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PeopleBooks and the PeopleSoft Online Library

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PeopleBooks and the PeopleSoft Online Library
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PeopleBooks and the PeopleSoft Online Library Preface

This preface provides an overview Oracle's PeopleSoft Online Library and discusses:

- Additional resources.

- Comments and suggestions.

Understanding the PeopleSoft Online Library

The PeopleSoft Online Library is an HTML-based website that contains comprehensive documentation for Oracle's PeopleSoft Enterprise applications and tools. Use this documentation as a research library and as a context-sensitive online help system. It provides standard navigation and search capabilities, including an expandable table of contents, a keyword index, and a full-text search feature.

The PeopleSoft Online Library is organized hierarchically, like a library of books. The home page (index.htm) displays links to all installed documentation types, including PeopleBooks.

Additional Resources

Additional information is available for your PeopleSoft Enterprise release and located on My Oracle Support website.

- Application maintenance information

- Business process diagrams

- Interactive Services Repository

- Hardware and software requirements

- Installation guides

- Integration information

- Minimum technical requirements (MTRs)

- Documentation updates

- PeopleBooks support policy

- Statement of Direction

- Release Value Proposition

- Prerelease notes

- Product release road map

- Release Notes

- Cumulative Feature Overview

- Troubleshooting information

- Upgrade information

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about PeopleBooks and other Oracle PeopleSoft reference and training materials. Please send your suggestions to PSOFT-INFODEV_US@ORACLE.COM. Include release numbers for the PeopleTools and applications that you are using.

Chapter 1

Accessing PeopleBooks and the PeopleSoft Online Library

This chapter discusses the different options for accessing:

*   Hosted PeopleBooks

*   Downloading PeopleBooks

*   PeopleBooks in PDF Format Documentation Updates

Hosted PeopleBooks

Oracle PeopleSoft Enterprise Hosted PeopleBooks allows you the option to access your context sensitive PeopleBook help directly from our hosted server. The hosted documentation will be updated on a regularly scheduled basis ensuring that you have access to the most current documentation. This reduces the need to view separate application maintenance documentation postings on My Oracle Support since that documentation will now be incorporated into the hosted PeopleBooks content. The PeopleSoft Hosted PeopleBooks is available in English only.

Simple instructions for setting up context sensitive help are also located on the Oracle PeopleSoft Enterprise Hosted PeopleBooks website

See http://www.oracle.com/pls/psft/homepage.

Oracle PeopleSoft Enterprise Hosted PeopleBooks

Welcome to the Oracle PeopleSoft Enterprise Hosted PeopleBook website. This site features the HTML install of our 9.0 and 8.49 PeopleBooks.

Follow these links to view the PeopleBooks for each of these Oracle PeopleSoft products:

- Customer Relationship Management Release 9.0 (CRM)
- Enterprise Learning Management Release 9.0 (ELM)
- Enterprise Performance Management Release 9.0 (EPM)
- Financials Supply Chain Management Release 9.0 (FSCM)
- Human Resources Management System and Campus Solutions Release 9.0 (HRCS)
- PeopleTools Release 8.49 (PT)
- Portal Solutions Release 9.0 (PS)

You may link directly to this site and access the content using your PeopleSoft application help functionality. View the simple steps to set up the context sensitive help.

Content for future releases (post 9.0/8.49) will also feature a regular update schedule, thus allowing you to access up to date PeopleBooks. This will reduce the need to rely on multiple PeopleBook update documents that are typically posted on MetaLink. By accessing the Hosted PeopleBook library, you will have the most current release of PeopleBook content.

We will also offer updated installable PeopleBooks and PDFs (through ePD and OTN respectively) to those who have secure firewall issues and cannot link to an outside website. The Hosted and Updated installable PeopleBooks will be available in English only. Translated PeopleBooks will still be offered in their original GA state via ePD.

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Oracle PeopleSoft Enterprise Hosted PeopleBooks

Downloading PeopleBooks

At each release a complete line of PeopleBooks documentation is made available with the release through the Oracle E-Delivery website.

You can set up the PeopleSoft Online Library on a server where PeopleSoft Internet Architecture resides. Translated PeopleBooks are offered for PeopleSoft Enterprise Application PeopleBooks via Electronic Product Delivery (ePD) at general availability (GA). Your install documentation includes an appendix with instructions for how to install your PeopleBooks for your business environment.

See Installing PeopleBooksappendix in your Install documentation.

PeopleBooks in PDF format

Oracle makes PeopleSoft Enterprise documentation available to you on the Oracle website. You can download PDF versions of PeopleSoft Enterprise documentation online, on the Oracle Technology Network (OTN). These PDF files are available online for each major release shortly after the software is made generally available.

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

Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on My Oracle Support. Many additional types of documentation exist for your release, including:

- Release Notes — describes the new features, enhancements in the release.

- PeopleSoft Cumulative Feature Overview Tool— provides concise high level summaries of the enhanced functionality between a starting and target release.

- Install Guides — provides detailed platform specific installation instructions.

- Hardware Software Guides — describes minimum hardware and additional component software requirements.

- Upgrade Guides — provides detailed instructions for upgrading customers, including locations for required additional patches prior to upgrading.

- Licensing Notes — provides supplemental licensing information related to the use of PeopleTools technology and third-party products.

- Documentation Homepages — provides updated release specific information with links to additional information that may be relevant.

 PeopleSoft Enterprise offers many information solutions to help our customers succeed, the PeopleSoft Enterprise Information Portal provides customers with a single entry point to locate the documentation, training, and other useful information they need to help with their implementation process and improve their daily experience with our products. By using our popular PeopleSoft Enterprise Information Solution data sheets, customers can easily access information and links to PeopleBooks, Documentation Updates, Instructor-Led Training, Online Classes, User Productivity Kits (UPK), Self Study CDs, Certification Programs, and other helpful information.

See http://www.oracle.com/applications/peoplesoft-information-portal.html.

Chapter 2

Understanding PeopleBooks

This chapter discusses:

- PeopleBooks structure.

- Typographical conventions and visual cues used in PeopleBooks.

- ISO country and currency codes.

- Common PeopleBooks.

- Common elements used in PeopleBooks.

PeopleBooks Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use PeopleBooks more efficiently.

The PeopleBooks structure conveys conceptual material and a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

Chapters	*Description*
Preface	This chapter explains: • The structure of the PeopleBook you are reading. • Common elements used in the PeopleBook, if applicable. • Additional resources.

Chapters	Description
Getting Started With…	(Optional) This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters in the application PeopleBooks. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.

Chapters	Description
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

Typographical Conventions and Visual Cues Used in PeopleBooks

This section discusses:

- Typographical conventions.

- Visual cues.

- Country, region, and industry identifiers.

- Currency codes.

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft 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 *O*.
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

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

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft PeopleBooks. Reference to an ISO country code in your PeopleBook does not imply that your application includes every ISO country code. Example of a country-specific heading: "(FRA) Hiring an Employee"

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult your application PeopleBooks for more information.

Region, and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

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)

Common PeopleBooks

Common PeopleBooks are books of the same name that are used in multiple applications or books of particular interest to all customers.

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.

Using PeopleSoft Applications

The Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this PeopleBook provide general information about using PeopleSoft applications.

See *PeopleTools PeopleBook: Using PeopleSoft Applications*

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

Chapter 3

Using PeopleBooks

This chapter discusses how to:

* Navigate the PeopleBooks interface.

* Search the Hosted PeopleBooks library.

* Search the PeopleSoft Online Library.

* Display and print screen shots and graphics in PeopleBooks.

Navigating the PeopleBooks Interface

This section provides an overview PeopleBooks navigation and discusses how to:

* Enable the reference pane.

* Navigate between books and chapters.

* Navigate within a chapter.

* Use the table of contents.

* Use the index.

Understanding How to Access the PeopleBooks Interface

When you click release name and version on Oracle PeopleSoft Enterprise Hosted PeopleBooks home page, the PeopleBooks Library page is displayed.

The PeopleBooks are logically grouped by suite, product line, or functional area so that books are easier to find when accessing them online. Select a PeopleBook title on the home page to display the PeopleBook interface.

* Document pane.

   The pane on the right side of the window displays the document HTML file, which corresponds to a chapter.

* Navigation pane.

   The pane above the document pane contains display options, navigation controls (breadcrumbs), and the current PeopleBook name and chapter titles.

- Reference pane.

   The pane on the left side of the window contains three tabs: Contents, Index, and Search. Select these tabs to explore the PeopleBooks or to locate a specific topic. You can hide the reference pane to maximize the size of the document pane.

Note. When you access a topic through the help link on an application page, through context-sensitive (F1) help, or when you access one PeopleBook from another, the reference pane is always hidden initially.
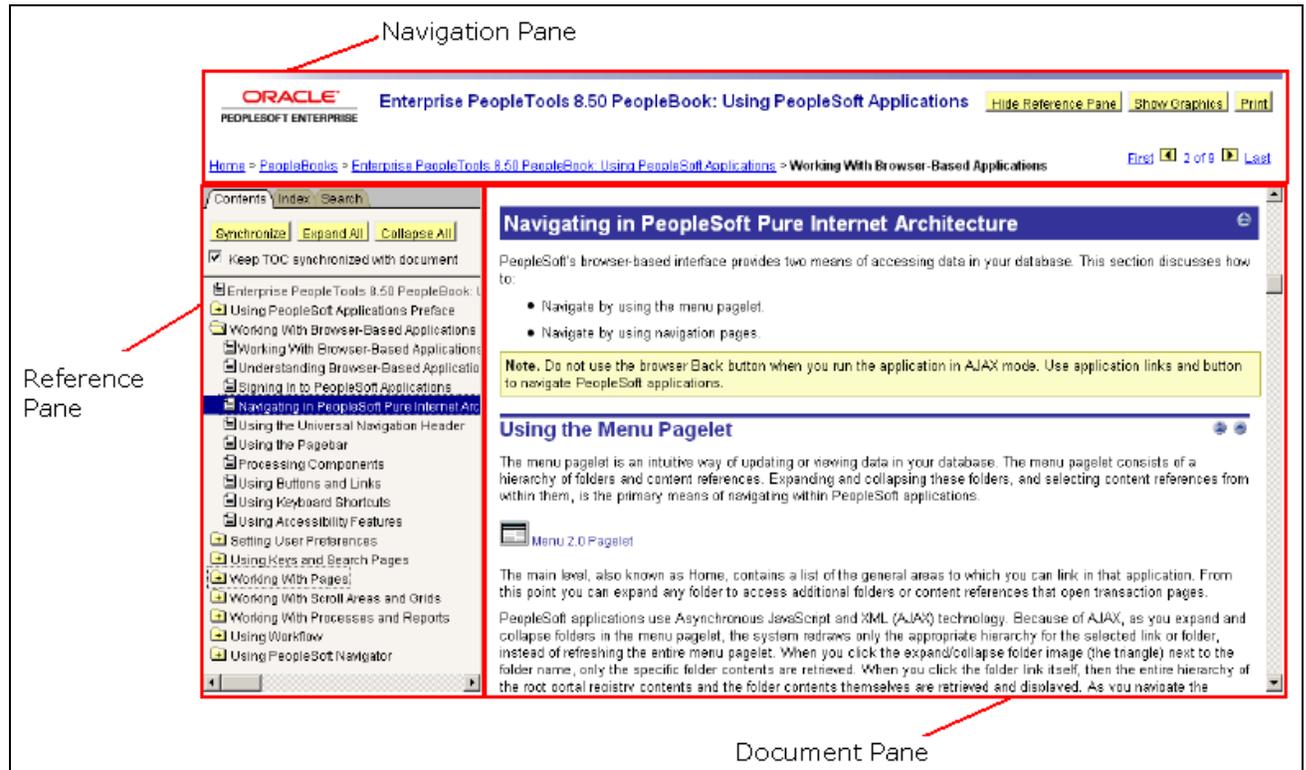
PeopleBook page with panes identified

Enabling the Reference Pane

If the reference pane (with the Contents, Index, and Search tabs) doesn't appear, click the Show Reference Pane button in the Navigation pane at the top of the browser. To hide the Reference pane, click the Hide Reference Pane button. If you have cookies enabled on your browser, your last Reference pane setting is remembered when you jump between books. Otherwise, jumping to a new book always hides the Reference pane (to speed page loading).

PeopleBook page with reference pane enabled

Navigating Between Books and Chapters

Use the navigation pane to view information about the current PeopleBook and to navigate between PeopleBooks or between chapters in the current PeopleBook.

Navigation Pane

Click the breadcrumb hyperlinks at the bottom of the navigation pane to access:

*   PeopleSoft Online Library home page Home, which allows you to navigate to other documentation types if your company has integrated or customized documentation.

*   PeopleBooks, allows you to select a book from within the library. Books in the library are divided by suite or product.

*   PeopleBook name, which identifies the PeopleBook you are currently viewing.

*   PeopleBook chapter name, which precisely identifies your location within the PeopleBook.
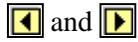
◀ and ▶	Click the Previous button or the Next button to go to the previous or next chapter in the book.

Note. These buttons move you to the previous or next chapter in the sequence in which the chapters are organized in the book, not (as with the browser's Forward and Back buttons) in the sequence in which you have opened the chapters.

First and **Last**	Click these links to go to the first and last chapter in a book, respectively.

Navigating Within a Chapter

Use the navigation features in the document pane to navigate within a chapter.

Click a cross-reference link to go to a related topic. These links typically appear in sentences that begin with the word *See* and following subtopic headings that contain the words *See Also.*

🔼	Click the Top button to go to the top of the current HTML page.
🔼	Click the Previous button to go to the beginning of the parent section.

Using the Table of Contents

Select the Contents tab in the Reference Pane to drill down to topics in the current PeopleBook.
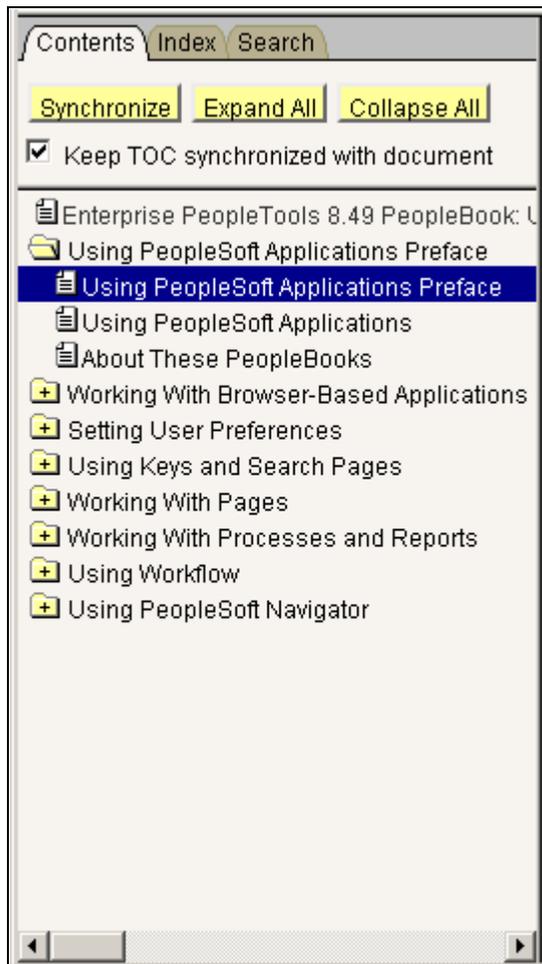
Reference Pane displaying Contents tab

	Click a closed folder icon to expand a chapter.
	Click an open folder icon to collapse a chapter.
	Click a section icon to open to the section.
	Click the Synchronize button to open the Table of Contents to the topic that currently appears in the Document pane.
	Click the Expand All button to open all the folders in the Table of Contents.
	Click the Collapse All button to close all the folders in the Table of Contents.
	Select this check box to automatically synchronize the Table of Contents. As you navigate through the chapters, the document pane and the reference pane will stay synchronized.
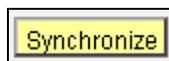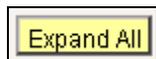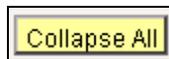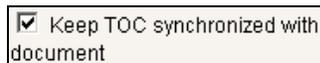
Using the Index

Select the Index tab to search a keyword index for the current PeopleBook.

To display an index topic, enter a keyword in the text box or scroll to the keyword and click it. The document appears at the associated topic, unless there are multiple topics.

If multiple topics are related to the keyword, a pop-up menu appears. Click the link for the topic that you want to access.

Searching the Hosted PeopleBooks Library

This section discusses how to:

- Perform a simple search.

- Perform an advanced search.

- Viewing search results.

Performing a Simple Search

In the Search tab of the reference pane, enter a word or phrase and select the search button. This search will search only the documentation for the relevant product/release combination. If those results are not sufficient, you can select a radio button on the result page and issue the search again, to search all of Oracle.com.

Example of hosted simple search page

To perform a simple full-text search, enter the text for which you want to search, and then press Enter or click the Search button. The results display in the document pane.

Performing an Advanced Search

The advanced search is helpful if too few or too many results were obtained from the simple search. This page allows you to filter the results using several methods. You must enter the words or phrase in one of the first 3 search fields, select any of the additional optional fields, then select the search button.
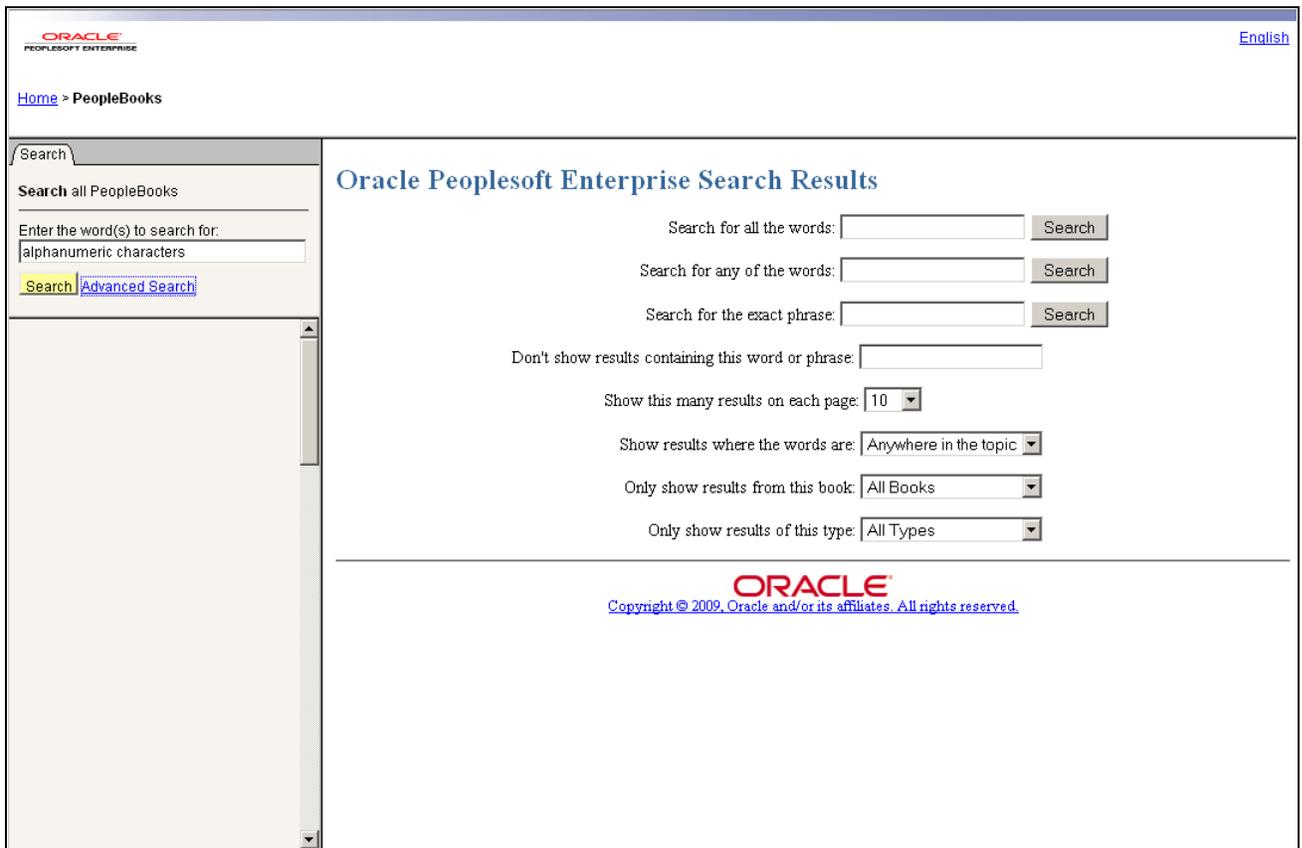
Example page of hosted PeopleBooks advanced search

Search for all the words:	By default, all search terms longer than 3 characters are surrounded by wildcards on both sides. For example, searching for intermedia also finds intermediate. Searching for sql or aq does not use wildcards, because those terms are 3 characters or less. If you include typical wildcard characters such as %, _, *, and ? in your search terms, they are interpreted as literal characters rather than wildcards.
Search for any of the words:	If the word you want might be known by more than one name, you can enter them in this search field. For example, select or query.
Search for the exact phrase:	Quotes are not required, and since all searches work the same for uppercase and lowercase terms, you do not need to enter a word in all capital letters.
Don't show results containing this word or phrase:	(Optional) Similar to the Boolean search NOT, any words or phrases entered in this field will be excluded from the search results.
Show this many results on each page:	(Optional) Expand the number of displayed search results by changing the selection from 10 (default), to 20, 50 or 100.

Show results where the words are:	(Optional) Select from the options: • Anywhere in the topic • In the topic title
Only show results from this book:	(Optional) You can select to search only the book you are in, or specify a book in the list. The alphabetical list contains all the books within the product line, for example if you were searching PeopleTools, the list would contain every PeopleTools PeopleBook by name.
Only show results from this type:	(Optional) If you included words like error or example in the search term to find specific kinds of information, you can leave these words out and use the filter choices in the result sidebar to find matches in specific kinds of topics. Types include Tasks, Concepts, Examples, Error Messages or Concepts.

Viewing Hosted Search Results

The Oracle PeopleSoft Enterprise Search Results page displays information about the current query, the total number of search results that were found, and the number of results on the current page.

Example of hosted search results page

If the top-ranked results contain information that's not relevant for you, you can filter the results in a number of ways. The sidebar on the right side of the results page lets you filter the results by information type (such as concepts, tasks, examples, error messages or glossary terms), job role (such as administration and application development), or by a specific book. Each topic in the results includes links to show only results from that book, or ignore results from that book. So you can limit the results to a single book when you think you are on the right track, or get rid of irrelevant hits if many results all come from the same book.

If you are searching for a keyword that is the same as a commonly used word, such as FROM, it is faster to use another method rather than sifting through thousands of matches. The Master Index has entries for keywords like these. For SQL, PL/SQL, and SQL*Plus keywords, a combined online quick reference lets you navigate to the definition.

 If you are still having difficulty finding the results you need, perhaps the information you want is not in this type of documentation. You can select a radio button to perform a search across all of Oracle.com, which includes white papers, product downloads, and documentation across all of Oracle's products.

Searching the PeopleSoft Online Library

This section discusses how to:

• Perform a simple search.

• Perform an advanced search.

• Viewing search results.

Performing a Simple Search

Select the Search tab to perform a full-text search of the current PeopleBook or of the entire PeopleBooks library.

Search tab with results

Note. The Search tab is context-sensitive. When you select this tab on the PeopleSoft Online Library home page, you search all documentation in the library. When you select this tab on the PeopleBooks page, you search all PeopleBooks in the library. When you select this tab in a particular PeopleBook, you search within that book only.

Important! The search feature is available only when you are connected to the PeopleSoft Online Library with HTTP (on a web server).

To perform a simple full-text search, enter the text for which you want to search, and then press Enter or click the Search button. The Search list box displays any topics that contain the text that you entered. Click the topic that you want to read.

The simple search form uses an "accrue" logic when searching. That is, it will find results that contain any or all of the terms that you entered, with priority given to documents that contain all or most of the keywords. The results appear sorted by book title, and then by score. Each results page displays 50 topics, titles only. To see titles and summaries, click the Show Summaries link. Book titles appear in the results when you search from the PeopleSoft Online Library or PeopleBooks Library home pages.

Note. Verity search syntax is not allowed in the simple search form. To perform syntax searches, use the Advanced Search page.

Performing an Advanced Search

Use the Advanced Search page to limit or expand your search to one or more documentation types or book titles. You can also define the type of search to perform and how you want to format the search results. Click the Advanced Search link on the Search tab to access the PeopleSoft Online Library: Advanced Search page.

PeopleBooks Library: Advanced Search page

Search for

Match	Select one of the following search modes:

- All words

  Only documents that contain all the keywords will be found. Do not use any Boolean operators such as AND or NOT.

- Any words

  Like the simple search form, this search uses an "accrue" logic to find documents that match any or all of the keywords, with priority given to those that contain all or most of them. Do not use any Boolean operators.

- Exact phrase

  When you use this mode, all search text is assumed to be part of one phrase. You do not need to wrap the text in quotes when you use this mode.

  Note. You can search for exact phrases in the other modes by wrapping the phrase in quotes.

- Query syntax

  Use this mode to take advantage of Verity's powerful search language, which includes common Boolean operators like AND and NOT, as well as more complex operators. For more information, follow the Help link on the Advanced Search page.

Limit by

Search title text only	Select this check box to the search text only in topic titles. This search will limit your results to only those topics for which you are searching.
Book Title	Click one or more titles in the list box (using Ctrl+click) to limit your search to those books only.
Product Line	Click one or more product line names in the list box (using Ctrl+click) to limit your search to those product lines only.

Results Formatting

Show titles only	Select this check box to hide the topic summaries in the search results. This option can save a lot of screen space when scrolling through many results.
Hits in titles take priority	Selecting this option (the default) sorts results meeting the search criteria within the title, before those without.

Hits per page	Select the number of topics that you want to appear on each results page. The default value is *10.*
Sort the results by	Use the list boxes to specify whether to sort the results by Score, Book Title, or Product Line. You can then specify secondary and tertiary sort criteria.
Show	Select additional information to appear in the results. For example, when you sort by Score and then by Book Title, you may want to see the book titles in the results. When you sort by Book Title, you may want to display book titles as headings, which is the default setting, or in the topic titles themselves.
	Note. When you sort by Score only, no additional information can appear.

Search Tips

Here are some basic guidelines for searching from the Advanced Search page:

- Enter terms in lowercase to find all term matches, regardless of capitalization.

  The search feature is case-sensitive. If you use mixed-case capitalization, the search feature finds only terms that match your exact capitalization.

- When using the Query syntax mode, enter words separated by spaces to search for a phrase.

  You do not need to enclose the phrase in quotation marks. This mode will find work stem varieties for the words in that phrase. For example, *set up* finds "set up," "setting up," "set ups," and so on.

- Enclose terms in double quotation marks only when you want the search feature to interpret the terms literally.

  When you do this, the search feature does not find word stem matches.

Viewing Search Results

The Search Results page displays a list of topic summaries, information about the current query, the total number of topics that were found, and the number of topics on the current page.

Search results from the Advanced Search page

Navigational links on this page include:
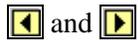
◀ and ▶	Click the Previous button or the Next button to go to the previous or next Search Results page.
First and **Last**	These links take you to the first and last pages of results, respectively.
Back to Search	This link takes you back to your last search.
	Note. Some browsers will not reload all the form criteria used in the last search.
Back to Library	Click this link to return to your last location in the PeopleSoft Online Library before jumping to the Advanced Search page.

Displaying and Printing Screen Shots and Graphics in PeopleBooks

In the document pane, you can display many of the graphics in Pop-up or Inline mode. The default Pop-up mode provides greater document loading and scrolling speeds because each graphic is represented by a small pop-up icon. In Inline mode, graphics appear at full size in the document pane. This mode is useful when viewing the PeopleBooks locally (when loading and scrolling speeds are not an issue) and with the browser window maximized.

Navigation Pane

Hide Graphics	Click to activate Pop-up mode.

Show Graphics	Click to activate Inline mode.
Print	Click to print the current file with graphics displayed in Inline mode and in the appropriate scale.

Important! If you use your browser's Print command, the graphics appear exactly as they appear on the screen: pop-up icons are not replaced with the actual graphics, and graphics are not scaled to fit on the printed page.

Document Pane

Click this pop-up icon in the document pane to display the graphic at full size in a separate window.

Chapter 4

Managing the PeopleSoft Online Library and PeopleBooks

This chapter provides an overview of the PeopleSoft Online Library and discusses how to:

- Manage the PeopleSoft Online Library.

- Manage full-text searching.

Understanding the PeopleSoft Online Library

This section discusses the:

- PeopleSoft Online Library website.

- Global level.

- Language level.

- Documentation type level.

- Book level.

The PeopleSoft Online Library Website

The PeopleSoft Online Library is a website that enables you to browse various types of PeopleSoft Enterprise documentation, including PeopleBooks and implementation guides. It also provides context- and language-sensitive online help for PeopleSoft Enterprise application users. The library is designed to be flexible so that you can easily add or remove content and control which documents users can search, browse through, or use as online help. This document describes how to install new PeopleSoft Enterprise documentation over an existing website and how to control access to individual documentation types and books.

To take advantage of the flexibility of the PeopleSoft Online Library, you must understand the hierarchical directory structure of the website and how it corresponds to the organizational levels of the documentation on the site.

The Global Level

The top directory of the website (which we'll call <docroot>) constitutes the *global* level of our library. At the global level are three HTML files: index.htm, f1search.htm, and helptest.htm.
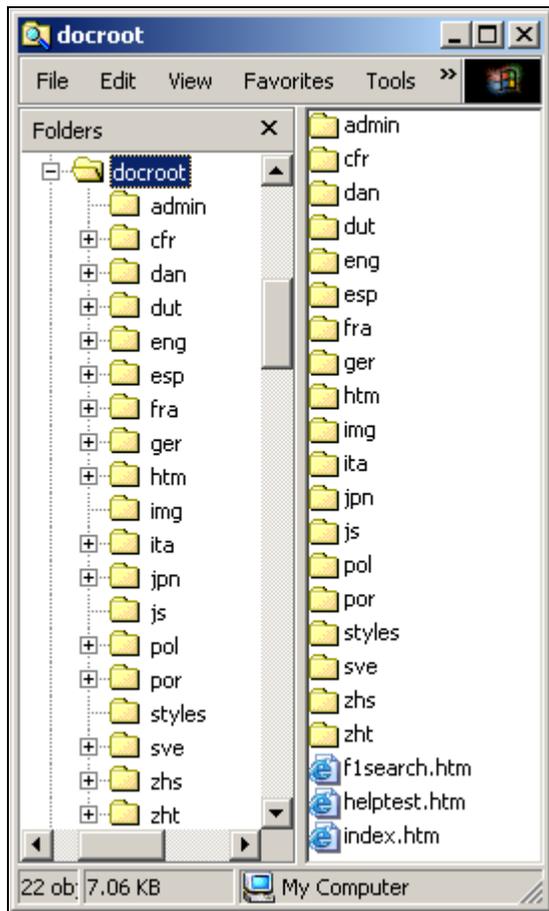
Global level of the PeopleSoft Online Library

When <docroot>/index.htm is opened by the browser, JavaScript logic for this page determines the browser's language setting and redirects the user to a PeopleSoft Online Library home page in that language, if it exists. If no language match is found, English is used as the default language.

The <docroot>/f1search.htm file processes online help requests from the PeopleSoft Enterprise applications. When help is requested from an application page a URL to <docroot>/f1search.htm is passed to the browser. The URL contains arguments that specify the help context ID and the user's preferred language. If that language exists on the PeopleSoft Online Library website, the documentation in that language is searched for a relevant help topic, and, if one is found, the corresponding page is opened. English is used as the default language if a preferred language match is not found.

The <docroot>/helptest.htm file is used for testing/troubleshooting online help functionality.

Utility Directories

Also at the global level are four utility directories (htm, img, styles, and js) that contain files that are used at the global level or that are shared by subsequent levels of the PeopleSoft Online Library.

- The htm directory contains common HTML files used in the PeopleSoft Online Library interface.

- The img directory contains graphic files.

- The styles directory contains cascading style sheet files.

- The js directory contains JavaScript files.

These utility directories appear at lower levels of the library site, too. While it's not important to list or describe most of the files in these directories, one thing is important to understand: At each level of the library is at least one JavaScript utility file that stores information about the structure of the level below. At the global level, the key JavaScript file is <docroot>/js/langs.js, which stores information about the languages that have been installed in the PeopleSoft Online Library.

See <u>Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Language Support, page 34.</u>

The Language Level

Below <docroot> are directories representing each installed documentation language: eng (English), fra (French), por (Portuguese), and so on. Each of these directories represents the *language* level of the website.
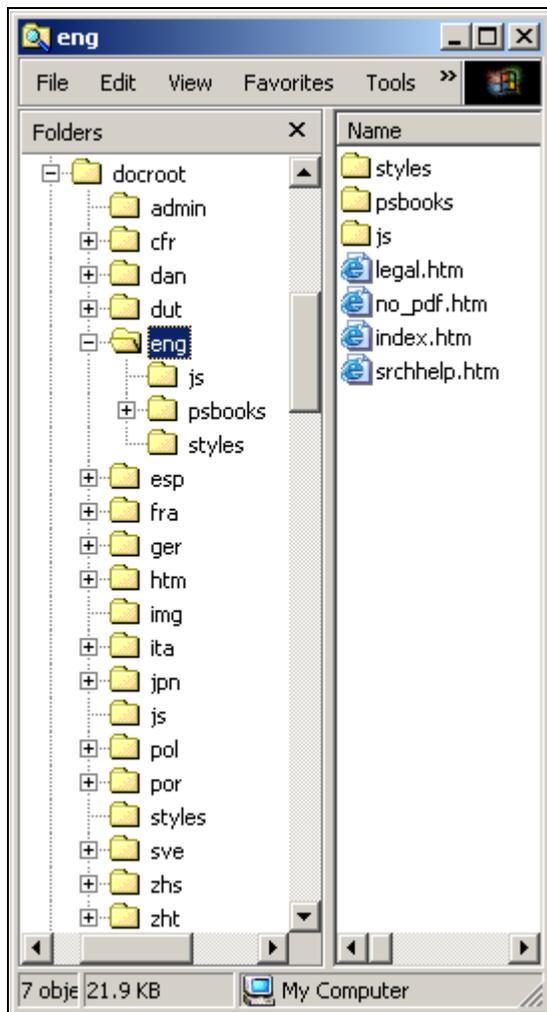
Language levels of the PeopleSoft Online Library

The language level is essentially the top of the PeopleSoft Online Library site as far as users are concerned. When a user navigates to <docroot>/index.htm, that user is redirected to the appropriate language directory, based on his or her browser language. The files at (and below) the language level are all language-specific: PeopleBooks and other content, website display labels, CSS stylesheets, accented character conversion routines, and so on.

Utility Directories

Like the global level, the language level also has utility directories that store files that are used at the language level or that are shared by subsequent levels of the PeopleSoft Online Library.

• The styles directory contains cascading style sheet files.

• The js directory contains JavaScript files.

   Information about the next organizational level below the global level (documentation type level) is stored in three separate JavaScript files.

   See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Documentation Types, page 35.

   The files are:

   • <docroot>/eng/js/colltypes.js, which specifies which documentation types can be full-text searched.

   • <docroot>/eng/js/doctypes.js, which specifies which documentation types appear on the PeopleSoft Online Library home page.

   • <docroot>/eng/js/helptypes.js, which specifies which documentation types support online help.

   Also in the language level js directory are several *labels.js files that contain translatable text variables used throughout the PeopleSoft Online Library site.

The Documentation Type Level

Within each language directory are subdirectories that each contains a specific type of documentation. For example, the <docroot>/eng/psbooks directory contains PeopleBooks, and the <docroot>/eng/dftie directory (if delivered) contains online help for self-service applications. Each of these directories represents the *documentation type* level.

Note. In the remainder of this document, we use eng (English) as the language directory in our example file paths.
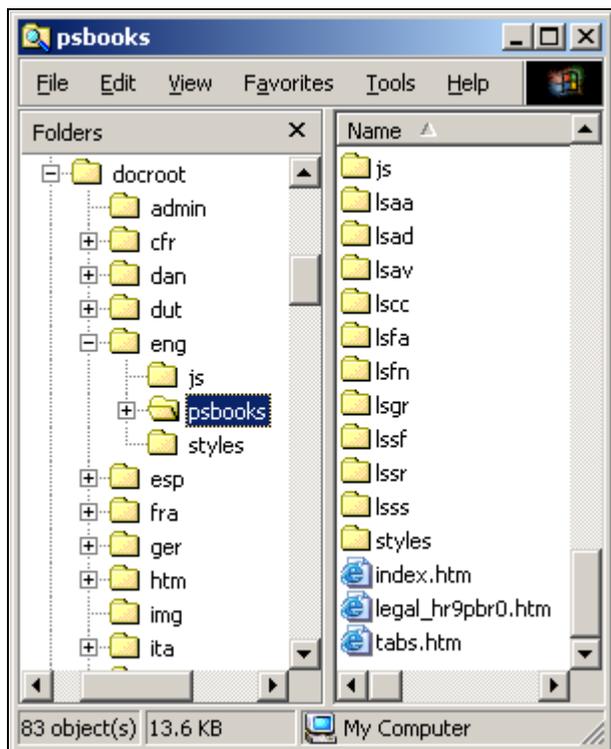
Documentation type level (PeopleBooks) of the PeopleSoft Online Library

The files stored at the documentation type level are used for the PeopleSoft documentation type home page, for PeopleBooks-specific copyright information, and to provide backwards compatibility with previous PeopleBooks versions.

Utility Directories

Like the language level, the documentation type level also has three utility directories that store files that are used at this level or that are shared by subsequent levels of the PeopleSoft Online Library:

* The img directory contains graphics files.

* The styles directory contains cascading style sheet files and information about the PeopleBook hierarchy.

    The hierarchy, and suite/categories for the books are controlled by two files:

    * TopTOCStyle.xml, which specifies the hierarchy or groupings that the books should be displayed on the PeopleBooks library page.

    * content.css contains the related stylesheet information.

- The js directory contains JavaScript files.

  Information in the next organizational level (book level) is stored in three JavaScript utility files:

  - <docroot>/eng/psbooks/js/booklist.js, which specifies which books in a documentation type appear on the documentation type home page.

  - <docroot>/eng/psbooks/js/helplist.js, which specifies which books in a documentation type are to be used for context sensitive help.

  - <docroot>/eng/psbooks/js/colllist.js, which specifies which books in a documentation type can be full-text searched.

- The coll directory contains search collections that can be used by engines such as Verity for searching the website.

  This directory is created or recreated when you install PeopleBooks or use the PSOL Manager utility.

  See <u>Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Full-Text Searching, page 40.</u>

The Book Level

Below the documentation type level are directories for the individual "books" that make up the documentation type. For example, the <docroot>/eng/psbooks/fapy directory contains the *PeopleSoft Enterprise Payables PeopleBook.*
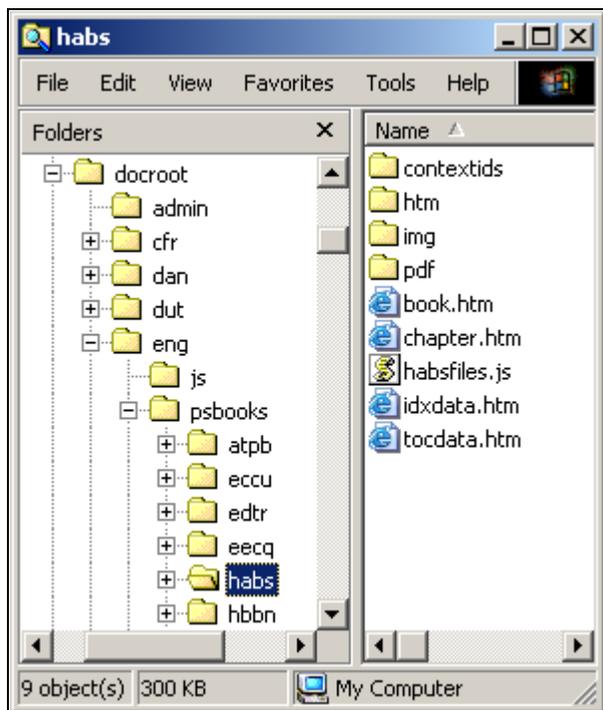
Book level of the PeopleSoft Online Library

The files found at the book level comprise both the content and the online interface of an individual PeopleBook. Book.htm and chapter.htm are framesets that display the content of the book. Idxdata.htm and tocdata.htm contain the index and table of contents of the book. The JavaScript file (*xxxx*files.js) contains an array that lists the order of the individual HTML files that make up the content of the book. This array is used by the navigation features of the book interface.

Content Directories

Three of the subdirectories below the book level store content-related files:

• The htm directory contains the individual HTML files that make up the content of the book.

• The img directory contains graphics referenced by the HTML files.

• The pdf directory contains Adobe Acrobat files containing other book content.

Utility Directories

At the book level is only one utility directory. The contextids directory contains JavaScript files for online help support.

Managing the PeopleSoft Online Library

This section provides an overview of PeopleSoft Online Library management and discusses how to:

• Install new PeopleSoft Enterprise documentation.

• Manage language support.

• Manage documentation types.

• Manage individual PeopleBooks.

Understanding PeopleSoft Online Library Management

When additional documentation is made available, you may want to merge that documentation with your existing PeopleSoft Online Library (PSOL) site. You accomplish this by installing the new documentation CD over your existing documentation. All the necessary JavaScript utility files are updated to reflect all the content (new and old) on the website.

You can also edit the PSOL Manager utility files manually to reflect changes that you've made to your website and to limit access to it. For example, for documentation types and book titles, you can control whether users can browse (by way of a home page table of contents), perform a full-text searchable, or used for online help.

Installing New PeopleSoft Enterprise Documentation

Before installing new or additional PeopleSoft Enterprise documentation, decide if you want to combine your existing documentation with the new documentation. If so, you should copy your existing PeopleSoft Online Library site to the location where you plan to install the new documentation. Then, simply install the new documentation to the same location. Newer files overwrite the older files of the same name.

See your installation guide.

Managing Language Support

PeopleSoft Online Library language support is controlled by the <docroot>/js/langs.js file, which defines an array of language codes and their corresponding language names. Here is a sample of the JavaScript code:

```
languages = new Array(
 "cfr||fc||Fran&ccedil;ais du Canada",
 "dut||nd||Nederlands",
 "eng||en||English",
 "esp||es||Espa&ntilde;ol",
 "fra||fr||Fran&ccedil;ais",
 "ger||de||Deutsch",
 "ita||it||Italiano",
 "por||ps||Portugu&ecirc;s",
 "zhs||zh||Simplified Chinese"
 );
```

Each of the array elements contains three values, separated by double pipes ("||"): the language code (also the language directory name), the browser language code, and the language name as it should appear in the PeopleSoft Online Library. This array is used by the PeopleSoft Online Library home page (<docroot>/eng/index.htm) and the PeopleBooks Library home page (<docroot>/eng/psbooks/index.htm) to display a table of alternate language links that link you to the corresponding home page in a new language.

Alternate language links

The languages array is also used during a PeopleSoft Enterprise application help request to try and match the help documentation language to the language of the user.

If you want to disable one or more languages in the PeopleSoft Online Library:

1. Open <docroot>\js\langs.js for editing.

    The file text looks something like this:

    ```
    languages = new Array(
     "cfr||fc||Fran&ccedil;ais du Canada",
     "eng||en||English",
     "esp||es||Espa&ntilde;ol",
     "fra||fr||Fran&ccedil;ais"
     "dut||nd||Nederlands",

    );
    ```

2. To disable support for an installed language on your site, precede the appropriate line with a double slash
    (//).

    Here's an example (new text in bold):

    ```
    languages = new Array(
     "cfr||fc||Fran&ccedil;ais du Canada",
     "eng||en||English",
     "esp||es||Espa&ntilde;ol",
     "fra||fr||Fran&ccedil;ais",
     //"dut||nd||Nederlands",

    );
    ```

3. Remove the trailing comma from the last uncommented line in the array definition.

    Here's an example (deleted text in strikethrough):

    ```
    languages = new Array(
     "cfr||fc||Fran&ccedil;ais du Canada",
     "eng||en||English",
     "esp||es||Espa&ntilde;ol",
     "fra||fr||Fran&ccedil;ais",
     //"dut||nd||Nederlands",

    );
    ```

4. Save the file.

Note. The order of the array elements determines the order of the language links on the home pages, with the exception of *Francais du Canada.* For formatting purposes, this link always appears in the third table column or last in the list.

Also, the Asian language link text is actually represented by graphics (located in <docroot>/img) for reasons of character set compatibility. Special JavaScript code is available on the home pages (home_nav.htm) to deal with these exceptions.

Managing Documentation Types

For each documentation type in a particular language level in the PeopleSoft Online Library, you can enable or disable it for three kinds of functionality: browsing, online help, and full-text searching.

Browsing

To enable browsing as a documentation type, it should appear on the PeopleSoft Online Library home page.
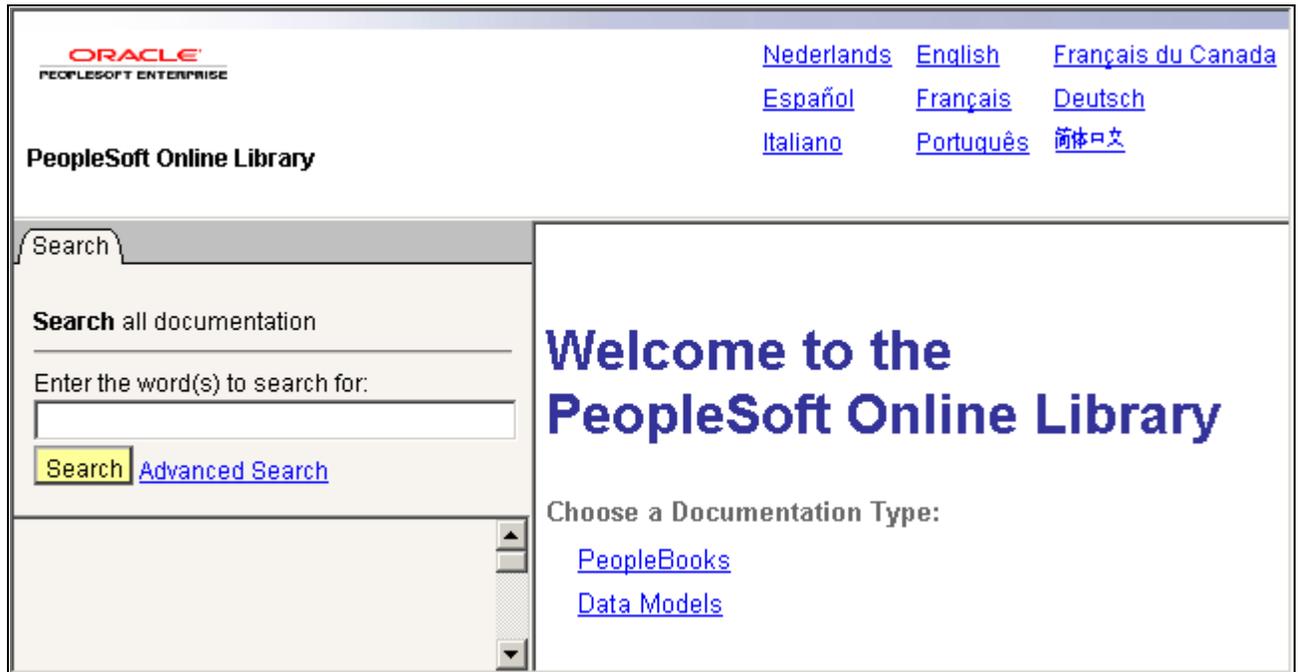
Documentation types that appear on the PeopleSoft Online Library home page

Which documentation types appear on the PeopleSoft Online Library home page is controlled by the <docroot>/eng/js/doctypes.js file, which defines an array of documentation type file paths and their corresponding display names. In each line, two values are separated by double pipes ("||"): the directory name and the display name of the documentation type.

```
doctypes = new Array(
 "psbooks||PeopleBooks",
 "hrms_9.1_data_models||Data Models"
);
```

The process of adding or disabling browsing support for a documentation type in the array is similar to adding or disabling language support.

•   To disable (hide) a documentation type, precede it with a double slash (//).

•   To add a type, add a new line to the array declaration (before the closing parenthesis).

    Remember that the last element in the array must *not* be followed by a comma.

Context Sensitivity

At this level of the PeopleSoft Online Library hierarchy, you not only control which documentation types are browsable, but also you control which documentation types are available as online help. You do this by editing the <docroot>/eng/js/helptypes.

The syntax of the helptypes.js file is similar to that of doctypes.js. All books in the documentation types that are listed in helptypes.js can be searched for a matching help topic during an online help request.

Note. If you add a documentation type to helptypes.js, a file called helplist.js must exist in a js directory below the top level of the documentation type (<docroot>/eng/eut/js/helplist.js) or the help logic will fail.

Searching

The syntax of the colltypes.js file is also similar to that of doctypes.js. The documentation types that are listed in colltypes.js are available as searchable documentation types on the PeopleSoft Online Library Advanced Search page.

Managing Individual PeopleBooks

You can remove book titles from the PeopleBooks library table of contents, disable them as online help, or remove the books from the search collections by editing three JavaScript files. The files that control these functions are:

- <docroot>/eng/psbooks/js/booklist.js — controls the display of book titles on the table of contents, so that users can browse through the list of available PeopleBooks.

- <docroot>/lang/psbooks/styles/TopTOCStyle.xml — controls the display of the book hierarchy or book suites on the PeopleBooks library.

- helplist.js — controls context sensitivity, allowing users to access the books through online help in the application.

- colllist.js — controls the availability users to search a book when using the advanced search options.

Browsing

The ability to browse through a list of available books is controlled by two primary means. The booklist.js controls the display of books on the table of contents, and the TopTOCStyle file controls how they display.

The syntax of the booklist.js doesn't contain an explicit array declaration, only array element assignments. Here is some sample JavaScript code from booklist.js:

```
booknames[booknames.length]="psbooks/tpsq||Enterprise PeopleTools 8.50 PeopleBook:⇒
 PeopleSoft Query";
booknames[booknames.length]="psbooks/tsum||Enterprise PeopleTools 8.50 PeopleBook:⇒
 PeopleSoft Setup Manager";

function getTitle(strProdCode, strDocType) {
 strProdCode = strProdCode.toLowerCase(); ...
```

The lines preceding the function getTitle declaration are the array assignment lines that define the PeopleBook titles that users are able to browse in the library.

To remove a title from the PeopleBooks library home page, comment it out by preceding that line with a double slash (//). To add a book however, you must also add it to the TopTOCStyle.xml file which controls the category hierarchy of book titles on the home page. If you simply add a book title to the booklist.js, helplist.js and colllist.js JavaScript files it will appear at the bottom underneath the categorized book hierarchy list.

The display of the book hierarchy and grouping/categories on the PeopleBooks library page is controlled by the TopTOCStyle.xml file in conjunction with the stylesheet in the content.css file. Both TopTOCStyle.xml and content.css files are located in the lang/psbooks/styles directory.

The syntax of the TopTOCStyle.xml file consists of two elements:

Element Type	*Attributes*
Heading element	Contains book elements and text data for category title. The following attributes are available: • class: Specify CSS class that is defined in content.css • style: CSS style can be specified here without using class defined in CSS file
Book element	The following attributes are allowed: • bookcode (required): Specify book code to be listed. • prefix (optional): This value is added in front of the book title. • class: Specify CSS class that is defined in content.css • style: CSS style can be specified here without using a class defined in content.css file. • sortas: This value is used for sort to list book titles if it exists. This is required for Japanese books.

The following example of TopTOCStyle.xml illustrates PeopleBooks hierarchy and categories for Financials.

```
− <top_toc>
  − <heading expandable="no" class="SUBTOPIC">
      <book bookcode="atpb"/>
      <book bookcode="tupa"/>
      <book bookcode="tgst"/>
    </heading>
  − <heading class="TOPICHEADING1">
      FSCM PeopleBooks
      <book bookcode="fspf"/>
      <book bookcode="ecmt"/>
      <book bookcode="eecp"/>
      <book bookcode="eccu"/>
      <book bookcode="edtr"/>
    − <heading class="TOPICHEADING2">
        Financial Management Solution
        <book bookcode="ffpp"/>
        <book bookcode="fsgl"/>
      − <heading class="TOPICHEADING3">
          Financial Core
          <book bookcode="fscc"/>
          <book bookcode="fmpy"/>
          <book bookcode="fglr"/>
          <book bookcode="fapy"/>
          <book bookcode="fare"/>
        − <heading class="TOPICHEADING4">
            Treasury/Cash
            <book prefix="-" bookcode="fsbk"/>
            <book prefix="-" bookcode="ftcm"/>
            <book prefix="-" bookcode="fttr"/>
            <book prefix="-" bookcode="fgat"/>
            <book prefix="-" bookcode="ftrm"/>
          </heading>
        </heading>
      − <heading class="TOPICHEADING3">
          Asset Life Cycle Management
          <book bookcode="falm"/>
          <book bookcode="famp"/>
```

Sample of TopTOCStyle.xml file showing nested category headings

Context Sensitivity

You can disable a title from online help functionality by editing the <docroot>/eng/psbooks/js/helplist.js file just as you would booklist.js (as described in the previous section).

The syntax of the helplist.js file is identical to that of booklist.js, and you can edit it in the same way. The books that are listed in helplist.js are searched for a matching help topic during an online help request.

```
helpnames[helpnames.length]="psbooks/famp||PeopleSoft Enterprise Asset Management⇒
 9.1 PeopleBook";
helpnames[helpnames.length]="psbooks/fsbk||PeopleSoft Enterprise Banks Setup and⇒
 Processing 9.1 PeopleBook";
helpnames[helpnames.length]="psbooks/sbil||PeopleSoft Enterprise Billing 9.1⇒
 PeopleBook";
```

Note. The <docroot>/eng/js/helptypes.js file only specifies that books of a particular documentation type *can* be used for context sensitivity. But in <docroot>/eng/psbooks/js/helplist.js, you must specify every individual book that is to be used for context sensitivity.

Searching

The psbooks/js/colllist.js file controls which PeopleBooks appear in the list of book titles on the Advanced Search page. The syntax of the colllist.js file is slightly different from the previous two discussed. In addition to a path and title name, a "collections" path (shown in bold) must be defined in each string:

```
colllist[colllist.length]="psbooks/ccrm||PeopleSoft Enterprise CRM 9.1 Application⇒
 Fundamentals PeopleBook||eng/psbooks/ccrm/coll||";
colllist[colllist.length]="psbooks/cbom||PeopleSoft Enterprise CRM 9.1 Business⇒
 Object Management PeopleBook||eng/psbooks/cbom/coll||";
colllist[colllist.length]="psbooks/ccal||PeopleSoft Enterprise CRM 9.1 Call Center⇒
 Applications PeopleBook||eng/psbooks/ccal/coll||";
```

You can prevent a PeopleBook title from appearing on the Advanced Search page by preceding it with a double slash. To disable PeopleBook titles for searching, edit the <docroot>/eng/psbooks/js/colllist.js file just as you would booklist.js. All lines must end with a semicolon.

Important! The original purpose of the colllist.js file has been deprecated. It is no longer used to point to individual book collections. Now, only one collection is built per documentation type. However, the colllist.js file is still used to provide book title information when building a PeopleBooks search collection. The syntax of the file must be as shown above, even though the "coll" directories no longer exist.

To keep a particular PeopleBook from being included in a search collection, you could temporarily rename its htm folder before starting the collection build. To keep particular files from being included, you could temporarily rename them with a different file extension before starting the build. These solutions take advantage of the regular expression that the collection builder uses to find the PeopleBooks HTML files.

See Chapter 5, "Customizing the PeopleSoft Online Library," Integrating Searching, page 50.

Managing Full-Text Searching

This section provides an overview of the PeopleSoft Online Library full-text search capabilities and an overview of the PSOL Manager Utility.

See Chapter 5, "Customizing the PeopleSoft Online Library," Integrating Searching, page 50.

Understanding PeopleSoft Online Library Full-Text Searching

You can rebuild the Verity search collections used for full-text searching. You can add your own documentation to the PeopleSoft Online Library and make it, as well as PeopleBooks, searchable. Full-text search capabilities include:

- The system builds only one collection per documentation type, which eliminates the possibility of reaching the Verity upper limit of 128 collections when searching.

- You can add META tags to the HTML content files that define custom search fields and values. These search fields can then be used as search filters on the PSOL Advanced Search page.

Enabling PSOL Manager Utility

The PSOL Manager Utility is delivered with PeopleBooks when you install it. Instructions for enabling and using the utility, creating search collections, changing the PSOL Manager password, and specifying trusted clients are included in your PeopleTools install instructions.

If you create new documentation, or customize existing documentation, then you should recreate the search collection, so that users can search the desired set of books.

See *Enterprise PeopleTools 8.50 Installation for <your database platform>,* Appendix: Installing PeopleBooks, Administering PeopleBooks.

Chapter 5

Customizing the PeopleSoft Online Library

This chapter provides an overview of documentation integration and discusses how to integrate customized documentation into the library.

Understanding Documentation Integration

Just as you can add new PeopleSoft Enterprise documentation to an existing PeopleSoft Online Library, you can also integrate customized documentation into the site. This documentation may be preexisting internal documentation or new content that you've written to supplement PeopleBooks.

We do not encourage you to modify existing PeopleBooks files or to use a copy of an existing PeopleBook to make your changes. Although tempting at first, this approach can lead to substantial overhead for you, because every change you make to delivered content may render the table of contents or keyword index obsolete. Updating a PeopleBook table of contents and keyword index is a time consuming, manual task. Also, consider that:

• PeopleSoft Enterprise documentation that is delivered with a service pack overwrites the existing documentation.

• To keep pace with new browsers and web servers, Oracle might need to modify JavaScript code and content files to accommodate different document object models.

By keeping customized documentation in a completely separate directory at the documentation type level, you avoid these issues but can still enable context sensitivity and searching. Also, you don't have to adhere to the PeopleBooks format and layout; instead, you can choose any editor and any layout that you prefer.

You decide if your documentation will be accessible via the PeopleSoft Online Library home page, and you decide whether to establish context sensitivity and search capabilities.

Integrating Personalized Documentation into the Library

This section discusses how to integrate:

• Browsing

• Context sensitivity

• Searching

Integrating Browsing

To allow users to browse through your documentation in the library:

1. Create a new documentation type folder below the appropriate language directory in the library site.

   For example: <docroot>/eng/my_psbooks or <docroot>/eng/internal policies

2. Add the new documentation type to <docroot>/eng/js/doctypes.js.

   See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Documentation Types, page 35.

3. Locate the documentation files in the new directory.

4. Create (or rename) a home page called index.htm at the top directory level of the documentation type.

   This step ensures that the automated link to your documentation from the PeopleSoft Online Library home page works. If you already have a home page that you don't want to rename, you can insert JavaScript into index.htm to automatically redirect users to your home page.

Note. If you add a book to booklist.js, helplist.js and colllist.js, it will appear at the bottom of the categorized book list area, if you want to integrate the book into the hierarchy or categories, you need to add it to the TopTOCStyle.xml file.

Integrating Context Sensitivity

Any custom documentation in the PeopleSoft Online Library can be used as context-sensitive help for PeopleSoft Enterprise applications. If you have documented the features and uses of an application that you have modified or built, you can ensure that your users see that documentation when they call help from the application.

Preparing and enabling your documentation for context sensitivity requires more steps than adding a link to your documentation on the PeopleSoft Online Library home page. You must adhere to certain directory structures and file naming conventions. You might also need to add anchors to your documentation.

Understanding Context Sensitivity

Later we explain how to set up context sensitivity. But before you read that section, you may want to understand what actually happens during a help request. Understanding the reasoning behind the steps involved in enabling online help might aid you in troubleshooting if your context sensitivity doesn't work as expected.

When you request help from your application, the software generates a URL and passes it to your default web browser. This URL is generated by resolving two variables into a string value stored in the system. Here is an example of the syntax of the string, with variables wrapped in percent signs (%):

```
http://docroot/f1search.htm?ContextID=%CONTEXT_ID%&LangCD=%LANG_CD%
```

We discuss instructions for setting the value of the system help string as part of the discussion about installing PeopleBooks.

See your installation guide.

You can see that the string is a URL pointing to the f1search.htm page, which is in the <docroot> level of the library site. During the help call, the variables are resolved as follows:

- %CONTEXT_ID% is replaced with the name of the page or form from which help is called.

- %LANG_CD% is replaced with the user's preferred language code, for example ENG (English) or FRA (French).

Using the preceding syntax example, if help is called from the PeopleSoft Enterprise Components Options page by a German user, the resulting URL looks like this (resolved values in bold):

```
http://docroot/f1search.htm?ContextID=PSOPTIONS&LangCD=GER
```

When the help URL is passed to a browser, the f1search.htm page is opened, and the JavaScript logic inside uses the two passed arguments (Context ID and LangCD) to load the appropriate context ID lookup files. These files map valid application context IDs to locations in the documentation. The lookup file contents are searched and, when a match is found for the ContextID value, f1search.htm redirects the browser to the related location. If multiple matches are found, a pop-up window displays a list of help topic links from which the user can choose.

Because of the depth of the PeopleSoft Online Library directory structure, the process of loading the lookup files is complex. The following JavaScript sequence of events occurs when f1search.htm is opened:

1. Validate the LangCD value passed to f1search.htm against <docroot>/js/langs.js to see if the preferred language exists in the library.

   If not, substitute ENG (English).

2. Once the language (<langdir>) is determined, load <langdir>/js/helptypes.js to see which documentation types are enabled as context-sensitive help.

3. For each path (<typepath>) found in helptypes.js, load <langdir>/<typepath>/js/helplist.js to determine which books within this documentation type are enabled for context sensitivity.

4. For each book (<bookpath>) found in helplist.js, load <langdir>/<typepath>/<bookpath>/contextids/*x*.js, where *x* is the first character of the ContextID value passed.

The following example assumes that you have PeopleTools PeopleBooks installed and that your internal documentation is integrated as a separate documentation type:

1. A user with the language preference English clicks help on the USER_PREF page.

2. The following URL is passed to f1search.htm:

   ```
   http://docroot/f1search.htm?ContextID=USER_PREF&LangCD=ENG
   ```

3. The language code of the user's preferred language is validated against <docroot>/js/langs.js to see if that language exists in the library.

   ```
   <docroot>/js/langs.js:

     languages = new Array(
      "cfr||fc||Fran&ccedil;ais du Canada",
      "eng||en||English"
     );
   ```

   See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Language Support, page 34.

4. Once the language (<langdir>) is determined, <langdir>/js/helptypes.js is loaded.

    eng/js/helptypes.js:

    ```
    helptypes = new Array(
     "psbooks||PeopleBooks",
     "my_documentation_type||My Documentation"
    );
    ```

    See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Documentation Types, page 35.

5. For each path (<typepath>) found in helptypes.js, <langdir>/<typepath>/js/helplist.js is loaded.

    eng/psbooks/js/helplist.js:

    ```
    helpnames[helpnames.length]="psbooks/pt||Enterprise PeopleTools 8.50 PeopleBook:⇒
    Security Administration";

     eng/my_documentation_type/js/helplist.js:
      helpnames[helpnames.length]="my_documentation_type/my_pt_book||Internal⇒
    Document - Oroz Security Policies";
    ```

    See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Context Sensitivity, page 39
    .

6. For each book (<bookpath>) found in helplist.js, <langdir>/<typepath>/<bookpath>/contextids/*x*.js is loaded, where *x* is the first character of the ContextID value passed to f1search.htm.

    ```
    eng/psbooks/pt/contextids/j.js:
      bookmarks[bookmarks.length] = "USER_PREF||psbooks/pt/htm/ptcom001.htm#F1ID_Job_⇒
    Data1";
      bookmarks[bookmarks.length] = "USER_PREF||psbooks/pt/htm/ptcom001.htm#F1ID_Job_⇒
    Data2";
    ...

    eng/my_documentation_type/my_pt_book/contextids/j.js:
      bookmarks[bookmarks.length] = "USER_PREF||my_documentation_type/my_pt_book/htm⇒
    /xxxxx.htm#MYF1ID_USER_PREF";
    ```

7. Once all lookup files are searched and a match is found for the context ID, the browser is redirected to the location specified in the lookup file.

    If multiple matches result, as in this example, a pop-up window displays the choices and the user can decide which help topic to select.
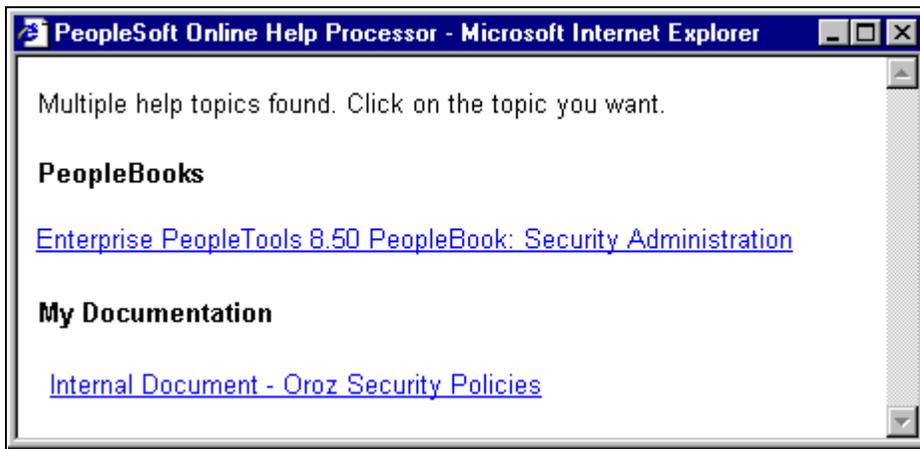
Pop-up window displaying available delivered & custom help topics

Preparing Your Documentation

In a help lookup file, a context ID (application page or panel name) can be mapped to a particular location in your documentation. That location can be a file name, or a file and anchor name. Whether you want to specify an anchor name depends on the length of your documentation files. If you document only one application page per HTML file, anchors are probably not necessary. If you document many application pages in an HTML file (as we do in PeopleBooks), however, you definitely need anchors. Anchors place users as close to their requested information as possible when they call help.

Another good reason for using anchors to denote help documentation locations is that they enable an automated process to build lookup files for you. In the PeopleBooks HTML files, we name every help anchor as *F1ID_* followed by the name of the application page that is being documented. For example, at the beginning of the help topic on the PeopleSoft Enterprise PeopleTools options page (PSOPTIONS), the following anchor tag is inserted: <A NAME="F1ID_PSOPTIONS"></A>. We then run a PERL script that parses our HTML files for *F1ID_* anchors and builds the lookup files automatically.

Setting Up the Utility Files

During a help call, the various JavaScript utility files are found and loaded in a strict order. For the help logic to work properly, all the necessary directories and files must exist.

*   helptypes.js

    Start by editing <docroot>/<langdir>/js/helptypes.js. Add a line for the new documentation type to be used as help. The syntax is:

    ```
    "<doctype_dir>||<doctype_name>"[,]
    ```

    A comma is not required after the last array assignment. For example, if you added your own documentation type to helptypes.js, it might look like this (in bold):

    ```
    helptypes = new Array(
     "psbooks||PeopleBooks",
     "my_documentation_type||My Documentation"
    );
    ```

    See <u>Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Documentation Types, page 35.</u>

- helplist.js

  Make sure a js directory exists below your documentation type directory. Then, you must place a file named helplist.js in that directory. If you don't already have one, copy psbooks/js/helplist.js and delete the contents. Add a line for every book that will be used as help. In this example for Oroz Corp the syntax is:

  ```
  helpnames[helpnames.length]="<doctype_dir>/<book_dir>||<book_title>";
  ```

  For example, if you created supplemental documentation for your General Ledger and Accounts Payable PeopleBooks for Oroz Corp, then your helplist.js file might have the following lines:

  ```
  helpnames[helpnames.length]="my_documentation_psbooks/my_documentation_gl
  ||Supplemental Oroz Corp General Ledger";
  helpnames[helpnames.length]="my_documentation_psbooks/my_documentation_ap
  ||Supplemental Oroz Corp Payables";
  ```

  Important! The help call logic requires that the HTML content files reside exactly one folder level below each book folder defined in helplist.js. Using the preceding code example, the content files would have to reside in oroz_psbooks/oroz_gl/htm and in oroz_psbooks/oroz_ap/htm.

  See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Individual PeopleBooks, page 37.

- Lookup Files

  For every book directory that you specify in helplist.js, you must create a "contextids" subdirectory. In these subdirectories are 37 files: a.js, b.js., c.js, and so on up to z.js, pce.js (used for PeopleCode) and 0.js, 1.js, 2.js, and so on up to 9.js. These are the context ID lookup files. The best way to create these directories and files is to copy them from a PeopleBooks folder. Then, edit the files so that they contain only this line:

  ```
  arraycount[arraycount.length] = bookmarks.length - 1;
  ```

  Your lookup files are now ready to be populated with valid context ID strings.

Populating the Lookup Files

A help lookup file contains lines of JavaScript code that assign strings to an array. Each string contains the context ID for a help topic and the relative path to the help topic, separated by two pipes ("||"). The name of the lookup file reflects the first character of all the context IDs stored inside. Here is an example of the syntax of these files:

```
bookmarks[bookmarks.length] = "<contextID1>||<path_to_file>#<anchor_name1>";
bookmarks[bookmarks.length] = "<contextID2>||<path_to_file>#<anchor_name2>";
...
bookmarks[bookmarks.length] = "<contextIDN>||<path_to_file>#<anchor_nameN>";

arraycount[arraycount.length] = bookmarks.length - 1;
```

A context ID corresponds to the name of the application page at which the user clicks help. This context ID is used by f1search.htm to redirect the user to the correct help topic. Therefore, to create a context-sensitive link for a new application page, MY_APPS, you would insert this line into an m.js file:

```
bookmarks[bookmarks.length] = "MY_APPS||my_doc_type/my_hr_book/htm/intro_to_
hr.htm#my_anchor";
```

Adhere to these conventions when populating lookup files:

- The first letter of the context ID in the string must correspond to the name of the lookup file.

  MY_APPS would reside in m.js; JOB_DATA1 would reside in j.js.

- All files must end with the arraycount line (shown in bold in the preceding example), even if they contain no context ID strings.

- The context ID lines in the lookup file must be sorted alphabetically.

- All lookup files for a specific book must reside in the corresponding \contextids folder for that book.

Populating a Chapter List File

Each PeopleBook folder contains an xxxxfiles.js file, this file consists of JavaScript array member assignments. Each line corresponds to a "chapter" file that makes up the PeopleBook. Each line also contains the title of that chapter. This file is used internally for the PeopleBook navigation controls.

See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," The Book Level, page 32.

The chapter list file is also used during the online help call if a context ID is found in more than one lookup file. In this case, the titles of the destination files are pulled from their corresponding chapter list files; they appear in the online help pop-up window as links.

If any possibility exists that the context IDs in your custom documentation will also be found in PeopleBooks, or found in multiple locations in your own documentation, then you must create chapter list files for your documentation. Certain browsers will generate an error if a chapter list file cannot be found for any of the books found to contain a matching help topic.

You can copy an xxxxfiles.js file from any PeopleBook folder and modify it to match your files and file titles.

Tips and Tricks

When you document a new application, you will want to edit the helptypes.js file and create a helplist.js, chapter list, and lookup files, as described previously. But, if you have documented changes to a *delivered* application, then you have some other choices:

- If your application modifications are minor, you can insert at the appropriate PeopleBooks help topic a link that jumps to your custom documentation.

   In this case, you probably don't need to enable your document for online help.

- If your application modifications are major and the PeopleBooks documentation for an application page is now largely obsolete, you may want to disable the PeopleBook help topic as well as enabling your own.

  To do this, find the proper context ID in the PeopleBook lookup files and comment it out by placing a double slash (//) before the line, like this:

```
//bookmarks[bookmarks.length] = "RA_BUS_UNIT_GBL||psbooks/cmkt/htm/cmkt04.htm#F1ID_⇒
RA_BUS_UNIT_GBL";
```

Note. Remember that the delivered PeopleBooks files and lookup files will be overwritten during the next PeopleBooks upgrade. Any changes that you make to delivered files may be lost.

Integrating Searching

When you integrate new content into the PeopleSoft Online Library, you may want to rebuild the PSOL Verity collections so that you can search the new content.

See

Understanding Searching

Before enabling your documentation to be searchable, you should understand how your documentation type will appear in the search drop-down lists and how Verity finds the field values that help limit a search.

First, the scope of the search forms in the PeopleSoft Online Library is context sensitive. That is, a different search scope is permitted, depending on how you navigated to the search form. For example, at the PeopleSoft Online Library home page, a search form appears in the lower left frame. If you use this form, all of the documentation types in the entire library (those specified in <docroot>/<langdir>/js/colltypes.js) are searched. However, searching at the *PeopleBooks* home page searches only within PeopleBooks (<docroot>/<langdir>/psbooks/js/colllist.js). You can adjust of scope by modifying the JavaScript, which is inside the forms, that interprets the browser's URL to find out at what level of the library the user is located.

The Advanced Search page (which you can access by way of either home page) is also context sensitive in this way. However, at the advanced search page, you can change which documentation type that you want to search by selecting from a drop-down list.

Note. A documentation type drop-down list appears in the Advanced Search page only if more than one documentation type is listed in colltypes.js.

You can also filter a search by selecting values from other drop-down lists that appear in the Advanced Search page (for example, Book Title or Product Line):

Limit by:

☐ Search title text only

Book Title:
- (Any)
- About These PeopleBooks
- Enterprise PeopleTools 8.50 PeopleBook: Analytic Calculation Engine
- Enterprise PeopleTools 8.50 PeopleBook: Application Designer Lifecycle Management Guide
- Enterprise PeopleTools 8.50 PeopleBook: Application Engine

Product Line:
- (Any)
- PeopleTools
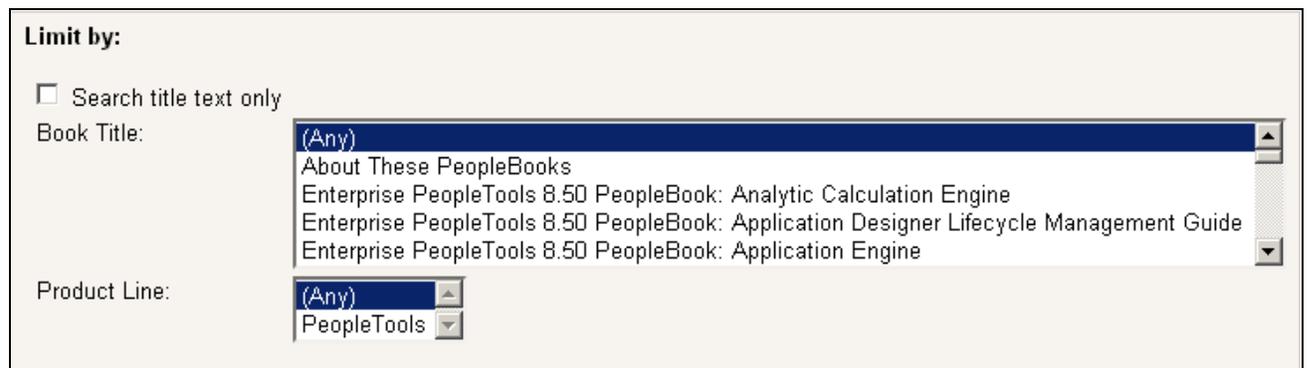
Drop-down list boxes with searchable PeopleBooks titles and product lines

The drop-down list boxes are populated by dynamically loading the searchfields.js file for each doctype listed in colltypes.js. The searchfields.js file resides in each <doctype>/js folder and is created during the collection build process. Its contents consist of search field names and field values found when parsing the HTML documentation. Here is an example of the searchfields.js contents:

```
fieldnames_psbooks = new Array('BKTITLE', 'prodline');

BKTITLE_psbooks_fld = new Array('PeopleTools 8.50 PeopleBook: Global Technology',
 'PeopleTools 8.50 PeopleBook: Workflow Technology');
prodline_psbooks_fld = new Array('PeopleTools');
```

The first line in this file defines a fieldnames_<doctype> array that lists the names of the available search fields. The remaining lines define an array for each fieldname listed in the first array. The array members are all the available values for that field. For example, BKTITLE_psbooks_fld contains a list of all the PeopleBooks titles found in colllist.js during the collection build. prodline_psbooks_fld contains the various prodline values found when parsing the HTML content.

You can control the field names and values that appear in this file by adding custom META tags to your HTML documentation. Do not edit searchfields.js manually, as it is overwritten every time you rebuild your collections.

Creating Custom Search Fields

As previously discussed, the fields in searchfields.js are pulled from META tags that appear in the HTML content files that are parsed during a collection build. You can add your own META tags to define custom fields and field values. The META tags must be added in HEAD section of the HTML file. The syntax of the META tags must appear as follows:

```
<meta name="filter" content="field_name=field_value">
```

where field_name is the name of the search field and field_value is the value. For example, if you wanted to create a field for searching by job types or the type of audience for your documentation is intended, you might add one of the following META tags to your HTML files:

```
<meta name="filter" content="audience=First Time Users">
OR
<meta name="filter" content="audience=Implementers">
OR
<meta name="filter" content="audience=DBAs">
```

Note. The collection build process does not currently support multiple values for a single field in an HTML file. For example, if you put all three of the above META tags into one HTML file, only the last would be picked up and used in searchfields.js as the value for the audience field. In future releases, we hope to allow the use of a delimiting character in the content attribute to let you specify multiple field values in one META tag.

Assuming each of the three example META tags was inserted into your custom documentation files, when the collection is rebuilt, the searchfields.js file for your documentation type will contain this code:

```
fieldnames_your_doctype = new Array(audience);

audience_your_doctype_fld = new Array('First Time Users',Implementers,'DBAs');
```

There is no limit to the number of custom fields that you can create, but consider that each of these fields will appear as a drop-down list on the Advanced Search page. Too many fields might make the search form unwieldy to navigate and use.

Note. Certain field names are reserved by Verity and should not be used in your custom META tags. These field names are title, subject, author, from, source, keyword, and keywords. It is wise to create field names with a unique name string as a prefix or suffix (for example: mybooks_author).

When you search across multiple documentation types, the Advanced Search form displays only those search fields that are shared among those documentation types. For example, PeopleBooks are delivered with the BKTITLE (book title) and prodline (product line) fields predefined. If you want to search your custom doc and PeopleBooks simultaneously and to filter those searches by book title and product line, you should add META tags for BKTITLE and prodline to your documentation:

```
<meta name="filter" content="BKTITLE=My Custom Book">
<meta name="filter" content="prodline=FSCM">
```

Creating Custom Search Field Labels

The search field names that you define in the META tags are system names. These names are used internally by the PSOL JavaScript and by Verity. For translation purposes, the names that actually appear on the search form are stored in srchlabels.js, a language-specific labels file found in the js directory under each language directory.

See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," The Language Level, page 29.

The JavaScript variables that define the search field labels must have a particular naming structure in order to be found by the search form code. The syntax is:

```
strfield_name_fld
```

where *field_name* is the name of the field as defined in your META tags. For example, the standard PeopleBook search field, prodline, has a label variable defined in srchlabels.js as:

```
 strprodline_fld
```

Important! The variable names are case sensitive. The field name included in the variable name must exactly match the capitalization of the field name as defined in the META tags (and searchfields.js).

Setting Up the Utility Files

When the Advanced Search page opens, the colltypes.js file is loaded to find which doctypes are available for searching. To enable your custom documentation type for searching:

1. Edit <docroot>/<langdir>/js/colltypes.js.

2. Add a line to make the documentation type searchable.

    Use this syntax:

    ```
    "<doctype_dir>||<doctype_name>"[,]
    ```

    Do not use a comma after the last array assignment. For example, if you added your own documentation type to colltypes.js, it might look like this (in bold):

    ```
    collections = new Array(
     "psbooks||PeopleBooks",
     "my_documentation_type||My Documentation"
    );
    ```

See Chapter 4, "Managing the PeopleSoft Online Library and PeopleBooks," Managing Documentation Types, page 35.

If you have created a new doctype directory in PSOL for your documentation, you must also define that doctype directory in the PSOL web.xml file.

Inside the <web-app> tags in that file, add the following text:

```
<context-param>
            <param-name>doctype.doctype_name</param-name>
            <param-value>reg_expr</param-value>
   </context-param>
```

where *doctype_name* is the name of your doctype directory and *reg_expr* is a regular expression used to find your searchable content below the docroot directory. Save the file and restart the web server.

Note. The following regular expression can be used to find all .htm files (but not .html files) anywhere below your doctype directory: [/\\]*doctype_name*[/\\].*\.htm$

If you want to be more restrictive on which files are parsed for the collection, adjust the regex accordingly. For example, in PeopleBooks, all searchable HTML content is in an htm directory. Therefore, the hard-coded regex for finding PeopleBooks content is [/\\]psbooks[/\\].*[/\\]htm[/\\].*\.htm$

Creating Collections

Once you have added your META tags, added the field labels to srchlabels.js, and updated colltypes.js and web.xml, you are ready to create your collections. Use the PSOL Manager utility.

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

agreement	In PeopleSoft 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 *receivables specialist.* 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.
	See also *detailed business process.*
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 *course.*
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft 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 *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.
	See also *population* and *division.*
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, 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 *communication key.*
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
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 *class*. |

course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data 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	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.
	In PeopleSoft 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.
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	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. 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.
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 *drop ship*).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort.* |
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft 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 *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft 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 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 *donor pyramid* 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 *Global Distribution System.* Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.
	See also *business unit.*
GL entry template	Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

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

institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
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 ADVANCED_SHIPPING_ORDER 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 *pending reservations.* Reservations that have been paid for are referred to as *confirmed reservations.*
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	Abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This term defines the data value or calculation upon which an assessment is determined.

KVI	Abbreviation for *Known Value Item.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
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 *learning management system.* 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 *1*—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 *3C engine.*
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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft 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 *Non-Discountable Products.* 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 *need analysis.*
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 *compensation object.*
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 *event.*
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 *giveaways*).
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 *record input value-added tax flag.* 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 *record output value-added tax flag.*
	See *record input VAT flag.*
recname	The name of a record that is used to determine the associated field to match a value or set of values.

recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft 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 *real-time event notification server* 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 *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* 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	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.
	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression	In PeopleSoft 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 *communication key.*
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft 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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	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).
	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).
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 polices 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 *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

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

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 *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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

universal navigation header
Every PeopleSoft 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 *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft 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 *eXtended Process Integrator.* 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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