PeopleSoft®

PeopleSoft Setup Manager for PeopleSoft Enterprise Incentive Management 8.9 PeopleBook

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PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook
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Contents

About This PeopleBook Preface

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Additional Resources

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

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements Used in PeopleBooks

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.

PeopleSoft Setup Manager Preface

This preface discusses PeopleSoft Setup Manager.

PeopleSoft Setup Manager

PeopleSoft Setup Manager enables your organization to quickly identify the products your organization will implement and the setup required to support your implementation. Furthermore, Setup Manager brings together the list of tasks required to support your implementation and the relevant documentation by providing PeopleBooks documentation links.

Note. Some of the page elements and colors that your product uses may differ slightly from the screen shots presented in this PeopleBook. This book uses a generic style sheet for the purposes of illustration only.

CHAPTER 1

Getting Started with PeopleSoft Setup Manager

This chapter discusses:

- Basic requirements for implementers.
- PeopleSoft Setup Manager setup.

Basic Requirements for Implementers

PeopleSoft applications are designed to support a broad range of configurations that are specific to the way in which you do business. As with any implementation, you are asked to make educated business decisions during this process to ensure that the final configuration reflects your company's business needs.

The implementation team must consider whether your company will alter your existing business processes to fit within the PeopleSoft system's delivered functionality or whether you will modify the PeopleSoft system to match your existing business processes. These decisions must be made with a thorough understanding of how your business operates, and should be based on a solid knowledge of PeopleSoft functionality.

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, PeopleTools documentation, and the PeopleBooks that are specific to your applications.

The PeopleSoft Setup Manager is designed to assist you with your implementation of recently purchased PeopleSoft products. Alternatively, you may use Setup Manager to implement new products that are now available to you because of a recent upgrade.

PeopleSoft Setup Manager Setup

PeopleSoft Setup Manager is delivered as part of the Enterprise Components that are standard with all PeopleSoft products.

Several activities must be completed before you use the setup task list that will guide you through the implementation of your PeopleSoft applications.

- First, the implementation team must make business decisions regarding what functionality you need to configure within your PeopleSoft applications.
- Next, you must install your PeopleSoft database and define security access. The EOLT Implementer role contains the permissions lists necessary to access the relevant Setup Manager pages contained within a PeopleSoft database.

- In addition to the other roles you associate with your user profiles, you must ensure the EOLT Implementer role is assigned to any user who requires access to Setup Manager.
- You will also need a user profile that gives you access to the setup components and processes you will use during the implementation.

See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration.*

Additionally, you must ensure that a Process Scheduler server is configured and running on the database that you are working on so that the Application Engine processes can be run.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler.*

You can use PeopleSoft Setup Manager with the PeopleSoft products for which you are licensed (and which have been installed on the database). Setup Manager resides in one database and enables you to perform the implementation in only that database.

See The PeopleSoft Installation Guide for your product suite.

PeopleSoft Setup Manager supports the implementation of one or more products within a single PeopleSoft database. If your implementation requires multiple PeopleSoft databases, you use one setup task list for each database.

The PeopleSoft Data Mover .DAT file that contains the delivered setup task lists and a required fix is posted on Customer Connection, Updates and Fixes.

Enabling PeopleBooks Help

PeopleBooks are the documentation delivered with every PeopleSoft application. One of the features of PeopleSoft Setup Manager is a link to PeopleBooks that is provided for each setup task identified by Setup Manager in your setup task list. This link takes you to the section in PeopleBooks that explains the fields and pages of the setup components with which you are working.

To be able to view the documentation from PeopleSoft Setup Manager, you need to install and configure PeopleBooks so that you can deploy the PeopleSoft documentation at your site. You can install PeopleBooks to a dedicated web server machine or to a separate web server machine. Either way, the web server software must installed before installing PeopleBooks.

See Also

The PeopleSoft Installation Guide for your product suite.

CHAPTER 2

Introducing PeopleSoft Setup Manager

This chapter lists common elements and provides an overview of PeopleSoft Setup Manager.

Common Elements Used in This PeopleBook

	In a tabbed grid only, expands grid columns to the right so that tabs are no longer needed.
	The expanded grid returns to its tabbed state.
	Enables you to download the contents of a grid to a Microsoft Excel spreadsheet.
Select All	Selects all check boxes in the grid.
Clear All	Clears all check boxes in the grid.
Additional Configuration	Activities that must be performed before or after a particular setup task.
Business Process	One of the delivered business process models maintained by the PeopleSoft system.
Configuration Set	The PeopleSoft application features that you have selected for implementation. The list of features is available to be edited or viewed by either product suite and product or by the associated business process.
Detailed Business Process	A second-level subsection of the delivered business process.
Feature	A piece of PeopleSoft functionality that requires one or more setup elements to be defined before it can be used. For example, Journal Generation, Travel Authorizations, and Commitment Control are all delivered features that can be selected by the user to implement. Features can be associated with more than one product, and more than one feature can be associated with one product. Additionally, features can be associated with one or more business processes.
Product	A module of PeopleSoft that is licensed by you. For example, PeopleSoft General Ledger, PeopleSoft Benefits Administration, and PeopleSoft Help Desk are all PeopleSoft products. Products can be associated with more than one product suite, and more than one product can be associated with one product suite.
Product Suite	A grouping of products that exist either within a product line or across product lines. For example, PeopleSoft Customer Relationship Management and PeopleSoft Human Capital Management are both product suites.

Setup Task	A line item from the Setup Task List page that is used to configure a single PeopleSoft component.
Setup Task List	A list of tasks generated by PeopleSoft Setup Manager that identify the setup components that must be configured to support the defined configuration set.

Understanding PeopleSoft Setup Manager

PeopleSoft Setup Manager is a tool that helps you implement your PeopleSoft applications by using a configuration set to produce a setup task list that is specific to your implementation of PeopleSoft.

PeopleSoft Setup Manager produces a setup task list that identifies the setup tasks required to support your specific implementation and presents those tasks in the sequence in which they must be completed. The list contains the related navigation path that shows where a setup component is located and provides a direct link to that setup component. For each task, a suggested load method is identified and links to PeopleBook documentation are available so that you can view documentation for that setup component.

Note. Setup Manager system data must never be altered or deleted as this will impair data integrity and Setup Manager results.

Managing Configuration Sets

A configuration set is a list of the features that you have selected to implement. It is organized by either business process or product suite and product. PeopleSoft Setup Manager enables you to switch between views to see the impact of one selection method upon the other. You can build a configuration set by using two different methods:

- PeopleSoft product suites and their supporting products and features
- PeopleSoft business processes and their supporting products and features

As you are creating your configuration set, you see that the information presented on the pages is specific to your installed PeopleSoft products. When you select a particular product to implement, the list of features presented are specific to that product. This helps guide you through the selection process and enables you to create a configuration set that is tailored to your licensed and installed PeopleSoft applications.

Generating Setup Task Lists

This Setup Manager feature enables you to generate a step-by-step list of tasks that are necessary for you to successfully set up your PeopleSoft system. An Application Engine process produces a sequenced list of tasks representing the components that must be configured to support the features you've selected for implementation.

Performing Setup Tasks

Once you've generated the list of setup tasks, you use the list to guide you through the implementation process. The setup list pages display an ordered list of tasks to be completed and links to PeopleBooks containing valuable information.

CHAPTER 3

Managing Configuration Sets

This chapter lists common elements and discusses how to:

- Create configuration sets.
- Manage configuration sets.
- Implement by products and features.
- Implement by business processes and features.
- Save configuration sets.
- Generate setup task lists.

Common Elements Used in This Chapter

View Summary	Click this button to display the summary page of features that you have selected to implement based on either product or business process. You must have selected at least one feature to view the summary page.
Expand All	Maximizes the collapsible section of the page to show the underlying business process or product name, the associated features, and a description of each feature.
Collapse All	Minimizes the collapsible section of the page to hide the underlying business process or product name, the associated features, and a description of each feature.
Continue	Displays the next page in the process.
Save	Click to save the information on the page.
Select All	Marks all check boxes on the page as selected.
Clear All	Clears all selected check boxes on the page.

Creating Configuration Sets

A configuration set is made up of PeopleSoft product suites or business processes and their underlying products and features that you have chosen through the Manage Configuration Set pages.

Regardless of whether you choose to make your configuration set selections from a business process or a product perspective, PeopleSoft Setup Manager displays the supporting data down to the feature level. Only installed products and their related business processes are displayed on the page for selection.

You begin by selecting an implementation method–either by business process or by product—that drives how the underlying features are presented to you. The strategy of selecting an implementation method is determined by the way in which you've structured your implementation project team or your implementation project. Are you replacing or improving a specific business process such as Order to Cash, or are you looking to implement specific PeopleSoft modules? You and your implementation team need to assess your company's needs and choose the implementation method accordingly.

From the Product Summary page or the Business Process Summary page, you can see your feature selections displayed relative to the products they support or the business processes they support. For example, if you are implementing a group of PeopleSoft product suites or products, you can check the Business Process Summary page to see what business processes you are supporting based on your feature selections. At that point, you might see that you have a business process partially implemented, and you could elect to implement the entire business process using PeopleSoft Setup Manager.

After you select the products and business processes for the configuration set, you save it with a unique name.

Creating Multiple Configuration Sets

You may want to generate more than one configuration set to support various implementation scenarios. For example, to perform a phased implementation, you may create a configuration set for each implementation phase. Or, you might also want to create different configuration sets to investigate the impact of selecting a particular set of features. You can also create different configuration sets to support different teams working concurrently on different functional areas. For example, you might have a team working on modules such as General Ledger and Accounts Payable while another team is working on Order Management and Billing.

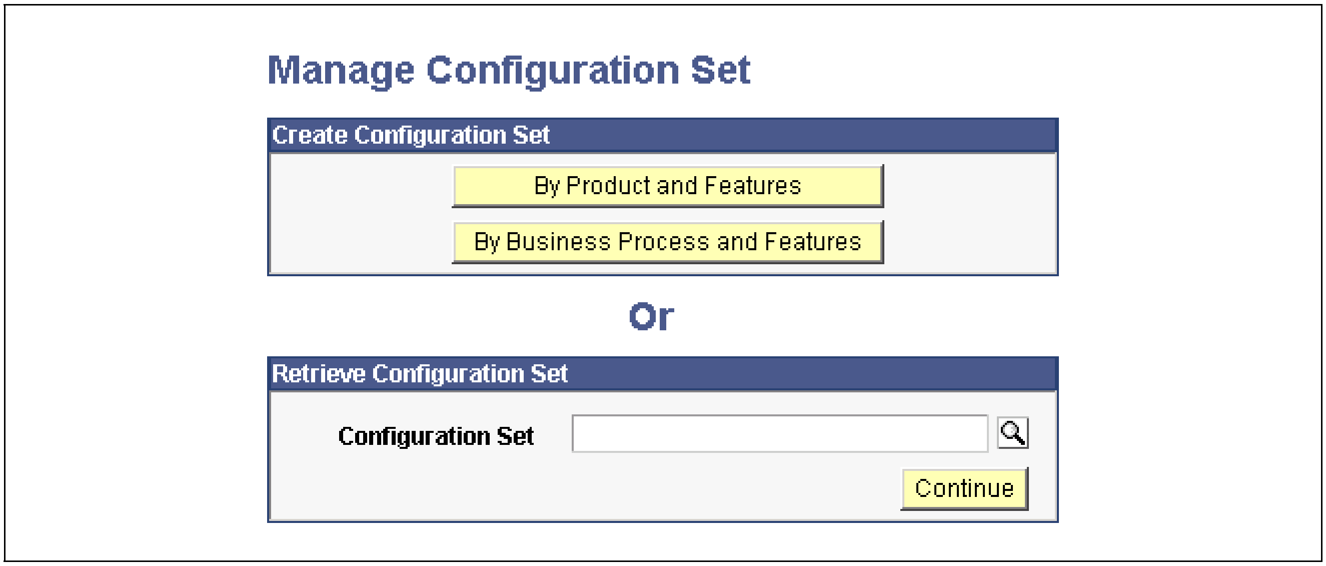
In summary, you can create multiple configuration sets that reflect different implementation scenarios. For example, you can create configuration sets that are specific to different phases of an implementation, or you might want to examine the impact of implementing different combinations of products and business processes.

Pages Used to Create Configuration Sets

Page Name	Object Name	Navigation	Usage
Manage Configuration Set	EOLT_SELECT_START	Enterprise Components, Manage Implementations, Manage Configuration Set	Create configuration sets for the implementation.
Product List	EOLT_PF_SELECT	Click the By Product and Features button on the Manage Configuration Sets page.	Select different products and their underlying features to implement.
Product Summary	EOLT_CFG_SUM_PF	Click the View Summary button on the Product List page.	View the configuration set and Select features to remove from the implementation.
Product Features	EOLT_PF_SELECT2	Click the link for the product name on the Product List page.	Select the underlying features for a product.
Business Process List	EOLT_BP_SELECT	Click the By Business Process and Features button on the Manage Configuration Set page.	Select business processes and the underlying features to implement.
Business Process Summary	EOLT_CFG_SUM_BP	Click the View Summary button on the Business Process List page.	View the configuration set, and select the features to remove from the implementation.
Business Process Features	EOLT_BP_SELECT2	Click the link for the Detailed Business Process name on the Business Process List page.	Select the underlying features for a detailed business process.
Enter Configuration Set Name	EOLT_CFGSET_NAME	Click Save on the Product Summary page or the Business Process Summary page.	Enter a name and description to save a configuration set.
Setup Task Generation Status	EOLT_GEN_TASKS	Click the Generate Setup Tasks button on the Product Summary page or the Business Process Summary page or select Enterprise Components, Manage Implementations, Review Setup Tasks Generation.	Uses an Application Engine program to create a list of setup tasks from the selected features, products, and business processes.

Managing Configuration Sets

Access the Manage Configuration Set page.



Manage Configuration Set page

You can create configuration sets based on products and features or based on business processes and features.

Click By Product and Features to select from a list of different products and related features for your implementation.

Click By Business Process and Features to select from a list of business processes and their associated underlying features.

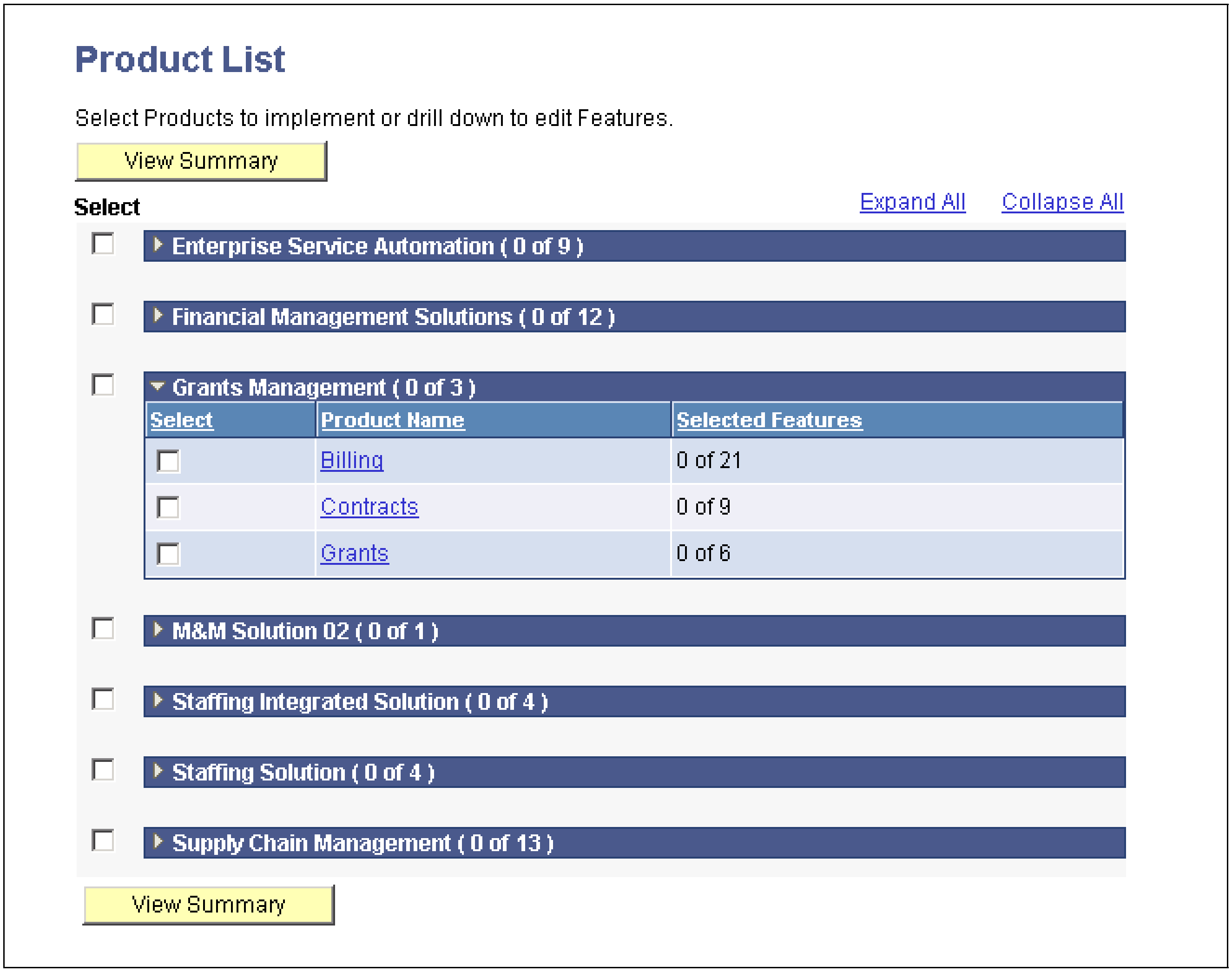
After you have saved a configuration set, you can retrieve it by using the search box on the page. If you select a saved configuration set, PeopleSoft Setup Manager retrieves and displays a page showing the product summary and the business process summary for that configuration set.

Implementing by Products and Features

If you choose to implement your system based on products, you select the products that your company wants to implement, or you can navigate to the underlying features and select them for implementation. Only those products licensed by you and marked as installed on the PS_INSTALLATION table are available for you to select.

Selecting Products

Access the Product List page.



Product List page with some product suites collapsed

The Product List page is made up of several collapsible grids that are labeled with the names of the PeopleSoft product suites. The collapsible grid label also shows the number of products that have been selected for implementation out of the total number of products that you installed relative to that product suite. The default appearance of the Product List page is expanded to show all of the product suites. When expanded, each collapsible grid shows a list of products within the particular product suite. To collapse the product lists that you don’t want to view, click the arrow that precedes the name of the PeopleSoft product suite.

To select all products associated with a particular product suite, select the check box to the left of the product suite name. As a default, no products are selected for implementation. You can select a subset of the features that support an individual product by clicking on the product name link.

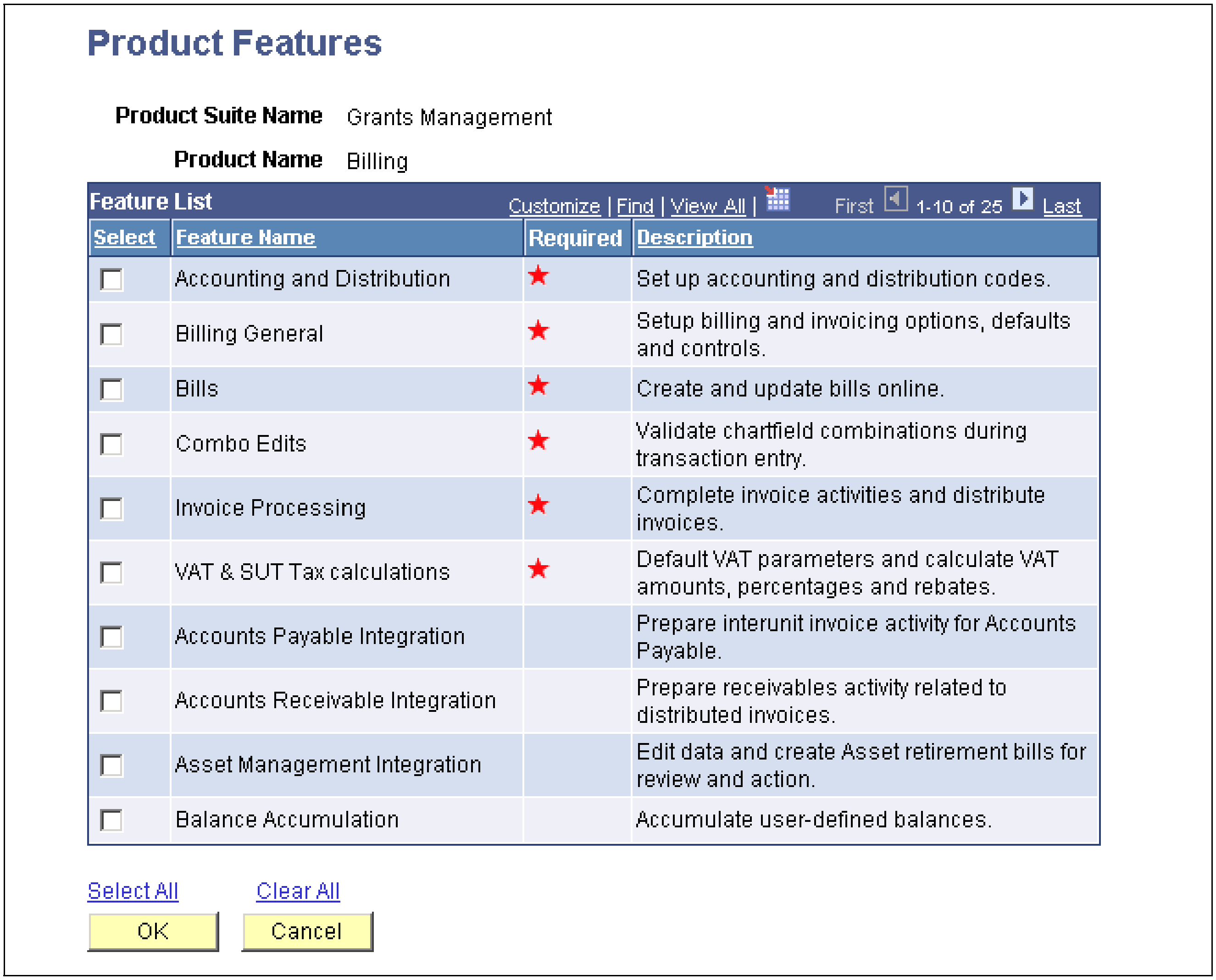
If a product belongs to more than one product suite and you select it for implementation, that product is automatically selected for all product suites in your system. For example, if you select Grants Management as a product suite, it includes the product *Billing*. Any other product suite that has Billing in it is also selected by the system.

Select	Select a check box to select an entire product within a product suite.
Product Name	Displays the product name as a link to the Product Features page, where you can select underlying features for the product.

Selected Features Displays the number of features that support the particular product and how many of those features have been selected for implementation.

Selecting Features

Access the Product Features page.



Product Features

Product Suite Name Grants Management

Product Name Billing

Feature List Customize | Find | View All | First 1-10 of 25 Last

Select	Feature Name	Required	Description
☐	Accounting and Distribution	★	Set up accounting and distribution codes.
☐	Billing General	★	Setup billing and invoicing options, defaults and controls.
☐	Bills	★	Create and update bills online.
☐	Combo Edits	★	Validate chartfield combinations during transaction entry.
☐	Invoice Processing	★	Complete invoice activities and distribute invoices.
☐	VAT & SUT Tax calculations	★	Default VAT parameters and calculate VAT amounts, percentages and rebates.
☐	Accounts Payable Integration		Prepare interunit invoice activity for Accounts Payable.
☐	Accounts Receivable Integration		Prepare receivables activity related to distributed invoices.
☐	Asset Management Integration		Edit data and create Asset retirement bills for review and action.
☐	Balance Accumulation		Accumulate user-defined balances.

Select All Clear All

OK Cancel

Product Features page

This page displays the list of features supporting the product that you've selected and enables you to select one or more of those features to include in the implementation. The page displays the feature name, and the description that shows the purpose of that feature. Select the check box for the features that you want to implement. The system automatically selects all required features for that product after at least one feature is selected.

The Select All and Deselect All links enable you to edit the list more efficiently.

Feature Name Displays the name of the feature that supports the product.

Required A red star in this field indicates that this is a required feature.

Description Displays the high-level description of the feature.

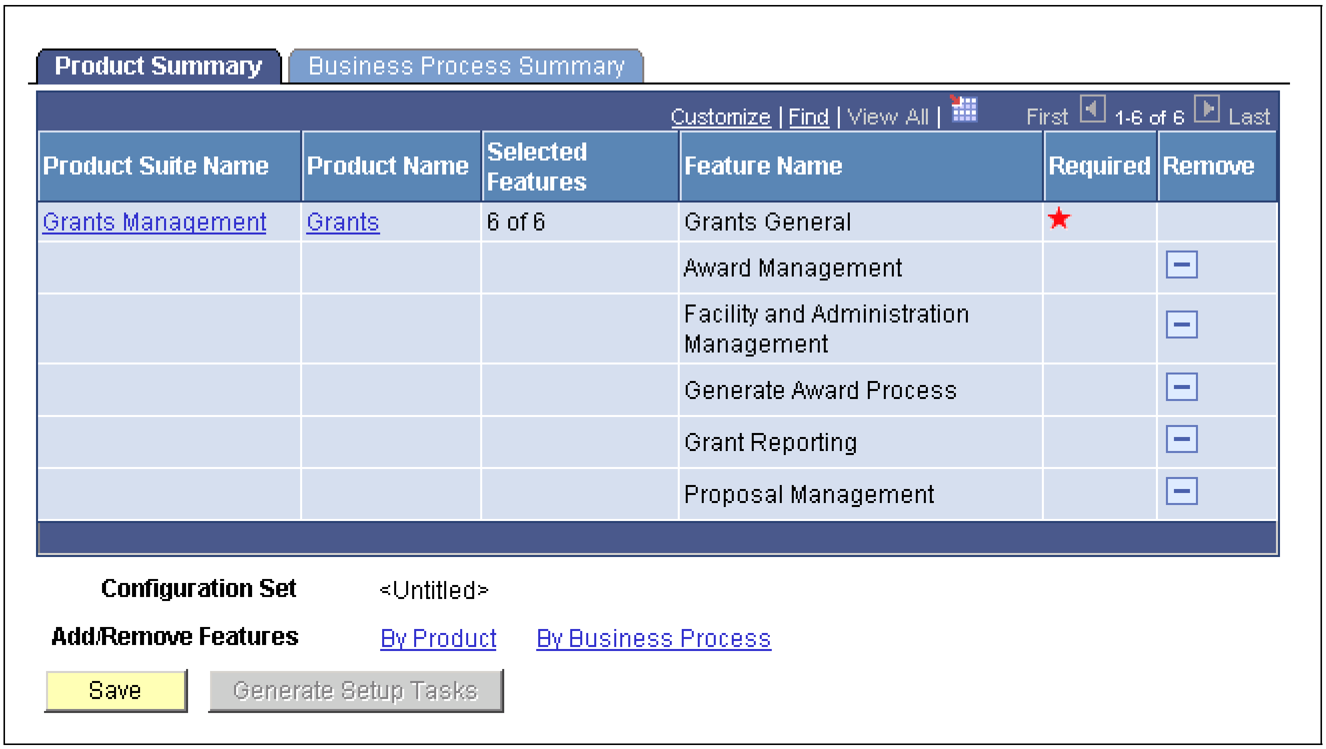
Understanding Required Features

Some of the features listed on this page are identified as required features. A required feature contains the basic components without which a particular product could not be implemented, so they must be set up for the product to function correctly. All required features appear at the top of the feature list by default. The system automatically selects all required features when you select any of the features for the product. If you clear one of the required features, PeopleSoft Setup Manager clears all other features for that product.

If a required feature belongs to more than one product or product suite and you select it for implementation, that feature is automatically selected for all products or product suites in your system. In addition, PeopleSoft Setup Manager selects any additional required features that support the other products and product suites.

Viewing the Product Summary

Access the Product Summary page.



Product Summary page

The names of the product suites and products on this page are links to the Product List page and the Product Features page, where you can view and edit the list of features that you want to implement.

Product Suite Name	Click the name of the product suite to view the Product List page.
Product Name	Click the name of the product to view the Product Features page.
Selected Features	Displays the number of features selected for implementation out of the total possible features for that product.
Feature Name	Displays the name of the feature as defined by PeopleSoft development.
Required	A red star in this column indicates that the feature is required for this product.

Remove	Click the Remove icon to delete this feature from the configuration set. This action is enabled only for optional features. Any feature that you remove from the Product Summary page is also removed from the Business Process Summary page.
Configuration Set	Displays the name of the configuration set. This field is not populated until the configuration set is saved.
Add/Remove Features	Click the link By Product to display the Product List page, where you can add and remove features. Click the link By Business Process to display the Business Process List page, where you can add and remove features.
Generate Setup Tasks	Click this button to start the process that creates the setup task list. This button is not available for selection until the configuration set has been saved.

Note. If you remove a feature from this page, the system also removes the feature from the Business Process page.

Implementing by Business Processes and Features

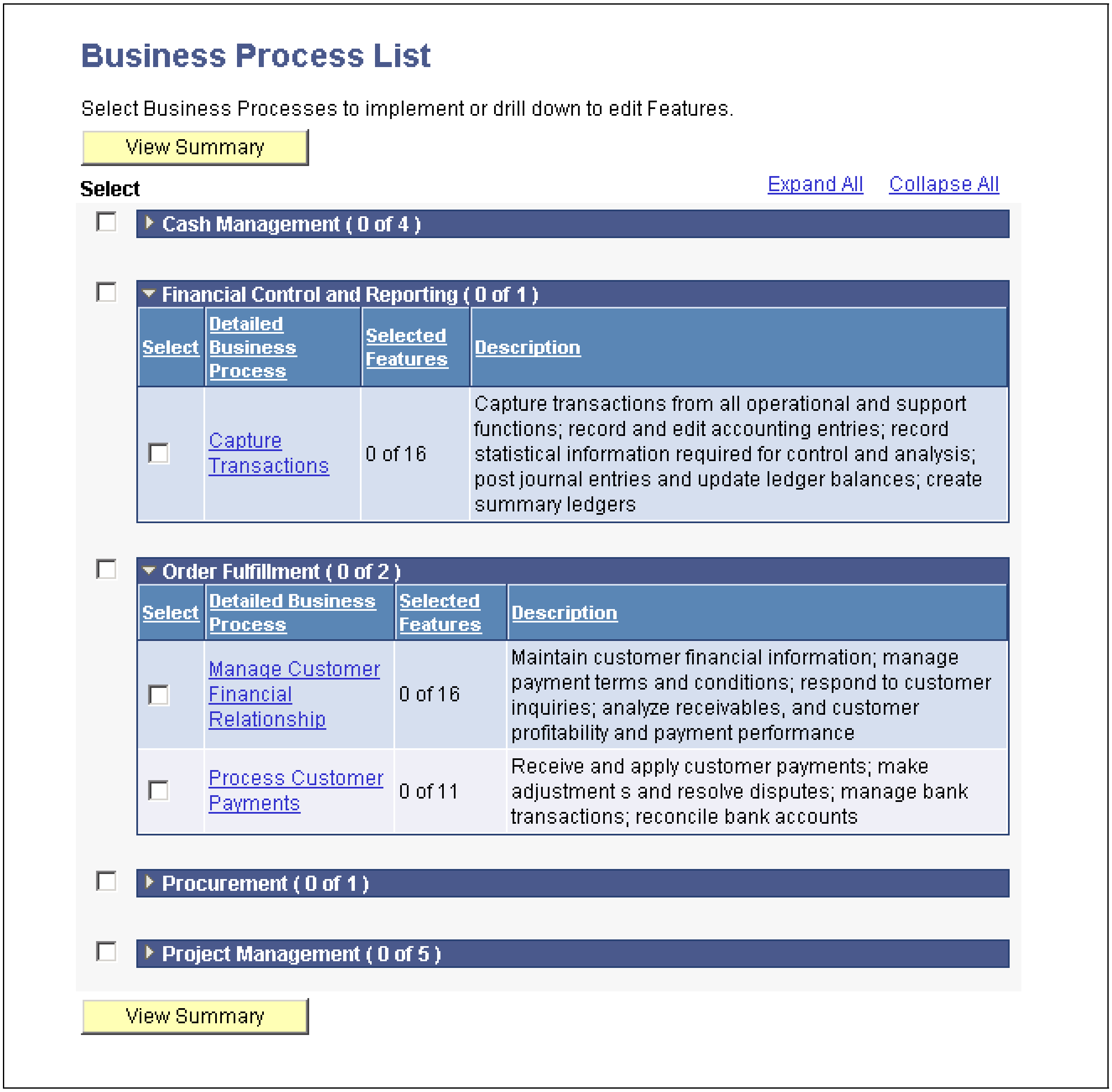
If you choose to implement your system based on business processes, you select the delivered business process that your company wants to implement, navigate to the underlying features, and select them for implementation. The PeopleSoft system delivers a list of business processes that are specific to your installed products. Only those business processes related to at least one installed product in the particular PeopleSoft database are available for you to select, and only those features associated with those products can be selected.

Note. PeopleSoft Setup Manager focuses on the key high-level business processes that the PeopleSoft system delivers to customers based on installed products. These business processes are stored as system metadata and are delivered with Setup Manager in the same way that the product and product suite information are delivered.

See Real-Time Business Processes on the PeopleSoft Customer Connection website.

Selecting Business Processes

Access the Business Process List page.



Business Process List page with several of the business processes collapsed

Business processes are made up of two categories: high-level business processes and detailed business processes. High-level business processes are made up of several detailed business processes. Detailed business processes comprise groups of features that support the detailed business process and, in turn, roll up into the high-level business process.

The Business Process List page is made up of several collapsible grids that are labeled with the names of the high-level business process. The collapsible grid label also shows the number of detailed business processes that have been selected for implementation out of the total number of detailed business process supported by one or more of your installed products. The default appearance of the Business Process List page shows all business processes expanded. When expanded, each collapsible grid shows a list of detailed business processes within the particular high-level business process. To collapse the high-level business process lists that you don’t want to view, click the arrow that precedes the name of the PeopleSoft high-level business process.

If you choose to implement your system based on business processes, you select the detailed business process that your company wants to implement, navigate to the underlying features, and select them for implementation. Only those business processes licensed by you and supported by products marked as installed on the PS_INSTALLATION table are available for you to select.

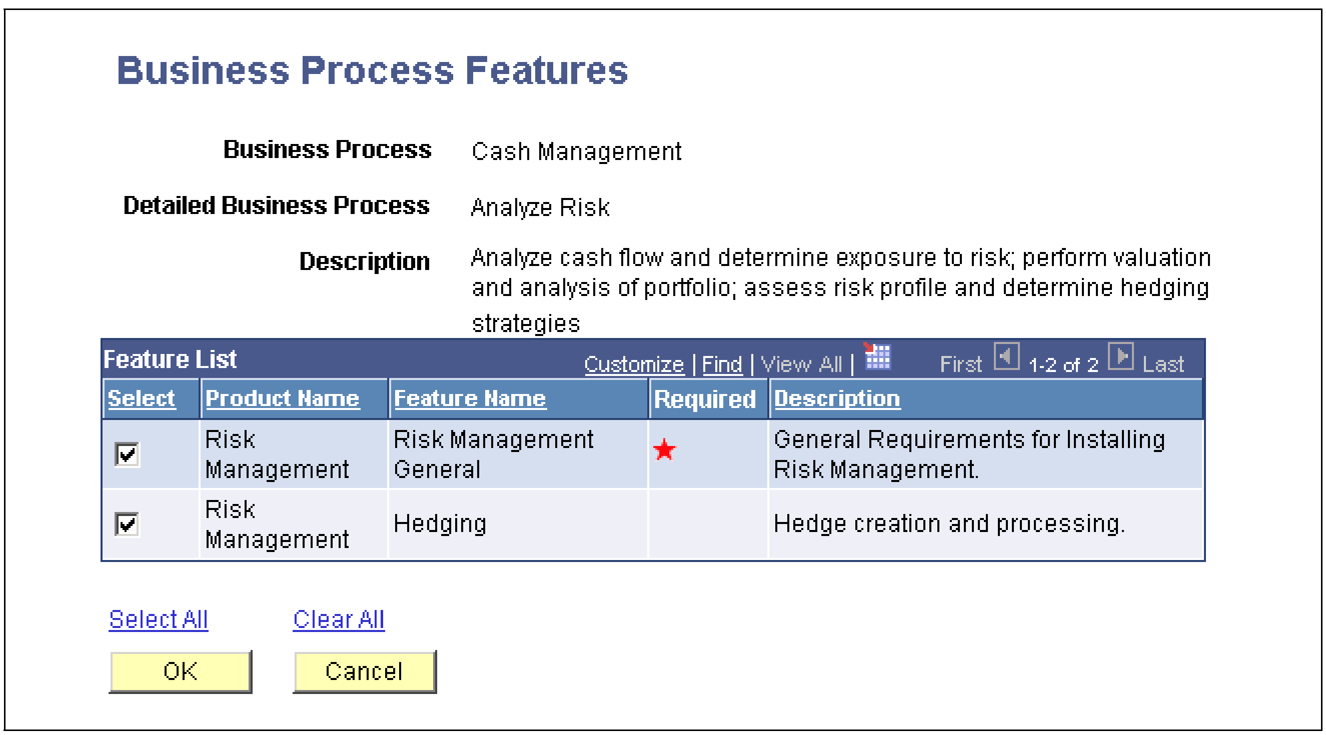
To select all detailed business processes associated with a particular high-level business process, select the check box to the left of the high-level business process name. As a default, no business processes are selected for implementation. You can select a subset of the features that support an individual detailed business process by clicking the detailed business process name link.

If a selected feature also supports other detailed business processes, the feature is automatically selected for the other detailed business processes where it is referenced. Additionally, the features that you selected on the business process side are also marked as selected for that product when viewing it from within a product suite.

Select	Select a check box to select an entire detailed business process within a high-level business process.
Detailed Business Process	Displays the name of the detailed business process as a link to the Business Process Features page.
Selected Features	Displays the number of features out of the total number possible that have been selected for implementation.
Description	Displays the description of the business process.

Selecting Business Process Features

Access the Business Process Features page.



Business Process Features page

This page displays the list of product and feature pairs that support the detailed business process that you've selected and enables you to select one or more of those features to include in the implementation. The page displays the feature name, and the description that shows the purpose of the feature. Select the check box for the features that you want to implement. The system automatically selects all required features for the same product after at least one feature for the product is selected.

Product Name	Displays the name of the product that supports the detailed business process.
Feature Name	Displays the name of the feature that supports the product.
Required	A red star in this column indicates that the feature is required for this product. All features associated with a product are cleared if one or more required features associated with that same product are cleared.
Description	Displays the description of the feature.
OK	Click to save any changes that you made to the page and display the Business Process Summary page.
Cancel	Click so that the system does not save any of the changes that you made to the page and displays the Business Process Summary page.

Understanding Required Features

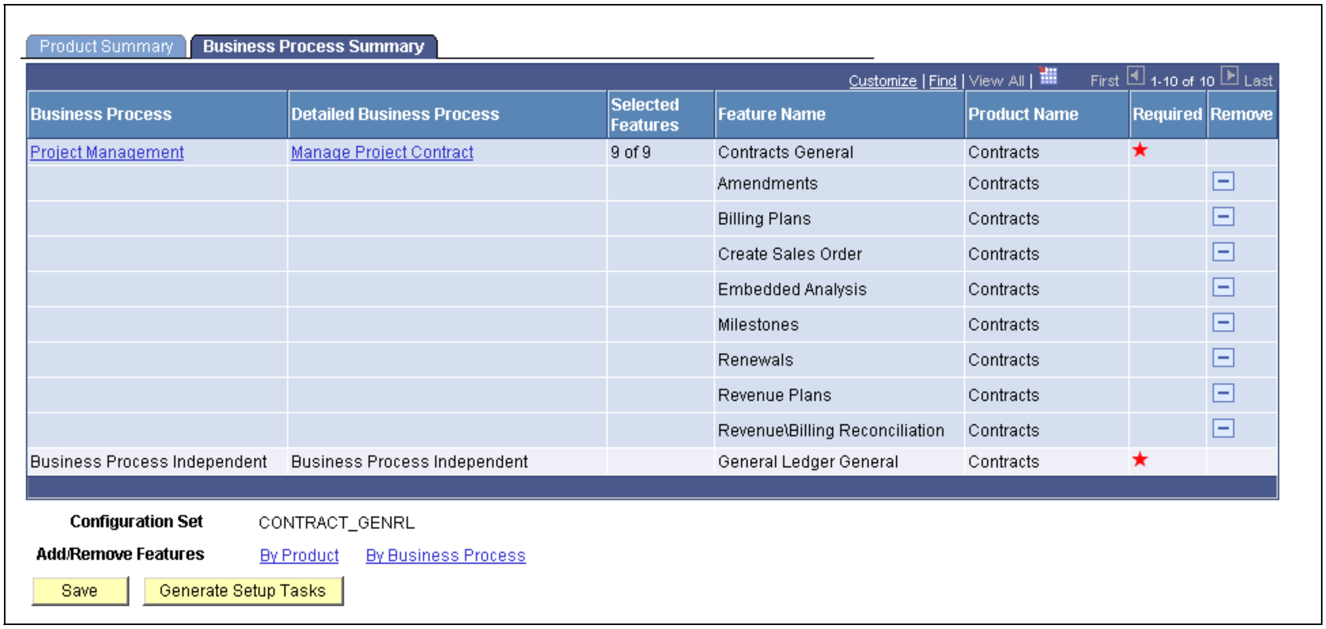
Some of the features listed on this page are identified as required features. A required feature must be set up for the product that supports the business process to function correctly. All required features appear at the top of the feature list by default. The system automatically selects all required features relative to a particular product when you select any of the features associated with that same product within the business process.

If you clear one of the required features, PeopleSoft Setup Manager clears all other features associated with the same product that the required feature was associated with for that business process.

If a required feature belongs to more than one detailed business process and you select it for implementation, that feature is automatically selected for all detailed business processes in your system where it was assigned. In addition, PeopleSoft Setup Manager selects any additional required features that support the same product that the originally selected required feature was associated with; Setup Manager does this for any detailed business processes where these features are assigned.

Viewing the Business Process Summary

Access the Business Process Summary page.



Business Process Summary page

The names of the high-level business processes and detailed business processes on this page are links to the Business Process List page and the Business Process Features page, where you can view and edit the list of features that you want to implement.

Additionally, you will see features listed on this page that don't directly support a business process, but are required to support the business process. Theses features are identified as *Business Process Independent*.

Business Process	Displays the name of the business process as a link that accesses the Business Process List page.
Detailed Business Process	Displays the name of the detailed business process as a link that accesses the Business Process Features page.
Selected Features	Displays the number of features that have been selected for implementation out of the total possible.
Feature Name	Displays the name of the feature.
Product Name	Displays the name of the product with which the feature is associated.
Required	A red star in this column indicates that the feature is required for this product.
Remove	Click the Remove icon to delete this feature from the configuration set. This action is enabled only for optional features. Any feature that you remove from the Business Process Summary page is also removed from the Product Summary page.
Add/Remove Features	Click the link By Product to display the Product List page, where you can add and remove features. Click the link By Business Process to display the Business Process List page, where you can add and remove features.
Generate Setup Tasks	Click this button to start the process that creates the setup task list. This button is not available for selection until the configuration set has been saved.

Note. If you remove a business process from this page, the system also removes the related features from the Product Summary page.

Saving Configuration Sets

Click Save on either the Product Summary page or the Business Process Summary page.

Enter Configuration Set Name page

To save the configuration set, enter a unique name and a description for the set that you've created. This name is used to retrieve a configuration set in the future and appears on the setup task list after it has been generated. Each time that you make a change to a configuration set and save it, it is saved with the existing configuration set name.

Configuration Set	Enter a unique name for the configuration set, using only alphanumeric characters with no spaces. Underscores are allowed.
Description	Enter a description that identifies the elements of the configuration set, using up to 50 characters.

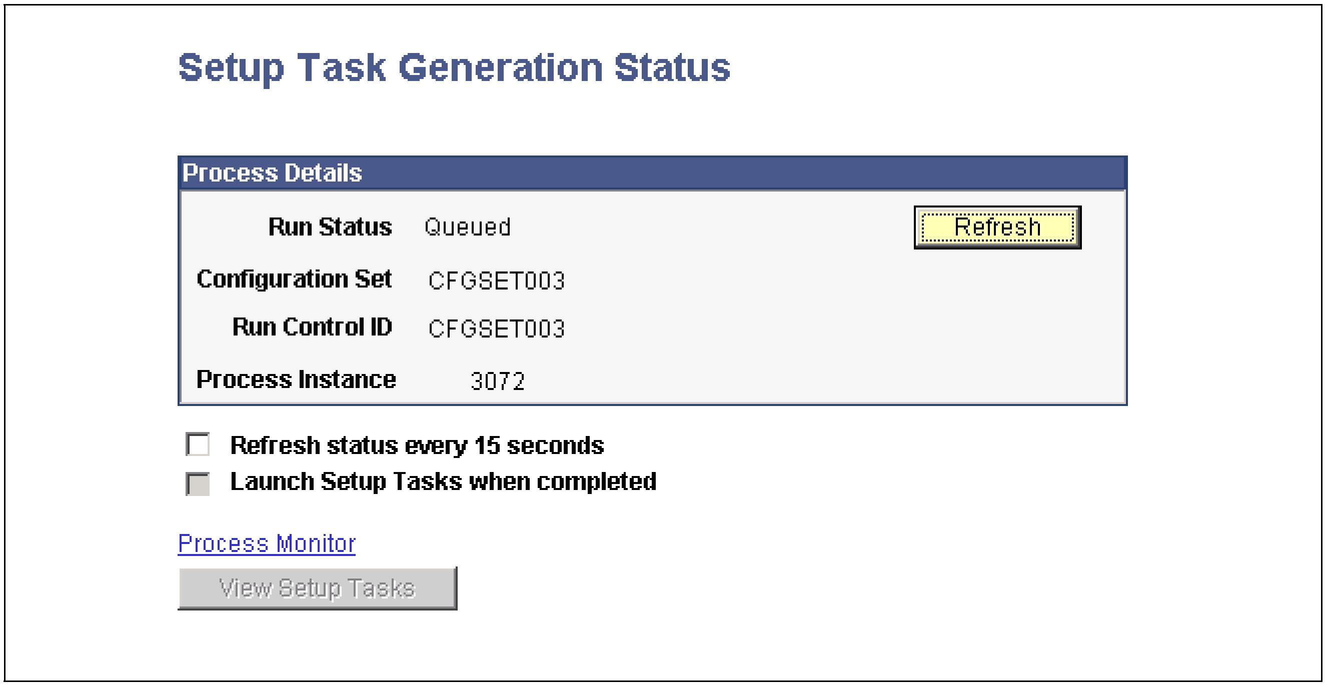
Generating Setup Task Lists

When you click the Generate Setup Tasks button on the Product Summary or Business Process Summary pages, the system starts the Application Engine process that creates a list of setup tasks that is based upon the selections that you have made.

The Review Setup Task Generation page displays the status of the process that generates a list of step-by-step setup tasks for the configuration set that you specify. Each time that you run this process for a specific configuration set, it overwrites the existing setup task list for that specific configuration set. Additionally, if you select a configuration set that is currently processing, the system displays a message informing you that the configuration set is unavailable until the process has completed.

To view any processes that are currently running, select Review Setup Task Generation from the Portal navigation, and select the name of the configuration set name. After the processes are complete, the Setup Task Generation Status page indicates that the process is complete, and you can view the View Setup Tasks button to see the setup task list.

Click the Generate Setup Tasks button on the Product Summary or Business Process Summary page.



Setup Task Generation Status page

Run Status	Displays the process status, such as *Queued* or *Success*.
Refresh	Click to check the status of a submitted process.
Configuration Set	Displays the name of the configuration set.
Run Control ID	Displays the run control ID. The system uses the configuration set name to create a unique ID that associates each user with the parameters that the process needs at runtime.
Process Instance	Displays the process instance number that was automatically assigned by PeopleSoft Process Scheduler when the process was run.
Refresh status every 15 seconds	Select this check box to have the system automatically refresh the page every 15 seconds. If you do not select this check box, click the Refresh button on the page to manually refresh the page and check the status of the process.
Launch Setup Tasks when completed	Select this check box to have the system automatically display the Setup Task List page when the process has finished. This check box is not available until you have selected the check box to refresh the status of the page automatically.
Process Monitor	Click this link to display the Process List page of Process Monitor, where you can check the run status and other details about the process.
View Setup Tasks	Available after the process has run successfully. Click this button to display the Manage Setup Tasks page.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

CHAPTER 4

Performing Setup Tasks

This chapter provides an overview of the setup task list and discusses how to:

- Review setup tasks.
- Track setup tasks.
- View setup task load methods.
- Export setup data.

Understanding the Setup Task List

The Manage Setup Tasks component identifies the setup tasks required to complete your implementation based on the feature selections you made in your configuration set. Setup tasks are displayed in sequence showing the order in which they must be completed and how each setup task relates to a specific PeopleSoft setup component.

Each task appears on the page with the following information:

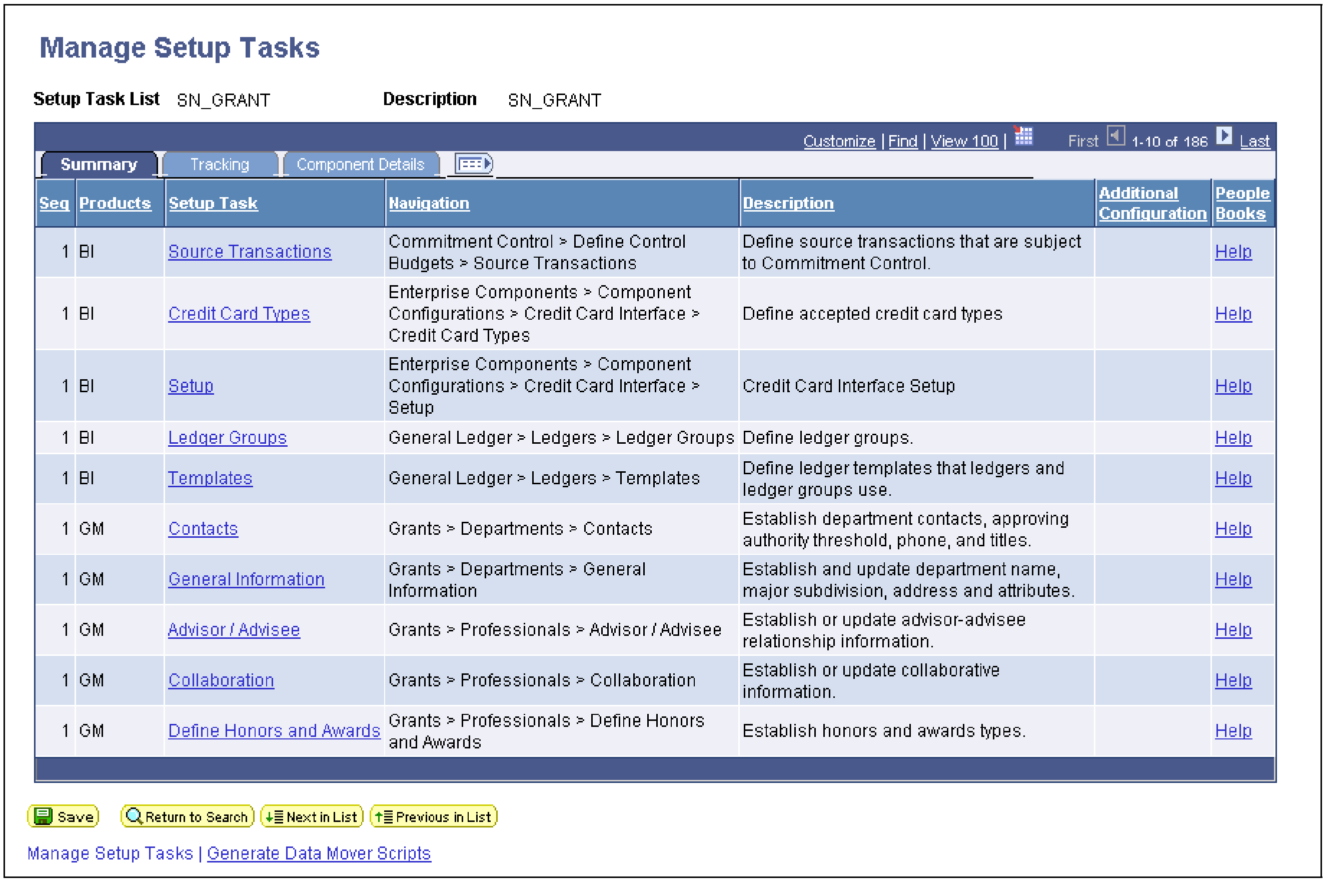
- A navigation link to the page where application setup data can be entered.
- A link to PeopleBooks where the particular PeopleSoft setup component is described.
- Text fields that enable you to assign an owner to each setup task as well as a designated start and end date.
- Information regarding the suggested delivered load method by which the setup component can be populated.

Pages Used to Manage Setup Tasks

Page Name	Object Name	Navigation	Usage
Manage Setup Tasks	EOLT_IMPL_RESLT	Enterprise Components, Manage Implementations, Manage Setup Tasks	View individual setup tasks, navigate to any additional tasks that must be completed and PeopleBooks content, track implementation progress, and view suggested load methods.
Discussion	EOLT_DISCUSSION	Click the Discussion icon.	Enter information and discussion about the progress of this setup task.
Additional Configuration	EOLT_IMPL_ADDCFG	Click the link in the Additional Configuration column on the Manage Setup Tasks Summary page.	Display any other tasks that are required to set up the component.
Generate Data Mover Scripts	EOLT_IMPL_RECS	Click the Generate Data Mover Scripts link on the Manage Setup Tasks page.	Create and save a Data Mover script to migrate data for selected setup components.

Reviewing the Setup Tasks

Access the Manage Setup Tasks page.



Manage Setup Tasks

Setup Task List SN_GRANT Description SN_GRANT

Customize | Find | View 100 | First 1-10 of 186 Last

Summary | Tracking | Component Details

Seq	Products	Setup Task	Navigation	Description	Additional Configuration	People Books
1	BI	Source Transactions	Commitment Control > Define Control Budgets > Source Transactions	Define source transactions that are subject to Commitment Control.		Help
1	BI	Credit Card Types	Enterprise Components > Component Configurations > Credit Card Interface > Credit Card Types	Define accepted credit card types		Help
1	BI	Setup	Enterprise Components > Component Configurations > Credit Card Interface > Setup	Credit Card Interface Setup		Help
1	BI	Ledger Groups	General Ledger > Ledgers > Ledger Groups	Define ledger groups.		Help
1	BI	Templates	General Ledger > Ledgers > Templates	Define ledger templates that ledgers and ledger groups use.		Help
1	GM	Contacts	Grants > Departments > Contacts	Establish department contacts, approving authority threshold, phone, and titles.		Help
1	GM	General Information	Grants > Departments > General Information	Establish and update department name, major subdivision, address and attributes.		Help
1	GM	Advisor / Advisee	Grants > Professionals > Advisor / Advisee	Establish or update advisor-advisee relationship information.		Help
1	GM	Collaboration	Grants > Professionals > Collaboration	Establish or update collaborative information.		Help
1	GM	Define Honors and Awards	Grants > Professionals > Define Honors and Awards	Establish honors and awards types.		Help

Save | Return to Search | Next in List | Previous in List

Manage Setup Tasks | Generate Data Mover Scripts

Manage Setup Tasks page: Summary tab

The Manage Setup Tasks page displays the identified tasks that you need to complete for the setup components on the list. Additionally, the page provides the navigation to the setup component and a link to the documentation containing more information on implementing the components listed on the page.

The summary shows the step-by-step sequenced list of setup tasks reflecting the order in which the setup components must be configured.

Seq (sequence)	Displays the sequence number in which the setup tasks must be completed. If tasks have the same sequence number, it means that those tasks can be performed in parallel.
Products	Displays the products that the task relates to.
Setup Task	Displays the name of the task that must be completed. This name is also a link to the first page of the setup component.
Navigation	Displays the portal navigation for the setup component.
Description	Displays the purpose of the setup component.
Additional Configuration	Displays a link to a page that shows any other tasks that must be completed to set up the component.
PeopleBooks	Displays a link to the PeopleBook that describes the first page in the component that supports the identified setup task.

Note. PeopleBooks must be installed on the web server for the PeopleBooks link to function. In addition, the PeopleBooks Help function must be set up on the web server.

Complete Appears when a task has been marked as 100 percent completed on the Tracking tab. A green check mark appears in this column indicating that the task is complete.

Note. You can use the export to Microsoft Excel spreadsheet function to download the setup task list, if necessary.

See Also

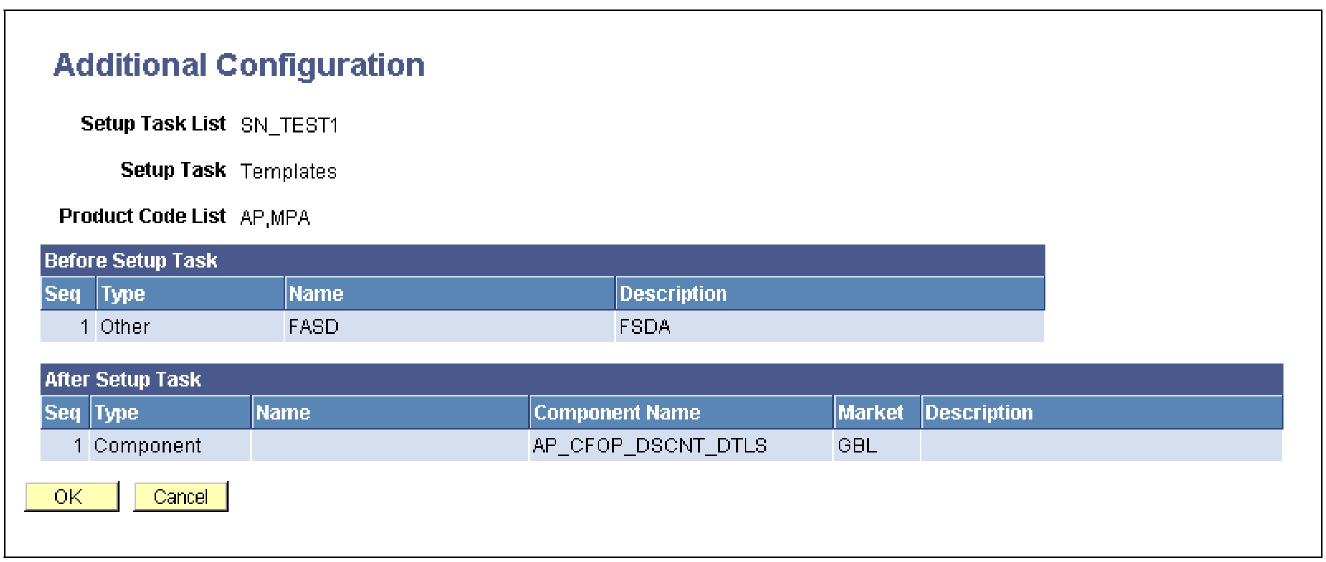
PeopleSoft Installation Guide for your product suite.

Completing Tasks in Parallel

The setup tasks are ordered and displayed in the sequence they need to be performed. Those setup tasks that share the same sequence number are tasks that can be completed in parallel. However, tasks sharing the same sequence number still appear in the order that they should be performed if they are not done in parallel. Tasks within one sequence number may have dependent setup tasks in subsequent sequence groups

Viewing Additional Configuration Tasks

Access the Additional Configuration page.



Additional Configuration page

Some setup components have tasks associated with them that must be completed before or after the specific setup task. Those tasks that must be completed before working on the parent setup tasks are listed in the Before Setup Task grid and appear in the order in which they must be completed. If there are tasks that must be completed after the setup task, they are listed in the After Setup Task grid and appear in the order in which they must be completed.

Some components may have additional steps that need to be completed before moving on to the next component. For example, a Structured Query Language script or an Application Engine process may need to be run to initialize values in a table. In these cases, additional configuration steps may be displayed for this setup task/component.

Each additional setup task is assigned a type: *Component* or *Other*. If the additional configuration is a component, the market and the component name appear on the page. If the additional task is the type *Other*, the name of the task and a description appear on the page.

Seq (sequence)	Displays the sequence in which these additional tasks must be completed.
Type	Displays the type. There are two types of additional setup tasks: *Other* and *Component*. When the setup task is listed as component, any additional configuration can be completed by using the identified PeopleSoft component. When the setup type is listed as other, the page displays a description of the other process that might include a report to run or another process that must be run.
Name	Displays the name of the component or other additional configuration item.
Component Name	Displays the name of the component as defined in PeopleSoft Application Designer. This field appears only when the additional configuration type is *Component*.
Market	Displays the market code for the component. This field appears only when the additional configuration type is *Component.*
Description	Displays a description of the additional configuration task.

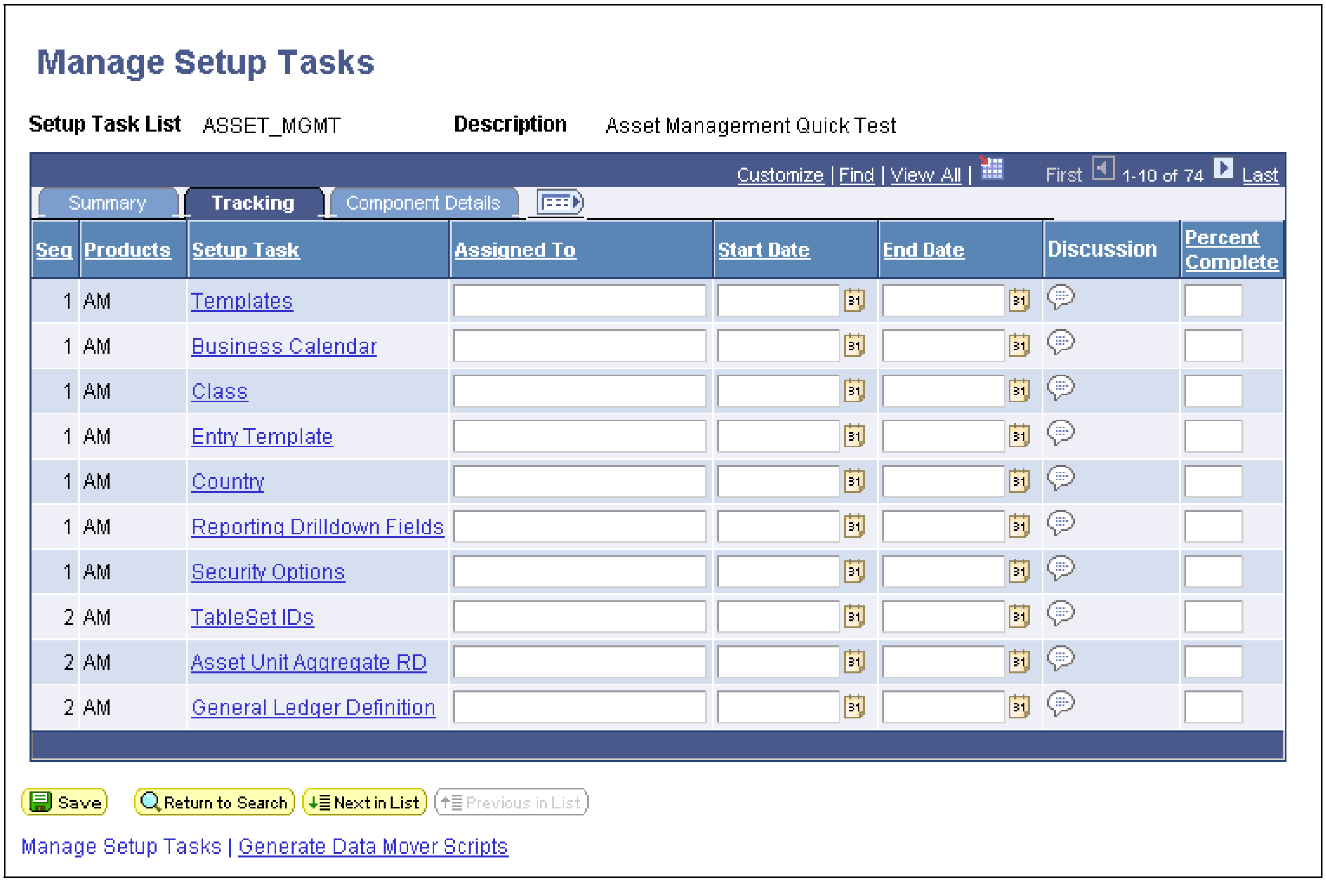
Viewing PeopleBooks Documentation

Each task in the setup list has a link to the PeopleBook that describes the setup component, fields, and required data that you must enter for the component.

Note. PeopleBooks must be installed on the web server for the PeopleBooks links to function.

Tracking Setup Tasks

Select the Tracking tab on the Manage Setup Tasks page.



Manage Setup Tasks page: Tracking tab

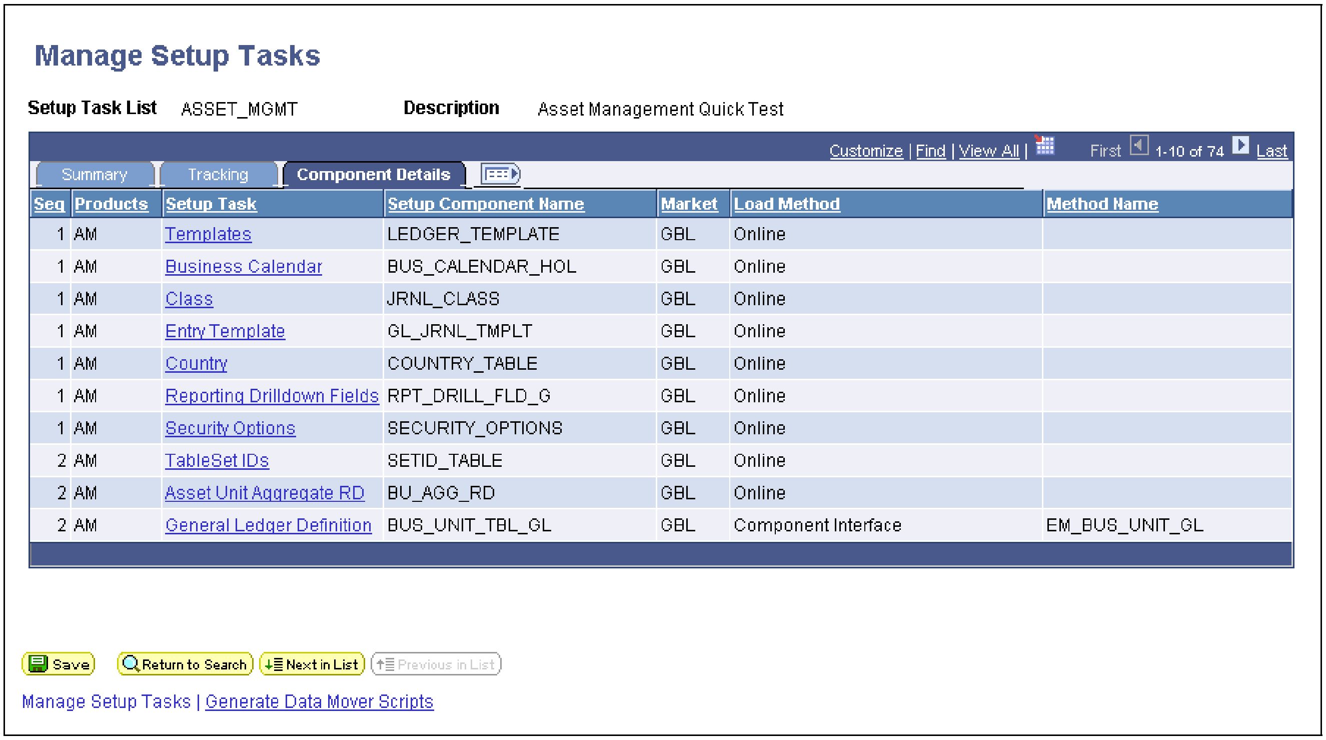
Use the Tracking tab to manage the process and personnel involved with completing the setup tasks. The fields on this page are purely informational and can be used by the project team and project manager to track the progress of the setup tasks.

Seq (sequence)	Displays the sequence number in which the setup tasks must be completed. If tasks have the same sequence number, it means that those tasks can be performed in parallel.
Products	Displays the code for the products that the task relates to.
Setup Task	Displays the name of the task that must be completed. This name is also a link to the first page of the component.
Assigned To	Enter a name to assign an owner to this setup task. This is a free-form edit box, so you can enter multiple names or the role of the individual who owns this task.
Start Date	Enter the start date for this setup task.
End Date	Enter an end date for this setup task.
Discussion	Click the icon to access the Discussion page, where you can enter information regarding the business decisions made, the progress toward completion of the task, and additional tasks related to the setup task.
Percent Complete	Enter a number representing the percent of the task that has been completed. When 100 percent is entered, the Complete field on the Summary tab displays

a green check mark on the first tab only. If a percentage is changed from 100 to something less than 100, the green check mark in the Complete field on the Summary tab is removed.

Viewing Setup Task Load Methods

Select the Component Details tab.



Manage Setup Tasks

Setup Task List ASSET_MGMT **Description** Asset Management Quick Test

Customize | Find | View All | First 1-10 of 74 Last

Summary | Tracking | **Component Details**

Seq	Products	Setup Task	Setup Component Name	Market	Load Method	Method Name
1	AM	Templates	LEDGER_TEMPLATE	GBL	Online	
1	AM	Business Calendar	BUS_CALENDAR_HOL	GBL	Online	
1	AM	Class	JRNL_CLASS	GBL	Online	
1	AM	Entry Template	GL_JRNL_TMPLT	GBL	Online	
1	AM	Country	COUNTRY_TABLE	GBL	Online	
1	AM	Reporting Drilldown Fields	RPT_DRILL_FLD_G	GBL	Online	
1	AM	Security Options	SECURITY_OPTIONS	GBL	Online	
2	AM	TableSet IDs	SETID_TABLE	GBL	Online	
2	AM	Asset Unit Aggregate RD	BU_AGG_RD	GBL	Online	
2	AM	General Ledger Definition	BUS_UNIT_TBL_GL	GBL	Component Interface	EM_BUS_UNIT_GL

Save | Return to Search | Next in List | Previous in List

Manage Setup Tasks | Generate Data Mover Scripts

Manage Setup Tasks page: Component Details tab

The Component Details page displays the technical details for each of the components. This includes the component name and the load method that you can use to load the data for the component during the implementation.

Seq (sequence) — Displays the sequence number in which this task must be completed. If tasks have the same sequence number, it means that those tasks can be performed in parallel.

Products — Displays the code for the products that the task relates to.

Setup Task — Displays the name of the task that must be completed, as a link to the first page of the component.

Setup Component Name — Displays the name of the component as defined in PeopleSoft Application Designer.

Market — Displays the code for the market that the component supports.

Load Method — Displays the PeopleSoft suggested method for loading the component. Values are: *Component Interface, Application Engine, Other,* and *Online.*

Method Name Depending on the type of load method, displays the name of the component interface, Application Engine, or custom load program.

Understanding Load Methods

PeopleSoft Setup Manager presents suggested load methods for the components that you need to set up:

- When Component Interface is noted as the load method, the page also displays the name of the component interface so that you can use the Excel to Component Interface utility to load the component.

  Alternatively, you can enter the data manually onto the page rather than use the component interface.

  See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces, "Using the Excel to Component Interface Utility"*

- When Application Engine is noted as the load method, PeopleSoft application development has created an Application Engine program for loading the data.

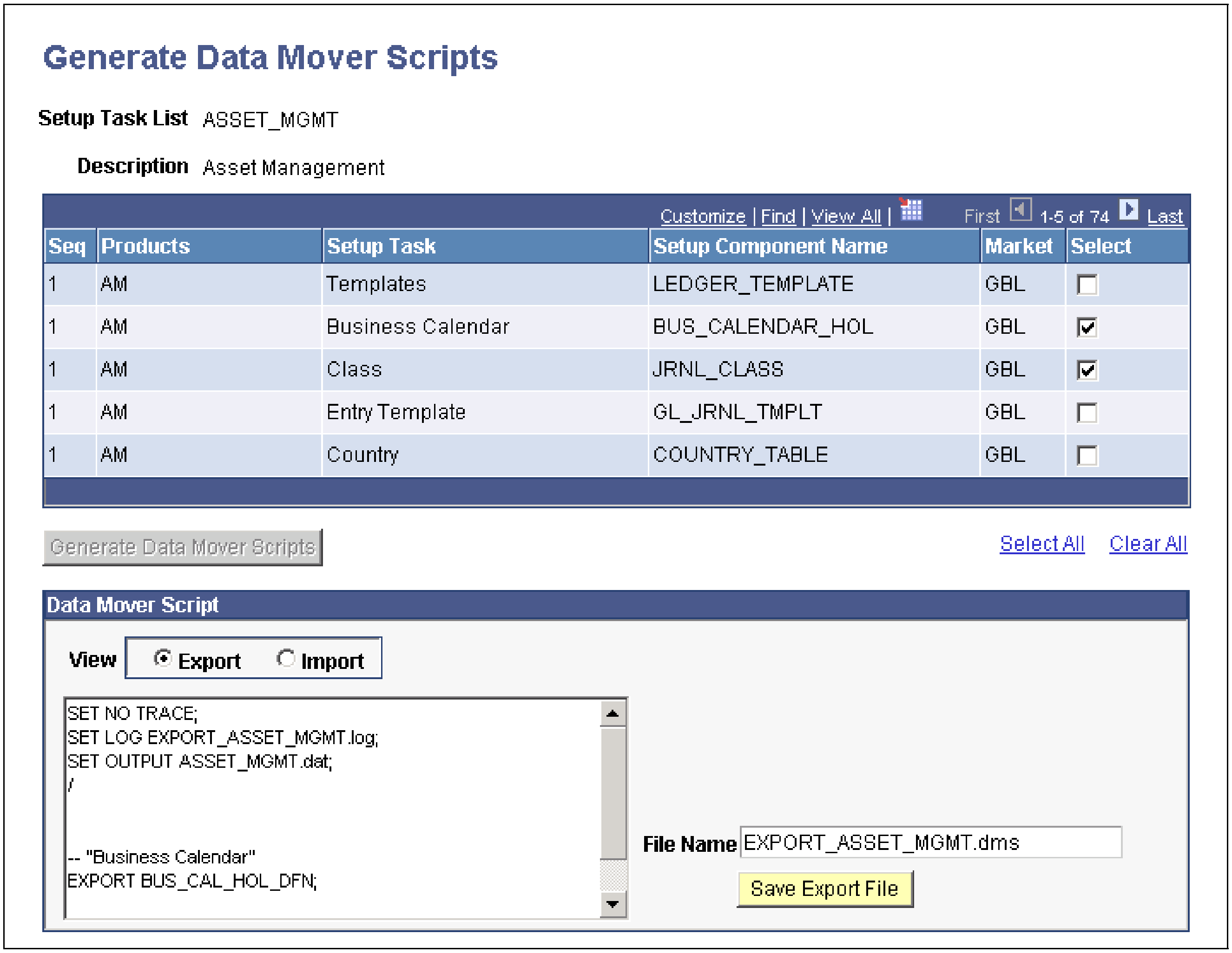
  Use the Application Engine that is listed on the page to load the data. Alternatively, you can enter that data manually onto the page rather than use the Application Engine.

  See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Engine.*

- When Online is noted as the load method, enter data manually through the component that is referenced on the page.
- When Other is noted as the load method, the name of the custom load method appears in the column.

Exporting Setup Data

Access the Generate Data Mover Scripts page.



Generate Data Mover Scripts page

This page enables you to select one or more of the components for a specific task and generate Data Mover scripts that export and import your setup data to another database. This functionality is designed to assist with the migration of application setup data from one environment to another. You can use the Data Mover scripts to populate other databases with setup data that you've entered in another environment.

Note. There are some setup components that cannot be exported or imported by using Data Mover. When you select the check box for that setup component, the system displays a message informing you that the selected component cannot be migrated by using Data Mover.

Once you select the components and click the Generate Data Move Scripts button, an additional section of the page appears with a window that displays the text of the Data Mover script and fields to enter a name for the scripts. The script includes a sequenced list of the tables that support the selected components. Where a table is identified within the script more than once, the duplicate references are commented out.

Note. Setup Manager identifies the primary tables that support the setup components that you select to migrate. Other tables, such as prompt edit tables that are defined on the setup component, are not identified by Setup Manager but may be necessary for the component to function in the new environment. PeopleSoft recommends that you identify these tables ahead of time when planning your implementation.

Setup Task List	Displays the name of the setup task list.

Description Displays a description of the setup task list.

Seq (sequence) Displays the sequence number in which the setup tasks must be completed. If tasks have the same sequence number, it means that those tasks can be performed in parallel.

Products Displays the code for the products that the task relates to.

Setup Task Displays the name of the task that must be completed, as a link to the first page of the setup component.

Setup Component Name Displays the name of the component that supports the setup task.

Market Displays the market code of the component that supports the setup task.

Generate Data Mover Script Click this button to display an additional area of the page that displays the text of the Data Mover script as well as the directory and filename where the script will be saved.

Note. This button is not available for selection until you have selected the check box for at least one setup task.

Export Select this option to view the Data Mover export script.

Import Select this option to view the Data Mover import script.

File Name Enter the file name for the Data Mover script. No directory separators are allowed in the filename edit.

Save Export File Click this button to save the file to the default output directory.

The PeopleSoft default directory is $PSHOME\appserv\files where $PSHOME is the home PS directory.

Your system administrator may have specified other locations for the output directory including:

- The directory for the environment variable $PS_FILEDIR that is defined on install of the application server
- The directory for the environment variable $PS_SERVDIR that is defined on install of the application server

See Also

Enterprise PeopleTools 8.45 PeopleBook: Data Administration Tools

Testing the Implementation

When the tasks in the Setup Task List have been completed, the implementation team should verify that the application functions as designed and supports the business scenarios that the implementation was based on. The approach to verifying that the setup is complete will be based upon the implementation methodology being used by the team.

After you have finished testing the implementation and have gone live, don't forget that you may use Setup Manager when you implement new products or new features. Additionally, Setup Manager can be used after upgrading your PeopleSoft applications to a new release when there are new products, features, or business processes that you want to implement.

Tasks associated with testing the implementation could include:

- Testing individual online transactions and batch processes
- Verifying that you can access any existing data and enter new data successfully.
- Running through the steps of business processes end-to-end.

Glossary of PeopleSoft Terms

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

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

action template

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

activity

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

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

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

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

address usage

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

adjustment calendar

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

administrative function

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

admit type

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

agreement

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

allocation rule

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

alternate account

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

analysis database

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

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

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

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

See also *course.*

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

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

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

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

See also *population*and *division*.

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

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

comm key
See *communication key.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *class.*

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

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

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

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

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

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

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

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

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

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

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

See also *population* and *cohort*.

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

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

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

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

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

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

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

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

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

event

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

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

event propagation process

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

exception

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

exclusive pricing

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

fact

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

financial aid term

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

forecast item

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

fund

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

gap

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

generic process type

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

gift table

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

GL business unit

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

See also *business unit*.

GL entry template

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

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

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

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

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

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

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

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

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

See also *update access.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *3C engine*.

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *compensation object.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See also *division* and *cohort*.

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

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

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

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

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

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

number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

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

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

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

process definition Process definitions define each run request.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

See *record input VAT flag.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

source transaction — In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

speed key — See *communication key.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

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

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

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

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

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

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

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

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

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

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

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

See also *inquiry access.*

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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