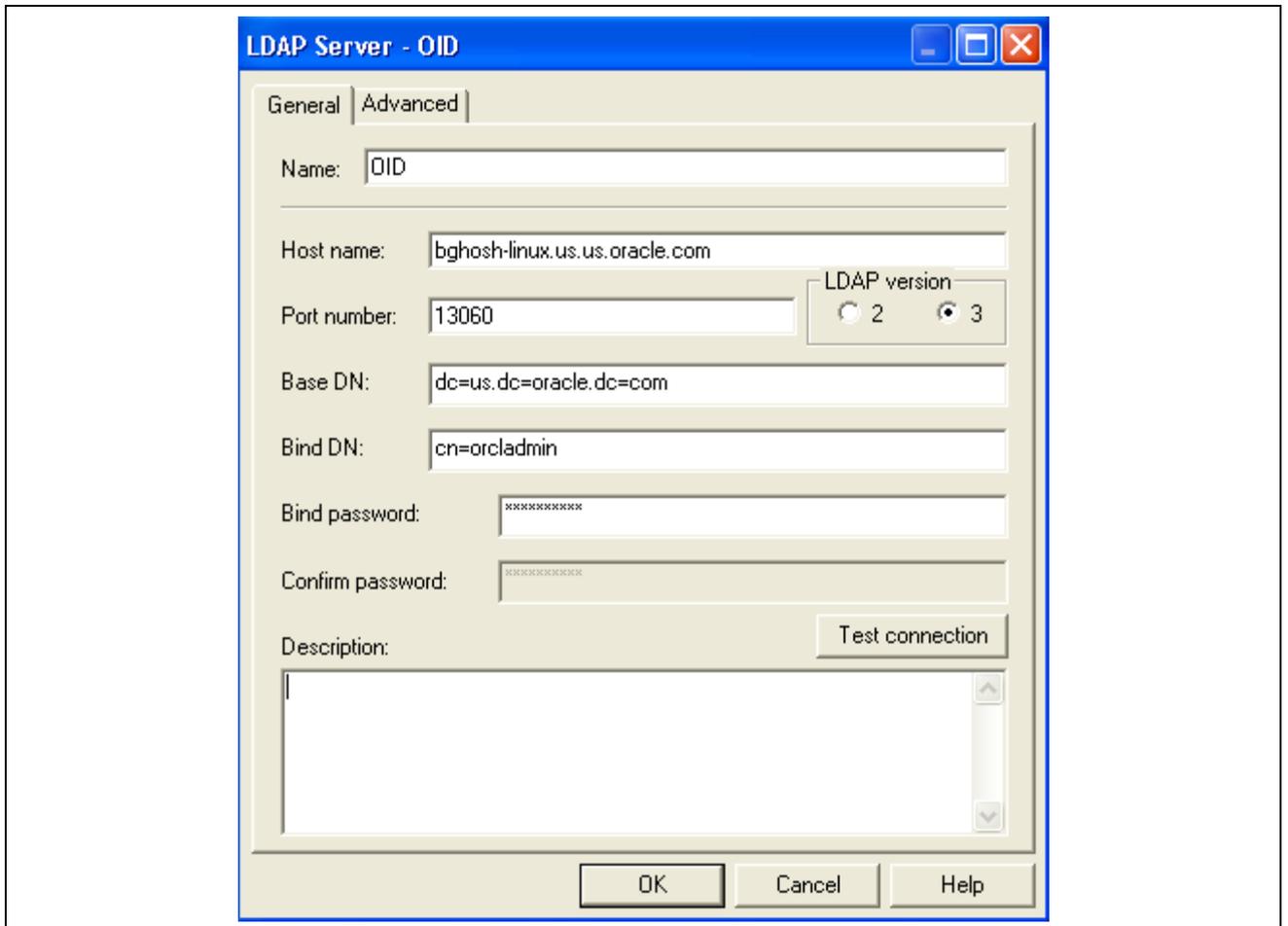
- Verify that an LDAP server is configured to match your OID.
- Access the Test Connectivity page and verify that all tests are successful.
2. Select the Authentication Map - Authentication page.
Verify that a map exists that matches the directory server in the previous step.
 3. Select the User Profile Map - Mandatory User Properties page.
Verify that a user profile map exists for the directory server in the previous step.
 4. Select the Signon PeopleCode page (PeopleTools, Security, Security Objects, Signon PeopleCode).
Verify that the Invoke as button is enabled, and the User ID and Password fields are populated with the person who has the authority to execute the signon PeopleCode.
Verify that the functions *LDAP_Authentication* and *LDAP_ProfileSynch* are enabled.
 5. Sign onto the PeopleSoft application as an enterprise user that exists in the LDAP server.
 6. If the signon to the PeopleSoft application fails, reboot the associated application server.

Note. The LDAP profiles are synchronized with PeopleSoft user profiles only when users sign onto the application. Therefore, all enterprise users (users that are created in the LDAP server) must sign onto the PeopleSoft application at least once before using Fusion Intelligence For PeopleSoft Enterprise applications.

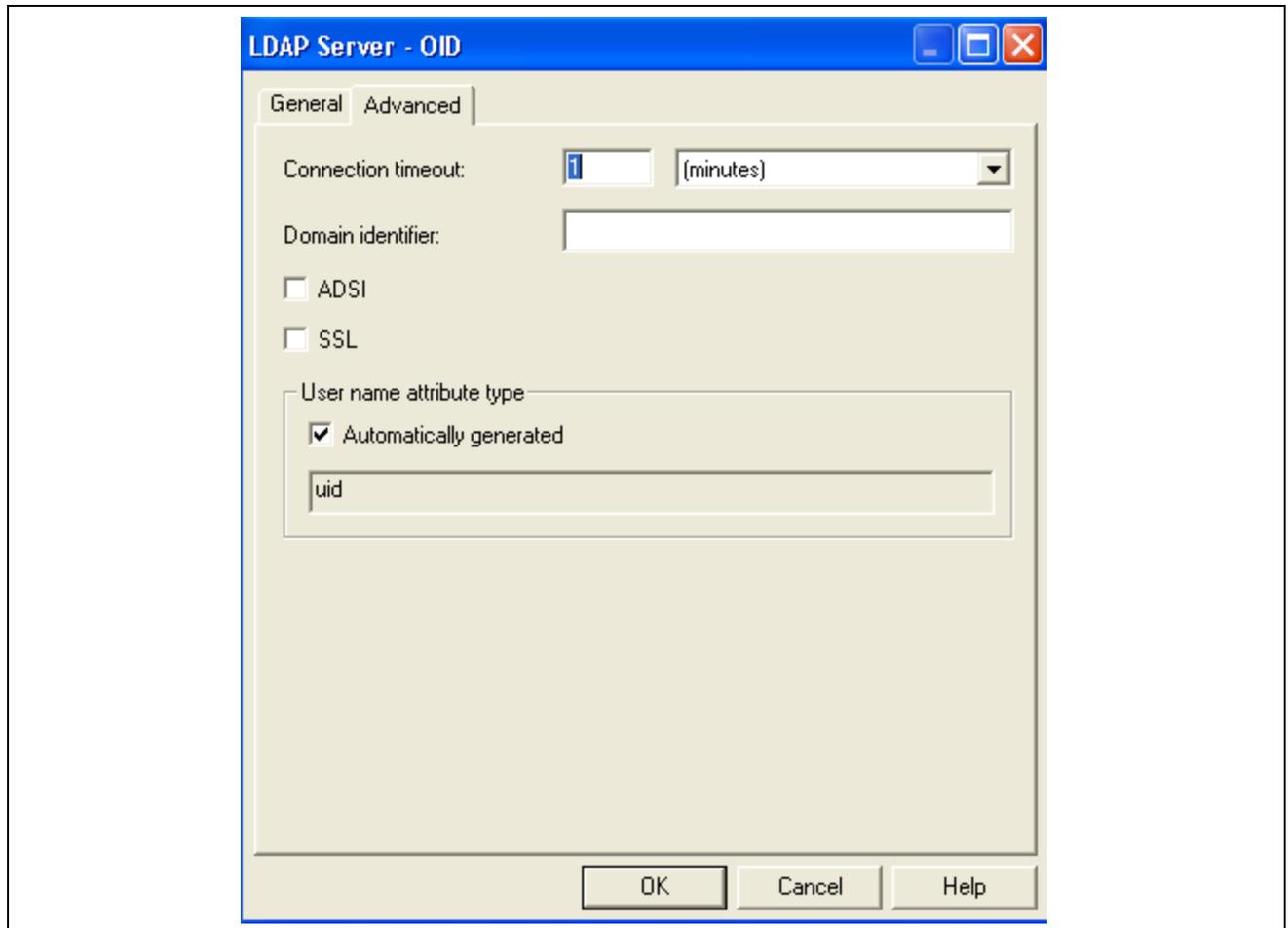
Configuring the Fusion Intelligence System to Use LDAP Authentication

To configure Fusion Intelligence to use LDAP authentication, complete the tasks that are discussed in this section.

In the Oracle BI Administration Tool, access the Security Manager - LDAP Server page (Oracle BI Administration, Manage, Security, LDAP Servers, Action, New, LDAP Server).



Security Manager - LDAP Server page: General tab



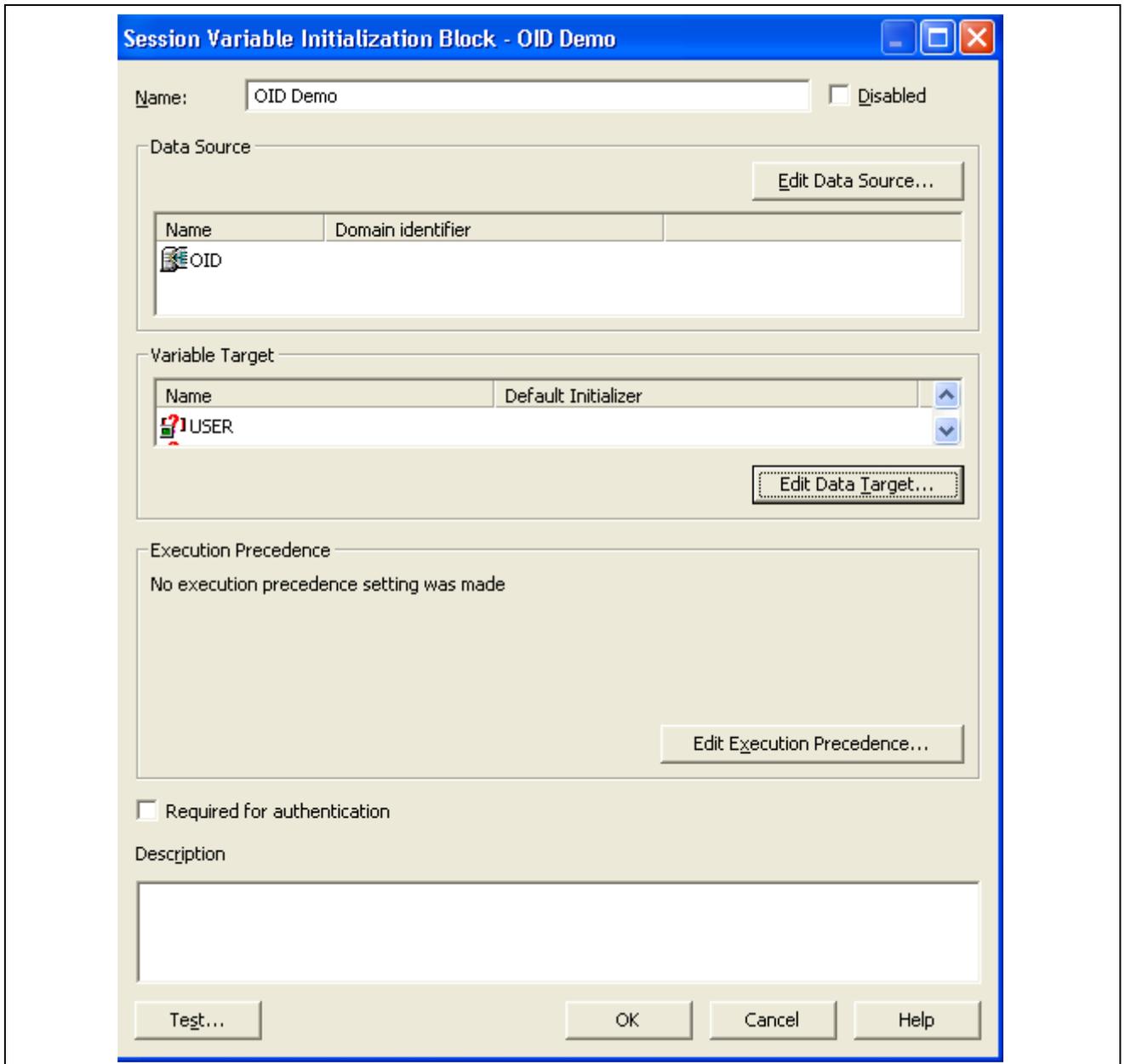
Security Manager - LDAP Server page: Advanced tab

Create a new LDAP server and enter the relevant information. The preceding screen shots show an example of establishing an LDAP server named *OID* (Oracle Internet Directory).

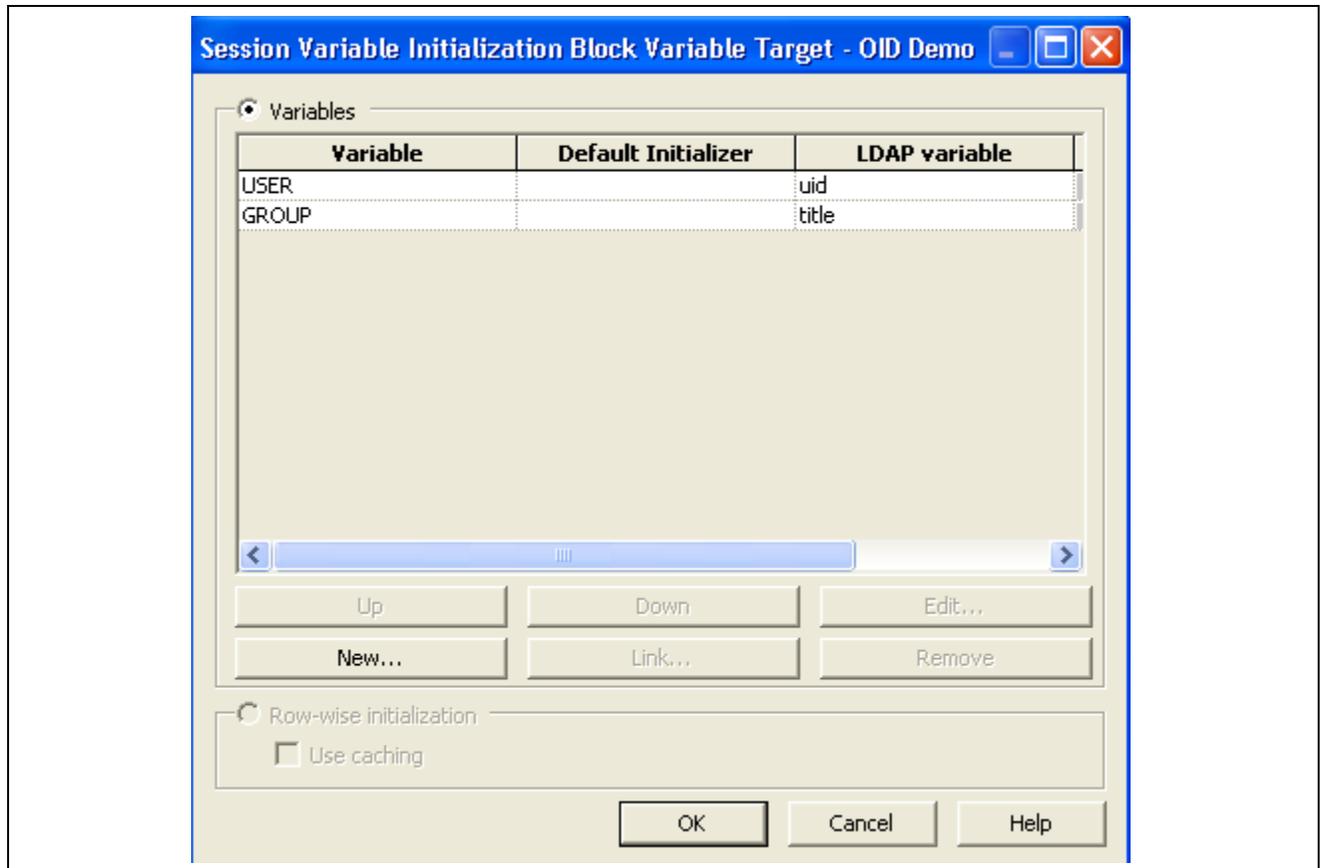
See *Oracle Business Intelligence Server Administration Guide*, "Security in OracleBI," OracleBI Security Manager, Importing Users and Groups from LDAP.

Configure Variables

Access the Session Variable Initialization Block page and Session Variable Initialization Block Variable Target page (Oracle BI Administration, Manage, Variables, Session, Initialization Blocks, Session Variable Initialization Block).



Session Variable Initialization Block page



Session Variable Initialization Block Variable Target page

The preceding screen shots show an example of configuring session variables for an initialization block named *OID Demo*. The data source for this initialization block is the *OID* LDAP server as shown on the LDAP Server page example in the previous section.

To configure variables:

1. Create a new session initialization block and select the LDAP server as the data source.
2. Create a session variable named *USER* and map it to the LDAP variable named *uid*.
3. Create a session variable named *GROUP* and map it to the LDAP variable that reflects the role of the user, such as *role* or *title*.

See *Oracle Business Intelligence Server Administration Guide*, “Using Variables in the OracleBI Repository,” Process of Creating Initialization Blocks.

Registering PeopleSoft as a Partner Application With Oracle Single Signon Server

To register PeopleSoft as a partner application with Oracle Single Signon Server, complete the tasks that are discussed in this section.

Sign onto the Single Signon Server and access the Edit Partner Application page (Single Signon Server, Access Partner Applications, SSO Server Administration, Administer Partner Applications).



Edit Partner Application - OBIEE

Partner Application Login

Enter the application name, the home URL and the success URL for this application. The home URL is the application's home page. The success URL refers to the URL to be redirected to upon successful login. It must correspond to the procedure that processes the user identification information from the SSO Server. For administrative purposes, the application id, the application token, and the encryption key used by the SSO Server to identify this application are also displayed here. The application token must be used by the partner application when requesting authentication.

ID: D3FE41EF
 Token: E50498VID3FE41EF
 Encryption Key: C841572F372F38AD
 Login URL: http://reas025.dsi-inet.peoplesoft.com:7777/pls/orasso/orasso.wwsso_app_admin.ls_login
 Single Sign-Off URL: http://reas025.dsi-inet.peoplesoft.com:7777/pls/orasso/orasso.wwsso_app_admin.ls_logout
 Name:
 Home URL:
 Success URL:
 Logout URL:

Edit Partner Application page

Create a new partner application and enter the appropriate values. The preceding screen shot shows an example of setting up PeopleSoft as a partner application with the Oracle Single Signon Server.

See *Oracle Application Server Single Sign-On Administrator's Guide*.

Registering the Fusion Intelligence System as a Partner Application With Oracle Single Signon Server

The steps to register Fusion Intelligence as a partner application with Oracle Single Signon Server are identical to the steps that you completed when you registered PeopleSoft as a partner application with Oracle Single Signon Server.

Configuring PeopleSoft for Single Signon With Oracle Application Server

To configure PeopleSoft for single signon with the Oracle Application Server, complete the tasks that are discussed in this section. Refer to the *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration* for a discussion and example of this configuration.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration*, "Implementing Single Signon," Implementing Single Signon Between PeopleSoft and Oracle Applications, Implementing Oracle as a Partner Application, Setting up Oracle as a Partner Application.

1. Configure the Oracle Application Server to use the Oracle Single Signon Server.

Access the Oracle Enterprise Manager's Infrastructure tab, and click the Change button in the Identity Management section to verify the appropriate Oracle Single Signon Server.

If a different Single Signon Server is to be used, reinstall Oracle Application Server and indicate the correct Single Signon Server during setup.

Note. Complete this step one time for each Oracle Application Server installation. You do not need to perform this step for each PeopleSoft installation on the Oracle Application Server.

2. Create a default user ID, that is similar to implementing the web server security exit in PeopleSoft.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration*, “Employing Signon PeopleCode and User Exits,” Using the Web Server Security Exit, Creating a Default User.

3. Modify the PeopleSoft web profile to contain default user signon information.

- Enable the Allow Public Access option for the web profile.
- Enter the same user ID that you created in the previous step.
- To prevent a user ID from appearing as the default user on the signon page, enter a 0 value for the Days to Auto Fill User ID field.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration*, “Employing Signon PeopleCode and User Exits,” Using the Web Server Security Exit, Modifying the Web Profile.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Internet Technology*, “Configuring the Portal Environment,” Configuring Web Profiles, Configuring Portal Security.

4. Implement signon PeopleCode.

Ensure that the Oracle Internet Directory user information exists in PeopleSoft. This can be accomplished with a delivered Signon PeopleCode function.

This step requires that user profiles are defined in the Oracle Internet Directory and in PeopleSoft. PeopleSoft provides the OSSO_AUTHENTICATION Signon PeopleCode function to obtain user profile and role information from the Oracle Internet Directory. To use this information, add and enable OSSO_AUTHENTICATION in the FUNCLIB_LDAP record definition by using the Signon PeopleCode page.

We recommend that you modify the entry for SSO_AUTHENTICATION and change the function name to OSSO_AUTHENTICATION. This action avoids mixing single signon options. In your Signon PeopleCode program, modify the `getWWWAuthConfig()` function to assign the value of the default user that you created to the `&defaultuserId` variable.

Note. OSSO_AUTHENTICATION must appear before LDAP_PROFILESYNC in the Signon PeopleCode page grid.

See *PeopleSoft Enterprise PeopleTools 8.48 PeopleBook: Security Administration*, “Employing Signon PeopleCode and User Exits,” Using Signon PeopleCode, Enabling Signon PeopleCode.

Note. Alternatively, you can write a custom PeopleSoft PeopleCode program to create the user as needed. However, this customization is not supported by Oracle.

5. Modify `mod_osso.conf` file, located in `<ORACLE_HOME>/apache/apache/conf/`, to redirect users to the Oracle Single Signon page.

This is an example of code in the `mod_osso.conf` file:

```
<Location /PORTAL> require valid-user
AuthType Basic
</Location>
```

6. Restart the Oracle Application Server and Oracle Internet Directory.

Configuring the Fusion Intelligence System for Single Signon With Oracle Application Server

To configure Fusion Intelligence for single signon with the Oracle Application Server, complete the tasks that are discussed in this section.

1. Select or create a Fusion Intelligence user for impersonation.

See *Oracle Business Intelligence Server Administration Guide*, “Security in Oracle BI,” Authentication Options.

- In the Fusion Intelligence repository, create a special user for this purpose, and assign this user a password. For example, create a user such as *Impersonator*, and assign a password such as *secret*.
- Add this user to the *Administrators* Presentation Catalog group.

2. Add the username and password that you created in the previous step to the Presentation Servers’ credential stores.

See *Oracle Business Intelligence Presentation Services Administration Guide*, “Customizing the Oracle BI Presentation Services User Interface,” Configuring the Oracle Business Intelligence ReportUI Portlet.

For example, open a command shell and select the directory `<OracleBI>/web/bin`, where `<OracleBI>` represents the root directory of the Presentation Server. Execute the *cryptotools* utility to add or edit the impersonator’s credentials in the Presentation Server’s credential store and supply values for all prompted parameters.

You must specify the credential alias impersonation, such as the one shown in this example:

```
cryptotools credstore -add -infile <OracleBIData>/web/config/credentialstore.xml
>Credential Alias: impersonation
>Username: Impersonator
>Password: secret
>Do you want to encrypt the password? y/n (y):
>Passphrase for encryption: another_secret
>Do you want to write the passphrase to the xml? y/n (n):
>File "<OracleBIData>/web/config/credentialstore.xml" exists. Do you want to
overwrite it? y/n (y):
```

In this example, the `<OracleBIData>/web/config/credentialstore.xml` file contains an entry that looks like this:

```
<sawcs:credential type="usernamePassword" alias="impersonation">
  <sawcs:username>Impersonator</sawcs:username>
  <sawcs:password>
    <xenc:EncryptedData>
      <xenc:EncryptionMethod
Algorithm="http://www.rsasecurity.com/rsalabs/pkcs/schemas/pkcs-5#pbes2">
        <pkcs-5:PBES2-params
Algorithm="http://www.rsasecurity.com/rsalabs/pkcs/schemas/pkcs-5#pbkdf2">
          <pkcs-5:KeyDerivationFunc>
            <pkcs-5:Parameters>
              <pkcs-5:IterationCount>1024</pkcs-5:IterationCount>
            </pkcs-5:Parameters>
          </pkcs-5:KeyDerivationFunc>
        </pkcs-5:EncryptionScheme
```

```

Algorithm="http://www.w3.org/2001/04/xmlenc#tripledes-cbc"/>
  </pkcs-5:PBES2-params>
</xenc:EncryptionMethod>
<xenc:CipherData>
  <xenc:CipherValue>jeThdk8ZklnTlyKIat8Dkw</xenc:CipherValue>
</xenc:CipherData>
</xenc:EncryptedData>
</sawcs:password>
</sawcs:credential>

```

Open the Presentation Server's configuration file, such as `<OracleBIData>/web/config/instanceconfig.xml` in this example, and locate the `<CredentialStore/>` node in this file. If no such node exists, create a new one. The purpose of the node is to specify the passphrase used to encrypt the password in this file. You must protect both the `credentialstore.xml` file and `instanceconfig.xml` file by using the operating system's file system protection, because the combination of these two files can reveal a privileged user's password. Neither file alone provides enough information to expose the password.

This is an example of how to specify the decryption passphrase in the `instanceconfig.xml` file:

```

<?xml version="1.0"?>
<WebConfig>
  <ServerInstance>
    <!-- other settings ... -->
    <CredentialStore>
      <CredentialStorage type="file"
path="<OracleBIData>/web/config/credentialstore.xml"
passphrase="another_secret"/>
      <!-- other settings ... -->
    </CredentialStore>
    <!-- other settings ... -->
  </ServerInstance>
</WebConfig>

```

3. Configure Fusion Intelligence for single signon.

- Ensure that the Presentation Server is not running on the machine where you want to set up single signon.
- Create several configuration settings.

These configuration settings tell the Presentation Server how to build up the connection string when it connects to the Oracle BI Server. In this example, the *IMPERSONATE* parameter (the user for which we are trying to establish a session) is required in the connection string. Additionally, include parameters that are supplied by the single signon system that may be passed through, such as locale, default dashboard, and other personalization parameters.

- For each parameter that is passed through in the connection string, you must indicate to the Presentation Server the source of the information to query. Possible sources are HTTP header, HTTP cookie, and server variable.

See *Oracle Business Intelligence Server Administration Guide*, "Using Variables in the Oracle BI Repository."

- When the authentication source is a Microsoft Windows domain, you can specify a special attribute to strip out the domain portion from the username, if necessary.

- When accepting trusted information from the HTTP server or servlet container, you must secure the machines that are permitted to directly communicate with the Presentation Server.

You can secure the machines with the `Listener/Firewall` node in `instanceconfig.xml`. Additionally, you can strongly secure the listener by using mutually authenticated SSL. If you use the `Listener/Firewall` node, the IP addresses of all scheduler instances and HTTP plugins (ISAPI and Servlet) must be added to the `instanceconfig.xml` file. If the scheduler or HTTP plugin is located on the same machine as the Presentation Server, you must also add `127.0.0.1` to the list of IP addresses.

Note. This setting does not control end-user browser IP addresses. If you use mutually-authenticated SSL, specify the DNs of all trusted hosts in the `Listener/TrustedPeers` node.

See *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

- These are examples of configuration files. Your actual configuration file will vary from this example:

```
<?xml version="1.0"?>
<WebConfig>
  <ServerInstance>
    <!-- other settings ... -->
    <Listener>
      <Firewall>
        <Allow address="127.0.0.1"/>
        <Allow address="192.168.1.100"/>
        <Allow address="192.168.1.101"/>
      </Firewall>
      <!-- other settings ... -->
    </Listener>
    <!-- other settings ... -->
    <CredentialStore>
      <CredentialStorage type="file"
path="<OracleBIData>/web/config/credentialstore.xml"
passphrase="another_secret"/>
      <!-- other settings ... -->
    </CredentialStore>
    <!-- other settings ... -->
    <Auth>
      <SSO enabled="true">
        <ParamList>
          <!--IMPERSONATE param is used to get the authenticated
user's username and is required -->
          <Param name="IMPERSONATE"
            source="serverVariable"
            nameInSource="REMOTE_USER"/>
        </ParamList>
      </SSO>
    </Auth>
    <!-- other settings ... -->
  </ServerInstance>
</WebConfig>
```

This example results in a connection string that takes on the following form:
 UID=Impersonator;PWD=secret;IMPERSONATE=rgrayson;

See *Oracle Business Intelligence Presentation Services Administration Guide*.

Setting Up Object-Level Security

You achieve object-level security by creating roles, and granting each role access to specific Oracle BI Administration Tool objects and Oracle BI Presentation Catalog objects.

This section discusses how to complete the following tasks to set up object-level security for Fusion Intelligence For PeopleSoft Enterprise applications:

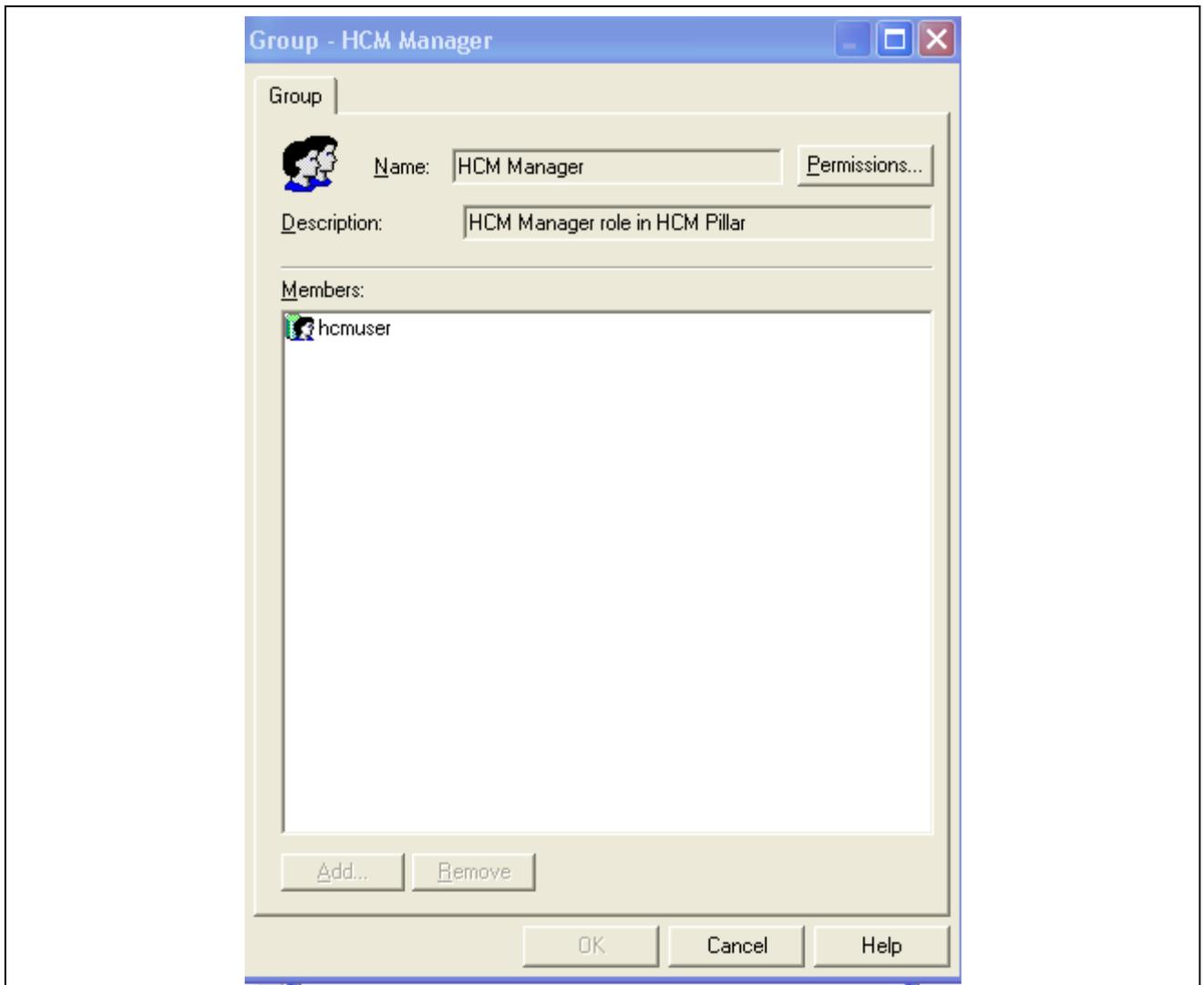
- Set up Oracle BI Server groups.
- Specify Presentation folder permissions.
- Set up Presentation Catalog groups.
- Grant role access to Presentation objects.

See *Oracle Business Intelligence Server Administration Guide*, “Security in Oracle BI,” Oracle BI Security Manager, Working with Groups.

See *Oracle Business Intelligence Presentation Services Administration Guide*, “Managing Oracle BI Presentation Services Security,” Administering Presentation Services Groups.

Setting Up Oracle BI Server Groups

In the Oracle BI Administration Tool, access the Security Manager - Group page (Oracle BI Administration Tool, Manage, Security, Groups, Action, New, Group).



Security Manager - Group page

Create as many groups as necessary in the Oracle BI repository to represent unique sets of security attributes.

Specifying Presentation Folder Permissions

Access the Presentation Catalog - Permissions page. (Open Presentation Catalog properties and click Permissions on the General tab.)

On the Presentation Catalog - Permissions page for the folder, enable the Show all users/groups option.

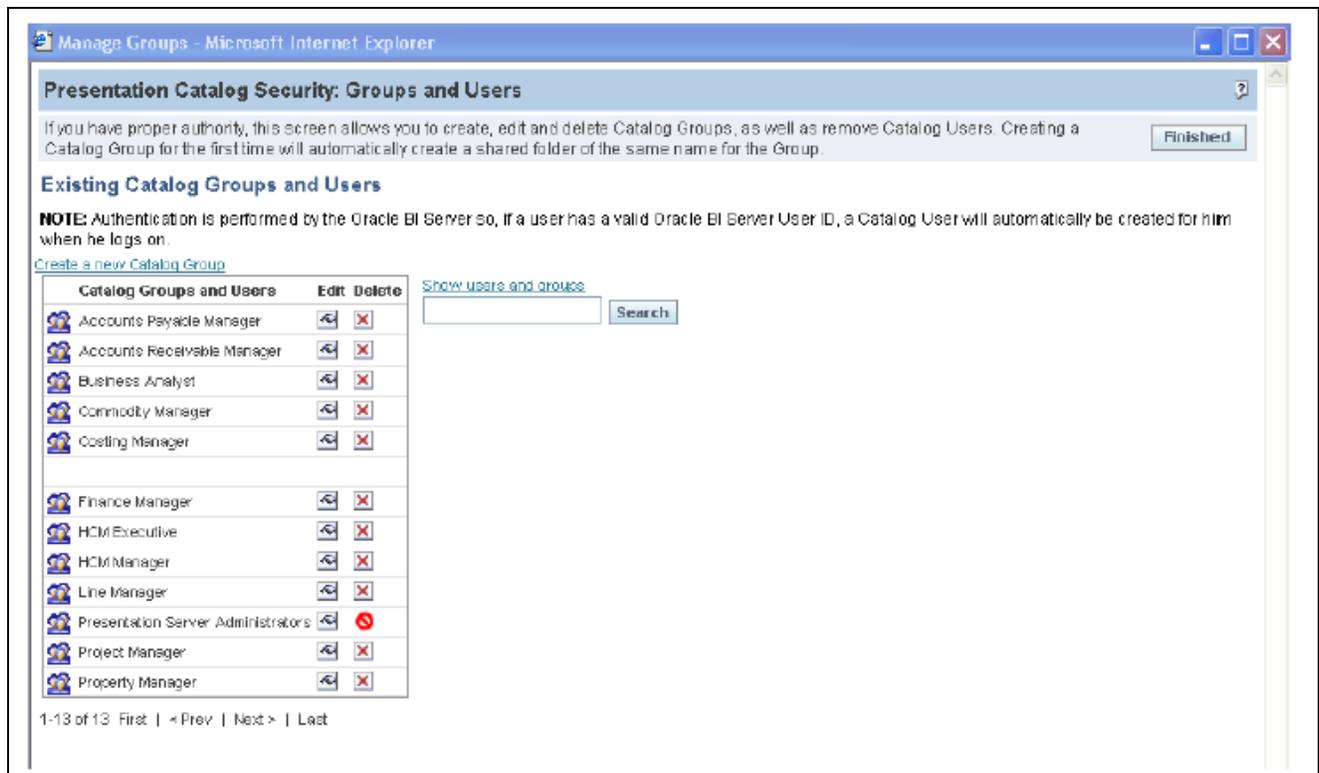
Setting up Presentation Catalog Groups

Presentation Catalog groups can be thought of as user roles, because the groups avoid ambiguity about which defaults and preferences to assign directly to users. Users can be associated with multiple roles by being members of multiple Presentation Catalog groups.

To secure Presentation Catalog objects for a specific Oracle BI Server group, the Presentation Catalog group name must match the Oracle BI Server group name. To maintain data security, a user's Presentation Catalog group name must match the user's security role in PeopleSoft.

If the Oracle BI Server group name matches the a Presentation Catalog group name, members of the Oracle BI Server group automatically become members of the Presentation Catalog group when they log into the Fusion Intelligence applications.

Access the Presentation Catalog Security: Groups and Users page (Oracle BI Presentation Services, Settings, Administration, Manage Presentation Catalog Groups and Users).



Presentation Catalog Security: Groups and Users page

Create Presentation Catalog groups that you will use to secure Presentation Catalog objects, such as dashboards, pages, and answers.

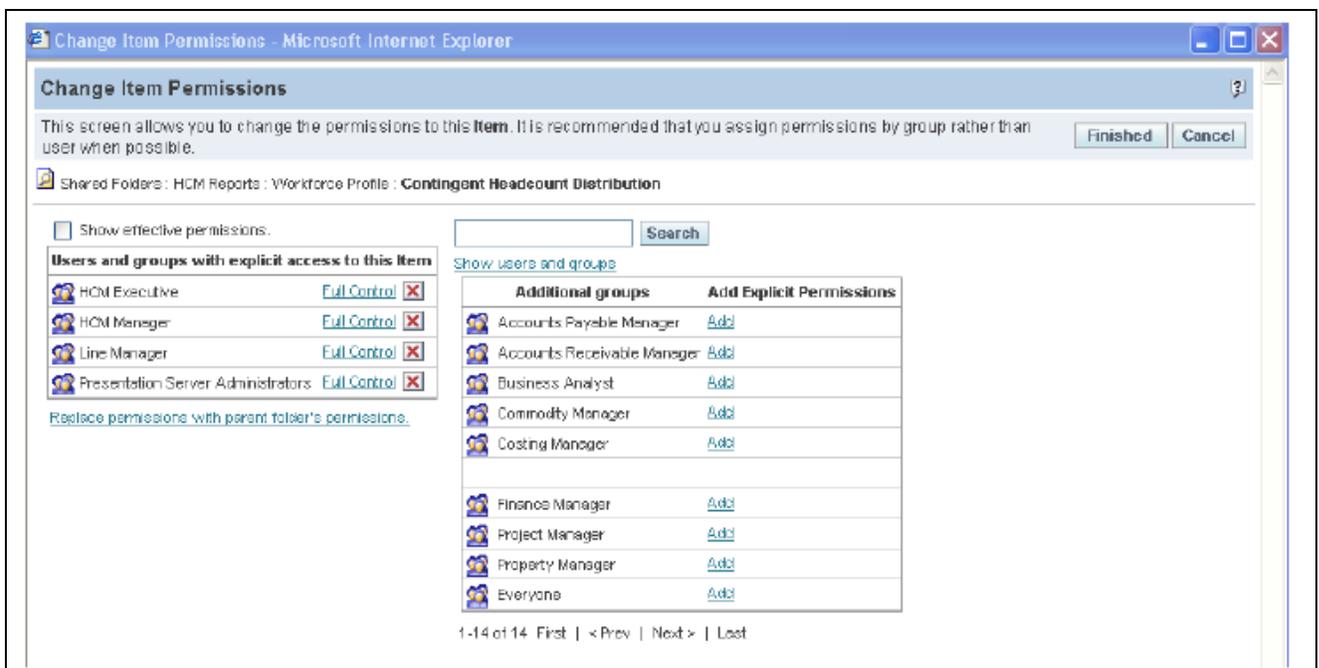
These groups are delivered in Fusion Intelligence For PeopleSoft Enterprise applications:

- Administrators

- Accounts Payable Manager
- Accounts Receivable Manager
- Business Analyst
- Commodity Manager
- Costing Manager
- Finance Manager
- HCM (Human Capital Management) Executive
- HCM Manager
- Line Manager
- Project Manager
- Property Manager

Granting Role Access to Presentation Objects

Access the Change Item Permissions page by clicking the Permissions icon or Page Security icon when the object is in edit mode.



Change Item Permissions page

Use the Change Item Permissions page to assign permissions to a specific object, such as a report, dashboard, or catalog.

To view and administer privileges associated with various components of OBIEE, such as general access to dashboards, answers, subject areas, security features, and so on, access the Change Privilege Permissions page (Oracle BI Presentation Services, Settings, Administration, Manage Privileges).

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, “Managing Content in the Oracle BI Presentation Catalog.”

Setting Up Data-Level Security

This section provides an overview of data-level security, and discusses how to complete the following tasks to set up data-level security for Fusion Intelligence For PeopleSoft Enterprise applications:

- Determine secured dimensions.
- Create physical joins.
- Secure dimensions.
- Secure facts that use specific dimensions.
- Remove data security on facts and dimensions.

See *PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse 8.9 PeopleBook*, “Securing EPM.”

Understanding Data-Level Security

The data-level security that you set up during the PeopleSoft Performance Management system implementation is maintained when users access the same data in Fusion Intelligence applications. Data-level security in Fusion Intelligence applications effectively leverages the PeopleSoft Performance Management security framework. You can set up additional data-level security in the Oracle BI Repository by using Oracle BI Server group filters and restrictive conditions in the Logical layer.

These SJTs are delivered with the Fusion Intelligence For PeopleSoft Enterprise applications and are used to store the secured members of a specific dimension:

- *D_BUS_UNIT_SJT* (Business Unit SJT)
- *D_COMMODITY_SJT* (Commodity SJT)
- *D_DEPT_SJT* (Department SJT)

The system uses *D_BUS_UNIT_SJT* to secure both the Business Unit and Business Unit Accounts Payable secured dimensions.

The system uses the *PF_SY_ROLE_USER* table to extract information about role user mapping.

All security-related tables are located in the Security Tables folder in the Oracle BI Repository.

Determining Secured Dimensions

Determine the dimension that you want to secure and identify the underlying table and its corresponding SJT. For example, if you want to secure the Business Unit dimension, the underlying table is *D_BUSINESS_UNIT*, and the corresponding SJT is *D_BUS_UNIT_SJT*.

See *PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse 8.9 PeopleBook*, “Securing EPM.”

Creating Physical Joins

Fusion Intelligence For PeopleSoft Enterprise delivers the physical joins for the delivered secured dimensions.

Access the Physical Diagram - Physical Join page (Oracle BI Administration Tool, Manage, Joins, <dimension>) to create physical joins.

This is an example of the Physical Join page showing a join between a dimension table and its SJT:

Physical Join - D_BUSINESS_UNIT_D_BUS_UNIT_SJT

Name: D_BUSINESS_UNIT_D_BUS_UNIT_SJT

Table: D_BUS_UNIT_SJT

Table: D_BUSINESS_UNIT

Column: PF_SY_ROLE_NAME, BU_SID, LASTUPDDTTM

Operator:

Column: BU_SID, BU_SRC_ID, BU_TYPE, SRC_SYS_ID

Driving: None

Type: Inner

Cardinality: N 0,1 1

Hint:

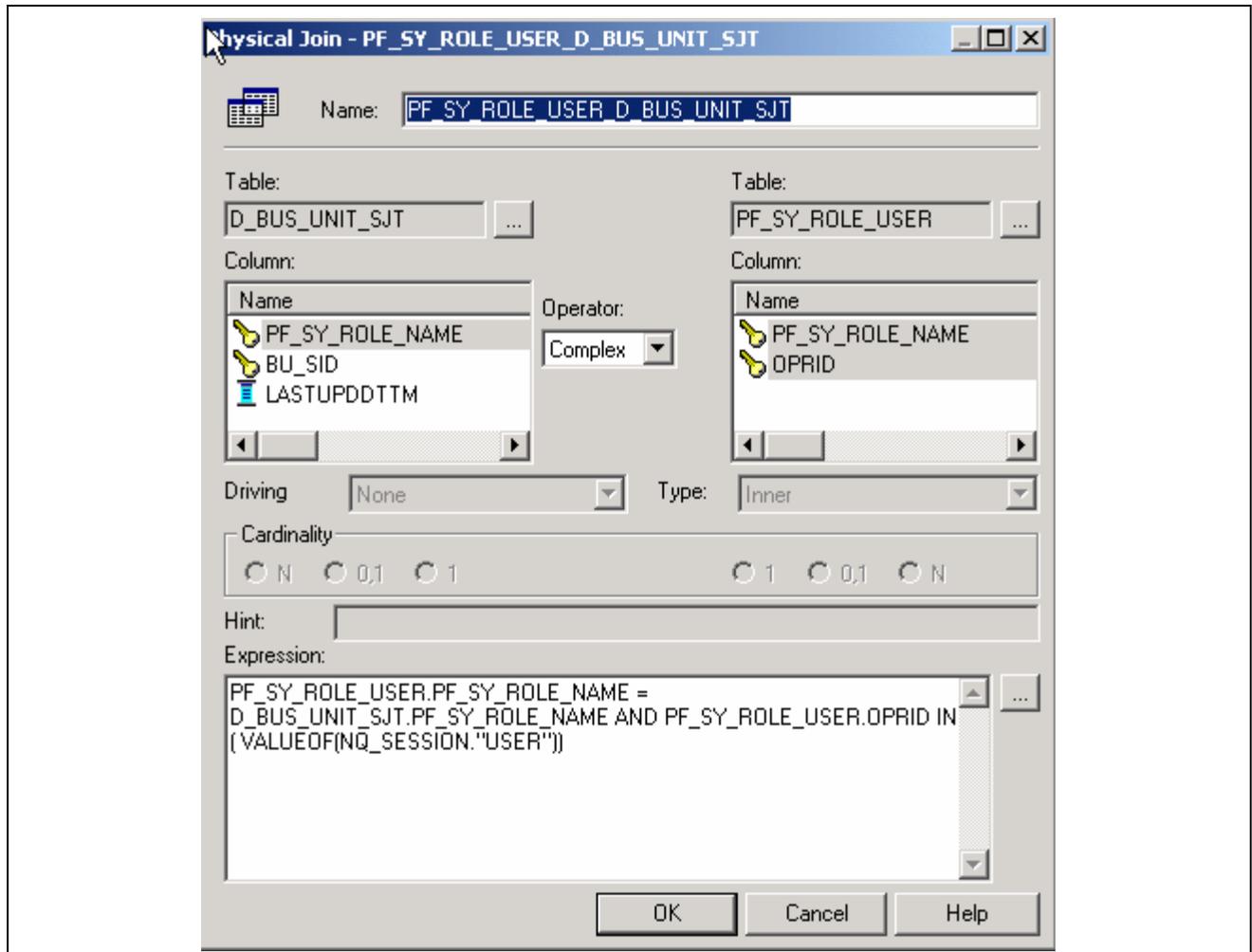
Expression: D_BUSINESS_UNIT.BU_SID = D_BUS_UNIT_SJT.BU_SID OR D_BUS_UNIT_SJT.BU_SID = 2147483647

OK Cancel Help

Physical Diagram - Physical Join page (1 of 2)

The WHERE clause that is shown in this example is `D_BUSINESS_UNIT.BU_SID = D_BUS_UNIT_SJT.BU_SID OR D_BUS_UNIT_SJT.BU_SID = 2147483647`. The number 2147483647 can be used for any dimension, and indicates *ALL* access for a role.

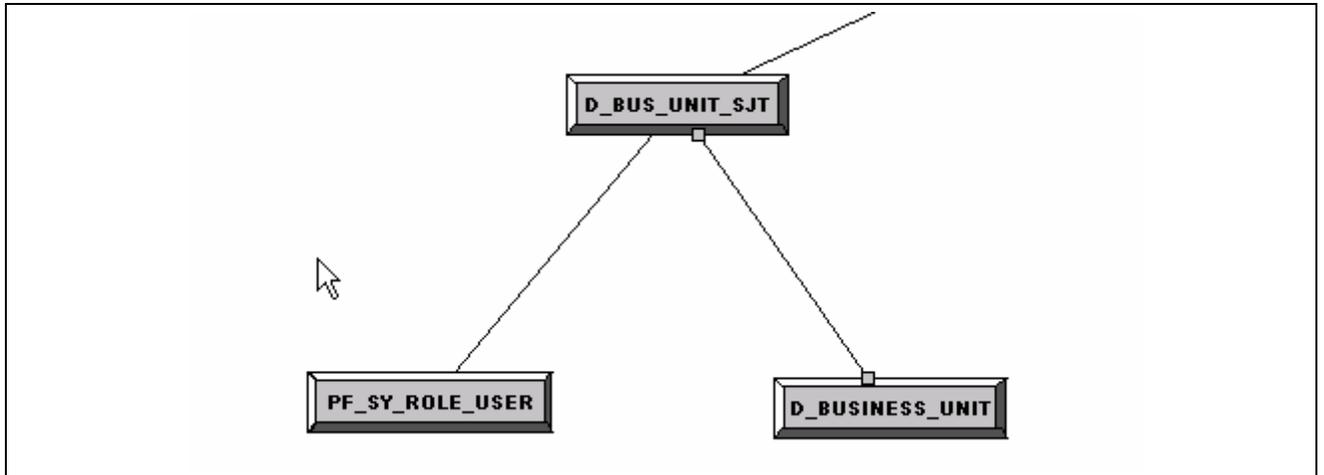
Following is an example of a physical join between the same SJT (D_BUS_UNIT_SJT) and the PF_SY_ROLE_USER table. Because SJT tables are populated with user role information, this join will map the role to the enterprise user:



Physical Diagram - Physical Join page (2 of 2)

The Where clause that is used in this example is `PF_SY_ROLE_USER.PF_SY_ROLE_NAME = D_BUS_UNIT_SJT.PF_SY_ROLE_NAME AND PF_SY_ROLE_USER.OPRID IN (VALUEOF(NQ_SESSION.\"USER\"))`. The variable `NQ_SESSION.USER` is an OBIEE variable that stores the user ID of the person who is currently signed onto the system.

This is the resulting physical diagram from the preceding two physical join examples:

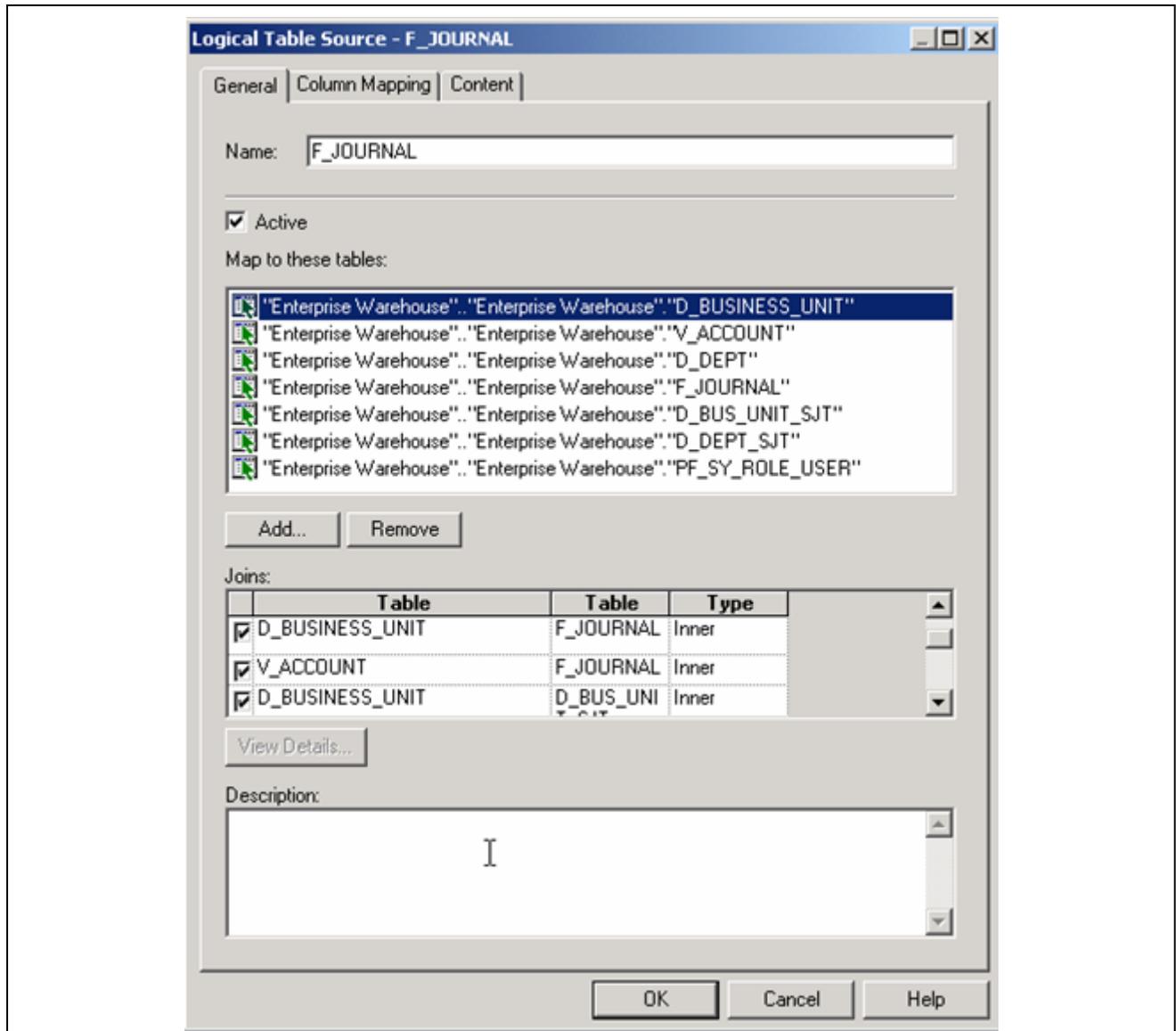


Physical Diagram page

Securing Dimensions

Access the Business Model and Mapping - Logical Table Source page (Oracle BI Administration Tool, Business Model and Mapping layer, <dimension>, Properties, Sources) to secure dimensions.

This is an example of the Logical Table Source page for the Business Unit dimension:



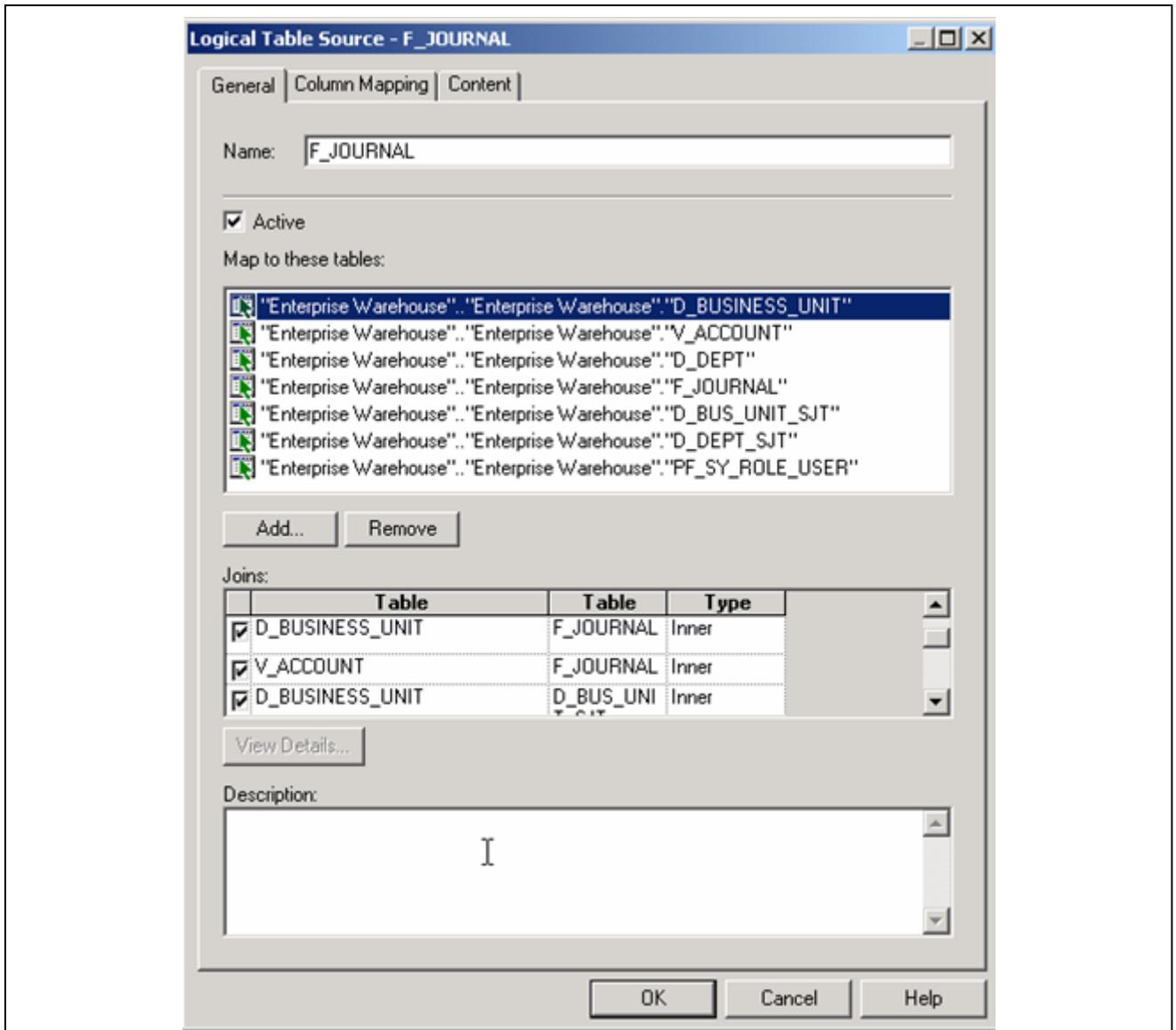
Business Model and Mapping - Logical Table Source page (1 of 3)

For instance, to secure the BUSINESS UNIT dimension, the tables that are involved are D_BUSINESS_UNIT and D_BUS_UNIT_SJT. In the Business Model and Mapping layer, open the D_BUSINESS_UNIT dimension properties, and click the Sources tab. Force a join with the D_BUS_UNIT_SJT and PF_SY_ROLE_USER by first adding the two tables to the Map to these tables region, and selecting the associated rows in the Joins grid.

Securing Facts That Use Specific Dimensions

Access the Business Model and Mapping layer - Logical Table Source page to secure facts.

This is an example of the Logical Table Source page for the F_JOURNAL fact:



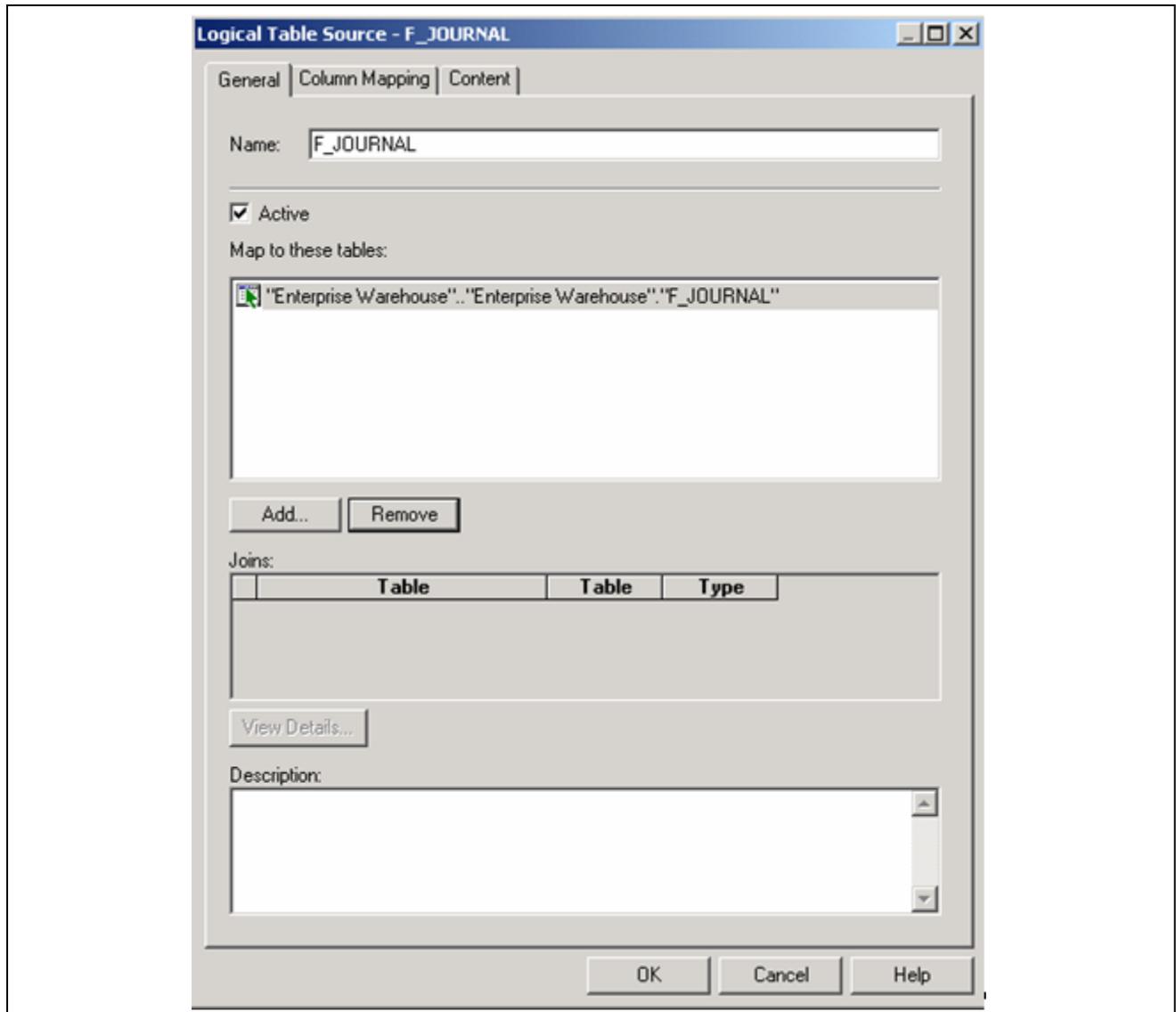
Business Model and Mapping Layer - Logical Table Source (2 of 3)

In this example, secure facts that use the F_JOURNAL dimension in the same way that you secured the BUSINESS_UNIT dimension. In the Business Model and Mapping layer, open the F_JOURNAL fact properties, and click the Sources tab. Force a join with the F_JOURNAL, F_JOURNAL_SJT, and PF_SY_ROLE_USER tables by first adding the three tables to the Map to these tables region, and selecting the associated rows in the Joins grid.

Removing Data Security on Facts and Dimensions

Access the Business Model and Mapping layer - Logical Table Source page to remove data security on facts and dimensions.

This is an example of the Logical Table Source page for the F_JOURNAL fact after you remove the table mapping that you added in the previous example:



Business Model and Mapping Layer - Logical Table Source page (3 of 3)

To remove the data security on facts or dimensions, select the dimension or fact, access the Sources, and right-click Properties. Clear the joins and remove the associated tables.

For example, assume that you want to remove the fact security that you set up in the previous section. To disable the security, delete the forced joins with D_BUSINESS_UNIT, D_BUS_UNIT_SJT and PF_SY_ROLE_USER tables. When you click the Remove button, the system removes the joins from the selected tables in the Map to these tables region, removing the joins from the Joins grid. The data will be unsecured.

CHAPTER 4

Setting Up Drilling to Online Transaction Systems

This section discusses how to complete the following setup tasks that are required to drill in place to PeopleSoft online transaction systems from Fusion Intelligence applications:

- Storing URLs for system source IDs and versions.
- Creating initialization blocks and dynamic repository variables.
- Creating logical columns.
- Creating answers with drill in place capability.

Note. The Drill to Transaction Systems feature is available if you use the Fusion Intelligence system with PeopleSoft Enterprise 8.8 and 8.9 transaction applications. You cannot drill in place from the Fusion Intelligence applications to JD Edwards online transaction applications.

Storing URLs for System Source IDs and Versions

PeopleSoft Enterprise Performance Management 8.9 contains two tables—PS_SRC_CONFIG and PS_SRC_COMPONENT—that Fusion Intelligence applications use to store the information that is needed to drill into PeopleSoft online transaction applications from Fusion Intelligence applications.

- The PS_SRC_CONFIG table stores the URL for the PeopleSoft homepage for a particular source system ID and version.

This is a deployment activity and will vary based on your particular PeopleSoft Internet Architecture (PIA) installation. The URL will be different for each implementation.

Do not add a forward slash to the end of the URL. Add a row if the row does not exist for a particular source, or just update the row.

This is an example of an SQL statement that sets up the functionality to drill into a PeopleSoft Human Capital Management instance:

```
UPDATE PS_SRC_CONFIG
SET URL_1 = 'HTTP://ADNTAS42.PEOPLESOFT.COM:6300/PSP/EM_HC890TS1_TS091824'
WHERE SRC_SYS_ID='HCM'
```

- The PS_SRC_COMPONENT table stores the component paths for a particular version of the source system ID.

The component paths may vary for different versions of the same PeopleSoft online transaction application.

Create a URL for the path to the PIA online transaction application component in this table. Add a forward slash to the beginning of the string. Ensure that all of the key fields are on the string, and that their parameter value is :1, :2, and so on, based on the number of keys in the component.

This is an example of an SQL statement that sets up the functionality to drill into the Job Summary page in the Human Capital Management instance. In this example, the component path has three parameters:

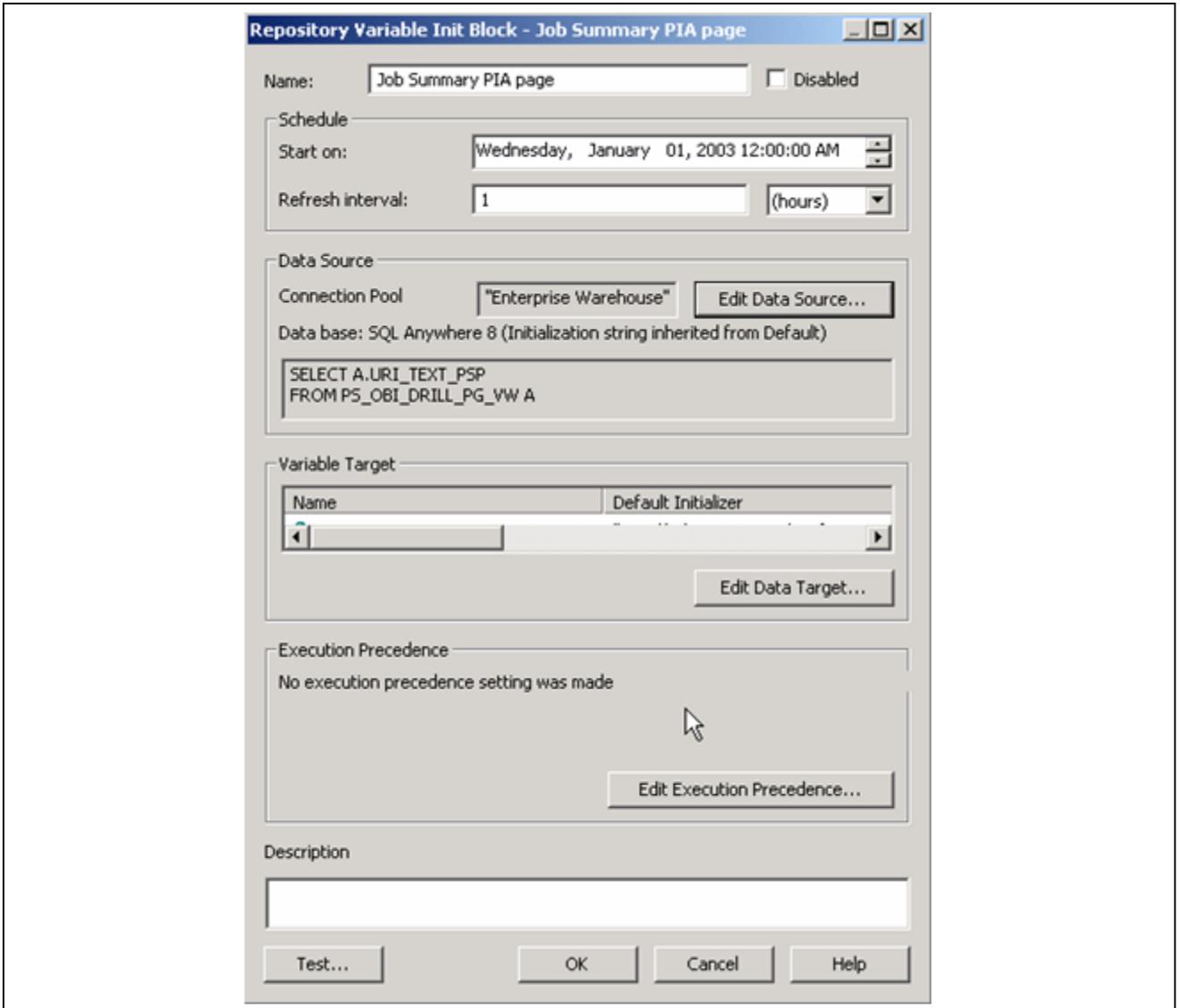
```
INSERT INTO PS_SRC_COMPONENT
VALUES ( 'HCM' , 'JOB_SUMMARY' , 'JOB_SUMMARY' , '/EMPLOYEE/HRMS/c/ADMINISTER_WORKFORCE_ =>
(GBL) .JOB_SUMMARY.GBL?EMPL_RCD=0&EMPLID=:1' )
```

Repeat this step to set up drill in place functionality for as many pages as necessary.

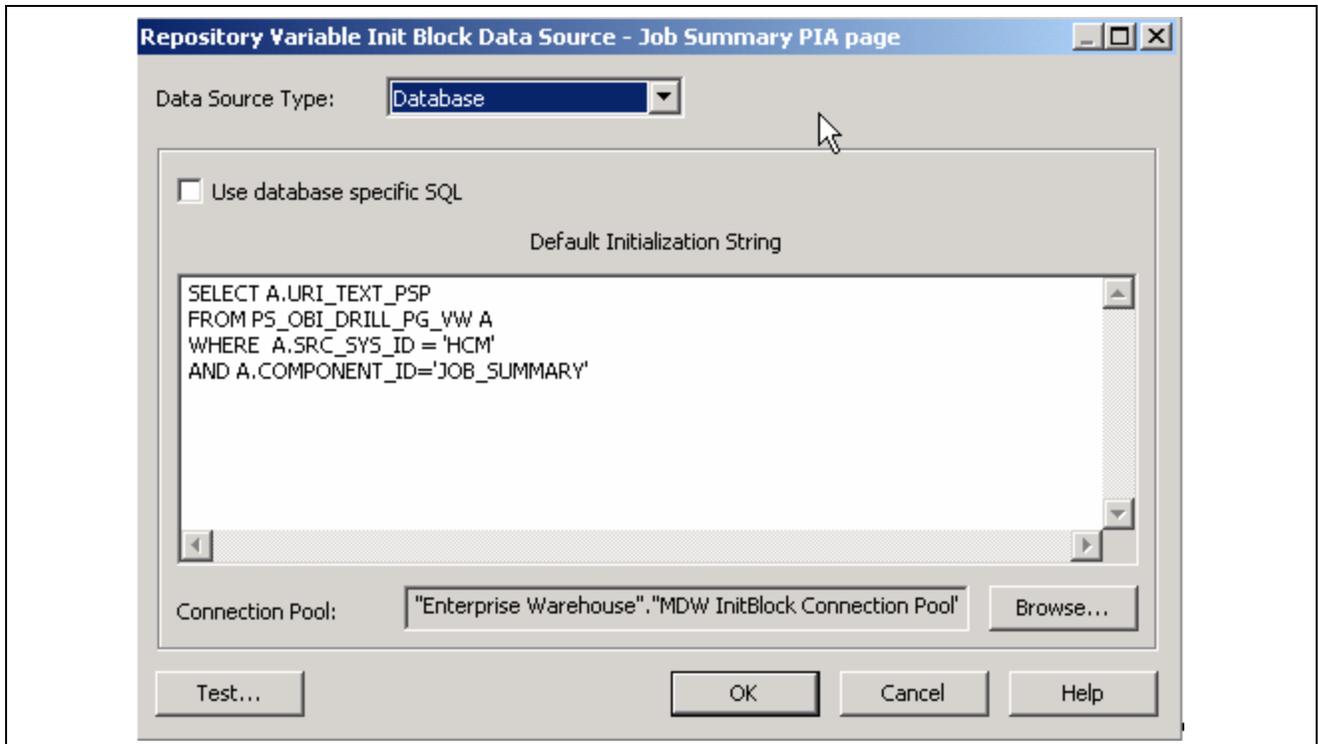
Creating Initialization Blocks and Dynamic Repository Variables

Access the Repository Variable Init (Initialization) Block page, the Repository Variable Init Block Data Source page, and the Repository Variable Init Block Variable Target page (Oracle BI Administration, Manage, Variables, Repository, Initialization Blocks) to create initialization blocks and dynamic repository variables.

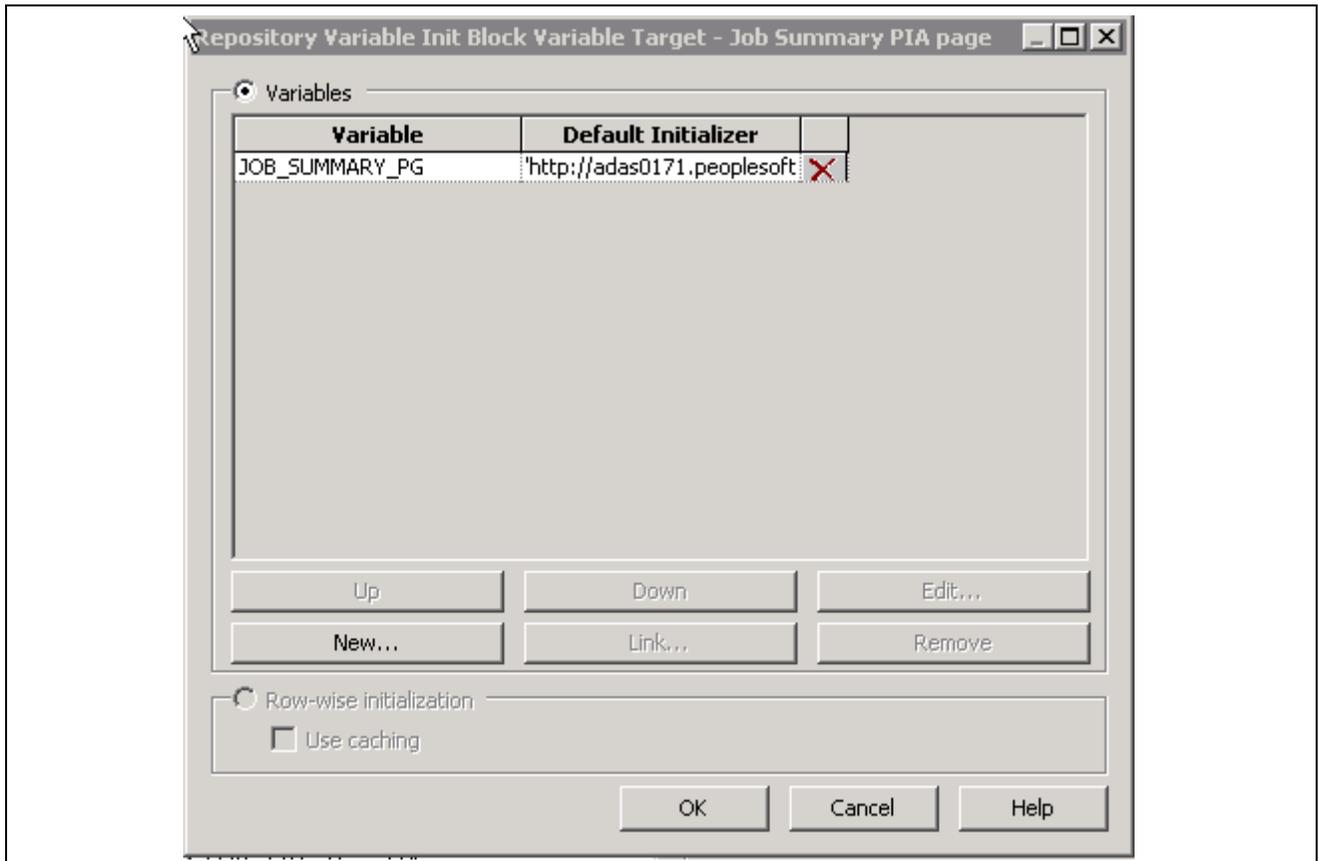
These are examples of the Repository Variable Initialization Block pages for the Job Summary page that is referenced in the previous example:



Repository Variable Init (Initialization) Block page



Repository Variable Init Block Data Source page



Repository Variable Init Block Variable Target page

In this example, you create an initialization block and dynamic repository variable to use to create the URL for the source system. You must create an initialization block for every online transaction system target page to which users will drill to from Fusion Intelligence applications.

This is an example of the data source default initialization string for one initialization block, that is defined with the component ID that was added to the PS_SRC_COMPONENT table in the previous step.

```
SELECT A.URI_TEXT_PSP
FROM PS_OBI_DRILL_PG_VW A
WHERE A.SRC_SYS_ID = 'HCM'
AND A.COMPONENT_ID='JOB_SUMMARY'
```

This is an example of the variable target default initializer for the initialization block:

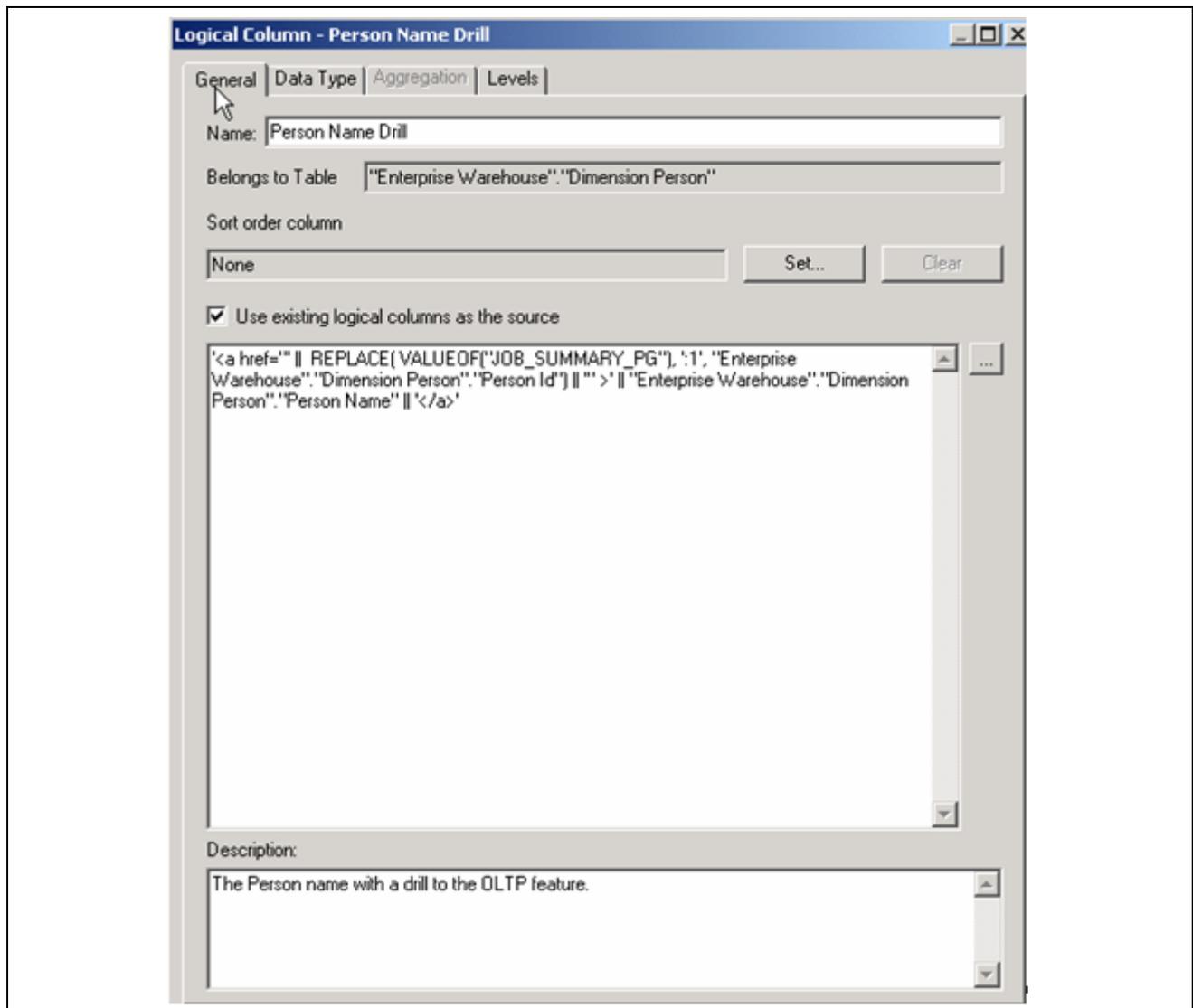
```
'http://adas0171.peoplesoft.com:6200/psp/EM_HC890TM_TS092152/EMPLOYEE/HRMS/c⇒
/ADMINISTER_WORKFORCE_(GBL).JOB_SUMMARY.GBL?EMPL_RCD=0&EMPLID=:1'
```

Refer to the *Oracle Business Intelligence Server Administration Guide* for a discussion of initialization blocks and dynamic repository variables.

See *Oracle Business Intelligence Server Administration Guide*, “Using Variables in the OracleBI Repository,” Process of Creating Initialization Blocks.

Creating Logical Columns

Access the Logical Column page Oracle BI Administration Tool, Business Model and Mapping, <subject area folder>, <dimension>.



Logical Column page: General tab

In this example, you are creating the PERSON NAME DRILL link so that users can drill from the PERSON dimension to the JOB SUMMARY page that is referenced in previous examples.

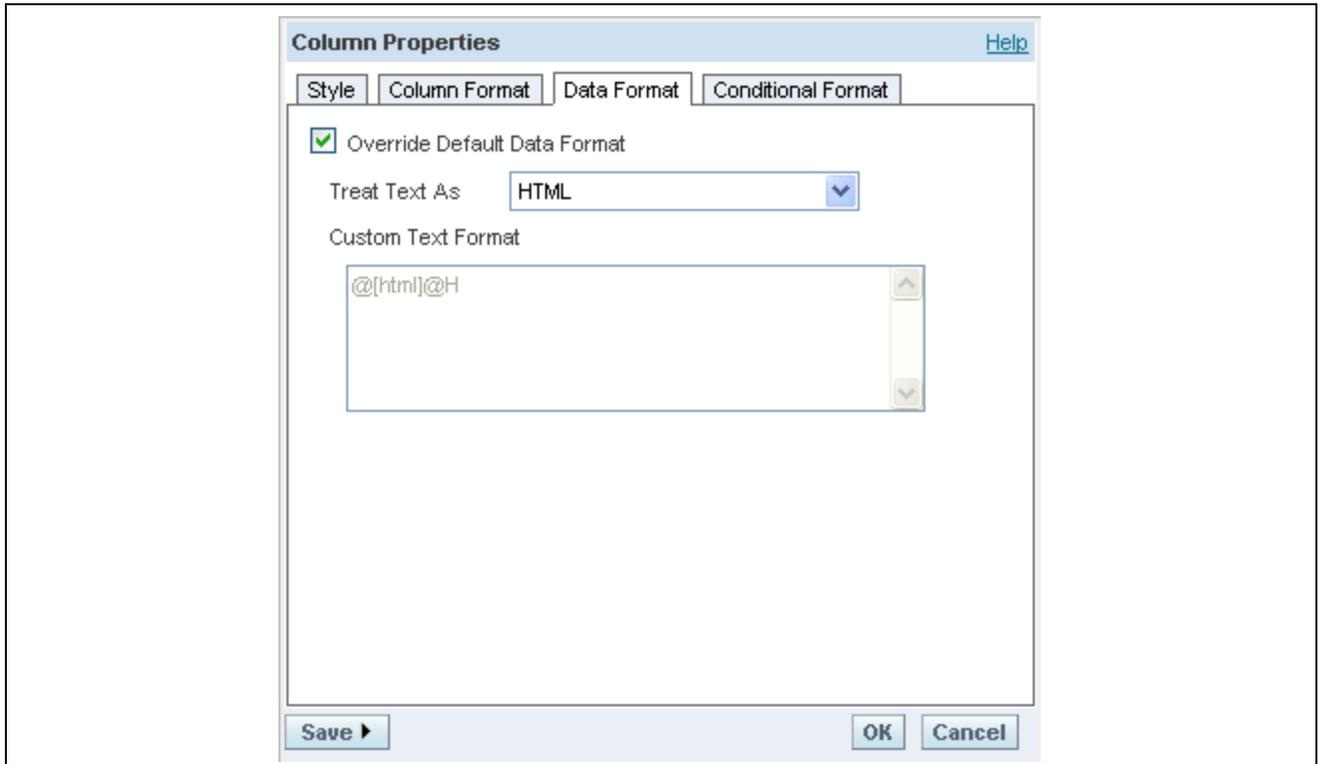
This is an example of setting up the PERSON NAME DRILL Link logical column in the Business Model and Mapping layer so that you can drill to the Job Summary Target page that is referenced in previous examples:

```
'<a href='\"' || REPLACE( VALUEOF('\"JOB_SUMMARY_PG\"'), ':1', 'Enterprise Warehouse'.\"Dimension Person\".\"Person Id') || \"' >' || 'Enterprise Warehouse'.\"Dimension Person\".\"Person Name\" || '</a>'
```

Creating Answers With Drill in Place Capability

Now you are ready to use Oracle BI Answers to create a report that contains the logical column that you created in the previous example. When you run the report, you can drill to the correct transaction application page from a link on the report.

In Oracle BI Answers, after you drag the new logical column into your report layout, access the Column Properties page: Data Format tab for the new column. Change the data format so that the system treats the text as HTML, as shown in this example:



Column Properties page: Data Format tab

CHAPTER 5

Understanding Fusion Financials Intelligence

This chapter discusses:

- Prerequisites.
- Fusion Financials Intelligence For PeopleSoft Enterprise.
- Guided navigations.
- Delivered security groups.

Prerequisites

Before you implement the Fusion Financials Intelligence For PeopleSoft Enterprise application, you must implement:

- PeopleSoft Enterprise Financials Warehouse 8.9.
- Oracle's PeopleSoft Enterprise or JD Edwards online transaction applications that supply data to the Financials marts.

Fusion Financials Intelligence For PeopleSoft Enterprise

The prebuilt dashboard and reports in the Fusion Financials Intelligence For PeopleSoft Enterprise application provide an overview of key profit and loss results, and an early warning of a possible revenue shortfall, and cost of sales or expense overrun. You can manage expenses against the budget and forecast, and know immediately if there is an overspending potential.

The Fusion Financials Intelligence For PeopleSoft Enterprise application contains metadata that maps to six PeopleSoft Financials Warehouse marts—Advanced Cost Accounting, Enterprise Service Automation, General Ledger and Profitability, Payables, Real Estate, and Receivables.

This table lists the delivered FMS: General Ledger dashboard pages, and the reports and prompts that are available on each page:

Pages	Reports	Prompts
Profit and Loss Overview	KPIs - Profit and Loss Top Orders - Revenue Pipeline Financial KPI Performance Trend Profit & Loss Statement Revenue Analysis Order Details	Calendar Financial Year Financial Period Business Unit Manager (Department)
Actual vs Prior-Budget-Forecast	Revenue Summary COGS (cost of goods sold) Summary Expense Summary Revenue/COGS/Expense by Account Journal Listing Budget Summary by Account	Calendar Financial Year Financial Period Business Unit Manager (Department) Chartfield1 Chartfield2 Chartfield3 Ledger
Financial Performance Trend	Financial Performance Trend - Yearly Financial Performance Trend - Period Trend Years	Calendar Financial Year Business Unit Manager (Department) Product Category

These are examples of the FMS: General Ledger dashboard pages:

Profit and Loss Overview
Actual vs Prior-Budget-Forecast
Financial Performance Trend
Page Options ▾

Calendar	Financial Year	Financial Period	Business Unit	Manager (Department)	Go
QT	2006				

Guided Navigation

Revenue is at risk of missing Budget/Forecast. Please access Revenue Summary report for further detail...

[Revenue Summary](#)

Some Business Units or Departments are at risk of Expense overrun. Please access Expense Summary report for further analysis...

[Expense Summary](#)

KPIs

Profit and Loss

Select Target: Prior Actual ▾

KPI	Current Actual	Prior Actual	Variance
Revenue	12,705,696.00	14,376,729.60	-11.62% ⬇️
Operating Margin %	14.06	27.61	-49.07% ⬇️
Operating Income	1,786,720.20	3,969,197.01	-54.99% ⬇️
Gross Margin Percentage	32.75	38.82	-15.63% ⬇️
Expenses	10,918,975.80	10,407,532.59	4.91% ⬆️
Cost of Goods Sold	8,544,385.80	8,796,118.59	-2.86% ⬇️

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Financial KPI Performance Trend

Time run: 1/1/2007 8:03:27 PM

Profit & Loss Statement

Time run: 1/1/2007 8:03:27 PM

Select View: Summary ▾

Financial Items	Reporting Actual Amount				% of Total			
	Q1-06	Q2-06	Q3-06	Q4-06	Q1-06	Q2-06	Q3-06	Q4-06
Revenue	3,520,800	3,061,632	3,026,424	3,096,840	27.7%	24.1%	23.8%	24.4%
Cost of Goods Sold	2,181,939	2,011,840	2,120,244	2,230,363	25.5%	23.5%	24.8%	26.1%

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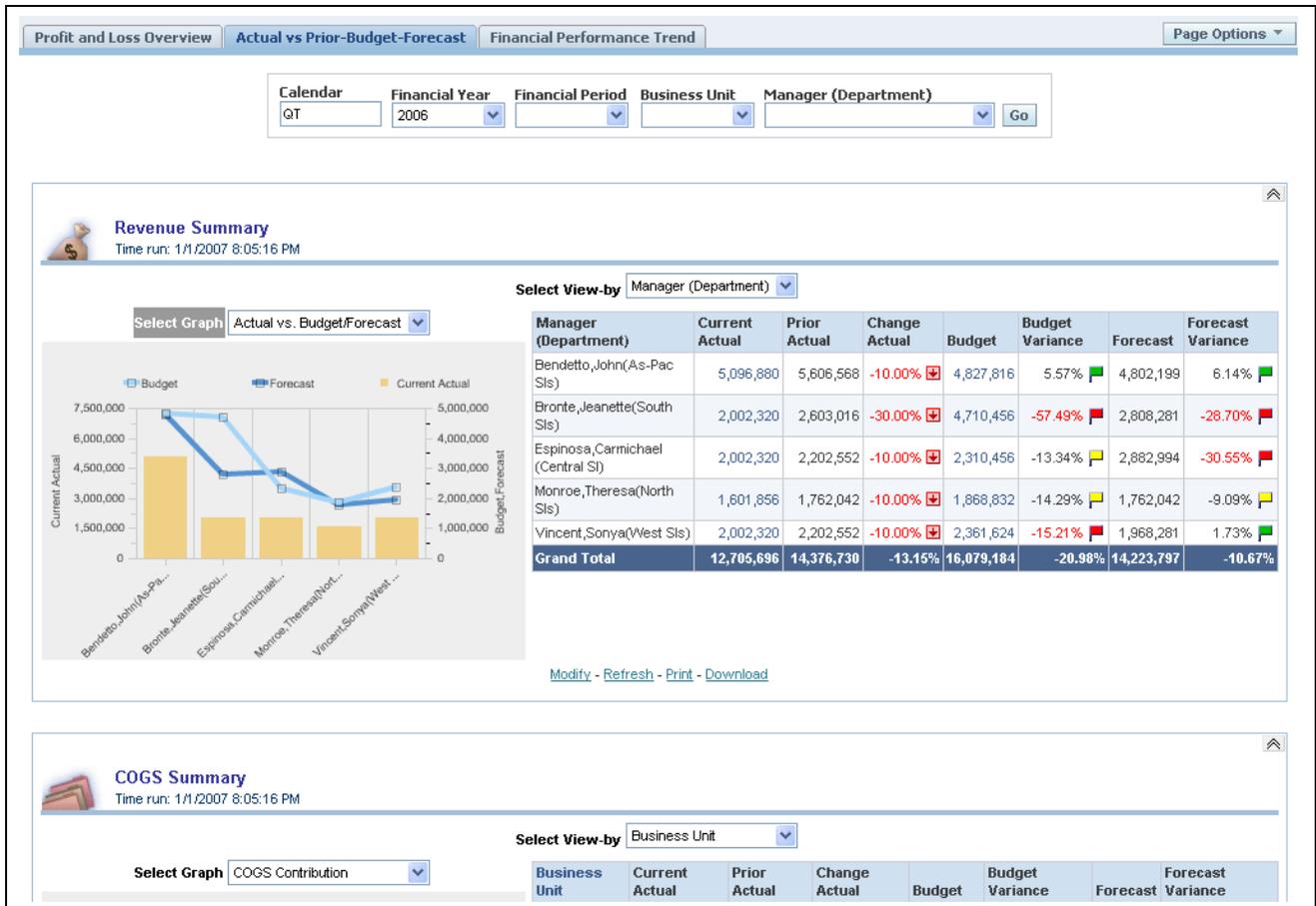
Revenue Analysis

Select View-by: Product Category ▾

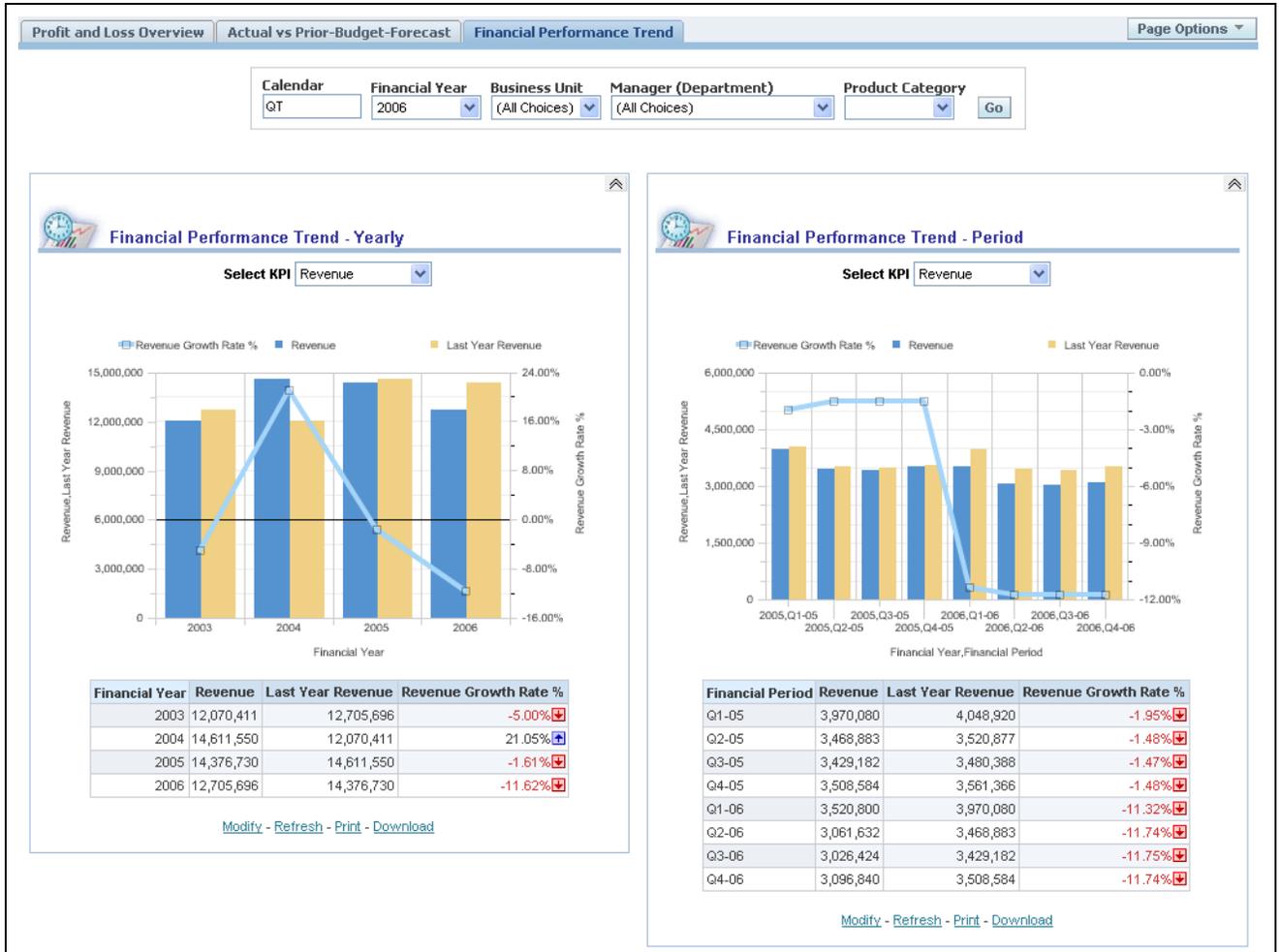
Software 3,604,176	Router 3,094,560
Hub 2,002,320	Memory 2,002,320
Switches 2,002,320	

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FMS: General Ledger dashboard: Profit and Loss Overview page



FMS: General Ledger dashboard: Actual vs Prior-Budget-Forecast page



FMS: General Ledger dashboard: Financial Performance Trend page

Guided Navigations

Guided navigations assist users in the exploration of results that appear on dashboards. The Profit and Loss Overview page in the FMS: General Ledger dashboard contains a Guided Navigation section that appears conditionally based on certain COGS, expense, and revenue key performance indicators (KPIs). When the system detects that one of these KPIs has reached its predefined threshold, a link appears in the Guided Navigation section to guide you to a summary report for further investigation.

This table lists the alert names, threshold descriptions, and guided navigation target pages for the alerts that are delivered with the FMS: General Ledger dashboard in the Fusion Financials Intelligence application:

Guided Navigation Name	Threshold Description	Guided Navigation Target Page
Revenue Alert	Revenue is at risk of missing the budget or forecast, based on this calculation: (revenue ÷ budget ≤ 0.95) and ((period end date – system date) ≤ 10)	Revenue Summary report
Expense Alert	Some business units or departments are at risk of an expense overrun, based on this calculation: (expenses ÷ budget ≥ 0.60)	Expense Summary report
COGS Alert	Cost of goods sold is at risk of exceeding the budget or forecast, based on this calculation: (COGS ÷ budget ≥ 0.90)	COGS Summary report

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, “Using Oracle BI Interactive Dashboards,” Adding Content to an Oracle BI Interactive Dashboard.

Delivered Security Groups

This list contains the financials-oriented Oracle BI Server and Oracle Presentation Catalog security groups that are delivered with the Fusion Financials Intelligence application:

- Accounts Payable Manager
- Accounts Receivable Manager
- Costing Manager
- Finance Manager
- Project Manager
- Property Manager

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*, “Setting Up Security,” Understanding Security Configuration Types.

CHAPTER 6

Understanding Fusion Human Resources Intelligence

This chapter discusses:

- Prerequisites.
- Fusion Human Resources Intelligence For PeopleSoft Enterprise.
- Guided navigation.
- Delivered security groups.

Prerequisites

Before you implement the Fusion Human Resources Intelligence For PeopleSoft Enterprise application, you must implement:

- PeopleSoft Enterprise Human Capital Management Warehouse 8.9.
- Oracle’s PeopleSoft Enterprise or JD Edwards online transaction applications that supply data to the Human Capital Management marts.

Fusion Human Resources Intelligence For PeopleSoft Enterprise

The Fusion Human Resources Intelligence application helps you proactively monitor workforce trends and retention. You can optimize your global workforce by capturing and analyzing data regarding workforce demographics, movement, and turnover.

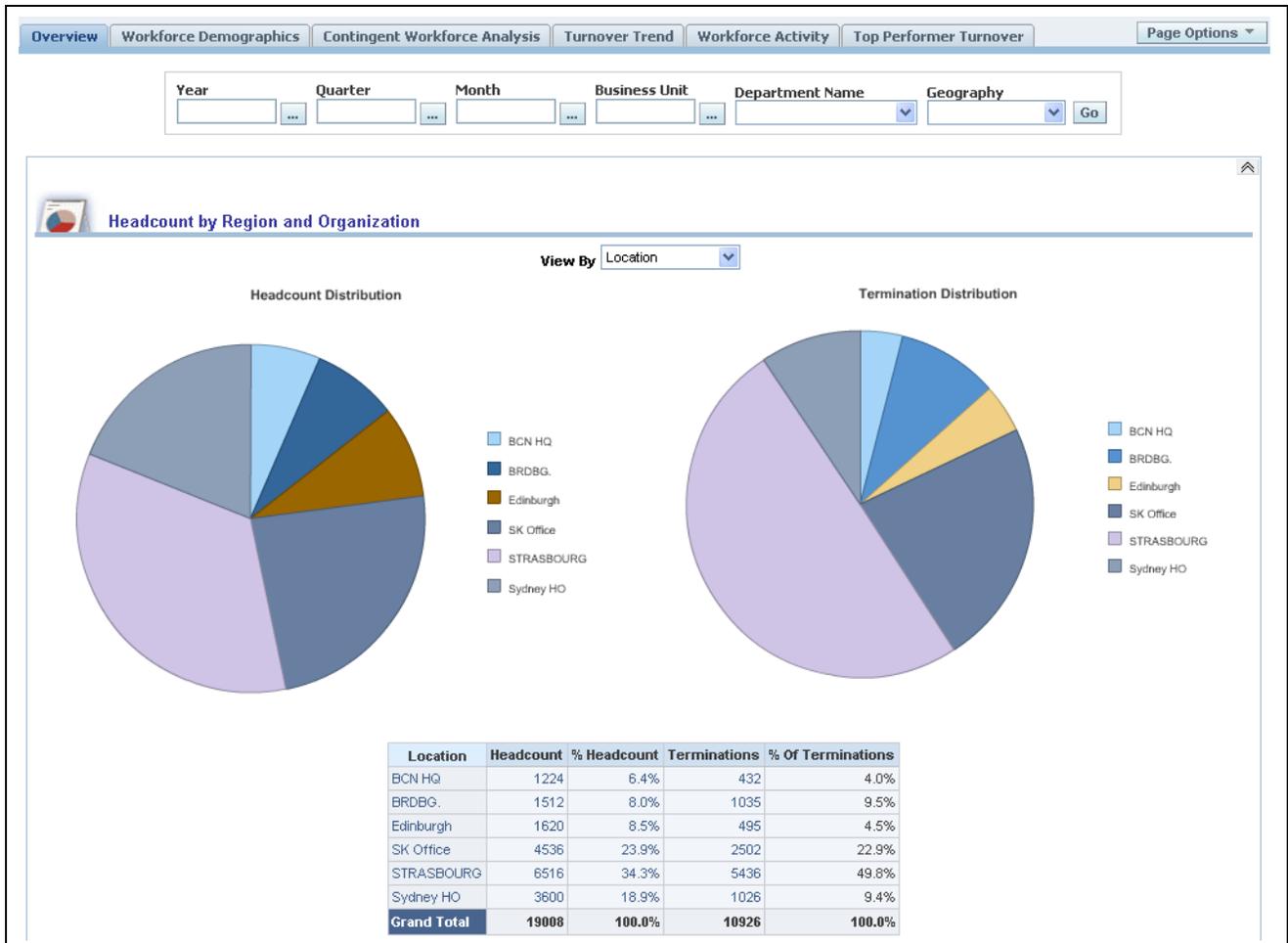
The Fusion Human Resources Intelligence For PeopleSoft Enterprise application contains metadata that maps to four PeopleSoft Enterprise Human Capital Management Warehouse marts—Compensation, Learning and Development, Recruiting, and Workforce Profile.

This table lists the delivered HCM: Workforce Profile pages, and the reports and prompts that are available on each page:

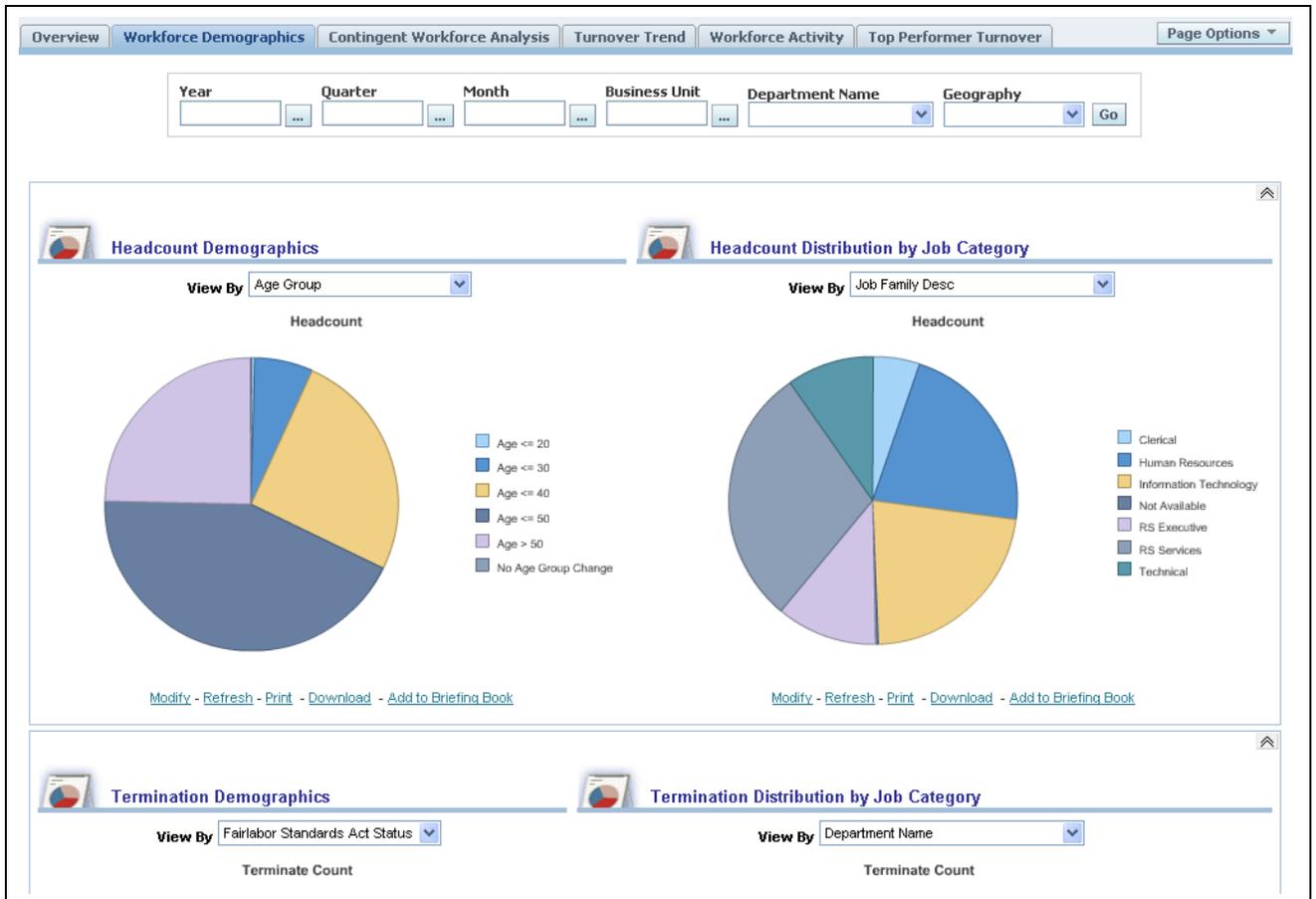
Pages	Reports	Prompts
Overview	Headcount by Region and Organization Headcount Trend Turnover Trend Promotion Trend	Year Quarter Month Business Unit Department Name Geography
Workforce Demographics	Headcount Demographics Headcount Distribution by Job Category Employee Hire Detail Report Termination Demographics Termination Distribution by Job Category Employee Termination Detail report Promotion Demographics Promotion Distribution by Job Category	Year Quarter Month Business Unit Department Name Geography
Contingent Workforce Analysis	Contingent Headcount Distribution Contingent Headcount Distribution Details Contingent Labor Utilization % Trend	Year Quarter Month Business Unit Department Name Geography
Turnover Trend	Employee Termination Detail report Turnover Correlation Position Change Trends Termination Detail Report	Year Quarter Month Business Unit Department Name Geography

Pages	Reports	Prompts
Workforce Activity	Workforce Movement Activity Employee Detail Report Employee Hire Detail Report Employee Transfer Detail Report	Business Unit Department Name Geography Year Quarter Month
Top Performer Turnover	Recent Regrettable Losses Top Performer Turnover Trends Top Performer At Risk	Year Quarter Month Business Unit Department Name Geography Jobcode Employee Location

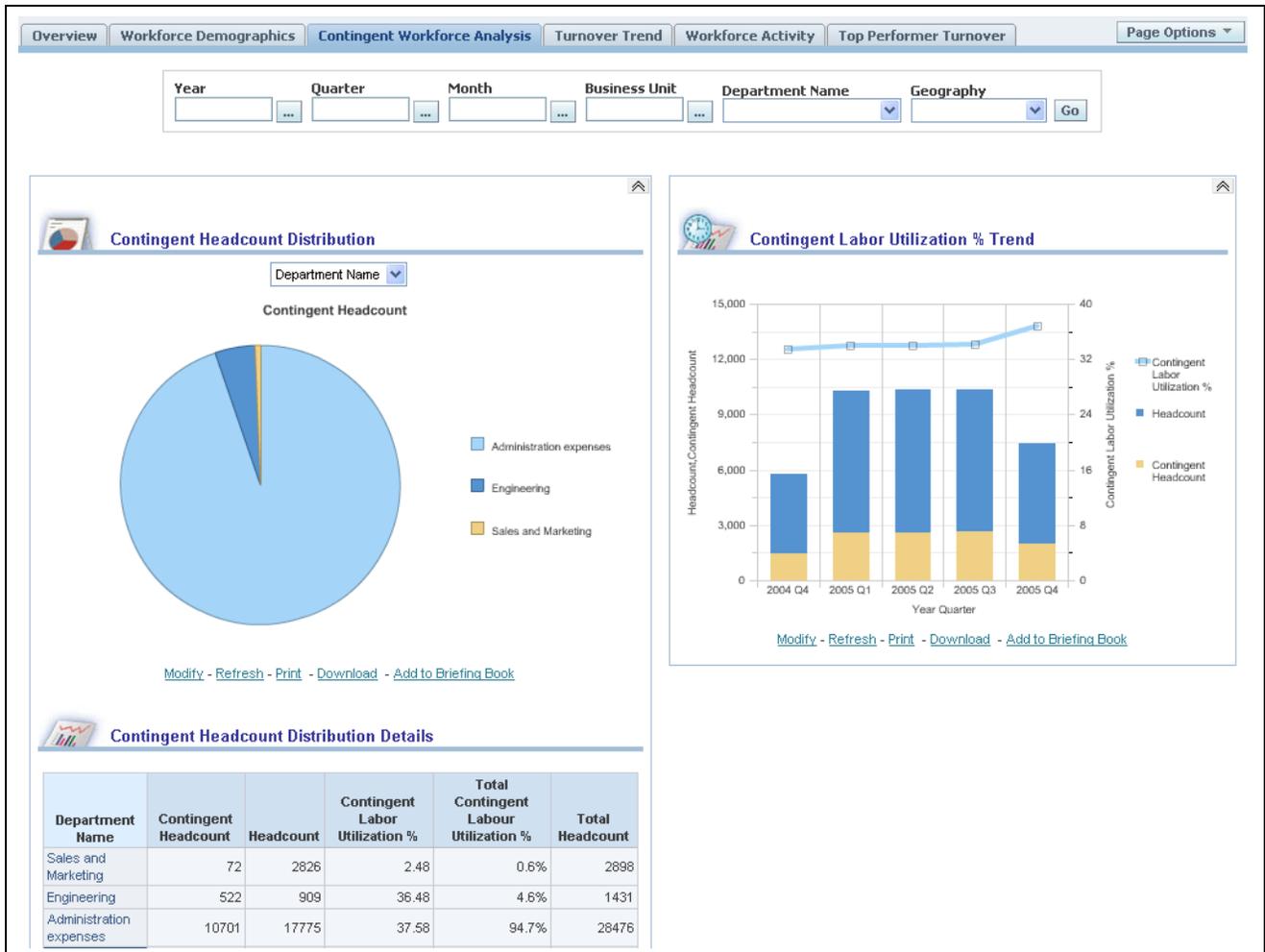
These are examples of the HCM: Workforce Profile dashboard pages:



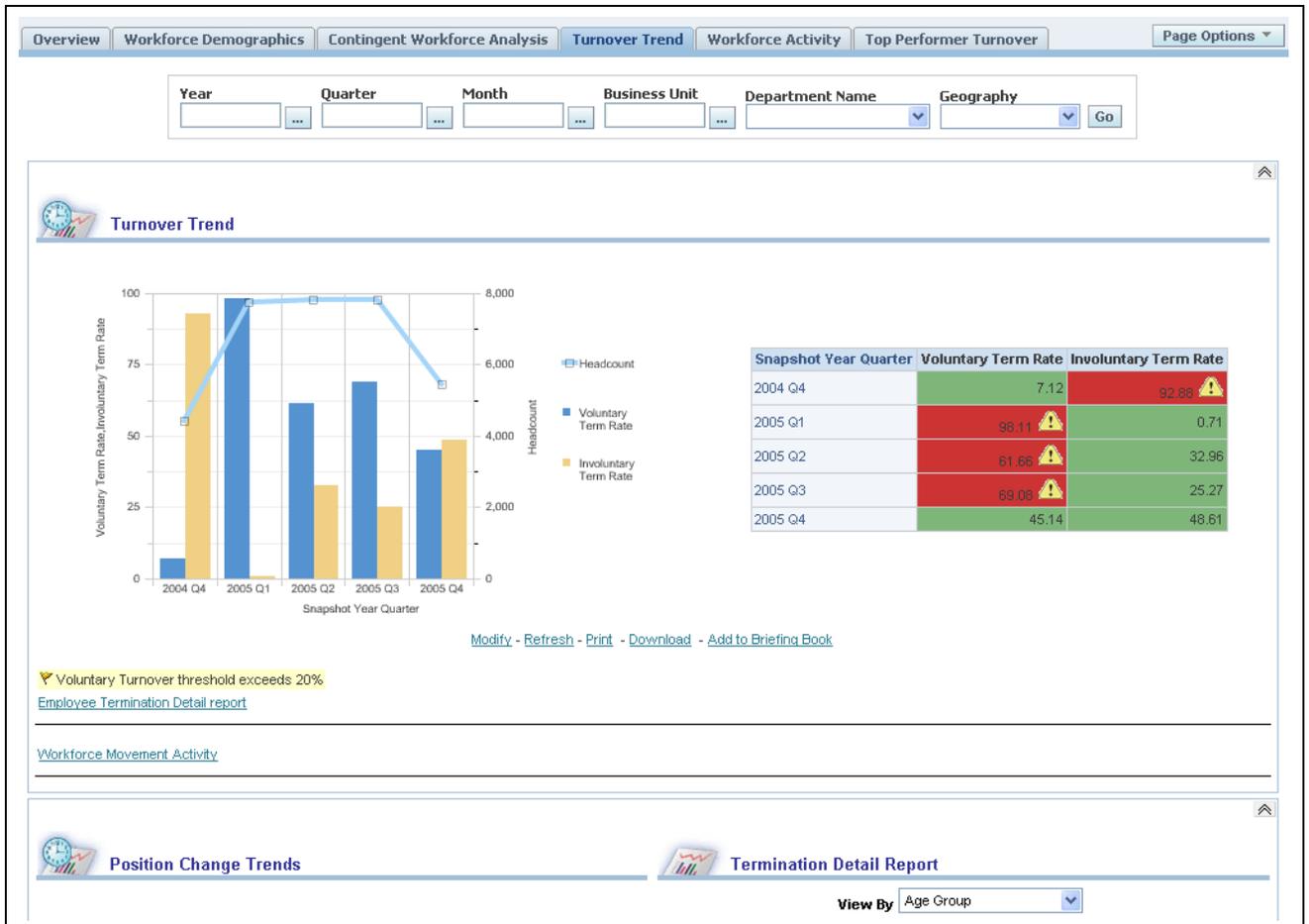
HCM: Workforce Profile dashboard: Overview page



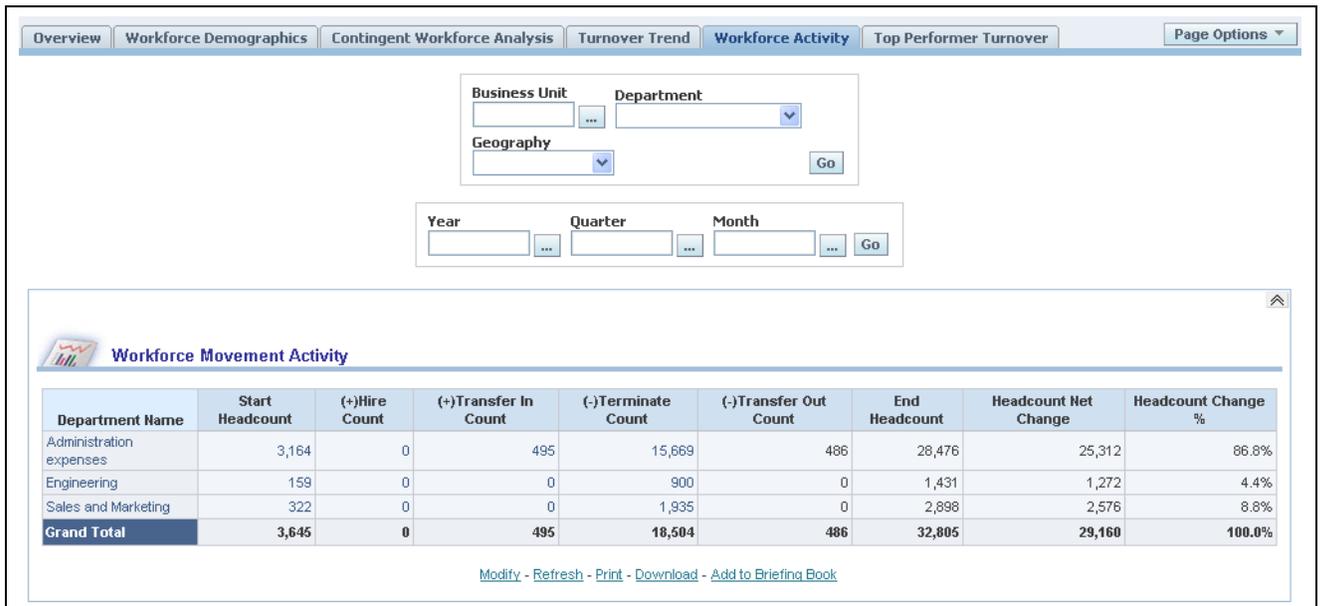
HCM: Workforce Profile dashboard: Workforce Demographics page



HCM: Workforce Profile dashboard: Contingent Workforce Analysis page



HCM: Workforce Profile dashboard: Turnover Trend page



HCM: Workforce Profile dashboard: Workforce Activity page

Overview
Workforce Demographics
Contingent Workforce Analysis
Turnover Trend
Workforce Activity
Top Performer Turnover
Page Options ▾

Year ...
 Quarter ...
 Month ...
 Business Unit ...
 Department Name ▾
 Geography ▾

Jobcode ...
 Employee Location ...

Recent Regrettable Losses

Employee: Levasseur, Jean-Pierre **Ed Level:** 1
Position: Administration expenses **Office:** SC

Employee: Novak, Willis **Ed Level:** 1
Position: Administration expenses **Office:** SC

Employee: Rast, Natascha Jacqueline Ph.D. **Ed Level:** 1
Position: Administration expenses **Office:** HS

Employee: Rodas Dato, Andres Roberto **Ed Level:** 1
Position: Administration expenses **Office:** BA

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Top Performer Turnover Trends

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Top Performer At Risk

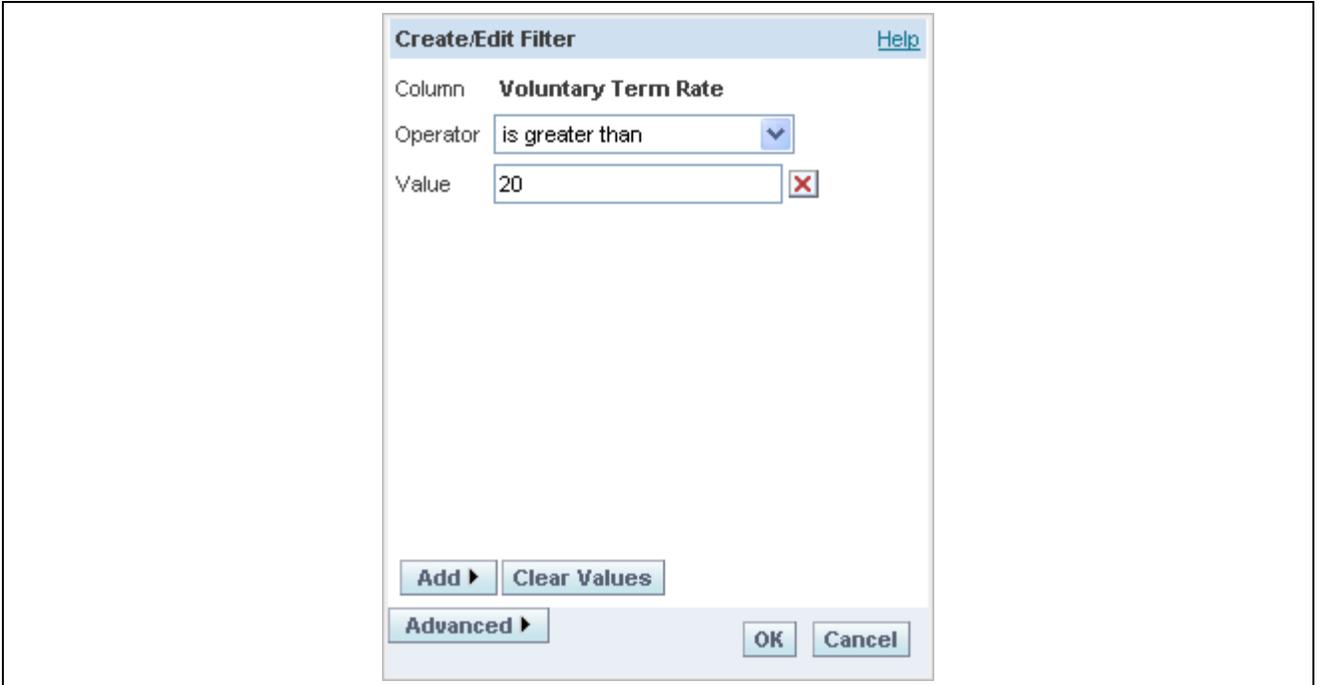
Person Name Drill	Department Name	Location	Jobcode Desc	Promotion Count	Performance Rating	Snapshot Year Desc
Rodas Dato, Andres Roberto	Administration expenses	SK Office	Executive Director-Operations	1	1	Year 2004
				1	1	Year 2005
Levasseur, Jean-Pierre	Administration expenses	BRDBG.	HR Representative	1	1	Year 2004
				1	1	Year 2005

HCM: Workforce Profile dashboard: Top Performer Turnover page

Guided Navigation

The Turnover Trend page in the Workforce Profile dashboard contains the Turnover Correlation Guided Navigation that appears conditionally based on the voluntary turnover results. When the system detects that voluntary turnover exceeds its predefined threshold of 20%, a link appears in the Turnover Trend section so that you can easily access the Employee Termination Detail report for further investigation.

You can change the delivered threshold value by accessing the Create/Edit Filter page for the Voluntary Term Rate column and editing the filter, as shown in this example:



The screenshot shows a 'Create/Edit Filter' dialog box. The title bar includes the text 'Create/Edit Filter' and a 'Help' link. The main area contains three fields: 'Column' with the value 'Voluntary Term Rate', 'Operator' with a dropdown menu showing 'is greater than', and 'Value' with a text box containing '20' and a red 'X' icon. At the bottom, there are buttons for 'Add', 'Clear Values', 'Advanced', 'OK', and 'Cancel'.

Create/Edit Filter page

See *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide*, “Filtering Requests in Oracle BI Answers.”

Delivered Security Groups

This list contains the human resource-oriented Oracle BI Server and Oracle Presentation Catalog security groups that are delivered with the Fusion Human Resources Intelligence application:

- HCM (Human Capital Management) Executive
- HCM Manager
- Line Manager

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*, “Setting Up Security,” Understanding Security Configuration Types.

CHAPTER 7

Understanding Fusion Supply Chain Intelligence

This chapter discusses:

- Prerequisites.
- Fusion Supply Chain Intelligence For PeopleSoft Enterprise.
- Delivered security groups.

Prerequisites

Before you implement the Fusion Supply Chain Intelligence For PeopleSoft Enterprise application, you must implement:

- PeopleSoft Enterprise Supply Chain Management Warehouse 8.9.
- Oracle’s PeopleSoft Enterprise or JD Edwards online transaction applications that supply data to the Supply Chain Management marts.

Fusion Supply Chain Intelligence For PeopleSoft Enterprise

The Fusion Supply Chain Intelligence For PeopleSoft Enterprise application delivers a prebuilt dashboard and reports that track procurement operations performance. You can analyze spending by commodity and supplier to discover ways to decrease costs, cycle times, and working capital.

The Fusion Supply Chain Intelligence For PeopleSoft Enterprise application contains metadata that maps to six PeopleSoft Supply Chain Warehouse marts—Fulfillment and Billing, Procurement, Spend, Inventory, Manufacturing, and Supply Chain Planning.

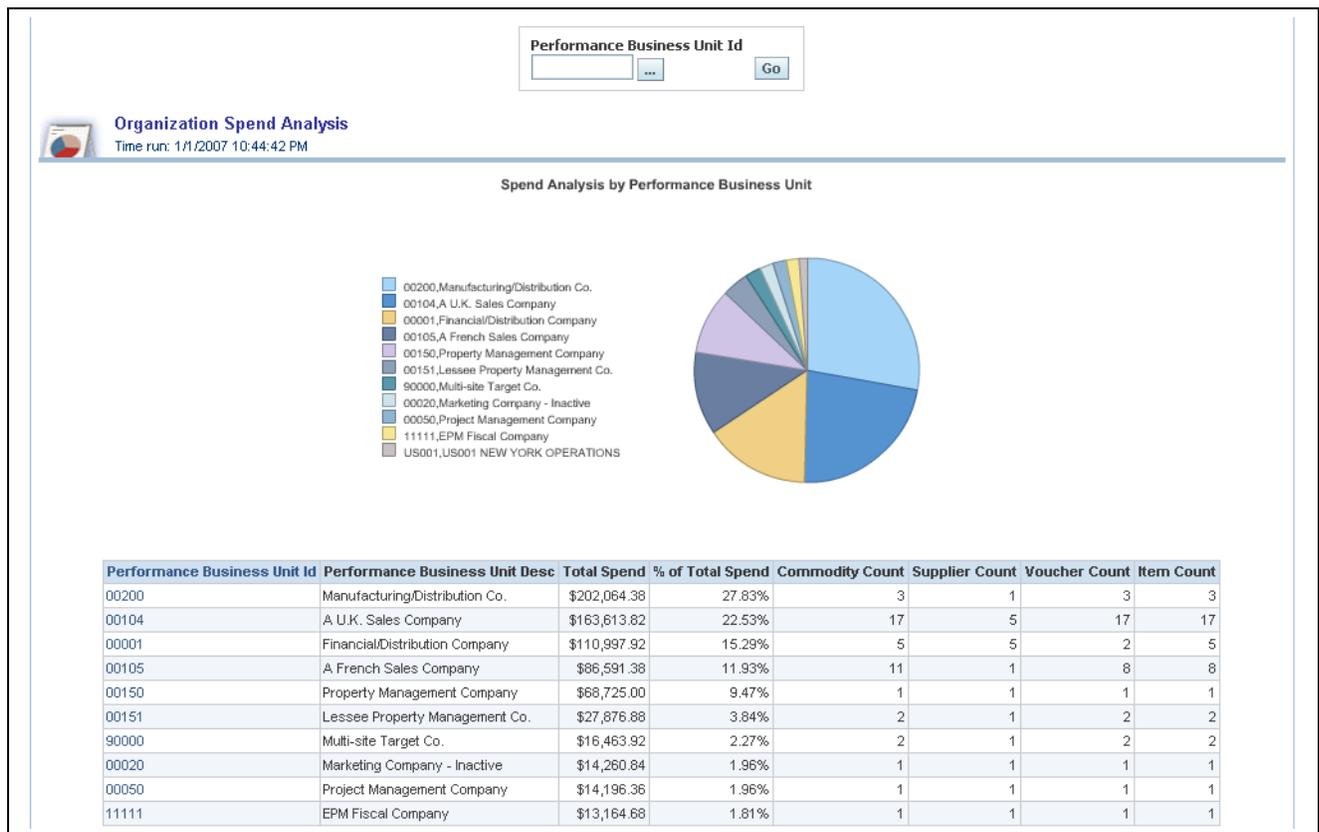
This table lists the reports and prompts that are available on the delivered SCM: Spend dashboard page:

Reports	Prompts
Spend By UNSPSC (United Nations Standard Products and Services Classification) Segment	Buyer
Spend By Remit To Supplier	Invoice Date
Spend By Performance BU	UNSPSC Segment
	Remit To Supplier
	Performance Business Unit Id

You can select these additional reports from links on the SCM: Spend dashboard page:

- Spend By UNSPSC Family
- Spend By UNSPSC Class
- Spend by UNSPSC Commodity
- Spend by Item
- Spend by Item Details
- Spend by Supplier
- Spend by Business Unit

This is an example of the SCM: Spend dashboard page:



SCM: Spend dashboard page

Delivered Security Groups

This list contains the supply chain-oriented Oracle BI Server and Oracle Presentation Catalog security groups that are delivered with the Fusion Supply Chain Intelligence application:

- Business Analyst
- Commodity Manager

See *Fusion Intelligence For PeopleSoft Enterprise 8.9 and JD Edwards PeopleBook*, “Setting Up Security,” Understanding Security Configuration Types.

Glossary of PeopleSoft Enterprise 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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise 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 Enterprise 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.

Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
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 Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
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 Enterprise 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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise 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 process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. <i>See also detailed business process.</i>
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
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 Enterprise 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.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
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.
cash drawer	A repository for monies and payments taken locally.
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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner	In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise 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 <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
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 <i>population</i> and <i>division</i> .

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, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise 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 <i>communication key</i> .
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 <i>comm keys</i> or <i>speed keys</i>) 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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise 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 Enterprise. 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).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
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 <i>class</i> .
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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	<p>In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	<p>In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes.</p> <p>In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.</p>
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	<p>In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise 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 Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise 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 Enterprise 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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise 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 Enterprise 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.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
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 Enterprise 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 <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise 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.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
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, and user interaction objects.

incentive rule	In PeopleSoft Enterprise 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 Enterprise 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 <i>update access</i> .
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.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise 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 Enterprise 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.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
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 Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise 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.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise 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 Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise 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 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 Enterprise 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 Enterprise 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.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
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 Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise 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 Enterprise 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 Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure 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.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise 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 Enterprise 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 Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	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 Enterprise 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	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise 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.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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 <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
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 Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.

REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
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.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise 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	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise 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.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise 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 Enterprise 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.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise 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 Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
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.
task	A deliverable item on the detailed sourcing plan.
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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise 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 Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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 Enterprise 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 link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise 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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