
PeopleSoft Enterprise CRM 9 Infosync Applications PeopleBook

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PeopleSoft Enterprise CRM 9 Infosync Applications PeopleBook
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About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Enterprise Application Prerequisites

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

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

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

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

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Downloading and Ordering Printed Documentation

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

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

Downloading PDF Files

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

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

Ordering Printed, Bound Volumes

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

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

Additional Resources

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in PeopleBooks

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

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

Oracle's PeopleSoft Enterprise CRM Infosync Applications Preface

This preface discusses:

- PeopleSoft enterprise products.
- PeopleSoft Enterprise CRM application fundamentals.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM business object management.
- PeopleSoft Enterprise CRM product and item management.
- PeopleSoft Enterprise CRM Sales.
- PeopleSoft Enterprise CRM Integrated FieldService.
- PeopleTools PeopleBooks.
- Additional documentation.

PeopleSoft Enterprise Products

This PeopleBook refers to these PeopleSoft enterprise products:

- Oracle's PeopleSoft Enterprise Infosync Server.
- Oracle's PeopleSoft Enterprise Infosync Client.

PeopleSoft Enterprise CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Infosync Applications PeopleBook* provides implementation and processing information for your PeopleSoft Infosync Server or Client application. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft CRM. It includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface”

PeopleSoft Enterprise CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

The *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook* contains these parts:

- Correspondence management.

This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation tools.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), and scripts.

- Configuration tools.

This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge management.

This part discusses the setup of Natural Language Processing (NLP) and Verity search.

- Business process management.

This part provides information on the two different approaches to manage business processes in PeopleSoft CRM and discusses:

- The setup of the BPEL infrastructure to initiate and manage BPEL process instances.
- The setup of Business Process Monitor to view the status information of initiated BPEL process instances.
- The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.
- The setup and execution of business projects.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, “PeopleSoft CRM Automation and Configuration Tools Preface”

PeopleSoft Enterprise CRM Business Object Management

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics.

This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “Getting Started”

PeopleSoft Enterprise CRM Product and Item Management

The *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

See Also

PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook, “PeopleSoft Enterprise CRM Product and Item Management Preface”

PeopleSoft Enterprise CRM Sales

PeopleSoft Enterprise Sales enables you to:

- Leverage the right channels, resources, and offerings to differentiate your business from others and prevail over the competition.
- Motivate and track sales performance using metrics-driven planning and compensation tools.
- Increase operational efficiency by integrating sales processes across the enterprise.
- Extend your sales reach through partners and other channels.
- Maximize sales productivity and build profitable, loyal customer relationships.

See Also

PeopleSoft Enterprise Sales 9 PeopleBook, “Oracle’s PeopleSoft Enterprise CRM Sales Preface”

PeopleSoft Enterprise CRM Integrated FieldService

PeopleSoft Integrated FieldService ensures total life cycle management of service requests for customers and technicians. PeopleSoft Integrated FieldService is a flexible service order and dispatch management solution that provides complete management of agreements, parts, time, and expenses. It provides functionality to systematically manage preventive maintenance programs, generate reports, and automatically schedule preventive maintenance service orders.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “PeopleSoft Integrated FieldService Preface”

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the Enterprise PeopleTools 8.48 PeopleBook.

Additional Documentation

In addition to the *PeopleSoft Enterprise CRM 9 Infosync Applications PeopleBook*, information that pertains to this integration is also available in other PeopleSoft and third-party vendor documentation. Consult these publications where applicable:

- *PeopleSoft Enterprise Integrated FieldService 9 PeopleBook*.
This book provides implementation and processing information for your PeopleSoft FieldService application.
- *PeopleSoft Enterprise Sales 9 PeopleBook*.
This book provides implementation and processing information for your PeopleSoft Sales application.
- PeopleSoft Enterprise CRM 9 Supplemental Installation Documentation.
This document contains additional instructions for installing PeopleSoft Infosync Applications and is available for download on Customer Connection, under Support, Documentation, Documentation Updates, Enterprise, Customer Relationship Management, All Products.
- Intellisync Server Installation and Administration Guides.
This document provides information on installing and administering the third-party Intellisync synchronization engine. It is available on the machine where your Infosync application is installed.

See Also

PeopleSoft Enterprise Integrated FieldService 9 PeopleBook, “PeopleSoft Integrated FieldService Preface”
PeopleSoft Enterprise Sales 9 PeopleBook, “Oracle’s PeopleSoft Enterprise CRM Sales Preface”

CHAPTER 1

Getting Started with PeopleSoft Enterprise Infosync Applications

This chapter provides an overview of PeopleSoft Infosync applications and discusses:

- PeopleSoft Enterprise Infosync applications business process.
- PeopleSoft Enterprise Infosync applications integration.
- PeopleSoft Enterprise Infosync applications implementation.

PeopleSoft Enterprise Infosync Applications Overview

Oracle's PeopleSoft Enterprise Customer Relationship Management (CRM) Infosync applications synchronize contacts, tasks, calendars, and emails between PeopleSoft CRM and Personal Information Management (PIM) servers (Microsoft Exchange or Lotus Domino). This allows end users to manage CRM contacts, tasks, calendar items, and emails on their mobile devices using PIM clients (Microsoft Outlook or Lotus Notes).

With this application, you can:

- Synchronize data between the CRM system and Microsoft Exchange with Microsoft Outlook or Lotus Domino with Lotus Notes.
- Control the user data being sent back and forth using dataset roles and rules.
- Resolve data conflicts between the PIM and the CRM servers.
- Support multiple mail servers.
- Monitor synchronization status and error logs.

This book covers information that is shared between the two applications (such as common business processes and functionality) under the same sections; differences between the applications are identified in this documentation wherever appropriate.

PeopleSoft Enterprise Infosync Applications Business Processes

PeopleSoft Enterprise CRM Infosync applications enable users to synchronize contacts, tasks, calendar items, and emails between the CRM and PIM systems.

We discuss these business processes in the business process chapters in this PeopleBook.

PeopleSoft Enterprise Infosync Applications Integration

See [Chapter 2, “Understanding PeopleSoft Enterprise CRM Infosync Applications,” Understanding Synchronization Process, page 4.](#)

PeopleSoft Enterprise Infosync Applications Implementation

PeopleSoft Enterprise CRM Infosync Applications do not require table-loading implementation steps.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface”

CHAPTER 2

Understanding PeopleSoft Enterprise CRM Infosync Applications

This chapter discusses:

- PeopleSoft Enterprise CRM Infosync applications.
- Synchronization process.
- Objects supported in synchronization.
- Datasets.
- User management.
- Data synchronization.

Understanding PeopleSoft Enterprise CRM Infosync Applications

PeopleSoft Enterprise CRM Infosync applications provide data synchronization of contacts, tasks, calendar items, and email between a PIM client (such as Microsoft Outlook and IBM Lotus Notes) and PeopleSoft Enterprise CRM. Users synchronize data between the enterprise and the PIM software on their systems, consolidating customer information in a single place and share it amongst authorized users across the company.

Note. The Infosync applications support the synchronization of contacts, which are actually persons with a contact, consumer, or worker role (or a combination of these roles) in PeopleSoft Enterprise CRM. From a PIM application's perspective, contacts are all simply contacts in the address book, whereas consumers are contacts in the consumer category, and workers are contacts in the worker category. In this documentation, the term *contacts* refers to persons as a whole regardless of their roles, unless stated otherwise.

The Infosync applications:

- Provide full control on the type of data exchanged during synchronization.

First, administrators can determine which supported objects to enable in synchronization for users by specifying those objects in different preference settings and associate users with them. In addition, they can delineate the set of data and limit its amount that is downloaded to users by defining dataset rules that determine the most relevant set of data delivered within the shortest possible synchronization time.

Administrators can also restrict certain data that exists on the PIM application, such as a private calendar item or a private contact, from being synchronized to PeopleSoft CRM by using categories and filters.

- Provide administrative control on synchronization process.

Administrators set up PIM preferences to specify details on how the supported objects are handled when they are synchronized to PeopleSoft CRM; for example, if new contacts can be added or if private tasks can be synchronized. Every user is associated with a PIM preference. Typically, administrators define a number of PIM preference settings that cover all users in a company based on roles or job functions. But if the company calls for a more specific definition of PIM preferences for users, PIM preference settings can also be set up on an individual user basis.

- Deliver predefined rules to resolve data conflicts that occur during synchronization.
- Provide synchronization status and error logs.

Note. In this documentation, Microsoft Exchange and Lotus Domino are collectively referred to as *PIM server*, and Microsoft Outlook and Lotus Notes are referred to as *PIM client*. Mobile users use PIM clients to view and modify data that is stored centrally on the PIM server.

Differences Between Server and Client Applications

From a user's perspective, the most prominent difference between the Infosync Server and Client applications is the way to request data synchronization. In a server application, this process occurs automatically at the server level and is transparent to users; no additional installation is required of the users. If users work with the client application, they first need to install the Infosync client software on their Windows machines. They click a button in the client software to initiate synchronization.

Installation and configuration tasks for these two applications are slightly different; information that pertains only to one application but not both is noted where applicable.

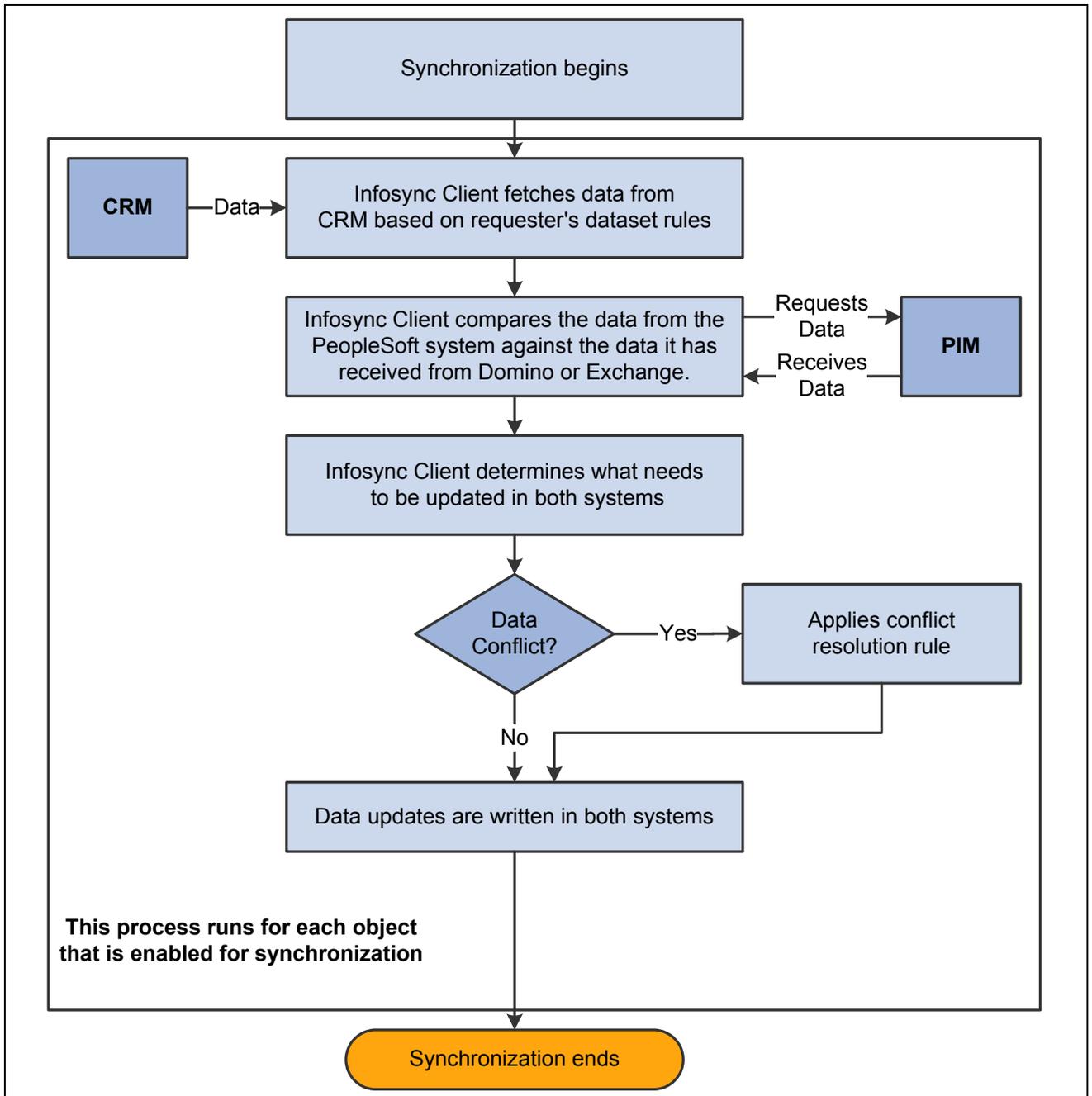
Understanding Synchronization Process

PeopleSoft uses Integration Broker to handle the XML-based communication between PeopleSoft Enterprise CRM and the Infosync applications.

This diagram illustrates the data synchronization process flow between PeopleSoft CRM and the PIM system:

PeopleSoft Enterprise Infosync Client

When the synchronization process starts, the Infosync Client sends an XML request message to Integration Broker, which executes a message PeopleCode to gather the changed data in PeopleSoft CRM and sends the reply back. Next, it polls the PIM system for changes. After receiving the data from these two systems, it performs a comparison and resolves any data conflict that occurs. At the end, the data pertaining to CRM is formatted in XML and sent back to PeopleSoft CRM as an XML message. Changes that are specific to the PIM system are updated accordingly.



PeopleSoft Enterprise Infosync Client synchronization process

PeopleSoft Enterprise Infosync Server

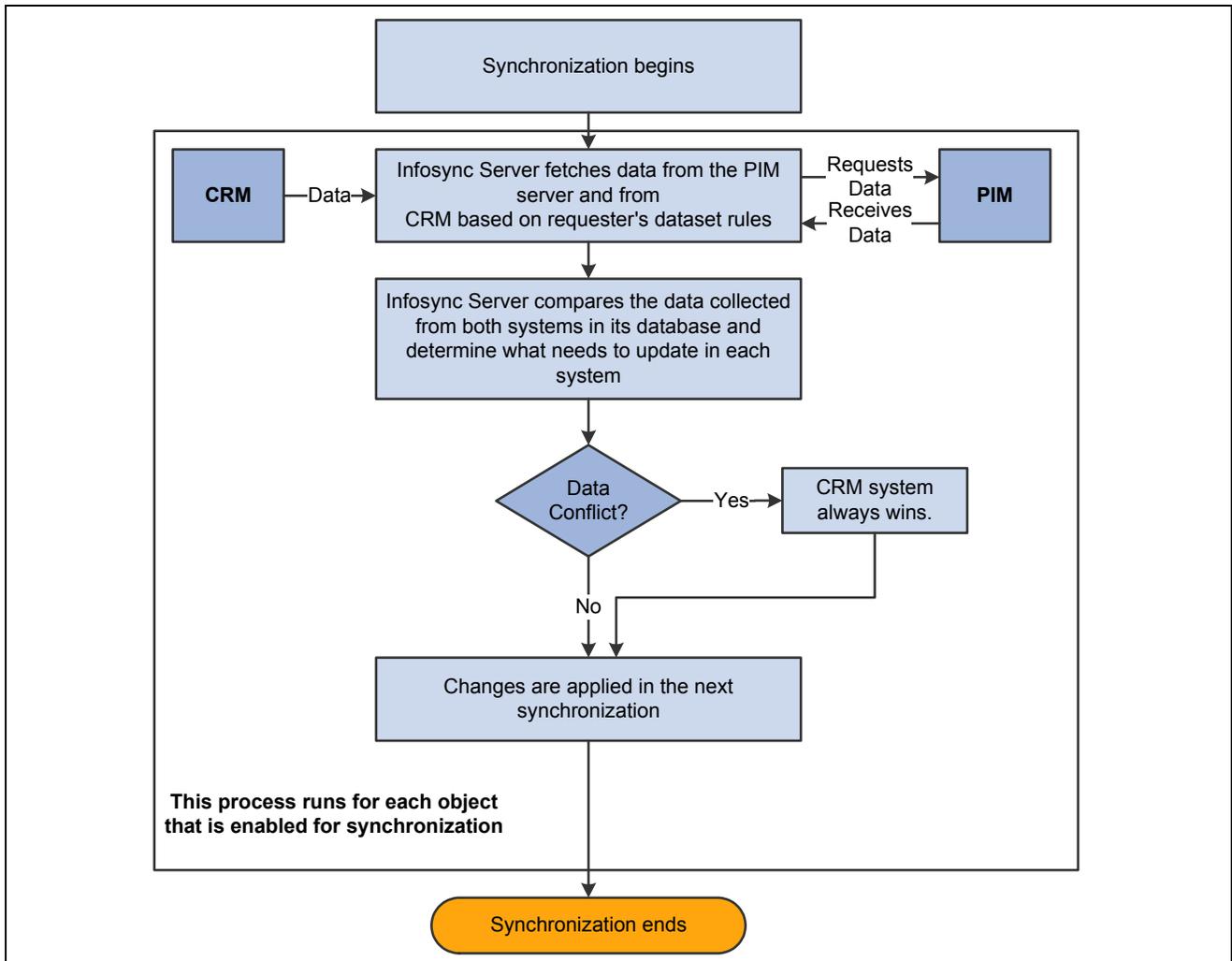
Infosync Server includes the Intellisync Mobile Suite (IMS), which provides these additional features:

- Integration with Lightweight Directory Access Protocol (LDAP) to complete the user creation process in an automated fashion.
- Synchronization of meetings with multiple attendees.

See [Chapter 2, “Understanding PeopleSoft Enterprise CRM Infosync Applications.”](#) [Understanding User Management, page 16.](#)

See Intellisync documentation

When the synchronization process starts, the Infosync Server sends an XML request message to Integration Broker, which executes a message PeopleCode to gather the changed data in PeopleSoft CRM and sends the reply back. Also, it polls the PIM server for changes (if the PIM server is Microsoft Exchange, no polling is needed because the Exchange server pushes changes to Infosync Server automatically). After receiving the data from the two systems, it performs a comparison and resolves any data conflict that occurs (the CRM system always win when there is data conflict). At the end, the data pertaining to CRM is formatted in XML and sent back to PeopleSoft CRM as an XML message. Changes that are specific to the PIM system are updated accordingly.



PeopleSoft Enterprise Infosync Server synchronization process

Understanding Objects Supported in Synchronization

This section discusses:

- Contacts, consumers, and workers.
- Tasks and calendar items.

- Email.
- Private objects.
- Object deletion.

Contacts, Consumers, and Workers

In PeopleSoft Enterprise CRM, contact, consumer, and worker are instances of the Person component and are referred to as roles. A person can have multiple roles; he or she can be contact, consumer, and worker simultaneously. From the PIM application's perspective, consumers and workers are the same as contacts and are stored in the address book. Category is used to distinguish which role that the person has in a contact record. By default, contact records with a consumer role are in the consumer category, those with a worker role are in the worker category, and those with a contact role are in the contact category. Category names are modifiable.

As an administrator, you can enable or disable synchronization for consumer or worker. For each of the enabled objects, further select the operations that the synchronization process supports. For example, if the consumer object is enabled, you can further decide whether to allow actions, such as consumer creation, update, or deletion to be synchronized to PeopleSoft CRM if any of these occurs on the PIM side. For any unsuccessful synchronization of records that happens due to unauthorized operations, errors for users are logged on the PIM Errors page.

Contacts (with the contact category) support multiple companies. Users can specify multiple companies in a contact record using separators. When the record synchronizes, it establishes and maintains a one-to-many relationship between that contact and its companies.

Users can access contact information in the 360-Degree View from the PIM client using the PIA URI setup on the PIM Preference page. You must associate the contact with a company in order to locate it in the system.

The 360-Degree View link can also be enabled for consumers and workers.

Note. Consider defining contact web page URLs links to be a one-time implementation decision. If users are currently using this field, using this feature will overwrite the existing values during synchronization.

The Infosync applications support the synchronization of private contacts from PIM systems. Contacts can be marked *private* in the PIM system and be synchronized to the CRM system along with the private attribute selected. To exclude private contacts from being synchronized, you can set up filter conditions that identify which categories of contacts are to be synchronized to the CRM system; by using the *exclude private* filter rule, private contacts are not synchronized.

See Also

[Chapter 3, "Setting Up PeopleSoft Enterprise CRM Infosync Applications," Specifying PIM Preferences for Contacts, page 37](#)

[Chapter 3, "Setting Up PeopleSoft Enterprise CRM Infosync Applications," Specifying PIM Preferences for Consumers, page 40](#)

[Chapter 3, "Setting Up PeopleSoft Enterprise CRM Infosync Applications," Specifying PIM Preferences for Workers, page 41](#)

Tasks and Calendar Items

Tasks and calendar items are displayed on the to-do list (or task list) and calendar of the PIM client. When they are synchronized to PeopleSoft CRM, they appear on the My Calendar and My Tasks components for the users.

In PeopleSoft Enterprise CRM, you can link tasks to transactions (such as leads, opportunities, and service orders) as needed. If a task that is created from a lead or opportunity is synchronized to the PIM system, the lead or opportunity name automatically appears on the subject line of the task in square brackets ([and]).

The Infosync applications deliver dataset rules that determine the most relevant subset of data to be synchronized between the PIM and PeopleSoft CRM systems for each user. You can refine the data subset by adding more dataset rules to exclude insignificant data records from being synchronized. For example, you can create a dataset rule that filters out cancelled and completed tasks because users may not need to see them anymore.

Note that if you create tasks with assignees on your PIM client, the synchronization process does not upload the assignee information to the CRM system.

Meeting Attendees

In addition to persons that already exist in PeopleSoft Enterprise CRM, users can also include people that are not yet registered in CRM in meeting invitations that they set up on the PIM client. Users can either enter the name or the email address of one-time meeting attendees in invitations. When synchronization completes, unregistered contacts can still be displayed in the corresponding task in the CRM system; users have the option to add these unregistered people to the system using quick create.

Note. If an email address is used to invite an unregistered person, the system uses the alias of the email address as the last name of the new contact record for that person.

The Infosync applications provide the intelligence to identify meeting attendees whose email addresses are not synchronized in the PIM and CRM systems. These attendees will appear in invitations after the synchronization process instead of being dropped. Users can update the email addresses accordingly.

If users add contacts to tasks (typically meetings) on the PIM client, these contacts are displayed on the tasks in PeopleSoft CRM after synchronization.

Meeting Attendance Classification

When setting up meetings from the PIM client, users can choose to invite people as required or optional attendees. After the synchronization process completes and the meeting tasks are available for viewing on the Task Details page, invitees are classified as required, optional, or FYI (for your information), based on their meeting attendee types in the original meeting task. For example, if a contact is listed on the To field, the attendance is required; the attendance is optional if the contact is listed on the Cc field; the attendance is FYI if listed on the Bcc field.

Recurring Tasks and Calendar Items

PeopleSoft Enterprise CRM Infosync applications support recurring tasks and calendar items in these frequencies:

- Weekdays. For example, Tuesdays and Fridays.
- Days of the month. For example, second and third Wednesdays in June, June 12th and 14th, third weekend in March, 11th of May and June, first and second Mondays and Fridays in August.
- Days of the year. For example, every other December 25th, second and fourth Mondays in July for two years.
- Days of the quarter. For example, last day of each quarter.
- Weekdays of the quarter. For example, second Monday of the next quarter.

Task Type Mapping

Administrators can create new task types in PeopleSoft CRM to meet business needs. This causes issues in the mobile environment because these new task types often do not correspond to existing types on the PIM client. To take care of this issue, PeopleSoft CRM provides administrators the ability to establish mapping between new and existing CRM task types and PIM client task types on the Task Type page. Any task or calendar item that is downloaded to the PIM client will be classified using its corresponding PIM task type as specified.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Working with Tasks,” Defining Task Types.

Task Summary

PeopleSoft CRM provides an application engine (AE) program that generates a task for users to remind them of their outstanding tasks. This task summarizes all open tasks with their subjects and due dates for reference. Administrators can run this AE program at any time of the day, manually or automatically. New dataset rules support the synchronization of these summary tasks to users’ PIM clients if they are configured in the PIM preferences.

See Also

[Chapter 3, “Setting Up PeopleSoft Enterprise CRM Infosync Applications,” Specifying PIM Preferences for Tasks, page 46](#)

[Chapter 3, “Setting Up PeopleSoft Enterprise CRM Infosync Applications,” Specifying PIM Preferences for Calendar Items, page 44](#)

[Chapter 3, “Setting Up PeopleSoft Enterprise CRM Infosync Applications,” Generating Task Summary, page 51](#)

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Email

PeopleSoft Infosync applications support the synchronization of email coming from the PIM application to PeopleSoft CRM. After the process completes and the email are stored in the PeopleTools’ email depository, they go through another process where they will be associated with a contact in the system using the email’s From address.

- If a matching contact is found, the system links the email to the contact and adds it to the contact as an interaction.
- If no matching contact or more than one contact is found, the system writes to the PIM error log and creates an interaction for the email with no contact information.

The user has the option to assign a contact to that interaction manually.

Administrators define a category (for Exchange server) or a folder (for Domino server) to which users assign or move their email to be synchronized. PeopleSoft Infosync applications pick up email in that specified category. After the synchronization, all uploaded email are displayed on the My Synched Email page. Users with access to contacts will be able to view synchronized email that are associated with them from PeopleSoft CRM. This feature helps users such as sales representatives who would like to share email contents with their team members across the company.

These synchronized email are linked to open transactions of their contacts, if available; users also have the option to associate email with transactions manually. For example, a user may want to link an email to a lead of the email’s contact, if the email discusses that lead. Email can be associated with these objects: lead, opportunity, case, service order, and call report.

Users can delete synchronized email on the connected server; doing so does not remove the original email that exists on the PIM server.

Email Attachments

Attachments are synchronized along with their parent email if the attachment sizes fall below the configured limit. If attachments are too large, they are not synchronized even though their parent email are.

For the Infosync Client, the attachment size setup needs to be done before the client application deployment. As for the server software, the attachment filtering option is available in the Admin Console. The configured maximum attachment size should be consistent between the Admin Console and the Integration Broker (in the application server).

Corresponding applications should be available on any system where attachments can potentially be opened.

Note. Other types of attachments, such as for calendar items, tasks or contacts, are not supported.

See Also

[Chapter 3, “Setting Up PeopleSoft Enterprise CRM Infosync Applications,” Specifying PIM Preferences for Emails, page 47](#)

[Chapter 4, “Managing Synchronized Objects and Information,” Working with Synchronized Email, page 59](#)

Private Objects

The Infosync applications support the synchronization of private contacts, tasks, and calendar items from PIM systems. If contacts are marked as private in the PIM client, these contacts are synchronized and their private status is transferred to the CRM system as well. When the Support Private feature is enabled for calendar items, the synchronization process creates a record for every private calendar item on the monthly calendar. The record displays the duration of the private calendar item and has a subject line that indicates that the item is a private record. Private tasks are handled similarly in PeopleSoft CRM.

Make sure that both the PIM and CRM systems share the same rules for handling private objects.

Object Deletion

Each object deletes records differently. This table summarizes what happens to the copy of a record (which was previously deleted on the PIM side) in PeopleSoft CRM if the delete operation is enabled for the record’s object:

Object	Result
Contact (delete contact operation is enabled)	The contact is removed from My Contacts.
Task or calendar item (delete calendar and delete task operations are enabled)	Transaction-related: record status changes to the status that is defined for deleted task or calendar item in PeopleSoft CRM.
	Independent: the status of the deleted task or calendar item is changed to <i>Cancelled</i> on the CRM system if the user is the owner of the item. The status is changed to <i>Declined</i> if the user is the assignee of the item.

Understanding Datasets

To control the distribution of data only to users who need it and help shorten the time needed for synchronization, the Infosync applications use datasets to filter data for users based on their roles.

Datasets, Dataset Roles, and Dataset Rules

Every user is associated with a PIM dataset role through the PIM preference profile that is specified in their user preferences. Each role is linked to five datasets (contact, task, and calendar item, consumer, and worker), each of which contains a list of dataset rules. A dataset rule defines the collection of data that is downloaded to the PIM system. Through the use of datasets, individual users receive updates for data that pertains only to them. For example, if the dataset rules chosen for Jane Smith's dataset role entitle her to receive updates for all the leads and tasks that she created, as well as calendar items that are created for her leads, she will not receive update on her PIM client any change that another colleague made regarding tasks that he created.

See Also

[Chapter 3, "Setting Up PeopleSoft Enterprise CRM Infosync Applications," Defining Dataset Rules and Roles, page 29](#)

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Delivered Dataset Rules

This table lists the predefined PIM dataset roles, datasets, and associated dataset rules that are delivered with the PeopleSoft CRM and PIM integration. Each dataset corresponds to a specific role and is associated with a number of dataset rules that identify sets of data to be downloaded to PIM server for end users associated to that role at synchronization.

Note. This set of delivered dataset information is for demonstration purposes; you can modify it. For example, administrators can create new dataset rules or modify existing ones as long as these rules carry to PeopleSoft CRM the SYNCID for contacts, calendar items, and tasks.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data to be Updated
PIM Field Service Role	PIM_FS_CALENDAR	CALENDAR ASSIGNED TO ME	Calendar items that are assigned to the user.
		CALENDAR FOR MY SERVICE ORDER	Calendar items for the service orders that are owned by the user, including those calendar items (for the service orders) that belong to other users.
		CALENDAR OWNED BY ME	Calendar items that are owned by the user.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data to be Updated
PIM Field Service Role	PIM_FS_CONTACTS	CONTACTS_CREATED_BY_ME	Contacts that are created by the user.
		CONTACTS FOR MY SERVICE ORDER	Contacts for the service orders that are owned by the user.
		MY_TASK_ASSIGNEE	Contacts that are selected as assignees in my tasks.
		MY_TASK_CONTACT	Contacts that are selected in my tasks.
PIM Field Service Role	PIM_FS_CONSUMER	CONSUMER_CREATED_BY_ME	Consumers that are created by the user.
		CONSUMERS_FOR_MY_SO	Consumers for the service orders that are owned by the user.
		CONSUMER_IN_TASK_ASSIGNEES	Consumers that are selected as assignees of my tasks.
		CONSUMER_IN_TASK_CONTACTS	Consumers that are selected as contacts of my tasks.
PIM Field Service Role	PIM_FS_CALENDAR	CALENDAR ASSIGNED TO ME	Calendar items that are assigned to the user.
		CALENDAR FOR MY SERVICE ORDER	Calendar items for the service orders that are owned by the user.
		CALENDAR OWNED BY ME	Calendar items that are created or owned by the user.
PIM Field Service Role	PIM_FS_TASK	TASKS ASSIGNED TO ME	Tasks that are assigned to the user.
		TASKS FOR MY SERVICE ORDER	Tasks that are associated with the user's service orders.
		TASKS OWNED BY ME	Tasks that are owned by the user.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data to be Updated
PIM Sales Role	PIM_SL_CALENDAR	CALENDAR ON MY LEADS	Calendar items for the leads that are owned by the user, including those calendar items (for the leads) that belong to other users.
		CALENDAR ON MY OPPORTUNITIES	Calendar items for the opportunities that are owned by the user, including those calendar items (for the opportunities) that belong to other users.
		MY CALENDAR	Calendar items that are owned by the user.
		CALENDAR ASSIGNED TO ME	Calendar items that are assigned to the user.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data to be Updated
PIM Sales Role	PIM_SL_CONTACTS	CONTACTS_CREATED_BY_ME	Contacts that are created by the user.
		CONTACTS_FOR_LEAD_TASK_ASSIGNEE	Contacts who are assignees of tasks that belong to user's leads.
		CONTACTS_FOR_OPP_TASK_ASSIGNEE	Contacts who are assignees of tasks that belong to user's opportunities.
		CONTACTS_FOR_LEAD_TEAM	Contacts for the lead sales team of which the user is a member.
		CONTACTS_FOR_OPP_TEAM	Contacts for the opportunity sales team of which the user is a member.
		CONTACTS_FOR_MY_LEAD	Contacts for the leads that are owned by the user.
		CONTACTS_FOR_MY_OPP	Contacts for the opportunities that are owned by the user.
		MY_TASK_ASSIGNEE	Contacts that are assignees of my tasks.
		MY_TASK_CONTACT	Contacts of my tasks.
		CONTACTS_ACT_TM	Contacts for the account team.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data to be Updated
PIM Sales Role	PIM_SL_TASK	MY SUMMARIZED TASKS	Tasks that are assigned to the user with the type summary.
		MY TASKS	Tasks that are created or owned by the user.
		TASKS AS ACCOUNT PLAN OWNER	Tasks in account plans of which the user is the owner.
		TASKS AS ACCOUNT PLAN TEAM MBR	Tasks in account plans of which the user is the member.
		TASKS ASSIGNED TO ME	Tasks that are assigned to the user.
		TASKS ON MY LEADS	Tasks for the leads that are owned by the user, including those tasks (for the leads) that are not assigned to the user.
		TASKS ON MY OPPORTUNITIES	Tasks for the opportunities that are owned by the user, including those tasks (for the opportunities) that are not assigned to the user.
		TASKS FOR MY CONTACTS	Tasks that concern contacts in My Contacts list, while the tasks are not assigned to the user.
PIM Sales Role	PIM_SL_CONSUMER	CONSUMER_CREATED_BY_ME	Consumers that are created by the user.
		CONSUMER_FOR_MY_LEAD	Consumers for the leads that are owned by the user.
		CONSUMER_FOR_MY OPPY	Consumers for the opportunities that are owned by the user.
		CONSUMER_ON_TASK_ASSIGNEES	Consumers who are assignees of user's tasks.
		CONSUMER_ON_TASK_CONTACTS	Consumers who are contacts of user's tasks.

PIM Dataset Role	Dataset	Dataset Rule	Set of Data to be Updated
Both	PIM_WORKER	WORKERS FOR PIM USERS	Workers in the same department as the user.
		WORKERS_IN_TASK_ASSIGNEES	Workers who are assignees of user's tasks.
		WORKERS_IN_TASK_CONTACTS	Workers who are contacts of user's tasks.

Understanding Intellisync Mobile Suite

Infosync Server includes the Intellisync Mobile Suite (IMS), which provides these additional features:

- Integration with LDAP to complete the user creation process in an automated fashion.
- Synchronization of meetings with multiple attendees.

See Also

[Chapter 2, "Understanding PeopleSoft Enterprise CRM Infosync Applications," Understanding User Management, page 16](#)

Intellisync documentation

Understanding User Management

While there are several ways to manually and automatically create users for synchronization, two are used commonly:

- Create users through file import in the administration console.
- Create users through LDAP import in the administration console.

Creating Users Through File Import in the Administration Console

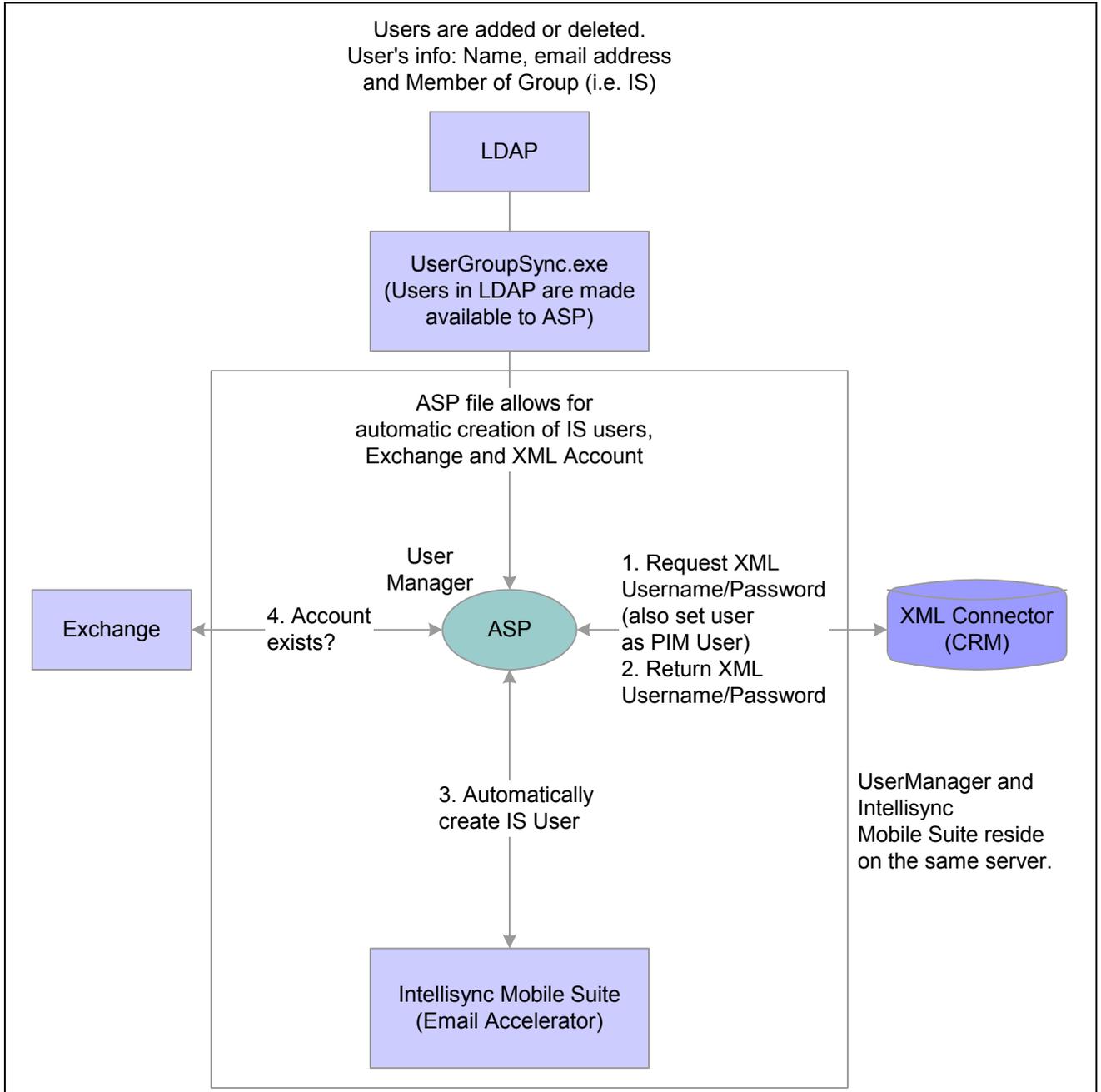
This method is supported in both Intellisync Server and IMS; the user list is generated using the PIM_ID_SYNC application engine process. Because Intellisync Server and IMS work with different file formats, the process generates the appropriate format based on the specified server installation: one for Lotus Domino, one for Microsoft Exchange.

The PIM_ID_SYNC process includes additional options for importing PIM users from the connected server, other than importing all users. You can choose to import users by PIM preference ID or to import only users that have been added since the last synchronization.

Creating Users Through LDAP in the Administration Console

IMS has a feature called UserManager, which can import users directly from your LDAP server, register them as PIM users on the connected server (after obtaining their usernames and passwords), and create and configure Intellisync users for them.

The following diagram shows how UserManager integrates with LDAP, the CRM system, the email server and IMS.



UserManager ASP integration

UserManager is a complete solution for user creation because it serves as a single point of entry for user creation, account registration (for Microsoft Exchange, Lotus Notes, and XML), and maintenance. No manual linkage is necessary.

Understanding Data Synchronization

This section discusses:

- Configuration settings and PIM preference.
- Categories and filtering.
- Conflict resolution.
- Field mapping.
- Performance logging.
- Synchronization rules and considerations.

Configuration Settings and PIM Preference

The Infosync configuration settings and PIM preferences determine users' synchronization profiles. When synchronization starts, the Infosync software reads these values to decide what data gets exchanged, which filters, conflict resolution rules, and field mappings are used, and performs the update in both CRM and PIM systems.

Configuration Settings

PeopleSoft Enterprise Infosync Client: In the client software, users define synchronization settings for each of these applications that they are running: address book, calendar, email, and to-do list. They can view the field mapping, select the filter to exclude unnecessary data from synchronizing to PeopleSoft CRM, and choose the conflict resolution rule to handle possible data conflicts during synchronization. The client application delivers predefined values for these settings.

See “PeopleSoft Enterprise CRM 9 Supplemental Installation Documentation”

PeopleSoft Enterprise Infosync Server: Administrators specify configuration settings for users on the Admin Console.

See “Intellisync documentation”

PIM Preferences

PIM preferences specify details on how the supported CRM objects are handled when they are synchronized to PeopleSoft CRM. The Infosync software delivers two sample PIM preferences that are configurable to suit your needs. Administrators can modify them as needed or create new ones. Typically, you define multiple function-specific (for example, sales manager or field technician) PIM preferences to cover all end users across the enterprise. For users with specific data synchronization requirements, you can customize PIM preference at the individual user level.

See [Chapter 3, “Setting Up PeopleSoft Enterprise CRM Infosync Applications,” Specifying PIM Preferences for Contacts, page 37.](#)

Category and Filtering

The Infosync applications use categories in conjunction with filters to identify which records to retrieve from the PIM side and synchronize to PeopleSoft CRM. In each PIM preference profile, administrators specify a category for every synchronization-enabled object. Users who are assigned to a PIM preference profile must enter the correct category (case sensitive) for each data record that they want to synchronize to PeopleSoft CRM. This table lists the system-delivered category values for each object:

Object	System-Delivered Category
Contact	Contact
Worker	Worker
Consumer	Consumer
Task	PeopleSoft
Calendar	PeopleSoft
Email	PeopleSoft

Note. Consider defining categories and filtering to be a one-time setup process. It is highly recommended that you do not make changes after the implementation, as doing so may cause unexpected results.

Categories are used with filters to determine what data is synchronized. For each of the synchronization-enabled objects (contact, task, and calendar), set up a filter with one or multiple rules. For filters with multiple rules, specify whether all conditions must be met before a record can be transferred to the other system.

For example, if you want to support the synchronization of contacts, consumers, and workers to PeopleSoft CRM, specify conditions in the filter using the *contains* and *or* operators like this:

Categories contains “Contact” OR

Categories contains “Consumer” OR

Categories contains “Worker”

Warning! If you specify multiple rules in a filter, use either the *AND* or *OR* operator to illustrate the relationship of the conditions, but not both.

Predefined Filters - PeopleSoft Enterprise Infosync Server

The Infosync Server delivers a predefined filter for each object (contact, task, and calendar); filters are set based on categories.

These filters are provided as samples; you can modify them as necessary.

Predefined Filters - PeopleSoft Enterprise Infosync Client

The Infosync Client delivers preset filters for each object:

- Address book (Contact) - Categories (condition: category equals “PeopleSoft”).
- ToDo (Task).
 - Exclude private data (condition: mark private is false).
 - Categories.
 - Categories and private (condition: category equals “PeopleSoft” and mark private is false).
- Calendar.
 - Exclude private data.
 - Categories.

- Categories and private.

Suppose that a user marks a task as private and groups it under the PeopleSoft category in the PIM client. If the filter for the ToDo section is set to *Categories and Private* in the Infosync Client application, the private task is not synchronized to PeopleSoft CRM. This task, however, is synchronized if the filter is set to *Categories*.

Enabling Private Support

To enable support for private tasks or calendar items:

- Set the PrivateFlag Field parameter to *1* in the DCSSettings.cfg file for tasks or calendar items.
- Ensure that the Private Flag field is mapped correctly.
- Ensure that the filter being used doesn't exclude private data.

If you set to exclude private data, no time slots are reserved for private tasks or calendar items on the CRM calendar even when the Support Private feature is enabled, because these records are not synchronized to PeopleSoft CRM.

Disabling Private Support

To disable support for private tasks or calendar items:

- Set the PrivateFlag Field parameter to *0* in the DCSSettings.cfg file for tasks or calendar items.
- Do not map the Private Flag field.

Note. No extra steps are required for contacts because the concept of “private” is not supported for contacts.

Conflict Resolution

The PeopleSoft CRM and PIM integration provides conflict resolution capabilities. When data conflicts occur during synchronization (for example, when end users modify the same field or the same record in both systems with different values), PeopleSoft Infosync applications resolve the conflict based on the selected conflict resolution rule.

During synchronization, PeopleSoft Infosync applications resolve data conflicts based on the selected resolution rule.

Conflict Resolution Rules: PeopleSoft Infosync Client

The client software delivers five predefined conflict resolution rules. You decide how the system handles data conflicts for the address book, calendar, and to-do list by selecting one of these rules from the client application:

- Add all conflicting items.
- Ignore all conflicting items.

Warning! It is recommended to not use this option because it has a potential for overwriting data.

- Notify me when conflicts occur. This is the default rule.
- PeopleSoft Infosync Client wins.
- Lotus Notes or Microsoft Outlook wins.

Conflict Resolution Rules: PeopleSoft Infosync Server

When there is a data conflict, the PeopleSoft side always wins.

Field Mapping

Field mapping dictates where data appears after it is transferred from one system to another. You can review the field map for each object (contacts, calendar, and task) in the Admin Console of PeopleSoft Enterprise Infosync Server or in the configuration setup of PeopleSoft Enterprise Infosync Client.

Note. PeopleSoft recommends that you use the delivered field mapping and do not alter it. If you must modify it, make sure the modifications are well tested.

PeopleSoft Enterprise Infosync Client: Status Mapping for Tasks - Microsoft Outlook

This table shows the task status mapping between PeopleSoft CRM and Microsoft Outlook.

Note. In Lotus Notes, status is not available in individual task records, so there is no task status mapping between PeopleSoft CRM and Lotus Notes.

Task Status in PeopleSoft CRM	Task Status in Microsoft Outlook
In Progress	In progress
Completed	Completed
Cancelled	Deferred
Open	Not started
Open	Waiting on someone else

PeopleSoft Enterprise Infosync Client: Assignee Mapping for Tasks - Microsoft Outlook

This table shows the task assignee mapping between PeopleSoft CRM and Microsoft Outlook:

Task Assignee Status	Task Assignee Status in Microsoft Outlook
Accepted	In progress
Completed	Completed
Assigned	Not started
Assigned	Waiting on someone else
Declined	Deferred

Performance Logging

PeopleSoft Infosync applications provide a lightweight debugging feature that can be used to identify possible synchronization bottlenecks in systems when the application server debugging options are not available, namely the production system. Administrators can enable any supported objects (contact, calendar, task, and email) where performance issues are reported and select the type of events to capture in the log. Depending on the scale of the impact, administrators can choose to put individual users, certain groups of users by PIM preference ID, or all users on the debug mode. Each of these selected types is then associated with a debug profile, in which objects and activities that are subject to debugging are specified.

The log page lists out by user the date and time when the log information is captured for each selected object and event. Administrators can review the times spent on different activities and further investigate those that took an unreasonably long time to finish.

Note. Use this feature with assistance from Oracle PeopleSoft Consulting or Global Support Center.

See Also

[Chapter 3, “Setting Up PeopleSoft Enterprise CRM Infosync Applications,” Setting Up Logging Options, page 56](#)

Synchronization Rules and Considerations

PeopleSoft Infosync applications are supported in multiple PeopleSoft CRM and PIM versions. In each of these environment combinations, the behavior of the system changes slightly. This section discusses general and object-specific rules that govern the synchronization process, as well as considerations that describe how the system works in different situations.

General Rules

Here is a list of rules or considerations that apply to the entire integration:

Rule or Consideration	Applies To
The first time that users synchronize data using an Infosync application is called an initial synchronization. PeopleSoft Infosync applications compare the keys of all records for each user with the same type of records in the other system, looking for duplicates. The process then creates a copy of the record in the other system (unless it finds an existing record with matching values in all keys). The keys for contact records are first name, middle name, last name, and company. The key for task records is subject; for calendar records, keys are start date and subject.	All
When users perform data synchronization using the client application, PeopleSoft recommends that they always initiate the process from the same machine. In other words, use only one machine to synchronize data, even if the user may have multiple workstations.	PeopleSoft Enterprise Infosync Client

Rule or Consideration	Applies To
<p>During synchronization, if PeopleSoft Enterprise Infosync Client displays a message indicating that there is a data conflict and users decide to cancel the process, the next synchronization becomes an initial synchronization if the conflict involves changing the key value of a record in both systems. Because the key value is changed, the PeopleSoft CRM copy and PIM copy of that record no longer recognize each other as equivalents in the other system. Therefore, when the next synchronization occurs, the process creates a copy for that PeopleSoft CRM copy in the PIM client, as well as a copy for that PIM copy in PeopleSoft CRM (because the process can't find the corresponding record for each of these two copies in the other system with all matching key values due to the change in key value).</p>	<p>PeopleSoft Enterprise Infosync Client</p>
<p>PeopleSoft Infosync applications use the SYNCID to uniquely identify every contact, task, and calendar item in PeopleSoft CRM for synchronization. The SYNCID is stored in the BO_ROLE table for contacts and in the RB_TSK table for tasks and calendar items.</p>	<p>All</p>
<p>If a record cannot be synchronized successfully to PeopleSoft CRM because the operation is not supported, PeopleSoft Infosync applications roll back to the PIM system the copy of the record that resides in PeopleSoft CRM at next synchronization. For example, suppose that a user updates a contact on the PIM client, and the update contact operation is not supported in the user's PIM preference. When synchronization occurs, it displays an error message about not synchronizing that updated contact record on the PIM Errors page (synchronization fails because the user doesn't have the permission to perform this process). As a result, the contact is updated on the PIM client but not in PeopleSoft CRM. When the next synchronization occurs, the contact (the version available in PeopleSoft) is synchronized and updated on the PIM client.</p>	<p>All</p>
<p>If you make a change to the existing setup—for example, reenabling the add contact capability in the PIM preferences or changing the conflict resolution rule or filter—the change takes effect on data updates that happen after that change. To resynchronize data that wasn't synchronized successfully before the change, users can modify the record on the PIM client and perform synchronization. For example, if the user wants to recreate a contact that was not added to PeopleSoft CRM because the add contact capability was disabled, that user can modify the contact in the PIM client and synchronize data. The synchronization process then picks up the contact from the PIM client and creates it in PeopleSoft CRM.</p>	<p>PeopleSoft Enterprise Infosync Client and Lotus Notes</p>
<p>PeopleSoft recommends that administrators complete the system setup before deploying the client application to users. Consider system setup a one-time implementation process and minimize changes made to system settings (for example, specifying new category or filter) after deployment because it may cause unexpected results. If administrators want to change the setup parameters, PeopleSoft recommends that users perform an initial synchronization to the device.</p>	<p>PeopleSoft Enterprise Infosync Client</p>
<p>If users create new contacts in Microsoft Outlook and enter information on address line fields for the <i>other</i> address type and synchronize, all the line information is formatted on the first address line of the contact in PeopleSoft CRM.</p>	<p>PeopleSoft Enterprise Infosync Client and Microsoft Outlook</p>
<p>Microsoft Outlook users must manually add the categories (defined in PIM preferences) in the master category list of the PIM client (one-time task) before these categories can be used. The list is available by clicking the Categories button on a task, calendar item, or contact.</p>	<p>Microsoft Outlook</p>

Contact Rules

Here is a list of rules or considerations that apply only to contacts:

Rule or Consideration	Applies To
<p>If users are unable to synchronize new contacts to PeopleSoft CRM because of missing or invalid value in information that is represented by multiple fields (for example, the contact address fields and the contact name field), they must modify all the correlated fields in order to synchronize the contact again. For example, if the user creates a new contact without a last name and performs synchronization, an error is returned and the contact is not synchronized. To correct the problem, the user must modify the first name and enter the last name before the next synchronization occurs.</p>	All
<p>When consumers or workers are synchronized to the PIM client, their company name fields are populated with the value — <i>Consumer</i> — or — <i>Worker</i> — respectively (because consumers and workers are not associated with companies in PeopleSoft CRM). If a company is added to a consumer or worker on the PIM side, the company is ignored by the synchronization process.</p>	All
<p>If users associate a contact with multiple categories <i>and</i> none or only one of these categories is defined in the PIM preferences, it is synchronized to PeopleSoft CRM when any of its categories is listed as a filter condition for the contact object. Users cannot synchronize a contact who is associated with multiple categories if more than one of them is defined in the PIM preferences; PeopleSoft Infosync applications log an error on the PIM Errors page, and the contact is not synchronized to PeopleSoft CRM.</p>	All
<p>If users receive updates about a contact based on their dataset rules, and this contact has multiple roles (for example, this person is also a consumer in PeopleSoft CRM), the user receives a record for each role this person has at synchronization. In this example, end users receive two records, one for the contact role and one for the consumer role.</p>	All
<p>If a user enters a list of companies at one time on the PIM client and the length of the company list exceeds 254 characters, the entire company list is not synchronized (assuming that the Support Multiple Companies feature is enabled). However, if the user enters one company at a time at each synchronization, only the last company name is not synchronized if adding it exceeds the maximum characters that are allowed to be synchronized for the Company field.</p>	All
<p>Company assignment to contacts. If, after synchronization, PeopleSoft CRM receives a contact record that is associated with a company, the system links the contact to that company if it successfully locates the company record with the exact same name in PeopleSoft CRM (assuming that the Allow Add with Invalid Company feature is disabled).</p> <p>In order for the system to recognize a company, even if only an abbreviated name is provided in the contact record, you can add match and return value pairs for commonly used company names in system delivered codesets. An example would be to add a pair for GE and General Electric so that the system knows recognizes GE and General Electric as one and the same.</p> <p>See <i>Enterprise PeopleTools PeopleBook: Integration Broker</i></p>	PeopleSoft Enterprise Infosync Client
<p>When users synchronize a contact from PeopleSoft CRM to the PIM client for the first time and the contact is associated with multiple companies, the process displays the newest existing relationship that the contact has with a company on the PIM client (if the Support Multiple Companies feature is disabled). If users later add another company relationship to that contact and perform synchronization, the process picks up the new relationship and updates the company for that contact on the PIM client accordingly.</p>	PeopleSoft Enterprise Infosync Client

Rule or Consideration	Applies To
<p>The display of contact addresses on the PIM client can change after synchronization, based on which address type becomes primary for that contact in PeopleSoft CRM.</p> <p>For example, a PeopleSoft CRM contact, who is associated with multiple addresses of type business and home, is synchronized for the first time. The process takes the first addresses that were created for each type and displays them in the equivalent contact record on the PIM client. (In PeopleSoft CRM, the first address that's created for a contact, regardless of type, becomes the primary address.) If a user adds a new home address for the contact and performs synchronization, the process picks up the old home address and doesn't make the address update on the PIM client unless the primary check box for this new address is selected. If the user changes the primary address to a newly created business address, this new business address and the old home address are synchronized and appear on the PIM client.</p>	PeopleSoft Enterprise Infosync Client
If a user adds a contact to a task in PeopleSoft, the contact will not show on the task in Microsoft Outlook.	Microsoft Outlook
If a user adds a contact to a task in PeopleSoft, the contact will appear in the address book in Lotus Notes.	Lotus Notes
If a user assigns a task to another person and the assignee later on synchronizes, the assignee will become the owner of the task on the PIM system.	PeopleSoft Enterprise Infosync Server and Microsoft Outlook
The Notes field in contact records is by default not mapped.	PeopleSoft Enterprise Infosync Client and Microsoft Outlook
After configuring the PIM preferences in PeopleSoft CRM to enable the 360 Degree View Link for contacts, the link will appear to the user on the PIM client after the second synchronization.	PeopleSoft Enterprise Infosync Client and Lotus Notes
It is recommended that when a user creates a contact in Microsoft Outlook, the user must decide whether the contact is private. If, later, the user selects the Private option on an existing contact and synchronizes, the contact will remain in PeopleSoft. The user should use categories to define which data is synchronized.	PeopleSoft Enterprise Infosync Client and Microsoft Outlook
Lotus Notes does not exclude private data because Lotus Notes considers everything to be private. Therefore there is not an option to Exclude Private Data in Lotus Notes.	PeopleSoft Enterprise Infosync Client and Lotus Notes
If a user has added a fax number to the contact under Home and Business, it will display one phone number on the PIM client. The PIM client does not define if the fax number is Home or Business. The number that is primary or entered first will display. This situation is true for other types of duplicated phone numbers.	PeopleSoft Enterprise Infosync Client and Microsoft Outlook

Calendar Item and Task Rules

Here is a list of rules or considerations that apply only to calendar items and tasks:

Rule or Resolution	Applies To
If users delete tasks or calendar items from the PIM side, and they were originally created from the task list in PeopleSoft CRM, these deleted records are no longer viewable from the task list in PeopleSoft CRM after synchronization. To see these deleted records, end users must go to their monthly or daily calendar.	PeopleSoft Enterprise Infosync Server
Enter a start and end time when you create a calendar item in PeopleSoft CRM. If the end time is not specified in the calendar item, PeopleSoft Infosync Enterprise Client automatically enters an end time (by adding 30 minutes to the start time) to the record on the PIM client after synchronization.	PeopleSoft Enterprise Infosync Client
If users create a task from the task list in PeopleSoft CRM with a specified start date and synchronize, the task is transferred to the Outlook client with its due date set to equal the start date. When the next synchronization process runs, the task is transferred back to PeopleSoft CRM, along with the due date. Because the due date on the PIM side is mapped to the close date in PeopleSoft CRM, the task is associated with the close date on the task list, and the task is stored as history.	PeopleSoft Enterprise Infosync Server and Microsoft Outlook
Microsoft Outlook users must manually add the category in the master category list of the application (a one-time task). The list is available by clicking the Categories button on a task, calendar item, or contact.	All
When viewing tasks in PeopleSoft CRM, the default in the Task Management component may be <i>All Open Tasks</i> , although when the user synchronizes the <i>Completed</i> tasks will show on the PIM client. <i>Cancelled</i> tasks will not show on the PIM side.	PeopleSoft Enterprise Infosync Server
If users create meeting or appointment tasks on the CRM system, synchronize them to Microsoft Outlook, and subsequently change the task statuses to <i>completed</i> on the CRM system, the statuses of these tasks on the Outlook application are updated accordingly and the tasks remain viewable on the application. Cancelled meetings and appointments, on the other hand, are deleted from Microsoft Outlook.	Microsoft Outlook
If users need to reassign tasks that are related to CRM transactions, it is recommended that the reassignment be done on the CRM side.	All
PeopleSoft Enterprise Infosync Client sets the maximum length of the description and subject for calendar items and tasks to 4095 and 254 characters, respectively. That means if the length of a sales lead task subject that is created in PeopleSoft CRM exceeds the limit, only the first 254 characters are synchronized to the to-do list on the PIM client.	PeopleSoft Enterprise Infosync Client and Microsoft Outlook
In system-delivered dataset rules, if a lead or opportunity task or calendar item is assigned to someone else, that assigned item is still visible on the owner's PIM calendar. This is because the delivered rules indicate synchronization of all tasks and calendar items for user leads and opportunities. You can modify the delivered rules as necessary.	All

Rule or Resolution	Applies To
<p>Task types are set up in the Task Management component, under Set Up CRM, Common Definitions, Task Management. When setting up Task types, the Do Not Show in Calendar option is available. According to the PIM client, if the option is selected, this means that the task will show as a task. If the option is not selected, this means that the task will show as a calendar item.</p>	<p>PeopleSoft Enterprise Infosync Client and Lotus Notes</p>
<p>PeopleSoft CRM delivers sample policies for the Task component. They are activated in the system and carry out actions (for example, sending a notification to the task owner when the task is closed.) if their conditions are met in the operational environment. To avoid unnecessary SMTP server errors from occurring during synchronization as a result of these notification-related policies, administrators need to either complete the setup of these policies or inactivate them.</p> <p>To inactivate a policy, navigate to Enterprise Components, Active Analytics Framework, Policies, Manage Policies and select a Task policy that belongs to the After the Task CI is Saved trigger point. Open the policy in the edit mode by clicking the Modify System Data and then the Redesign buttons. Change the status of the policy to inactive and save. To reactivate a policy, open it in the edit mode and set the status to active.</p> <p>Administrators may want to inactivate the trigger point as well. Navigate to Enterprise Components, Active Analytics Framework, Setup, Register Trigger Point. Look up the After the Task CI is Saved trigger point and change its status to inactive.</p> <p>See <i>PeopleSoft Enterprise Components for CRM 9 PeopleBook</i></p> <p>See <i>PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook</i>, “Working with Active Analytics Framework,” Understanding AAF.</p>	<p>All</p>

Task Note Rules

Here is a list of rules or considerations that apply only to notes.

Rule or Consideration	
<p>If an entry with more than one note is synchronized between the PIM system and PeopleSoft CRM, the notes are concatenated or only the most recent notes appear. This is specified for the users in the PIM Preference component.</p>	<p>All</p>
<p>From the PIM client, users can only update the notes that they are entering. Any previous notes must be updated in PeopleSoft and then synchronized.</p>	<p>All</p>
<p>Task note delimiters that appear on the PIM client where the note begins and ends are specified in the PIM Preferences component. These are configurable, although it is recommended that you use only characters, numbers, or dashes.</p>	<p>All</p>
<p>When task notes are created on the PIM client and synchronized, the subject line of the note reads <i>Note Added from PIM</i>.</p>	<p>All</p>
<p>If a user has previously selected the <i>Most Recent</i> option for synchronizing task notes and then later changes the option to <i>Concatenate</i>, the existing notes that have been synced will not automatically become concatenated, but will remain showing the most recent note.</p>	<p>All</p>

Rule or Consideration	
When a user adds a task note on the PIM client and synchronizes, the note on the PIM Client will show the same as before the synchronization which includes the delimiters surrounding the note. The user must synchronize once more to see the note without the delimiters.	PeopleSoft Enterprise Infosync Client
Only one set of note delimiters should be used when adding notes to a task. If a user needs to enter more than one note to a task, it is recommended that they synchronize twice, then add the additional note.	PeopleSoft Enterprise Infosync Client

CHAPTER 3

Setting Up PeopleSoft Enterprise CRM Infosync Applications

This chapter discusses how to:

- Define dataset rules and roles.
- Set up PIM preferences.
- Set up PIM user settings.
- Generate task summary.
- Set up signon PeopleCode for PIM users.
- Export users from PeopleSoft CRM to PeopleSoft Infosync Server.
- Set up logging options.

Note. This chapter covers tasks that are involved in setting up PeopleSoft Enterprise Infosync Server and Client. Administrators can take full advantage of the system-delivered data that is predefined for some tasks (for example, dataset rules, dataset roles, and PIM preferences), or they can modify and create new rules and preferences that best fit their business needs.

Be sure to read and perform installation and configuration tasks documented in the PeopleSoft Enterprise CRM 9 Supplemental Installation Documentation for Infosync applications where applicable.

Defining Dataset Rules and Roles

This section discusses how to:

- Define dataset rules.
- Define dataset roles.

A dataset is a collection of dataset rules that are used to determine what data end users receive on their PIM server as a result of a synchronization. In the integration setup process, you define the relationship between end users and dataset rules using this logic:

- Each user is associated with a PIM preference.
- Each PIM preference specifies a dataset role for each synchronization-enabled object (contact, consumer, worker, calendar, task, and email).
- Each dataset role is associated with a dataset (group of dataset rules) for each synchronization object.

When synchronization completes, users receive updates on data based on the associated dataset rules. For example, suppose that you use the system-delivered dataset rules for synchronizing sales user tasks. After synchronization, the updates that sales users get for the task object come from their own tasks (rule: MY TASKS), tasks that are assigned to their leads (rule: TASKS ON MY LEADS), and opportunities (rule: TASKS ON MY OPPORTUNITIES). PeopleSoft delivers predefined datasets and datasets rules for this integration. You can modify them or create custom ones to work with your implementation.

Note. If a user is no longer associated with a contact, consumer, or worker (for example, a sales user reassigns a lead task to another person and therefore does not receive any updates about the lead's contacts from the CONTACTS_FOR_LEAD_TASK_ASSIGNEE dataset rules), the record is removed from the user's address book.

Pages Used to Define Dataset Rules and Roles

Page Name	Object Name	Navigation	Usage
Dataset Rules	EOEC_DATASET	Enterprise Components, Component Configurations, Datasets, Dataset Rules	Define rules that comprise a dataset. Dataset rules are associated with users through dataset roles; they are used in the synchronization process to determine what data gets updated in PeopleSoft CRM and the PIM system.
PIM Roles	PIM_ROLE	Set Up CRM, Product Related, Infosync, Dataset Role, PIM Roles	Define dataset roles and associate them with datasets and dataset rules.

Defining Dataset Rules

Access the Dataset Rules page.

See *PeopleSoft Enterprise Components for CRM 9 PeopleBook*

Defining Dataset Roles

Access the PIM Roles page.

PIM Roles

Role Name: PIM Sales Role

Contacts

Dataset Name: 

Find | View All First  1-5 of 11  Last

	*Rule		
1	<input type="text" value="CONTACTS_ACT_TM"/> 		
2	<input type="text" value="CONTACTS_CREATED_BY_ME"/> 		
3	<input type="text" value="CONTACTS_FOR_LEAD_TASK_ASSIGI"/> 		
4	<input type="text" value="CONTACTS_FOR_LEAD_TEAM"/> 		
5	<input type="text" value="CONTACTS_FOR_MY_LEAD"/> 		

PIM Roles page (1 of 4)

Tasks

Dataset Name:

Find | View All First 1-5 of 8 Last

	*Rule		
1	<input type="text" value="MY SUMMARIZED TASKS"/>		
2	<input type="text" value="MY TASKS"/>		
3	<input type="text" value="TASKS AS ACCOUNT PLAN OWNER"/>		
4	<input type="text" value="TASKS AS ACCOUNT PLAN TEAM MBR"/>		
5	<input type="text" value="TASKS ASSIGNED TO ME"/>		

Task Summary

Dataset Name:

Find | View All First 1-4 of 4 Last

	*Rule		
1	<input type="text" value="CRITICAL TASKS ASSIGNED TO ME"/>		
2	<input type="text" value="MY CRITICAL TASKS"/>		
3	<input type="text" value="MY OVERDUE TASKS"/>		
4	<input type="text" value="OVERDUE TASKS ASSIGNED TO ME"/>		

PIM Roles page (2 of 4)

Calendar Items

Dataset Name:

Find | View All First 1-5 of 6 Last

	*Rule		
1	CALENDAR AS ACCOUNT PLAN OWNE	+	-
2	CALENDAR AS ACCT PLAN TEAM MBR	+	-
3	CALENDAR ASSIGNED TO ME	+	-
4	CALENDAR ON MY LEADS	+	-
5	CALENDAR ON MY OPPORTUNITIES	+	-

Consumers

Dataset Name:

Customize | Find | View All First 1-5 of 6 Last

	*Rule		
1	CONSUMER_CREATED_BY_ME	+	-
2	CONSUMER_FOR_MY_LEAD	+	-
3	CONSUMER_FOR_MY_OPPTY	+	-
4	CONSUMER_ON_TASK_ASSIGNEES	+	-
5	CONSUMER_ON_TASK_CONTACTS	+	-

PIM Roles page (3 of 4)

Workers

Dataset Name:

Customize | Find | View All First 1-3 of 3 Last

	*Rule		
1	WORKERS FOR PIM USERS	+	-
2	WORKERS_IN_TASK_ASSIGNEES	+	-
3	WORKERS_IN_TASK_CONTACTS	+	-

PIM Roles page (4 of 4)

PeopleSoft delivers two predefined dataset roles: PIM Field Service Role and PIM Sales Role. The Administrator specifies the dataset and dataset rules for each supported object.

Dataset Name Select a dataset for each object that you want to synchronize: contact, consumer, worker, task, task summary, and calendar. All of the associated rules are available in the Rule grid after you select a dataset.

Rule Select dataset rules that are applicable to this role.

Note. You don't need to select all of the rules that are defined in a dataset for the dataset role. For example, if sales users prefer to see updates on tasks that are assigned to only them, select the *My Tasks* rule for the *PIM Sales* role.

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook

Setting Up PIM Preferences

This section discusses how to:

- Specify general PIM preferences.
- Specify PIM preference for contacts.
- Specify PIM preference for consumers.
- Specify PIM preference for workers.
- Specify contact method mapping.
- Specify PIM preference for calendar items.
- Specify PIM preference for tasks.
- Specify PIM preference for emails.

Note. When you configure PIM preferences, consider it a one-time implementation process. Avoid changing PIM preferences after PeopleSoft Enterprise Infosync applications go into production.

Pages Used to Set Up PIM Preferences

Page Name	Object Name	Navigation	Usage
Setup	PIM_PREFERENCE_PG1	Set Up CRM, Product Related , Infosync, Preferences, Setup	Specify, by PIM server, the overall synchronization preference for each defined PIM role as information is synchronized from the PIM server to PeopleSoft CRM.
Contact	PIM_PREF_CONTACT	Set Up CRM, Product Related , Infosync, Preferences, Contact	Specify the synchronization preference for contacts.
Consumer	PIM_PREF_CONSUMER	Set Up CRM, Product Related , Infosync, Preferences, Consumer	Specify the synchronization preference for consumers.
Worker	PIM_PREF_WORKER	Set Up CRM, Product Related , Infosync, Preferences, Worker	Specify the synchronization preference for workers.
Address	PIM_PREF_ADDRESS	Set Up CRM, Product Related , Infosync, Preferences, Address	Specify contact method mapping for contacts, consumers, and workers.
Calendar	PIM_PREF_CALENDAR	Set Up CRM, Product Related , Infosync, Preferences, Calendar	Specify the synchronization preference for calendar items.
Task	PIM_PREF_TASK	Set Up CRM, Product Related , Infosync, Preferences, Task	Specify the synchronization preference for tasks.
Email	PIM_PREF_EMAIL	Set Up CRM, Product Related , Infosync, Preferences, Email	Specify the synchronization preference for emails.

Specifying General PIM Preferences

Access the Setup page.

Setup page

PIM Preference ID
(Personal Information Manager preference ID)

Enter the name of the PIM preference that you are defining. Associate each user with a PIM preference by specifying a PIM preference ID in the user preference on the Overall Preferences page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, “Setting Up Security and User Preferences,” Defining Overall Preferences.

Debug

Select to allow more specific information (for example, technical errors and message logs that are sometimes not end-user friendly) to be captured and displayed on the PIM Errors page. This is useful for administrators to debug and troubleshoot the application.

PIM Application Type

Identifies the PIM server type and other relevant information of the PIM server that is pertinent to this integration. Information in this group box is used by the PIM_ID_SYNC application engine program.

Note. Information that is entered in this group box pertains to PeopleSoft Enterprise Infosync Server and does not apply to the client application. However, PeopleSoft recommends that you select the PIM application type.

PIM Type (Personal Information Manager type)

Select the PIM application (Lotus Domino or Microsoft Exchange client/server) to use in the integration: *Client - Exchange*, *Client - Domino*, *Server - Exchange* and *Server - Domino*.

Mail Domain Name and Mail Folder

Enter the domain for the Microsoft Exchange server or the folder in which the mail server resides for the Lotus Domino server.

The name of this field is Mail Folder if the PIM type is Domino. The name changes to Mail Domain Name if the PIM type is Exchange.

PIA Server

Specify the name of the machine where the CRM system resides.

User Group Enter the name of the user group in IMS to which users associated with this preference profile belong.

Address Book

This section is unavailable if the selected PIM type is Exchange.

Server Name Enter the name of the server where the address book resides.
This value is used for exporting users from the CRM system and importing them to the Infosync Server.

Note. You must place an address book on the server to enable synchronization of contacts by PeopleSoft Enterprise Infosync Server.

Name Prefix and Name Suffix (Optional) Enter the prefix and suffix to be added as part of the address book name for users.
When you run the application engine program to export PeopleSoft user IDs, it generates address book names for users using this format:

<address book name prefix><ShortName><address book name suffix>.nsf

where ShortName is the user's ID that can be located on the Basics tab of the user's person record in Lotus Notes. The field label is Short name/UserID and the field value is used as part of the address book name.

To adhere to address book naming convention, leave the name prefix blank and enter *_NAB* as the suffix.

General Settings

Information that is entered into this group box pertains to PeopleSoft CRM.

PIA URI Enter web server information to generate a URI for the address book (the contact tool) on the PIM client. This URI will take the end user to the associating contact record in the 360 Degree View. If your web server address includes a port number, you must also include it in the address.

Note. A URI does not include the content information in the link. Think of it as a subset of the URL that points to the location of the resource, but does not include any parameters passed to that resource.

PIA Portal Enter the level of portal access that PIM users will have.

PIA Node Enter the Pure Internet Architecture node that your system uses for integration.

See Also

Chapter 2, "Understanding PeopleSoft Enterprise CRM Infosync Applications," Performance Logging, page 22

Specifying PIM Preferences for Contacts

Access the Contact page.

PIM Preference ID PIM SALES

Contact

Role Name PIM Sales Role

Category Contact

Allowed Actions from PIM

Add

Update

Delete

Company Options

Company Separator

Support Multiple Companies

Contact 360-Degree View Link

Allow Add with Invalid Company

Do not Delete Invalid Company

My Contact List

Add

Delete

Contact page

Contact

Specifies the synchronization preference that applies to contacts.

Role Name

Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.

Category

Enter a category that is used by the Infosync applications to identify which contacts on the PIM client are to be synchronized.

The contact category that you specify in this field must be identical to the one that users use to categorize contacts in the address book. Contacts that don't belong to this category are not synchronized. You can change the category name to anything during setup, but ensure that the filter and the category mapping are updated as well. The default value is *Contact*.

Allowed Actions from PIM

Select to provide users who are associated with this preference the ability to add, update, and delete contacts from their address books and synchronize the change in PeopleSoft CRM.

If any of these operations is disabled, any user who tries to synchronize a contact to PeopleSoft CRM using the unauthorized operation will receive an error message on the PIM Errors page. The corresponding contact in PeopleSoft CRM is not affected and is used to roll back to the user's address book in the next synchronization. However, if a user adds or updates a contact directly from PeopleSoft CRM, the change is synchronized in the PIM system and is available to users who receive updates on this contact (based on dataset rules). This is because the add, update, and delete operation settings do not control data flow originating from PeopleSoft CRM to the PIM system.

Note. You cannot delete contacts from PeopleSoft CRM.

Support Multiple Companies and Company Separator

Select to enable synchronization to support a one-to-many relationship between contacts and companies. From the address book, users can enter multiple companies for a contact in this format:

```
<company1>;<company2>;<company3>
```

where ; (semicolon) is the default company separator. Do not enter a space between a company name and separator.

When the contact record is synchronized to PeopleSoft Enterprise CRM, it is associated with companies that were previously specified on the PIM client. From the PIM client's perspective, the company that has the longest relationship with the contact ranks first in the array of companies. If a new company is added to the contact in PeopleSoft CRM, the new company appears at the end of the list after synchronization. If you add a new company to the contact in the address book and put the new company in the front, it is automatically placed at the end in the next synchronization.

If this feature is disabled, the synchronization process handles only the newest company relationship. If the user clears the company field in a contact record, the current relationship becomes inactive; if the user updates the company name to a new one, the relationship with the new company becomes active. The old company remains in the contact record and it is no longer synchronized. By default, this feature is disabled.

To enter multiple companies for a contact in Lotus Notes, click the drop-down list box for the Company field, and enter the companies (in a formatted manner) in the New keyword field.

Note. PeopleSoft recommends that you consider this configuration a one-time setup process and do not change it after implementation.

Contact 360-Degree View Link

Select to enable the contact URL to be synchronized to the PIM side. The URL address is specified using the PIA URL field on the Setup page. If this is disabled, the URL will not be synchronized.

Note. You must associate the contact with a company for this URL to link to the contact.

Allow Add with Invalid Company

Select to allow newly created contacts to be synchronized to PeopleSoft Enterprise CRM, even if they are associated with companies that do not exist in PeopleSoft CRM. When that happens, the Infosync applications send a message to users stating that the invalid company is ignored while the contact is synchronized to the CRM server. That means that the contact is added to PeopleSoft CRM without a company.

If this feature is disabled, users get an error message if they try to synchronize any newly created contact with an invalid company name; the contact is not synchronized.

Do Not Delete Invalid Company

Select this option if you do not want Infosync applications to send a request to IMS to remove the company name from the contact data if the company is not valid in the customer data model (CDM).

My Contact List

Specifies the synchronization preference that applies to the My Contact List.

- Add** Select to enable contacts to be added to the PIM system.
- Delete** Select to enable contacts to be deleted from the PIM system.

Specifying PIM Preferences for Consumers

Access the Consumer page.

Consumer page

Consumer

Specifies the synchronization preference that applies to consumers.

- Enable Consumer** Select to enable contacts (with a consumer specific category) in the address book to be synchronized as consumers in PeopleSoft Enterprise CRM. If you decide not to support synchronization of consumers, clear this check box to deactivate the rest of the page; users who are associated with this PIM preference receive an “object type not enabled” error message on their PIM Errors page when they try to synchronize consumers to PeopleSoft Enterprise CRM.
- Role Name** Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.
- Category** Enter a category that is used by PeopleSoft Infosync applications to identify which consumers in the PIM server are to be synchronized. The consumer category that you specify in this field must be identical to the one that end users use to categorize consumers in the address book. Contacts that don't belong to this category are not synchronized as consumers in PeopleSoft CRM. You can change the category name to anything during setup, but update the filter and the category mapping as well. The default value is *Consumer*.
- Allowed Action from PIM** Select to provide users who are associated with this preference the ability to add, update, and delete consumers (as a type of contacts) from their address books and synchronize the change in PeopleSoft Enterprise CRM.

If any of these operations is disabled, any user who tries to synchronize a consumer to PeopleSoft Enterprise CRM using the unauthorized operation will receive an error message on the PIM Errors page. The corresponding consumer in PeopleSoft CRM is not affected and rolls back to the user's address book in the next synchronization. However, if a user adds or updates a consumer directly from PeopleSoft Enterprise CRM, the change is synchronized on the PIM side and is available to all users who receive updates on this consumer (based on dataset rules). This is because the add, update, and delete operation settings do not control data flow originating from PeopleSoft Enterprise CRM to the PIM system.

Note. You cannot delete consumers from PeopleSoft CRM.

Consumer 360 Degree View Link

Select to allow the consumer URL to be synchronized to the PIM side. The URL address is specified using the PIA URL field on the Setup page. If this is disabled the URL will not be synchronized.

Note. The consumer must be associated with a company for this URL to link to the consumer.

My Contact List

Specifies the synchronization preference that applies to the My Contact List.

Add Select to enable consumers to be added to the PIM system.

Delete Select to enable consumers to be deleted from the PIM system.

Specifying PIM Preferences for Workers

Access the Worker page.

The screenshot shows the 'Worker' page in the PeopleSoft Enterprise CRM interface. At the top, there are navigation tabs for Setup, Contact, Consumer, Worker (selected), Address, Calendar, and Task. Below the tabs, the page title is 'PIM Preference ID PIM SALES'. A checkbox labeled 'Enable Worker' is checked. Under the 'Worker' section, there are two input fields: 'Role Name' with the value 'PIM Sales Role' and a search icon, and 'Category' with the value 'Worker'. Below these is a section titled 'Allowed Actions from PIM' with two checked checkboxes: 'Update' and 'Delete'. To the right of this section are two more checkboxes: 'Secure Home Contact Methods' (checked) and 'Worker 360 Degree View Link' (unchecked). At the bottom, there is a section titled 'My Contact List' with a single unchecked checkbox labeled 'Delete'.

Worker page

Worker

Specifies the synchronization preference that applies to workers.

Enable Worker

Select to enable contacts (with a worker specific category) on the PIM client to be synchronized as workers in PeopleSoft CRM. If you decide not to support synchronization of workers, clear this check box to deactivate the rest of the page; users who are associated with this PIM preference get an “object type not enabled” error message when they try to synchronize workers to PeopleSoft Enterprise CRM.

Role Name

Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.

Category

Enter a category that is used by the Infosync applications to identify which workers on the PIM client are to be synchronized. The worker category that you specify in this field must be identical to the one that you use to categorize workers on the PIM client. Contacts that don't belong to this category are not synchronized as workers. You can change the category name to anything during setup, but also update the filter and the category mapping. The default value is *Worker*.

Allowed Actions from PIM

Select to provide end users who are associated with this preference the ability to update and delete workers (as a type of contacts) from the PIM client and synchronize the change in PeopleSoft Enterprise CRM.

If any of these operations is disabled, any end user who tries to synchronize a worker to PeopleSoft Enterprise CRM using the unauthorized operation will receive an error message on the PIM Errors page. The corresponding worker in PeopleSoft Enterprise CRM is not affected and is rolled back to the user's address book in the next synchronization. However, if a user updates a worker directly from PeopleSoft CRM, the change is synchronized on the PIM client and is available to users who receive updates on this worker (based on dataset rules). This is because the update and delete operation settings do not control data flow originating from PeopleSoft Enterprise CRM to the PIM system.

Secure Home Contact Methods

Select to prevent worker home contact information from being synchronized to the PIM side. This includes the phone number, address, and email that has *Home* as the purpose, as well as pager number that has *Pager 1* or *Pager 2* as the purpose in PeopleSoft CRM. For example, if you map the business address type (PIM system) to the home address type (PeopleSoft Enterprise CRM) on the Address page of the PIM preference, the business address on the PIM system is never synchronized. Home contact information in PeopleSoft Enterprise CRM is secured: it doesn't take updates from the PIM system (no permission error occurs) and is not synchronized to it either. This feature is enabled by default.

If this check box is clear, the worker's home contact information still isn't synchronized to the PIM side. However, any update on it from the PIM client is synchronized to PeopleSoft CRM. You cannot see the change because of the security that is enforced for worker information in PeopleSoft Enterprise CRM.

Note. In order for end users to add home contact information for a worker from the PIM system and have the information synchronized to PeopleSoft Enterprise CRM, the Secure Home Contact Methods feature must be disabled and end users must have a secured worker role. Secured worker roles are set up in the Secured Worker Role object. Select Set Up CRM, Security, Secured Worker Role.

Worker 360 Degree View Link

Select to enable the worker URL to be synchronized to the PIM side. The URL address is specified using the PIA URL field on the Setup page. If this is disabled, the URL will not be synchronized.

Note. You must associate the worker with a company for this URL to link to the worker.

My Contact List

Specifies the synchronization preference that applies to My Contact List.

Delete Select to enable workers to be deleted from the PIM system.

Specifying Contact Method Mapping

Access the Address page.

Address page

Addresses and Phones

Home Address Type, Business Address Type, and Other Address Type

Enter contact method purposes (defined in PeopleSoft Enterprise CRM) that home, business, and other addresses in the PIM system are mapped to in PeopleSoft CRM after synchronization. A contact method purpose indicates when the specified contact method may be used. For example, suppose that you

typically send business-related correspondence to a contact using the contact's business address. To deliver an urgent document to the contact after office hours, you can use the home address. The default contact method purposes for home, business and other address types are *Home*, *Business*, or *Other*.

If you change the address types, the next synchronization becomes an initial synchronization.

Note. The *Other* address type is applicable to Microsoft Exchange Server only.

Primary Address Type

Select the primary address type: *Home*, *Business*, and *Other*. If a contact has multiple addresses, the one that belongs to this address type becomes the primary address for the contact in PeopleSoft Enterprise CRM.

Home Phone Type, Business Phone Type, and Other Phone Type

Enter contact method purposes (defined in PeopleSoft Enterprise CRM) that home, business, and other phones in the PIM system are mapped to in PeopleSoft Enterprise CRM after synchronization. The default contact method purposes for home, business, and other phone types are *Home*, *Business*, and *Other*.

Note. The *Other* phone type is applicable to Microsoft Exchange Server only.

Phone Ext (phone extension)

Enter a prefix for phone extensions. The Infosync applications support phone extensions in all phone types.

Specifying PIM Preferences for Calendar Items

Access the Calendar page.

The screenshot shows the 'Calendar' tab of the 'PIM Preference ID' page for 'PIM SALES'. The page is divided into several sections:

- Calendar:**
 - Role Name:** PIM Sales Role
 - Category:** PeopleSoft
 - Allowed Actions from PIM:**
 - Add
 - Update
 - Delete
 - Calendar Type in PIA:**
 - All Day Event:** ALLDAYEVENT
 - Appointment:** APPOINTMENT
 - Meeting:** MEETING
 - Anniversary (Domino Only):** ALLDAYEVENT
 - Reminder (Domino Only):** REMINDER
- Notes:**
 - Sync Option:** [Dropdown menu]
 - Add - Begin Delimiter:** [Text input field]
 - Add - End Delimiter:** [Text input field]

Calendar page

Calendar

Specifies the synchronization preference that applies to calendar items.

Role Name	Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.
Category	Enter a category that is used by PeopleSoft Infosync applications to identify which items in the calendar are to be synchronized. The calendar category that you specify in this field must be identical to the one that you use to categorize calendar items in the PIM system. Calendar items that don't belong to this category are not synchronized. You can change the category name during setup, but make sure that you also update the filter and the category mapping. The default value is <i>PeopleSoft</i> .
Allowable Actions from PIM	<p>Select to provide users who are associated with this preference the ability to add, update, and delete items from the calendar and synchronize the change in PeopleSoft Enterprise CRM.</p> <p>If any of these operations is disabled, any user who tries to synchronize a calendar item to PeopleSoft CRM using the unauthorized operation will receive an error message on the PIM Errors page. The corresponding calendar item in PeopleSoft Enterprise CRM is not impacted and rolls back to the user's calendar in the next synchronization.</p> <p>If a user adds, updates, or deletes a calendar item directly from PeopleSoft Enterprise CRM, the change is synchronized to the PIM system and is available to users who receive updates on this calendar item (based on dataset rules), regardless of the selection. This is because the add, update, and delete operation settings <i>do not</i> control data flow originating from PeopleSoft Enterprise CRM to the PIM system.</p>

Calendar Type in PIA

All Day Event	Select a task type that is defined in the CRM system to map with the all day event type on the PIM client. Available task types are not associated with time.
Appointment	Select a task type that is defined in the CRM system to map with the appointment type on the PIM client. Available task types are associated with time.
Meeting	Select a task type that is defined in the CRM system to map with the meeting type on the PIM client. Available task types are associated with time.
Anniversary (Domino Only)	<p>Select a task type that is defined in the CRM system to map with an anniversary type on the PIM client. Available task types are not associated with time.</p> <p>This calendar type is applicable to Domino server only.</p>
Reminder (Domino Only)	<p>Select a task type that is defined in the CRM system to map with a reminder type on the PIM client. Available task types are associated with time.</p> <p>This calendar type is applicable to Domino server only.</p>

Notes

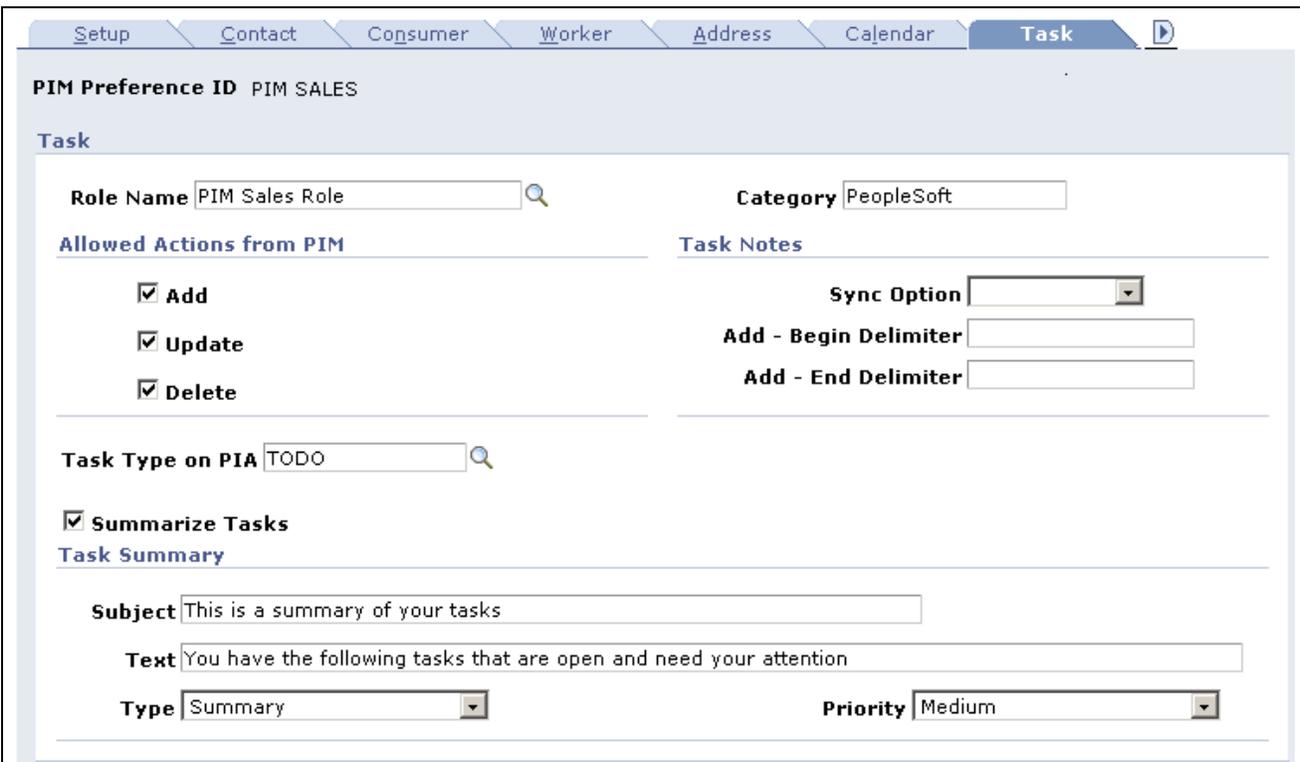
Sync Option (synchronization option)	Select <i>Concatenate</i> or <i>Most Recent</i> to view the task notes.
--	---

Add - Begin Delimiter and Add - End Delimiter

Enter a beginning and ending delimiter that define where the task note begins and ends. The note description field on the PIM client shows these delimiters to define where the note text must be added. PeopleSoft recommends that you use only characters, numbers, or dashes.

Specifying PIM Preferences for Tasks

Access the Task page.



The screenshot displays the 'Task' page for PIM Preference ID PIM SALES. The page is divided into several sections:

- Role Name:** PIM Sales Role
- Category:** PeopleSoft
- Allowed Actions from PIM:** Add, Update, and Delete are all checked.
- Task Notes:** Sync Option (dropdown), Add - Begin Delimiter (text field), and Add - End Delimiter (text field).
- Task Type on PIA:** TODO
- Summarize Tasks:** Checked.
- Task Summary:**
 - Subject:** This is a summary of your tasks
 - Text:** You have the following tasks that are open and need your attention
 - Type:** Summary
 - Priority:** Medium

Task page

Task

Specifies the synchronization preference that applies to tasks.

Role Name

Select the role for which the PIM preference is created. Dataset roles are defined on the PIM Roles page.

Category

Enter a category that is used by the Infosync applications to identify which tasks in the to-do list are to be synchronized. The task category that you specify in this field has to be identical to the one that users use to categorize tasks on the PIM client. Tasks that don't belong to this category are not synchronized. You can change the category name to anything during setup, but also update the filter and the category mapping. The default value is *PeopleSoft*.

Allowed Actions from PIM

Select to provide users who are associated with this preference the ability to add, update, and delete tasks from the to-do list and synchronize the change in PeopleSoft Enterprise CRM.

If any of these operations is disabled, any user who tries to synchronize a task to PeopleSoft CRM using the unauthorized operation will receive an error message on the PIM Errors page. The corresponding task in PeopleSoft

Enterprise CRM is not affected and is rolled back to the user to-do list in the next synchronization. However, if a user adds, updates, or deletes a task directly from PeopleSoft Enterprise CRM, the change is synchronized to the PIM side and is available to users who receive updates on this task (based on dataset rules). This is because the add, update, and delete operation settings do not control data flow originating from PeopleSoft Enterprise CRM to the PIM system.

Task Notes

Sync Option	Select <i>Concatenate</i> or <i>Most Recent</i> to view the task notes on the PIM client.
Add - Begin Delimiter Add - End Delimiter	Enter a beginning and ending delimiter that define where the task note begins and ends. The note description field on the PIM client shows these delimiters to define where the note text must be added. PeopleSoft recommends that you use only characters, numbers, or dashes.
Task Type on PIA	Select a task type in the CRM system to associate with tasks on the PIM client.
Summarize Tasks	Select to enable the generated summary task to be synchronized to users' PIM clients.

Task Summary

Subject	Enter the text to be used as the subject of the summary task.
Text	Enter the text to be included in the body of the summary task. The text appears before the actual task list.
Type	Select the task type for summary tasks created in the CRM system. The system delivers a default type called <i>Summary</i> .
Priority	Select the priority of the summary task.

See [Chapter 3, "Setting Up PeopleSoft Enterprise CRM Infosync Applications," Generating Task Summary, page 51.](#)

Specifying PIM Preferences for Emails

Access the Email page.

Email page

Enable Email

Select to enable users' emails to be synchronized in PeopleSoft Enterprise CRM. If you decide not to support synchronization of emails, clear this check box to deactivate the rest of the page; users who are associated with this PIM preference receive an "object type not enabled" error message on their PIM Errors page when they try to synchronize emails to PeopleSoft CRM.

Category

Enter a category that is used by the Infosync applications to identify which emails are to be synchronized. The email category that you specify in this field must be identical to the one that users use to categorize emails on the PIM client. Emails that don't belong to this category are not synchronized. You can change the category name to anything during setup, but also update the filter and the category mapping. The default value is *PeopleSoft*.

Link Transactions

Select types of transactions that can be added to their associated emails as links. Options are *lead*, *opportunity*, *case*, *service order* and *call report*.

Setting Up PIM User Settings

This section discusses how to:

- Associate PIM preferences with users.
- Specify PIM accounts for users.

Pages Used to Set Up PIM User Settings

Page Name	Object Name	Navigation	Usage
Users	PIM_PREF_USERS	Set Up CRM, Product Related , Infosync, Preferences, Users	Associate users with or disassociate users from the PIM preference.
Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, Security, User Preferences, Overall Preferences	Associate a user with or disassociate a user from a PIM preference.
Worker: Details	RD_PRSN_DETAILS	Workforce, Search Worker, Worker	Specify the PIM account for a user.

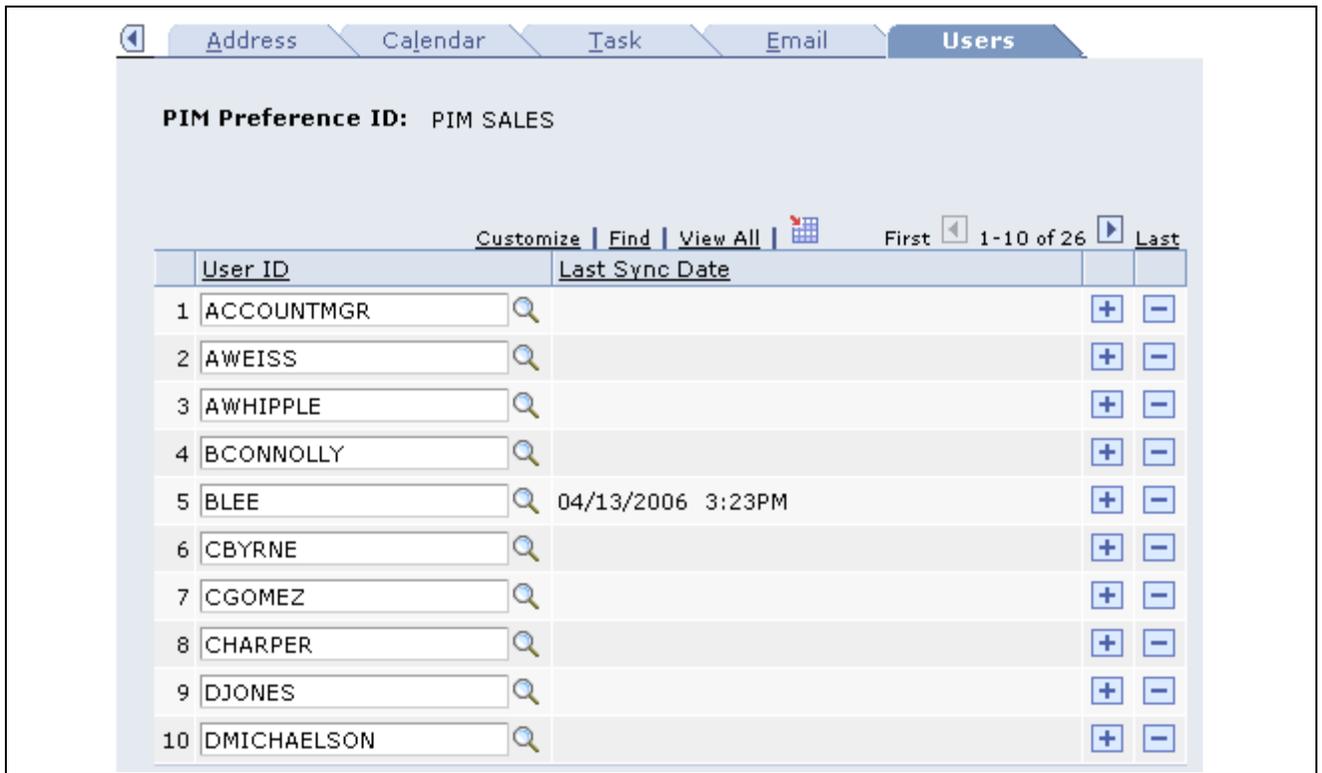
Associating PIM Preferences with Users

Associate each user with a PIM preference on either one of these two pages:

- The Users page.
- The Overall Preferences page.

Any change you make on one page is updated automatically on the other page as well.

Access the Users page.



Users page

User ID

Select the PeopleSoft user ID of a PIM user to be associated with this PIM preference. You can add or delete end users from the list as necessary.

If you add a new user who is currently linked to another PIM preference, the old association is deleted and the new one takes effect immediately after you save the page.

Ensure that you complete the prerequisite on saving the user preferences record for each PIM user; otherwise, some of them may not be available for selection.

Last Sync Date (last synchronization date)

Displays the date and time when the last synchronization occurred. The last transaction date for different end users vary, depending upon whether data updates actually occurred between PeopleSoft Enterprise CRM and the PIM system. If there is no data update for some end users after synchronization, their last sync date displays an earlier timestamp than other users who have just received data update.

The screenshot displays the 'Overall Preferences' page for a user. At the top, there are tabs for 'Overall Preferences', 'Call Center', 'Sales', 'Change Management', and 'Account'. Below the tabs, the user's details are shown: 'User ID' SMARX and 'Description' Marx, Stu Manager. The main section is titled 'Overall Preferences' and contains several fields:

- Business Unit:** APP01 (Appliances)
- SetID:** IPROD (Appliances)
- As of Date:** 05/12/2005
- Localization Country:** USA (United States)
- Requester:** VP1 (Oprid for CRMSKT, CRMQABAK)
- Role Type ID:** (empty)
- Company Name:** (empty)
- Partner Relationship Type:** (empty)
- *Market:** Global
- Order Capture Unit:** (empty)
- Mobile Customer Options:** (empty)
- PIM Preference ID:** PIM SALES
- Duplicate Parm Set:** (empty)
- Alternate Character Enabled**
- Wealth Management**

Overall Preferences page

SetID

Enter a setID for the end user. It is used as the default setID for consumers (created by the end user in the PIM server) as the records are synchronized in PeopleSoft Enterprise CRM, if sales business units are not applicable to that end user.

Localization Country

Specify a country code for the user as the localization country.

Note. You *must* specify this value for PIM end users because the Infosync applications use it as a default value in scenarios where a user adds a contact in the address book but forgets to enter a country for the contact. When synchronization occurs, the process populates the contact’s missing country value with the localization country value of the user (who creates the contact); otherwise, the user receives synchronization errors.

PIM Preference ID

Select a PIM preference with which the user is associated. When synchronization occurs, the process verifies the user’s PIM preference and dataset rules that are associated with that preference to determine what data gets updated in the PIM server for the user. Set up PIM preferences using the PIM Preferences component.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Setting Up Security and User Preferences,” Defining Overall Preferences

Specifying PIM Accounts for Users

Access the Worker: Details page.

PIM Account Name

Enter the login name of the user’s PIM client (Microsoft Outlook or Lotus Notes). If you don’t specify the PIM account name for the user, the PeopleSoft user ID of the user appears as the account name in the import text file after you run the PIM_ID_SYNC process to export PeopleSoft users.

Generating Task Summary

This section discusses how to generate task summary.

Page Used to Generate Task Summary

Page Name	Object Name	Navigation	Usage
Summarize Tasks	PIM_TSK_SUM	Set Up CRM, Product Related , Infosync, Summarize Tasks, Summarize Tasks	Generate tasks that summarize outstanding open tasks for users as reference.

Generating Task Summary

Access the Summarize Tasks page.

Run the PIM_TSK_SUM application engine program to generate the task summary for the selected user in the chosen time zone. To synchronize this task summary to the user’s PIM client, select the Summarize Tasks field on the Tasks page of the PIM preference profile that is associated with the user.

Setting Up Signon PeopleCode for PIM Users

This section discusses how to:

- Enable Signon PeopleCode.
- Create users for accessing PeopleSoft CRM from PeopleSoft Infosync Server.
- Define PIM system data.
- Specify administrator access.

Note. This section applies to PeopleSoft Enterprise Infosync Server only.

Pages Used to Set Up Signon PeopleCode for PIM Users

Page Name	Object Name	Navigation	Usage
Signon PeopleCode	SIGNONPPC_PAGE	PeopleTools, Security, Security Objects, Signon PeopleCode	Enable Signon PeopleCode programs.
PIM System Data	PIM_SYSTEM_DATA	Set Up CRM, Product Related, Infosync, Install Options, PIM System Data	Define PIM system data to enable users from PeopleSoft Infosync Server to log on to PeopleSoft CRM through Integration Broker without requiring user passwords.
Admin User Access	PIM_USER_ACCESS	Set Up CRM, Product Related, Infosync, Install Options, Admin User Access	Specify access rights for the administrator to various pages and components by associating permission lists.

Enabling Signon PeopleCode

For more information, refer to the Infosync chapter in the PeopleSoft Enterprise CRM 9 Supplemental Installation Documentation.

See *Enterprise PeopleTools PeopleBook: Security Administration*

Creating Users for Accessing PeopleSoft CRM from the PeopleSoft Infosync Server

Refer to the PeopleSoft Enterprise CRM 9 Installation Document for more information on user creation within Infosync applications.

Defining PIM System Data

Access the PIM System Data page.

PIM System Data page

Note. The user ID specified on this page should not be subject to synchronization. In other words, do not enter any sales or field service user who uses the server application for data synchronization as the PIM transient user. This user must not be an Integration Broker user.

- PIM Transient User ID** Enter a user ID that serves as a transient user. Create a transient user like any regular user by selecting PeopleTools, Security, User Profiles, User Profiles. There are no special requirements for how it should be created.

- PIM Transient User Password** Enter the password of the transient user.

- Default PIM Preference ID** Enter the PIM preference that the system assigns to users if it cannot identify the PIM preference for them in the user account creation process.

- Internal Mailbox ID, External Mailbox ID and Unknown Mailbox ID** Enter the mailboxes where different types of incoming emails are routed in the mail server.

- Attachments URL** Enter the identifier of the FTP server URL where email attachments are stored and fetched.

Establish URL identifiers on the URL Maintenance page under PeopleTools, Utilities, Administration, URLs.

Specifying Administrator Access

Access the Admin User Access page.

Admin User Access page

Specify permission lists to associate with the administrator user for authentication that happens in the CRM system. This user is used by UserManager to add PIM users.

Exporting Users from PeopleSoft CRM to PeopleSoft Infosync Server

This section discusses how to:

- Export users from PeopleSoft CRM.
- Import users into PeopleSoft Infosync Server.
- Create users through LDAP.

Note. This section applies to PeopleSoft Enterprise Infosync Server only.

Page Used to Export Users from PeopleSoft CRM to PeopleSoft Infosync Server

Page Name	Object Name	Navigation	Usage
PIM ID Export	PIM_TL_RUN	Set Up CRM, Product Related , Infosync, User ID Export, PIM ID Export	Run the PIM_ID_SYNC application engine process to export IDs of specified PIM users to a text file.

Exporting Users from PeopleSoft CRM

PeopleSoft CRM delivers an application engine process (PIM_ID_SYNC) that exports PIM user IDs from PeopleSoft CRM to a text file. The file is used by a utility to import users to PeopleSoft Infosync Server. In addition to exporting all PIM users, administrators can select to export:

- A group of users by PIM preference.
- Users that have been added to the system since the process was last run.

If none of these options are specified, the system exports all users that are associated with a PIM Preference ID to the file.

By default, data synchronization does not occur for exported users during the user export process. To allow data synchronization to occur for these users while a user export process is in progress, set the line `$sync=0` to `$sync=1` in the export file that is created by export process before importing users in IMS.

Note. If you use UserManager to export users it is not necessary to use this process, because exports occur automatically. You can still use this process to perform manual exports.

Refer to the installation document for more information on the user export process.

See “PeopleSoft Enterprise CRM 9 Installation Document”

Importing Users into PeopleSoft Infosync Server

Use the Intellisync Admin Console to import large numbers of users. Reference the user import text file that is generated by the PIM_ID_SYNC program and begin the import process.

Refer to the PeopleSoft Enterprise CRM 9 Installation Document and the Intellisync installation and setup guide for more information on importing users.

Creating Users Through LDAP

This section discusses what you need to do in order to create users through LDAP.

You should complete the following steps:

1. Schedule user group sync that imports users from LDAP into Intellisync, and set up the group in Intellisync.
2. Schedule User Manager, which registers users as PIM users in PIA and creates and configures Intellisync users for them. In order to run this job, you must first configure it by editing its .ini file. Refer to your Intellisync documentation for more information.

Example: Exchange Server

The .ini file format for Exchange is as follows:

```

CONSOLIDATE=true

URL=http://10.197.4.181/usrmgr/userManager.asp

OUTPUT=userManagerLog.xml

XML=<PARAM NAME="PROCESS_EA">TRUE</PARAM>
<PARAM NAME="PROCESS_XML">TRUE</PARAM>
<PARAM NAME="PROCESS_EXCHANGE">TRUE</PARAM>
<PARAM NAME="XML_TRANSLATORID">100</PARAM>
<PARAM NAME="XML_LOOKUPFUNC">lookupPIAXML
('http://adas0102/PSIGW/HttpListeningConnector?From=PSFT_PIM&
To=PSFT_CR&MessageName=PIM_CONTACT_SYNC&
MessageType=sync&Password=infosync')</PARAM>

```

The variable parameters are:

Parameter	Description
URL=http://XX.XXX.X.XXX/usrmgr/userManager.asp	This is the IP (internet protocol) address of the machine where the Infosync Server is running
Parameter inside the lookupPIAXML()	The complete URI used to integrate with Integration Broker. This is used for the LDAP interface.

Example: Domino Server

The .ini file format for Domino is as follows:

```

CONSOLIDATE=true

URL=http://XX.XXX.X.XXX/usrmgr/userManager.asp

OUTPUT=userManagerLog.xml

XML=<PARAM NAME="PROCESS_EA">TRUE</PARAM>

```

```

<PARAM NAME="PROCESS_XML">TRUE</PARAM>
<PARAM NAME="PROCESS_DOMINO">TRUE</PARAM>
<PARAM NAME="XML_TRANSLATORID">100</PARAM>
<PARAM NAME="XML_LOOKUPFUNC">lookupPIAXML
('http://adas0102/PSIGW/HttpListeningConnector?From=PSFT_PIM&
To=PSFT_CR&MessageName=PIM_CONTACT_SYNC&
MessageType=sync&Password=infosync')</PARAM>

```

The variable parameters are:

Parameter	Description
URL=http://XX.XXX.X.XXX/usrmagr/userManager.asp	This is the IP address of the machine where the Infosync Server is running
Parameter inside the lookupPIAXML()	The complete URI used to integrate with Integration Broker. This is used for the LDAP interface.

Setting Up Logging Options

This section discusses how to:

- Define PIM log settings.
- Associate users with PIM log settings.
- View PIM log.

Pages Used to Set Up Logging Options

Page Name	Object Name	Navigation	Usage
PIM Timing Setting	PIM_DBG_PROFILE	Set Up CRM, Product Related, Infosync, Timing, Setting, PIM Timing Setting	Define PIM log settings.
PIM Timing Users	PIM_USER_PROFILE	Set Up CRM, Product Related, Infosync, Timing, Users, PIM Timing Users	Associate users with PIM log settings.
PIM Timing Log	PIM_TIMING	Set Up CRM, Product Related, Infosync, Timing, Log, PIM Timing Log	View time log.

Defining PIM Log Settings

Access the PIM Timing Setting page.



PIM Timing Setting page

Timing Options

Calendar Objects, Email Objects, Contact Objects, and Task Objects

Select the synchronization-enabled objects to be traced.

For each selected object, the system logs the times when any of these events occurs:

- Execution of dataset rules.
- Search of newly added records.
- Search of deleted records.
- Search of changed records.

Get Request and Put Request

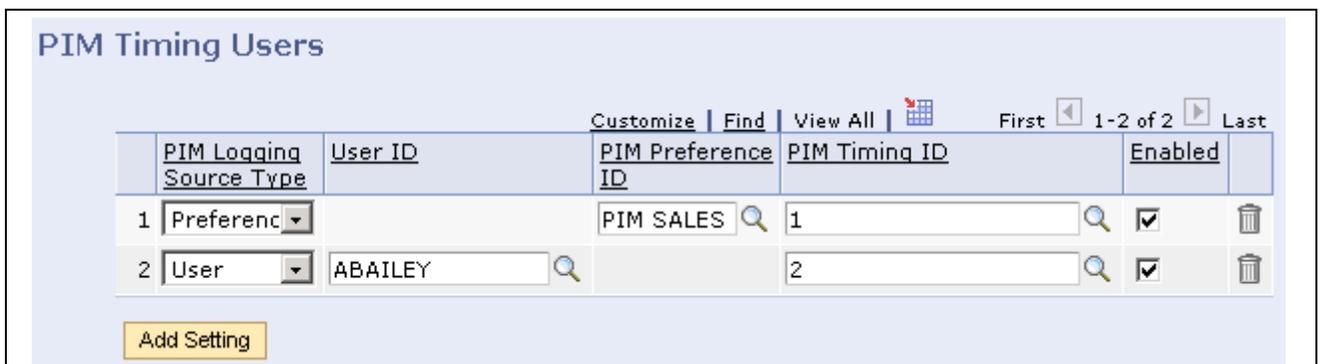
Select to capture the time spent on the get request or put request (or both) for each selected object.

Objects Fetching and Objects Storing

Select to capture the time spent on fetching or storing (or both) new, deleted, and changed records for each selected object.

Associating Users with PIM Log Settings

Access the PIM Timing Users page.



PIM Timing Users page

PIM Logging Source Type Select a user or a group of users to enable logging. Options are *All*, *Preference*, and *User*.

Note. When a user is associated with all three source types: *User*, *Preference*, and *All*, the log setting of the *User* source type takes precedence over *Preference*, followed by *All*.

User ID Enter the ID of a user whose synchronization activities are logged.
This field appears if the logging source type is *User*.

PIM Preference ID Enter a PIM preference in which its users' synchronization activities are logged.

This field appears if the logging source type is *Preference*.

PIM Timing ID Enter the logging setting to be applied to the selected users.

Viewing PIM Log

Access the PIM Timing Log page.

PIM Timing Log			
User BLEE			
Customize Find View All 			
		First <input type="button" value="◀"/> 1-28 of 28 <input type="button" value="▶"/> Last	
Created Datetime	Seq Nbr	Object Type	Description
04/17/2006 9:44AM		GET	Begin of RequestMessage
04/17/2006 9:44AM		GET	Begin of RequestMessage
04/17/2006 9:44AM	1	GET	End of None Request
04/17/2006 9:44AM	1	GET	End of None Request
04/17/2006 9:44AM	2	GET	Add Fetch Starting
04/17/2006 9:44AM	3	GET	Modify Fetch Starting
04/17/2006 9:44AM	4	GET	End of HeaderDetail Request
04/17/2006 9:45AM		GET	Begin of RequestMessage
04/17/2006 9:45AM		GET	Begin of RequestMessage

PIM Timing Log page

The log captures the logged event (according to the log setting) and the time it was logged for selected users. You can identify events that take a long time to process and investigate the cause of the performance issue.

CHAPTER 4

Managing Synchronized Objects and Information

This chapter provides an overview of system-delivered permission lists and discusses how to:

- Work with synchronized emails.
- View synchronization status information.

Understanding System-Delivered Permission Lists

PeopleSoft Infosync Server provides three permission lists that give user groups access to different PIM pages based on their job functions. These permission lists are:

- CRPIM0001 (PIM user permission list)

With this permission, users have access to the My PIM Status page to view personal status, error logs, and deleted objects.

- CRPIM0002 (PIM administrator permission list)

With this permission, users have access to all setup pages under Set Up CRM, Product Related, Infosync.

- CRPIM0003 (PIM manager permission list)

With this permission, users have access to the PIM Users Status page.

Working with Synchronized Email

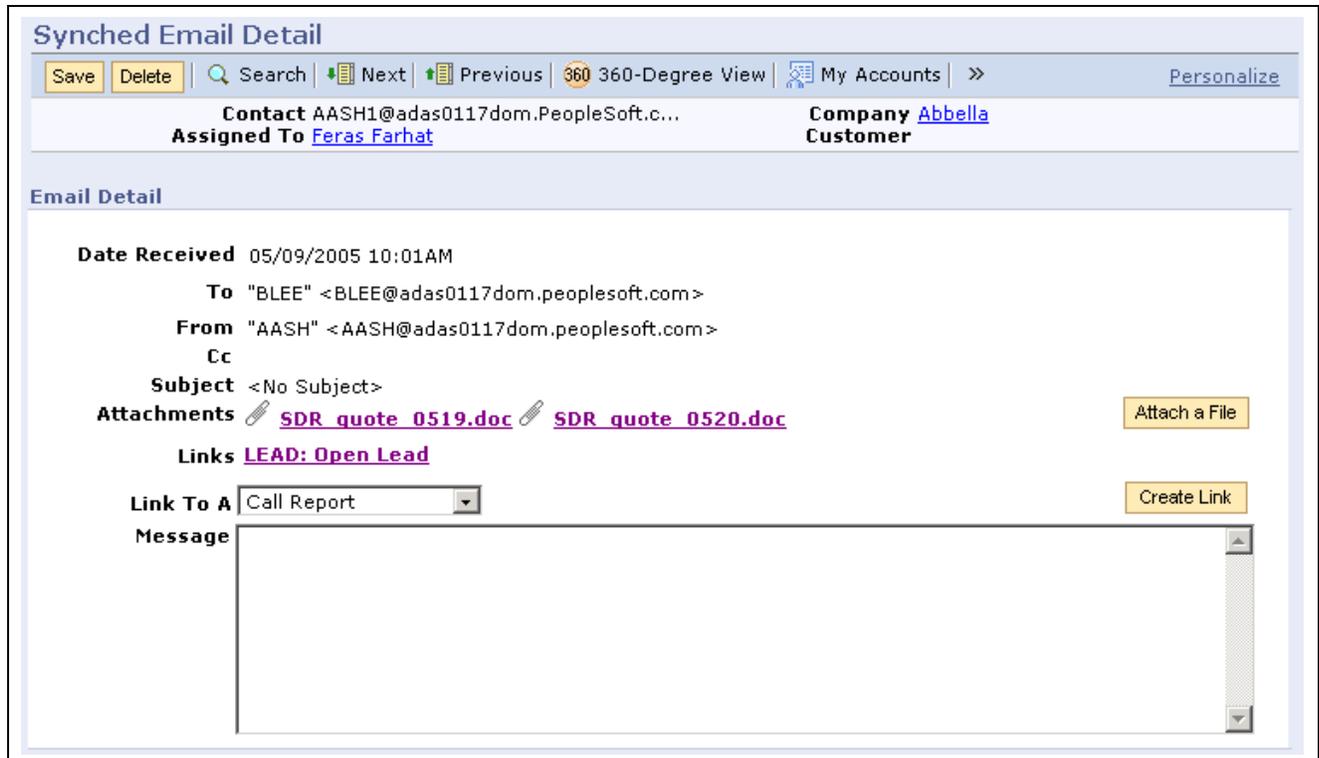
This section discusses how to work with synchronized email.

Page Used to Work with Synchronized Email

Page Name	Object Name	Navigation	Usage
Synched Email Detail	PIM_IN_EMAIL895	My Synched Email Click to open an email on the My Synched Email page.	View email messages that are synchronized from the PIM system to PeopleSoft CRM.

Viewing Synchronized Email

Access the Synched Email Detail page.



Synched Email Detail page

Email Detail

This section displays the summary information of the synchronized email. Users can save changes that are made to the email, or delete the email if it is synchronized by mistake.

Attachments Displays files that are attached to this email before and after synchronization.

Attach a File Click to select files from the local machine to attach to this email.

Links Displays transactions that are associated with the contact or those that you selected to associate with the email using the Create Link button.

Click the link to access the selected transaction. Note that users must be authorized to access the component of the transactions they wish to open, otherwise an error message appears which denies their access.

Link To A and Create Link Select from a list of open transactions to create links with this email, then click the Create Link button to perform the action. Options are:

- Call report.
- Case.
- Lead.
- Opportunity.
- Service order.

These transactions include, but are not limited to, open transactions of the email contact.

Note. From the search of the My Synched Email page, users can select multiple emails from the search result and link them to the same transactions simultaneously.

See [Chapter 3, “Setting Up PeopleSoft Enterprise CRM Infosync Applications,” Specifying PIM Preferences for Emails, page 47.](#)

Viewing Synchronization Status Information

This section discusses how to:

- View synchronization status.
- View synchronization errors.
- View all synchronization users.

Note. Managers have access to the status information of all PIM end users; PIM end users have access to their own status information. Access to status information is controlled by permission lists.

Pages Used to View Synchronization Status Information

Page Name	Object Name	Navigation	Usage
PIM Status	PIM_STATUS_PG	<ul style="list-style-type: none"> • My PIM Status, PIM Status (for users) • Set Up CRM, Product Related , Infosync, Sync Users Status, PIM Status(for administrators) 	View user synchronization status.
PIM Errors	PIM_ERROR_PG	<ul style="list-style-type: none"> • My PIM Status, PIM Errors (for users) • Set Up CRM, Product Related , Infosync, Sync Users Status, PIM Errors (for administrators) 	View a log of errors and warnings that occurred on PeopleSoft CRM during synchronization.
All Users	PIM_SYNC_PG	Set Up CRM, Product Related , Infosync, Sync Users Status, All Users	View a list of PeopleSoft users who use PeopleSoft Infosync Server to synchronize information.

Viewing Synchronization Status

Access the PIM Status page.

PIM Status PIM Errors All Users					
Customize Find View All [Grid Icon]					
First [Left Arrow] 1-7 of 26 [Right Arrow] Last					
	User ID	PIM Preference ID	Last Sync Date	Error Count	Last Error Date
1	ACCOUNTMGR	PIM SALES			
2	AWEISS	PIM SALES			
3	AWHIPPLE	PIM SALES			
4	BCONNOLLY	PIM SALES			
5	BLEE	PIM SALES	04/17/2006 9:46AM	5	04/13/2006 3:23PM
6	CBYRNE	PIM SALES			
7	CGOMEZ	PIM SALES			

PIM Status page

- Object** Displays the three types of PIM objects that are synchronized: calendar, address book (contact), and task.
- Total Count** Displays the total number of records transferred.
- Last Transaction Timestamp** Displays the date and time when the last transaction of the corresponding object occurred.
- Last Sync Date** (last synchronization date) Displays the date and time when the last synchronization occurred. The last transaction timestamp may or may not be equal to the last synchronization date, depending upon whether data updates actually occurred between the PeopleSoft Enterprise CRM and PIM systems. If data was not updated for an object after synchronization, the last transaction time of the object indicates an earlier date and time than its last synchronization date.

Viewing Synchronization Errors

Access the PIM Errors page.

PIM Status			PIM Errors	All Users
User ID: BLEE			Refresh	Delete All
			Customize	Find
			View All	First
			1-5 of 5	Last
Object	Created Datetime	Sync Error Text		
1 Calendar	04/13/2006 3:23PM	(18103,68) Task save failed in Task API - Task Management API Error Handler: 3(17834,2384) - Select a Primary Contact 1(91,37) - Error saving Component Interface. {RB_TSK_CI} (91,37) (0,0) RB_TSK_API.Task.OnExecute Name:errorHandler PCPC:1000 Statement:18 Called from:RB_TSK_API.Task.OnExecute Name:Save Statement:326 Called from:PIM_XMLOBJ.OBJECTS.Schedule.OnExecute Name:Modify Statement:593 Called from:PIM_XMLOBJ.OBJECTS.Appointments.OnExecute Name:Modify Statement:284 Called from:PIM_XMLDOC.XMLMessages.PutMessage.OnExecute Name:Process Statement:53 Called from:PIM_CONTACT_SYNC.RequestHandler.OnExecute Name:OnRequest Statement:9 Task save failed in Task API UID =1144, START DATE and TIME: 2006-04-13 15.30.00.000000, SUBJECT: 2 Private Meet		

PIM Errors page

- Object** Displays, if applicable, the object that the error pertains to.
- Sync Error Text** Displays errors and warnings that occurred in PeopleSoft CRM during synchronization. Select the Debug check box on the Setup page of the PIM preferences component to get more specific error text for troubleshooting purposes.

Note. You can find additional log information captured by the Intellisync Server in the C:\LOGS\XML and C:\LOGS\SYNCENGINE folders.

Viewing All Synchronization Users

Access the All Users page.

	<u>User ID</u>	<u>PIM Preference ID</u>	<u>Last Sync Date</u>	<u>Error Count</u>	<u>Last Error Date</u>
1	ACCOUNTMGR	PIM SALES			
2	AWEISS	PIM SALES			
3	AWHIPPLE	PIM SALES			
4	BCONNOLLY	PIM SALES			
5	BLEE	PIM SALES			
6	CBYRNE	PIM SALES			
7	CGOMEZ	PIM SALES			

All Users page

Error Count

Displays the number of errors that the user encountered.

Last Error Date

Displays the date when the last synchronization error occurred.

APPENDIX A

International Support

This appendix provides an overview of the international support that is available in PeopleSoft Enterprise Infosync Server only.

PeopleSoft Enterprise Infosync Server is designed to support global deployments. When possible, data is processed without regard for the data source code page. Exceptions to this are when an external application, such as one of the groupware applications, forces non-Unicode data through the system.

Understanding International Support for PeopleSoft Enterprise Infosync Server

This section discusses:

- Administration functions and user interface .
- Connector elements.
- Native language environment.
- Mixed language environment support.
- PeopleSoft Enterprise Infosync Server limitations.
- Environmental limitations.
- Configuration recommendations.

Administration Function and User Interface

PeopleSoft Enterprise Infosync Server administration function and user interface are shipped in English. Localized user interfaces are currently not available. Administration function and user interface include all user interface elements, online help, and documentation. Please contact your account representative for information on how to localize the administrator function and user interface. The PeopleSoft Enterprise Infosync Server administrator console is designed for server to server synchronization and does not include a user interface feature for end users.

Connector Elements

The Admin Console in PeopleSoft Enterprise Infosync Server supports English and Japanese.

PeopleSoft Enterprise Infosync Server supports connector localization for the these languages:

- US English.
- European French.
- German.

- Modern Spanish.
- Japanese.

Connector support for the above languages and the mixed language environment outlined below is included in all PeopleSoft Enterprise Infosync Server releases.

Native Language Environment

In a native language model all points in the application model have been installed with the same language model. This model is well suited for regional specific installation. For example, a site requires synchronization support for the Japanese office only. In this model, the administrator would work entirely in English except when mapping fields from the PeopleSoft application to the target groupware application.

While the administrator is working in English, the synchronization engine and connector process data in the native or entered language.

Mixed Language Environment Support

In addition to native environment support, where all points in the application model have been installed with the same language model, PeopleSoft Enterprise Infosync Server can run in a mixed mode. One mode is where both the PeopleSoft and groupware applications have been installed while PeopleSoft Enterprise Infosync Server has been installed using an English model. In this model, the administrator would work entirely in English. This includes while mapping fields from the PeopleSoft application to the target groupware application. PeopleSoft Enterprise Infosync Server does not support an installation where the server and connectors have been installed with different language options.

While the administrator is working in English, the synchronization engine and connector process data in the native or entered language.

Infosync Server Limitations

There are a limited set of regions where using the English connector limits the functional specification of the product. The most obvious is for the Japanese markets, where contact records contain Yomi fields for both company name and contact name. In this case using English connectors would result in the phonic name field not being synchronized.

It should be noted that when installing PeopleSoft Enterprise Infosync Server to connect to a language that is not supported by a localized version of the connectors, the installer cannot see the target language. For example, in the above model the site will be using an English installation of PeopleSoft Enterprise Infosync Server to connect to a Dutch version groupware product. On the Installation Mode Selection screen of the setup wizard, the Select the language of groupware's server drop-down list box is displayed without reference to Dutch. The installer should select English and continue with the installation process.

Environmental Limitations

Unique issues arise when using a mixed language model. This model assumes that the environment is connected to globally enable application models on both ends. Though PeopleSoft is fully Unicode enabled, there are questions surrounding the groupware applications. One area of concern is with older version of the groupware applications. If these applications have not been designed to use language independent codes in their APIs, field mapping and subsequent synchronization errors will occur.

In addition to concerns with the older groupware APIs, it is possible for users to configure the OS code pages and user interface for the environment in a manner that can create issues.

Configuration Recommendations

Due to inherent complexity in with mixed language environment, here are the recommendations for installations:

- Keep all portions of the deployment environment within one code page. For example, if the business requires support for French, Dutch and English, PeopleSoft Enterprise Infosync Server and groupware product should be installed using a Western European code page or Unicode. All application should be installed using the same code page.
- All server operating systems should be installed with the same code page options.

Glossary of PeopleSoft Enterprise Terms

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

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

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	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 Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met.

For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.

compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost 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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i> .
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to

	run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.
incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

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

common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single

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

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
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 Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
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.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.

system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise 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 Enterprise Projects.

trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exemption	Abbreviation for <i>value-added tax exemption</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.
yield by operation	In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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