
PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook

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PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 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>

PeopleSoft Enterprise Dashboard Integration Framework Preface

This preface discusses Oracle Business Activity Monitoring (Oracle BAM).

Oracle BAM

The documentation for Oracle BAM contains essential information describing the setup and design of real-time reports, alerts, and rules.

Oracle BAM includes these modules:

- Oracle BAM Active Viewer

This module enables you to view reports that were written in BAM Active Studio. As data continuously changes, the system updates the graphs and charts that are used to make up the reports.

- Oracle BAM Active Studio

This module is a robust web-based reporting tool for creating and delivering reports used in Oracle BAM.

- Oracle BAM Architect

This module is the user interface for the data designer. Through Oracle BAM Architect, the data designer creates and manages data objects, manages transaction source processing, and creates and manages plans.

- Oracle BAM Administrator

This module is the application that the system administrator employs for user management, message management, and plan monitoring in Oracle BAM. Using Oracle BAM Administrator, the system administrator manages roles and security levels, manages the message center, and the plans that load data into the Oracle BAM Active Data Cache (ADC).

- Oracle BAM Enterprise Link

This module is the extract, transform, and load (ETL) application that the developer employs for moving data from a source system into the Oracle BAM Active Data Cache (ADC).

See Also

Oracle BAM Active Studio User's Guide

Oracle BAM Architect User's Guide

Oracle BAM Administrator's Guide

Oracle BAM Enterprise Link Design Studio User's Guide

CHAPTER 1

Getting Started with the Dashboard Integration Framework

This chapter discusses:

- Dashboard integration framework overview.
- Dashboard integration framework integrations.
- Dashboard integration framework implementation.

Dashboard Integration Framework Overview

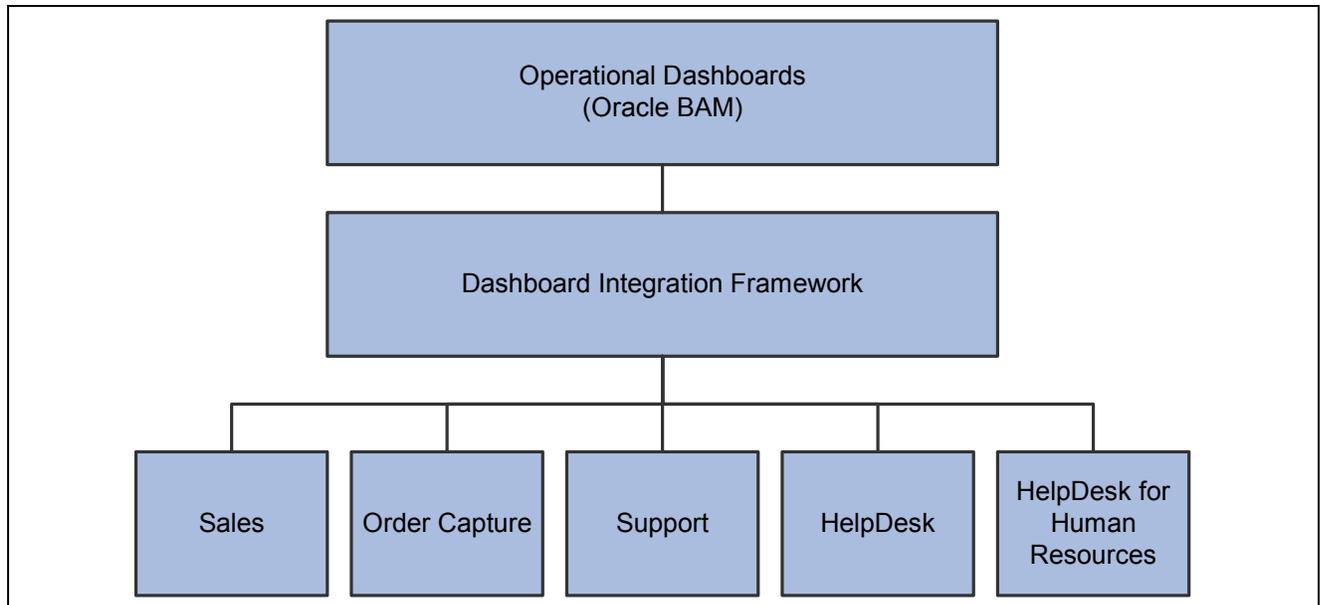
PeopleSoft dashboard applications are built on two complementary systems: a transactional system that is your system of record for your operational data, and a dashboard system that displays real-time reports interactive reports based on the transactional data. The dashboard integration framework provides mechanisms for moving data between these two systems.

This PeopleBook describes the integration framework for PeopleSoft Internet Architecture (PIA) transactional systems. The three areas of the dashboard integration framework are:

- A messaging framework that moves transaction data (and data from the related control tables) from PIA to the dashboard system.
- A security framework that moves user information from PIA to the dashboard system.
- An action framework in PIA that receives action requests from the dashboard and sends confirmations and error messages back to the dashboard.

Dashboard Integration Framework Integrations

The dashboard integration framework provides a layer between the dashboard applications, which are built with Oracle Business Activity Monitoring (Oracle BAM), and the PeopleSoft applications that provide the transactional data to the dashboard.



Dashboard integration framework integrations

Important! The documentation for Oracle BAM contains essential information for implementers of PeopleSoft dashboard applications.

We discuss integration considerations in the implementation chapters in this PeopleBook

Dashboard Integration Framework Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and data models for the dashboard integration framework.

CHAPTER 2

Understanding PeopleSoft Dashboards

This chapter discusses:

- Dashboards.
- Dashboard data.
- Dashboard elements and the dashboard interface.

Dashboards

Operational dashboards present real-time information about business operations and enable users to take appropriate actions based on that information.

The information appears in interactive graphical reports that enable business users to quickly understand the health of their operations at a summary level and to drill into more detailed information. Targets and thresholds are integrated into the reports to help users readily identify business risks, and system-generated alerts notify users when predefined conditions are met.

The data that appears in the dashboard originates in one or more transactional systems. An efficient messaging system ensures that data changes in the transactional systems are sent immediately to the dashboard system and that dashboard reports are updated in near real time.

Messages are also sent the other direction: when a dashboard user initiates an action, the dashboard system sends the action request back to the transactional system where the action is completed—at which point, any data changes that are the result of the action are immediately sent back to the dashboard system where the user can see the results of the actions.

Dashboard Data

The transactional system sends two types of data to the dashboard system. *Facts* are the data objects on which you report—the actual transactions that the business is monitoring. For example, in the PeopleSoft CRM dashboard applications, cases, orders, leads, and opportunities are all facts. *Dimensions* are lookup tables with values that are referenced in fact tables or in other dimensions. For example, a case fact might reference dimension tables with status values, and the case, order, lead, and opportunity facts might all reference a common dimension table with customer data.

Although the fact and dimension data originates in the transactional system, there are two types of data that are maintained directly in the dashboard system:

- Certain targets and thresholds.

Certain dashboard reports show status against defined targets and thresholds. Although some targets (such as sales forecasts) can be derived from the transactional system, other targets are meaningful only in the context of the dashboard report and are therefore maintained in the dashboard system. Each dashboard application has its own user-facing dashboard pages for setting targets and thresholds.

- Alert conditions.

The dashboard system generates the alerts and stores the conditional logic that determines when alerts are triggered. Use the Oracle BAM tools to maintain alert conditions.

Dashboard Elements and the Dashboard Interface

PeopleSoft dashboard applications use a standard interface that guides users from high-level summary information into deeper detail and, if necessary, into actions that the user can take in response to the information that is shown.

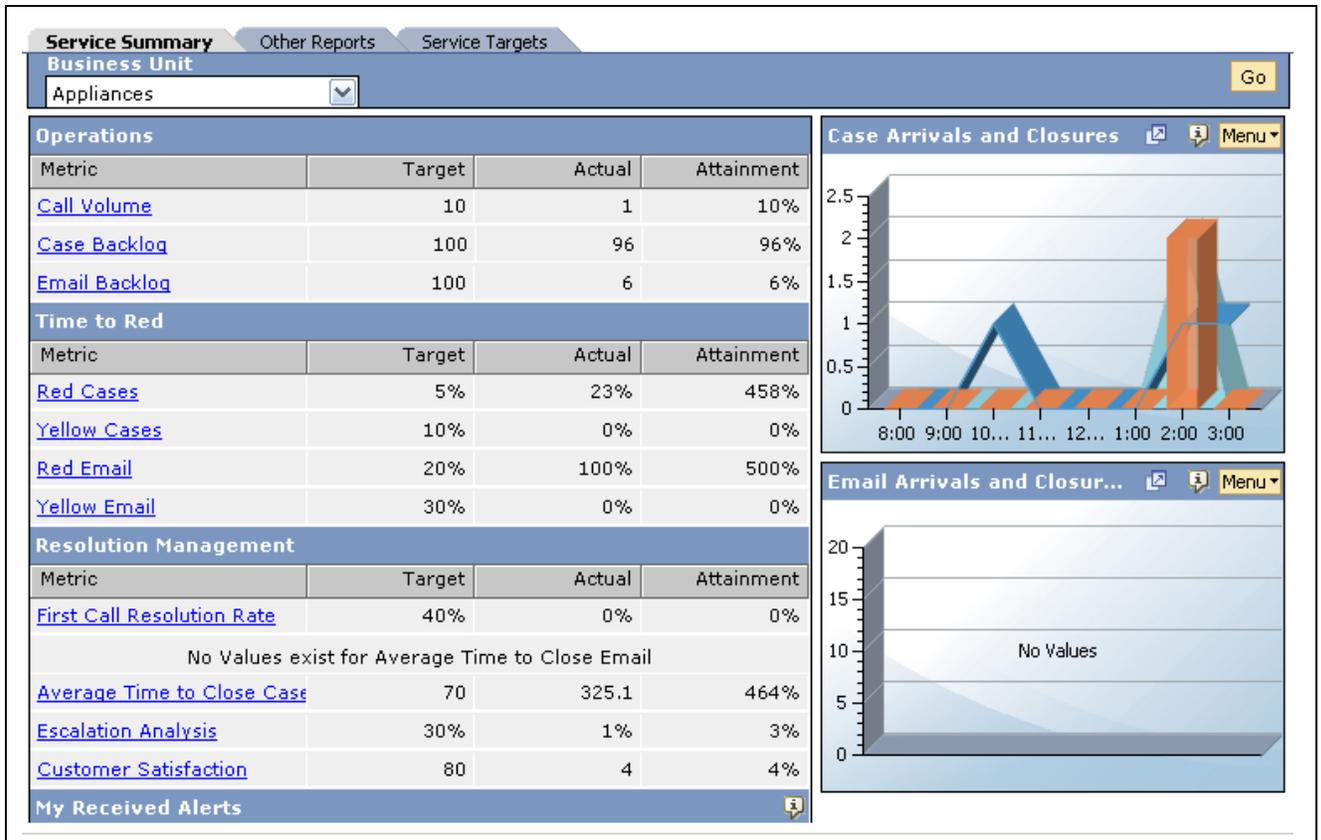
This section discusses:

- The dashboard window.
- Summary reports.
- Discovery reports.
- Actions.
- Alerts.

The Dashboard Window

Although dashboard users access the dashboard system from the PeopleSoft menu, the dashboard itself appears in a separate window.

The main dashboard window has application-specific pages for each licensed dashboard application and an application-independent page for viewing alerts:



Main dashboard window

Reports and Views

The content of a page in the dashboard window is called a *report*. From the main dashboard window, users can access additional reports that appear in new windows.

Note. These new windows do not provide the ability to navigate back to the main dashboard window. To reopen the main dashboard window after closing it, users must return to the PeopleSoft system to click the My Dashboards menu link. Users should generally leave the main dashboard window open for their entire dashboard session.

Reports contain elements known as *views*. Views can be charts or other graphical elements (for example, pie charts, bar charts, or gauges), or they can be text data in a structured format such as a grid.

Refer to the dashboard application documentation for information about specific dashboard reports.

Note. The end-user interface does not have a page for setting up alerts. To define alerts, use Active Studio, the report- and alert-building tool within Oracle Business Activity Monitoring (BAM).

Toolbar Buttons

These toolbar buttons appear at the top of the main dashboard window. They are visible only if the user is authorized to perform the underlying function.

Email Click to send a copy of the current report—with the current report data—to other dashboard users. The dialog box that appears includes fields for

selecting recipients and adding subject and message text to accompany the emailed report.

Note. PeopleSoft CRM dashboard applications include an additional email interface for sending template-based email from a transaction to people such as customers who are related to the transaction. Refer to your the documentation for CRM dashboard applications for more information.

Print

Click to print just the current report without additional window elements such as the toolbar button or the tabs for each of the dashboard pages. In the print preview window that appears, click the Print button to complete the print request or the Close button to close the window without printing.

Edit Dashboard, Edit Tab Group, and Edit Content

Click to open Oracle BAM Active Studio, the application for creating and modifying dashboard reports. Dashboards and Tab Groups are specific elements in Active Studio and clicking the corresponding buttons opens those elements. The Edit Content button opens the current report in Active Studio.

Summary Reports

In the main dashboard window, there is a *summary report* for each dashboard applications. Summary reports include these views:

- One or more global filters that restrict the data that is included in the summary.

For example, in PeopleSoft Sales, the global filter limits the report to a single region. The default value comes from the user preferences in the PeopleSoft system, but the user can select a different business unit from the drop-down list box on the report and then click the Go button to apply the new filter.

- Summary metrics for each of the application's major themes.

For example, Forecast Management is one of the themes in PeopleSoft Sales, and the summary report for the PeopleSoft Sales dashboard shows various metrics related to this theme.

The summary metrics show targets, actuals, and the actual as a percent of the target. Depending on the specific metric, it might be better for this percentage, called *Attainment*, to be high or low. For example, a case backlog over 100% means you have more cases than your target, which is undesirable. On the other hand, a first call resolution rate over 100% means you are closing more cases on first contact than your target, which is a desirable thing. Users should consider each metric's actual meaning to determine whether the attainment levels are good or bad.

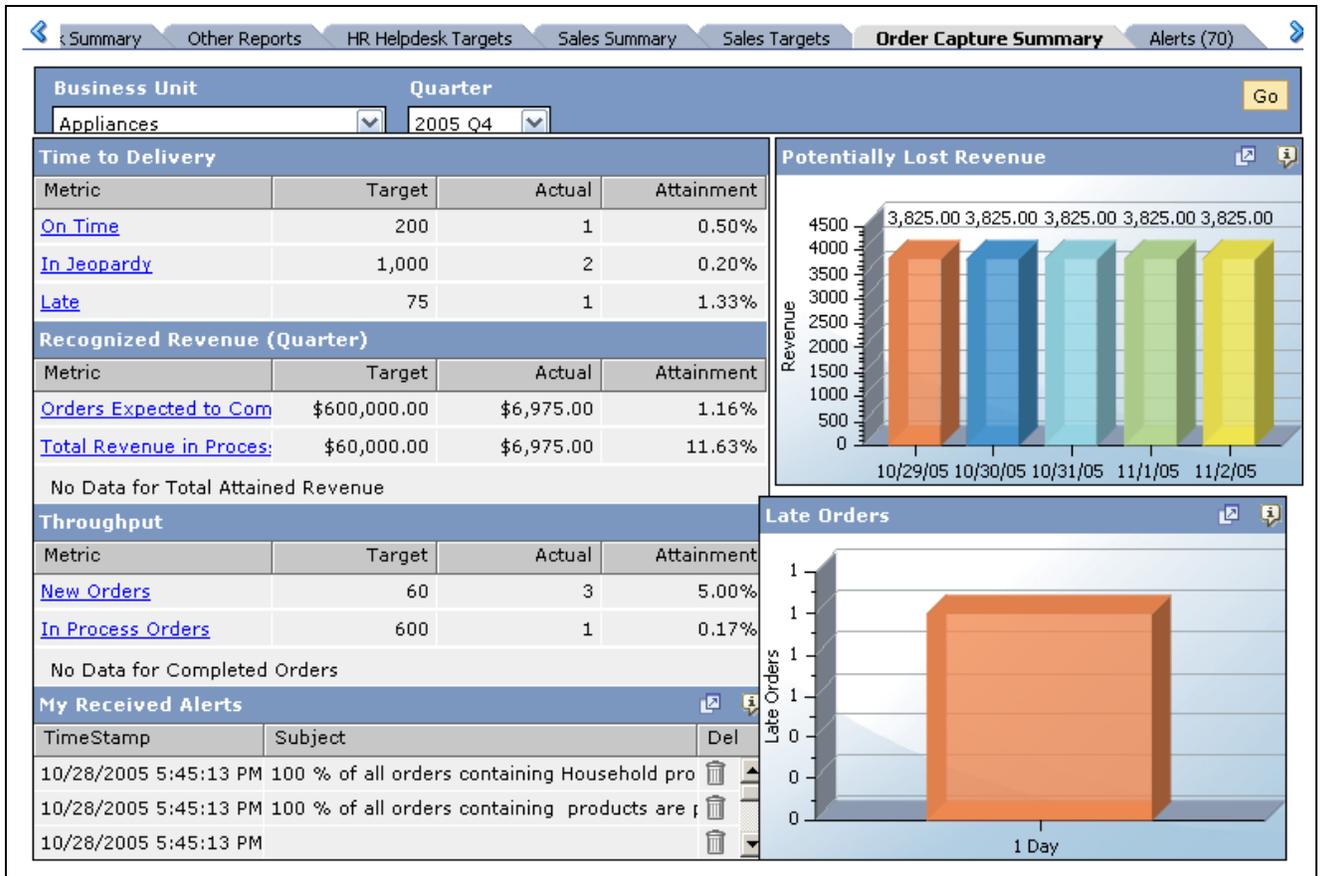
- Graphical views that illustrate key business operations.

For example, the summary report for the PeopleSoft Sales dashboard includes bar charts that show the actual and forecasted revenue for each sales person.

- A list of alerts.

Alerts appear both in the alerts view on the summary report and on the separate full-page Alerts report. Although the contents of the small view and the full-page report are the same, the full-page report enables users to see more information at once.

This is an example of a summary report:

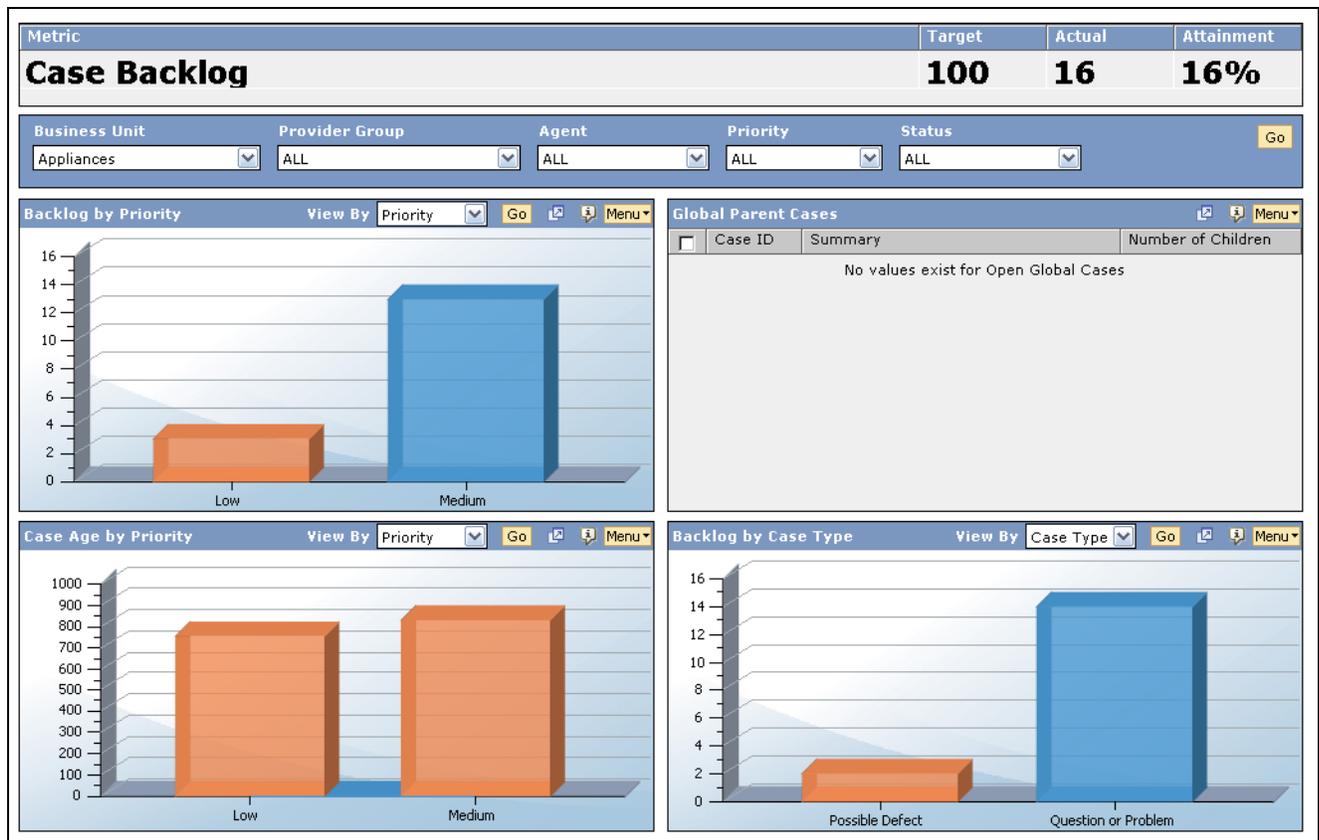


Order Capture Summary report

Discovery Reports

Users drill into the summary metrics or the graphical views on a summary report to access *discovery reports* that provide additional related data. A new Oracle BAM Active Viewer window opens when a user accesses a discovery report. Typically, the metric that the user is exploring is repeated across the top of the discovery report.

This example of a discovery report from the PeopleSoft Services Dashboard application has four views that show different information related to the case backlog metric from the Services Summary report:



Discovery report

Discovery reports include views that expand on the data from which the user accessed the report. For example, the Services Summary report has a case backlog metric. The related discovery page shown here repeats the main metric and provides four additional views that help the user analyze the nature of the cases in the backlog.

Page Controls

Dashboard users have a variety of page controls that are available to help manipulate the views on a report:

<global filter criteria>

Global filter fields for filtering report data appear at the top of the report. Users select filter values from drop-down list boxes, then click the Go button to apply the filter. The filter applies to every view in the report.

The specific filter fields on a report depend on the type of data that is shown.

View By

The View By drop-down list box on individual views provides instant multidimensional reporting. For example, a bar chart that initially shows case arrivals by priority can be instantly changed to show case arrivals by severity.

Users select a view by value and then click the Go button to update the display.



Click the Zoom icon to open a new window with a larger version of the view. Zooming is particularly useful when a chart has so many categories that the label text is hard to read in the report or when you want to see more data in a single view in a grid.



Click the Information icon to see a description of the view.

Menu

Click the Menu button to access a pop-up menu with report navigation links and links to context-appropriate actions.

Drilling

The views on a discovery page have predefined drilling hierarchies that enable users to access increasing levels of detail. The lowest level of any hierarchy is a list of individual transactions.

Because drilling hierarchies are predefined, users may lose the ability to drill down after changing the value in the View By field. For example, the default View By value for the Backlog by Priority view is *Priority*, and the predefined hierarchy is Priority-Status-Detail List. If a user at the top level of the hierarchy changes the View By value to *Severity* then the only drilldown that is available is directly to a list of individual transactions.



When you place the cursor over a view element and the cursor becomes a magnifying glass, you can click your mouse to drill into the element.

When drilling into charts, the dashboard displays the chosen subset of data in a new chart. For example, if a user clicks the bar for Medium priority cases in the Backlog by Priority chart, the view changes to a bar chart that shows the medium priority cases by status. Typically, the delivered charts have up to three levels of predefined drilling hierarchy; the third (lowest) level is the list of individual transactions.

When drilling into an individual transaction, the dashboard opens a new PeopleSoft window that shows the transaction in the PeopleSoft system. This new window is a standard PeopleSoft window, not a dashboard window.

Menu Links

Clicking the Menu button on a view or right-clicking within the view displays context-appropriate options:

Business Unit: Appliances |
 Provider Group: ALL |
 Agent: ALL |
 Priority: ALL |
 Status: ALL |
 Go

Provider Group Workload Menu

Provider Group Workload Summary Menu

Provider Group	# Cases	# High Priority	# Red Cases
Complai Servi	1	0	0
Dishwasher/App	6	0	5
Freezer/Refriger	3	0	1
Fulfillment Group	1	0	1
HVAC Support	3	0	1
None	48	2	5

Agent Workload Menu

Agent Workload Summary Menu

Agent Name	# Cases	# High Priority	# Red Cases
Barry Rider	1	0	0
Burt Lee	43	2	4
Marcia Lyons	3	0	2
None	6	0	3
Sean Boyet	3	0	1
Spencer Underw	6	0	3

Menu contents

The right-click menu has all of the same commands as the menu button. However, if the cursor is directly over a chart element (such as a bar in a bar chart), additional drilling commands are available from the right-click menu.

<Drill-down and navigation links> The hierarchical links at the top of the menu enable users to drill down into the view data according to a predefined hierarchy. For example, if a view shows cases by priority and then by status, a user who is looking at cases by priority can drill down to see cases of a specified priority broken down by status.

The Home and Drill Up links do not appear when the user is at the top level of the predefined hierarchy. However, once the user drills down to a lower level of the hierarchy, the Home link returns the user to the top level of the hierarchy, while the Drill Up links take the user one step up in the view hierarchy.

The Show Details link appears only when the user right-clicks over a specific chart element such as a bar on a bar chart. Click this link to access a list of the individual transactions for the chart element.

<Action links> The links under the Actions heading open action forms. If the user accesses the menu from the menu button or by right-clicking the chart background, the action form lists all transactions that were included in the view at the time the action form was accessed. If the user accesses the menu by right-clicking a specific chart element (for example, the bar for medium priority cases), then only the transactions that are represented by that chart element are included in the action form.

Actions

Actions are the “operations” in operational dashboards. When the reports and alerts bring an issue to a user’s attention, actions enable the user to react to the issue appropriately without ever leaving the dashboard system.

This example of an action form from the PeopleSoft Service Dashboard enables users to reassign cases:

Reassign Cases

Step 1: Select Cases to Reassign
Filters ALL ALL [Filter](#)

	Case ID	Summary	Provider Group	Agent
<input type="checkbox"/>	220320	Would like to know how often the freezer should be defrosted.	Freezer/Refrigeration Sup	Marcia Lyons
<input type="checkbox"/>	220320	Would like to know how often the freezer should be defrosted.	Freezer/Refrigeration Sup	Marcia Lyons
<input checked="" type="checkbox"/>	220324	Needs information on custom freezers for household.		Burt Lee
<input checked="" type="checkbox"/>	220324	Needs information on custom freezers for household.		Burt Lee
<input checked="" type="checkbox"/>	220324	Needs information on custom freezers for household.		Burt Lee
<input type="checkbox"/>	220334	Would like to know procedure for cleaning air conditioner.		Sean Boyet
<input type="checkbox"/>	220334	Would like to know procedure for cleaning air conditioner.	HVAC Support	Sean Boyet
<input type="checkbox"/>	220334	Would like to know procedure for cleaning air conditioner.	HVAC Support	Sean Boyet

Step 2: Select Agent to Reassign To
Filters ALL ALL [Filter](#)

	Provider Group	Agent
<input type="radio"/>	HVAC Support	Marcia Lyons
<input type="radio"/>	Fulfillment Group	Marcia Lyons
<input checked="" type="radio"/>	Freezer/Refrigeration Support	Marcia Lyons
<input type="radio"/>	Dishwasher/Appliance Support	Marcia Lyons
<input type="radio"/>	HVAC Support	Sean Boyet
<input type="radio"/>	Freezer/Refrigeration Support	Sean Boyet
<input type="radio"/>	Dishwasher/Appliance Support	Sean Boyet

[Reassign](#)

Review Summary and Status

Case ID	Summary	Assign From	Assign To	Status
220324	Needs information on custom freezers for household.	Burt Lee	Marcia Lyons	Processing
220324	Needs information on custom freezers for household.	Burt Lee	Marcia Lyons	Processing
220324	Needs information on custom freezers for household.	Burt Lee	Marcia Lyons	Processing

Action form

Important! Although the three-part format of this action form is typical, other action forms vary in ways that are appropriate for the specific action that is being performed. Refer to your dashboard application documentation for information about specific action forms.

Selecting Objects to Act Upon

The first step in an action form is to select the transactions to be included. Even before accessing the action form, users can leverage the filtering and drilling capabilities of dashboard reports and views to define a set of transactions upon which to act. Then, when the user selects an action, the system preserves the current data selection and presents an action form that lists the selected transactions.

Selecting a subset of transactions enables the user to vary the action parameters for different transactions. For example, if a call center manager has a list of 100 cases to reassign, the manager can select 10 to assign to user A, another 10 to assign to user B, and so forth.

Filters enable criteria-based selection. Applying a filter changes the content of the transaction list and is a practical way to make a long list more manageable. For example, a call center manager who needs to reassign all cases that are currently assigned to an employee who is on leave can filter by agent to see the relevant cases.

After filters have been applied, or when filter-based selection is not desirable, a check box column in the list of transactions enables manual selection of individual transactions.

Note. In the list of transactions, the first column includes links that a user can click to access the transaction in the PeopleSoft system.

Entering Action Parameters and Submitting an Action

Some, but not all, actions require parameters. For example, to reassign cases, a user needs to specify the new provider group and agent. Page elements for setting these parameters appear below the transaction list. When setting parameters involves selecting existing values (rather than freeform data entry), the action form provides a list of possible values. If multiple parameters are possible (for example, selecting a provider group and an agent), each valid combination of parameters is listed separately.

Filter fields at the top of the section help the user work with the list.

After the user selects or enters the necessary parameters, clicking the action button submits the action. The label on the action button depends on the action being performed: it is labeled Reassign in the Reassign Cases action form.

Users can perform the same action several times without leaving the action form. For example, the user can submit ten cases to be reassigned to provider group A, then change the transaction selection and the parameters to reassign ten different cases to provider group B.

Reviewing Summary and Status

Each time a user clicks the action button, the dashboard system sends a message to the PeopleSoft system with all the data that is necessary for completing the action: the action ID as well as the transaction list and the parameters. At the same time, the Review Summary and Status area of the action form displays a list of the transactions to be acted on and the details of the action.

The Status column in this grid indicates how far along the action processing is. The initial status is *Processing*. Because the PeopleSoft system sends confirmation information for each transaction, the status will eventually be either *Complete* or *Error*. The amount of time it takes to process the action depends on, among other things, the number of transactions that are submitted as part of the action request.

The Review Summary and Status list is session-specific. This means that a dashboard user who closes the action form no longer has access to the list. Reopening the action form starts a new session, and the Review Summary and Status list is empty until an action is submitted during the new session.

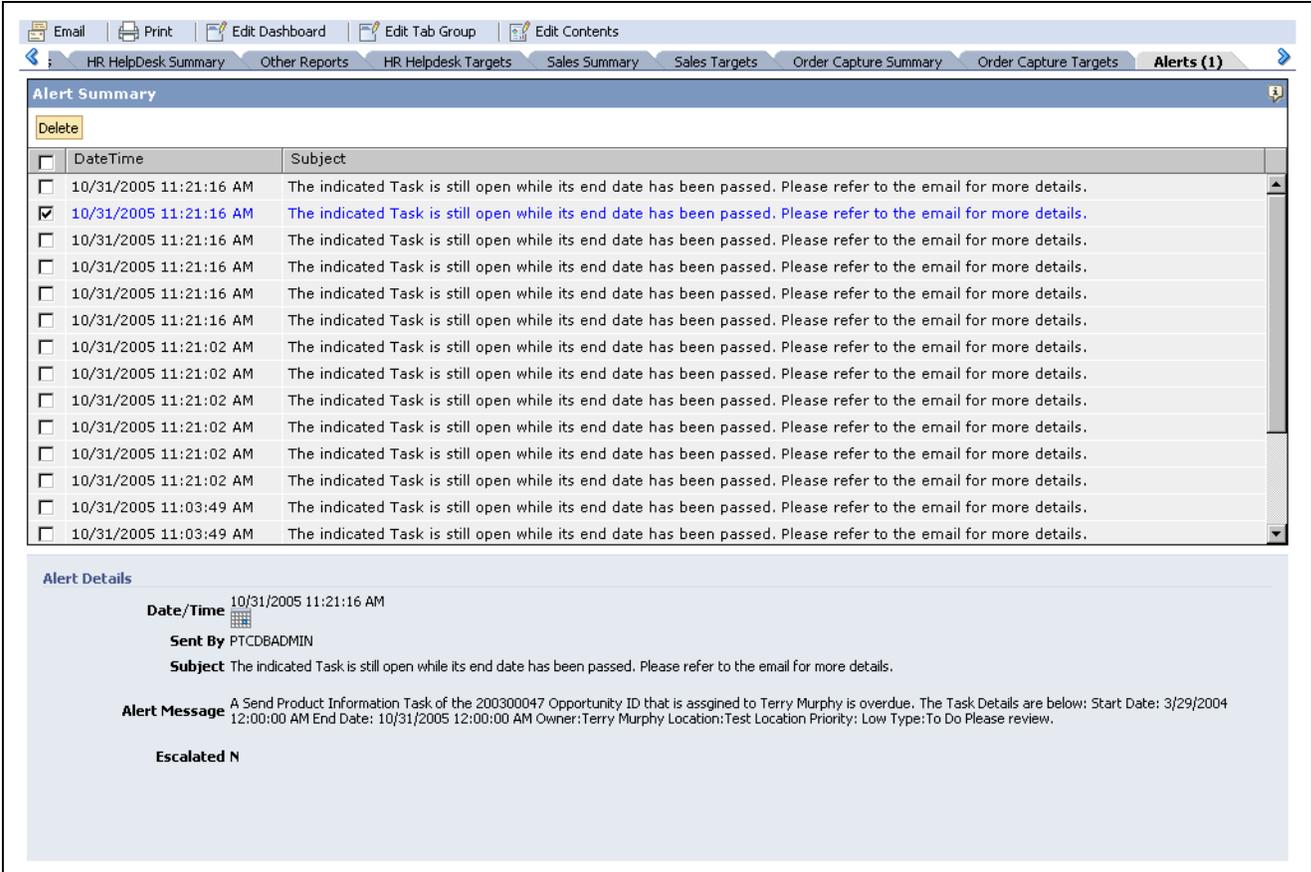
Although a user can no longer see the list of submitted transactions after closing the action form, the requested actions are still performed. The system sends alerts if any of the actions fail

See [Chapter 6, “Setting Up Dashboard Actions,” page 41](#).

Alerts

Alerts are messages that the dashboard system sends to specific users when predefined conditions are met. The dashboard interface includes a (full-page) Alerts report and a small Alerts view on each of the application summary reports.

The report and the view display the same alerts, but the report shows more alerts at a time and additional details about the selected alert:



Alert Summary

<input type="checkbox"/>	DateTime	Subject
<input type="checkbox"/>	10/31/2005 11:21:16 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input checked="" type="checkbox"/>	10/31/2005 11:21:16 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:21:16 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:21:16 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:21:16 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:21:02 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:21:02 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:21:02 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
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<input type="checkbox"/>	10/31/2005 11:21:02 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:21:02 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:03:49 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.
<input type="checkbox"/>	10/31/2005 11:03:49 AM	The indicated Task is still open while its end date has been passed. Please refer to the email for more details.

Alert Details

Date/Time 10/31/2005 11:21:16 AM

Sent By PTCDBADMIN

Subject The indicated Task is still open while its end date has been passed. Please refer to the email for more details.

Alert Message A Send Product Information Task of the 200300047 Opportunity ID that is assigned to Terry Murphy is overdue. The Task Details are below: Start Date: 3/29/2004 12:00:00 AM End Date: 10/31/2005 12:00:00 AM Owner: Terry Murphy Location: Test Location Priority: Low Type: To Do Please review.

Escalated N

Alert report

Alerts are automatically generated when specified conditions are met. Alerts do not necessarily demand action—they simply notify the user of a situation. It is then up to the user to respond appropriately.

Depending on how the alert is defined, the system might resend the alert at defined intervals as long as the condition is true. The system does not, however, remove alerts when the conditions are no longer true. For example, if a call center manager receives an alert when 10 percent of open cases are late, the alert does not disappear if the percentage later drops. The manager needs to manually delete the alert to remove it from the list.

Organizations normally have unique requirements for alerts. To meet these requirements, you can create and maintain your own alerts following the instructions provided in the Oracle BAM documentation.

PeopleSoft delivers representative alerts that you can use as models. You can also use the delivered alerts as-is, but because the alerts are associated with specific users, they are not automatically active. The installation documentation for the dashboard applications includes instructions for associating the delivered alerts with your users.

See *PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide*.

CHAPTER 3

Understanding the Messaging Framework

This chapter discusses:

- Dashboard architecture.
- The messaging framework.

Dashboard Architecture

This section discusses:

- Data transfer.
- Data manipulation.
- Integration setup.
- Customization considerations.

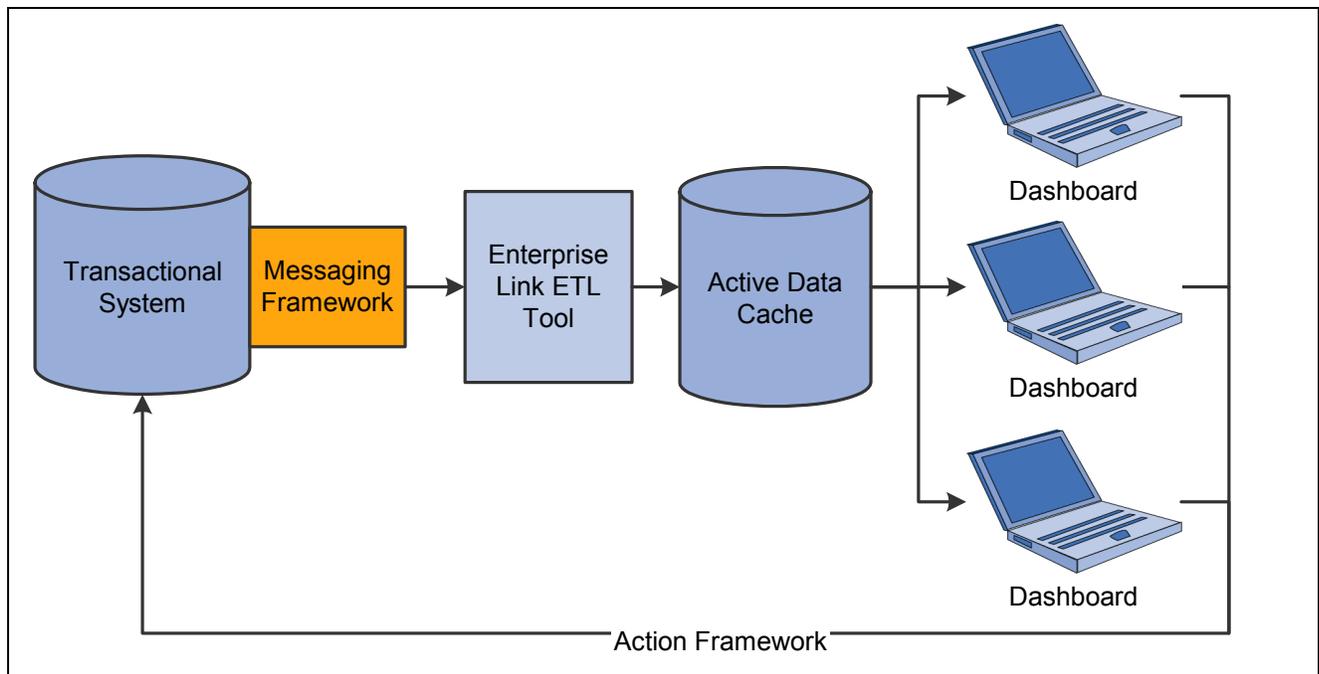
Data Transfer

PeopleSoft dashboard applications are built on two complementary systems:

- PeopleSoft transactional system.
This is your system of record for your operational data, and a dashboard system,
- Oracle Business Activity Monitoring (Oracle BAM).

This system displays real-time interactive reports based on the data. The Active Data Cache (ADC) is the data storage component of Oracle BAM.

This diagram shows the movement of data from a PeopleSoft database to the dashboard:



High-level messaging architecture

Data moves from the PeopleSoft system to the dashboard system through the following process:

1. Relevant data changes within the PeopleSoft transactional system are registered with the messaging framework.
2. The messaging framework publishes a Java Messaging Service (JMS) message to which Enterprise Link subscribes.
Enterprise Link is an Extract, Transform, and Load (ETL) tool within Oracle BAM.
3. After Enterprise Link performs any necessary transformations, the data is saved to ADC data objects.
Data objects are the ADC equivalent of database tables.
4. The dashboard viewer immediately updates its display to reflect data changes.

As the diagram shows, data also moves from the dashboard to the PeopleSoft transactional system. This occurs when a user submits an action from within the dashboard system.

Note. The data structure that is used in the ADC is known as a *star schema*. The Oracle BAM documentation discusses the ADC data structures.

Data Manipulation

As data is sent from PeopleSoft to the ADC, it requires these changes:

- It is denormalized

PeopleSoft relational databases use normalized table structures for efficient data storage. Oracle BAM, on the other hand, uses denormalized data structures that are optimized for the performance of the real-time reports. The application classes that fetch the data to be included in the message return the data in a format that is appropriate for the dashboard system. Enterprise Link performs certain additional data manipulations that are necessary before the data can be saved in the ADC tables.

- The source system is identified.

Because dashboard applications support data from multiple sources, it is useful to tag data with a source system identifier. The dashboard system settings that you establish include a source system ID, and the Change Notification process adds this identifier to each record that is sent to the dashboard system.

- A surrogate key is added to certain data objects.

Different source systems can use different key structure for similar objects. A surrogate key is a value that functions as a unique ID for each dashboard record, regardless of the data's native key structure in its source system. Oracle BAM Enterprise Link can generate surrogate keys at the time it saves a new record into the ADC. For performance reasons, PeopleSoft is selective about which data objects get surrogate keys.

The Enterprise Link plans that process incoming data include steps to convert native-key references to other records into the appropriate surrogate key. For example, in the Case data object, there is a field where the case status is identified by its surrogate key. If the case status table has a value of *Open* with a surrogate key of *123*, then open cases need to have the value *123* in their case status field. When a message arrives with data for an open case, Enterprise Link looks up the surrogate key for the Open case status and ensures that the case data in the ADC is saved with the appropriate surrogate key.

Occasionally a native-key reference to another record cannot be resolved. For example, if you create a new case status in the PeopleSoft system, there could be a situation where a case with that status arrives in the dashboard system before the new case status record arrives. In this situation, Enterprise Link uses the surrogate key value of *-1*, which has a corresponding description of *Unknown*.

It is also possible to have records where there is no native-key reference available. In this situation, Enterprise Link uses the surrogate key value of *-2*, which has a corresponding description of *None*.

Integration Setup

A JMS server must be available and configured for dashboard messaging, and a PeopleTools Integration Broker dashboard node must be configured with the appropriate URL for the JMS server's Java Naming and Directory Interface (JNDI) service.

This PeopleBook does not describe the necessary JMS and Integration Broker setup. Instead, refer to the dashboard installation documentation.

See *PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide*

Customization Considerations

PeopleSoft dashboard applications are built on the Oracle BAM platform. Use these Oracle BAM tools to modify the delivered system:

- Use Active Studio to modify reports and alerts.
- Use Architect to modify the data structures within the ADC.
- Use Administrator to manage security.

Note. The dashboard integration framework enables you to manage security within the PeopleSoft system and then to send users and their access levels to Administrator.

- Use Enterprise Link to perform the data manipulations that are necessary as data moves from the PeopleSoft system into the ADC.

Modifications to the delivered dashboard applications (other than security configuration) are considered customizations and are unsupported other than the support for Oracle BAM.

Refer to your Oracle BAM documentation for more information.

The Messaging Framework

This section discusses:

- Messaging framework elements.
- The message queues.
- The Change Notification process.

Messaging Framework Elements

The messaging framework is the mechanism by which data from PeopleSoft applications is sent to the dashboard system. The framework includes these elements for processing online changes:

- Two message queues that store identifying information about data to be sent.
- A daemon that you set up during installation to monitor the queues.
- The Change Notification Application Engine process (PT_CDB_UPDATE) that the daemon runs to process queue contents.

The two message queues are:

- PSCDBCHNGQ, which stores information that can be sent to the dashboard immediately.

Most dashboard data comes from this queue, including batch requests that are submitted from the Batch Data Load page.

See [Chapter 5, “Setting Up the Dashboard,” Initiating a Batch Data Load, page 37.](#)

- PSCDBSCHEDQ, which stores future-dated information.

For example, in PeopleSoft CRM, contact methods, worker departments, and tasks can be future dated. Because the dashboard shows only current data, any future-dated changes to these objects is held in the PSCDBSCHEDQ queue until such time as the data becomes effective.

The framework also includes the Batch Data Load Application Engine process (PT_CDB_BATCH). This facilitates batch data loads by creating message queue entries for objects that you specify. CRM dashboard applications use a separate process, the CRM Initial Data Load Application Engine process (RBD_INIT_DRV), to optimize performance for the high-volume initial load of CRM data.

To maximize performance for the messaging framework, you can set up parallel processing of the messages for each dashboard application. Multiple Process Scheduler servers are required to support parallel processing of online changes. The CRM Initial Data Load process supports parallel processing with either multiple Process Scheduler servers or with one Process Scheduler server with multiple AESRV process instances.

See Also

PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide

The Message Queues

There are two types of entries in the message queues:

- Entries for a single instance of an object—for example, a single case.
- Entries for a batch load of an object.

Message queue entries always include an object identifier (for example, case, lead, or order), an application ID (for example, Sales or Order Capture) and the entry type—single or batch.

Single-Instance Queue Entries

When an online user updates a relevant transaction, the system populates the message queue with minimal identifying information about the object whose data is to be sent to the dashboard. (“Relevant” transactions are determined based on which dashboard applications have been installed.) Because the message queue requires only basic identifying information about an object, items can be added to the queue with minimal impact on the online user.

When the Change Notification process handles a single-instance message queue entry, it calls an object-specific application class to fetch the rest of the data that needs to be transmitted to the dashboard. The application classes that PeopleSoft delivers for this purpose are optimized to bring over only data that is considered relevant to a dashboard user—that is, data that is either used in a delivered report or that could be useful to an organization that is creating additional, custom, reports.

Batch Data Load Queue Entries

Message queue entries for batch data loads are typically the result of some other process. There is a general purpose Batch Data Load page where you can submit requests for batch data loads, and there is a CRM-specific page for performing initial data loads. PeopleSoft CRM also has additional processes that create message queue entries for batch loads. For example, there is a daily process that creates an entry for currency exchange rates, resulting in a daily refresh of all currency exchange rate information in the dashboard system.

Message queue entries for batch data loads do not include any data other than the object type and the fact that it is a batch data load. When the Change Notification process handles a batch load message queue entry, it calls the same object-specific application class that is used to fetch data for single-instance entries. It also passes the application class the information that this is a batch load request. The object-specific application class includes a method that selects the appropriate instances of the object.

For some objects, such as the currency exchange rate load, a batch load processes all rows of data. Typically, batch loads of dimension tables will send all rows of data.

For other objects, the application class is more selective. In PeopleSoft CRM, there is a setup component where implementers enter criteria for the batch loading of certain objects, and the application class reads the settings in this component to determine which rows of data to return to the Change Notification process. Typically, batch loads of transaction tables are more selective. For example, an organization can choose not to load closed cases that are more than three months old.

Queue Processing

After the object-specific application class returns the relevant data to the Change Notification process, the process packages the data into XML messages that it then sends to the dashboard system. A single message can contain data from more than one object, though all objects must be the same type. For example, one message can contain data from multiple cases, but not from a mix of cases and leads. This bundling improves performance.

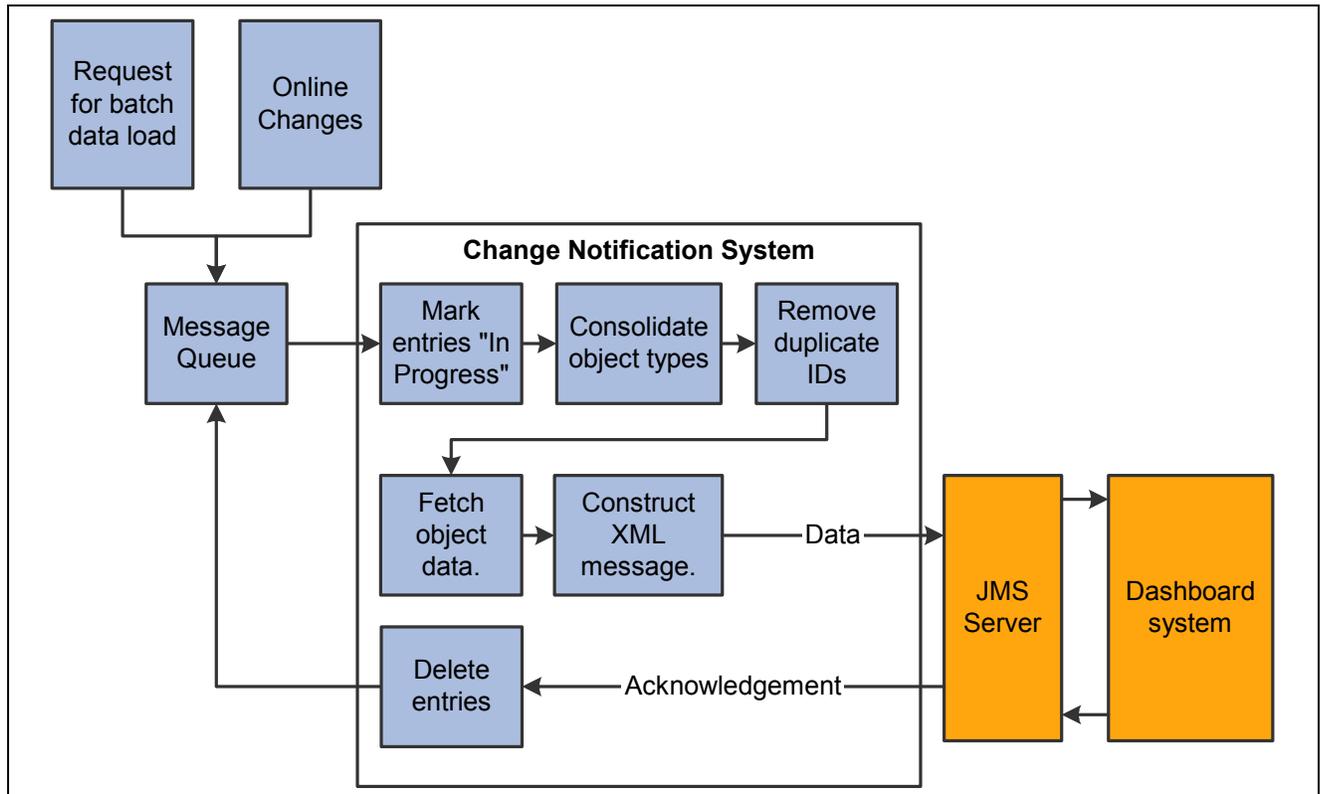
When you define dashboard settings in the PeopleSoft system, you can set a maximum message size. However, data from a single object is never split into multiple messages. Although it is unlikely that a single object would generate data in excess of the maximum message size, if this were to happen, the message would exceed the maximum.

The system sends the XML messages to the JMS server for the dashboard system. Within Enterprise Link, an Enterprise Message Source (EMS) that you established at installation time, subscribes to the message. Enterprise Link plans, which perform the transformations to be applied to the data, process the data and save it to the ADC.

Message queue entries are not deleted until the PeopleSoft system receives an acknowledgement from the JMS server. If message receipt is not confirmed, PeopleSoft reprocesses the queue entries. This architecture ensures that data is not lost if the system goes down or the messaging connection is broken.

The Change Notification Process

The following diagram illustrates the Change Notification process:



Change notification process

These steps describe the process that the diagram illustrates:

1. An online change or a batch data load request creates message queue entries.
2. If the Change Notification process is not already running, the daemon that was set up at installation time reacts to the arrival of items in the message queue by starting the Change Notification process.
3. The Change Notification process marks the current set of entries in the change notification queue as being in process.
4. The Change Notification process queries the current set of marked entries to consolidate entries for the same object type.
5. For each object ID, the Change Notification process collects the data that is to be sent to the dashboard. To do this, the Change Notification process invokes the application class that is appropriate for the object type.
6. The Change Notification process builds an XML message containing the object data for the changed objects.

A single message can include data for multiple queue entries for the same type of object. Bundling the data this way reduces traffic and individual message processing overhead.

7. The message is published to a JMS server.
JMS messaging is handled through the application server for online processes and through process scheduler for batch processes.
8. The JMS server acknowledges the receipt of the message and the Change Notification process removes the entries that were marked as “in process” from the change notification queue.
If there is an error, the Change Notification process will retry the operation. If neither an error nor an acknowledgement is received, the entries remain in process and are therefore sent again during the next pass of the Change Notification process.
9. The Enterprise Link EMS that subscribes to the message receives the message.
10. The dashboard system processes the message, updates the ADC, and updates any reports that are being displayed.
11. The Change Notification process checks for new entries in the queue:
 - If entries are found, the Change Notification process repeats the process with the new entries.
 - If no entries exist, the Change Notification idles for five seconds and then checks the queue for entries again.A system setting determines the maximum number of times that the process checks the queue before going dormant. If the process goes dormant, the daemon that monitors the message queue starts the process again when there are new arrivals in the queue.

If errors occur during the Change Notification process, the error is recorded in the daemon log, the queue entry that was not processed is returned to the “Waiting for Processing” status, and the system adds one to a counter that tracks how many times the affected entry has been tried. A queue entry that fails three times is removed from the queue.

It is important for an administrator to review the daemon log periodically to see if queue entries have been removed without being processed. The daemon log is a standard feature of PeopleSoft Process Scheduler.

See Also

Enterprise PeopleTools PeopleBook: Process Scheduler

CHAPTER 4

Understanding Security Integration

This chapter discusses:

- Security architecture.
- Single signon.
- Security synchronization.

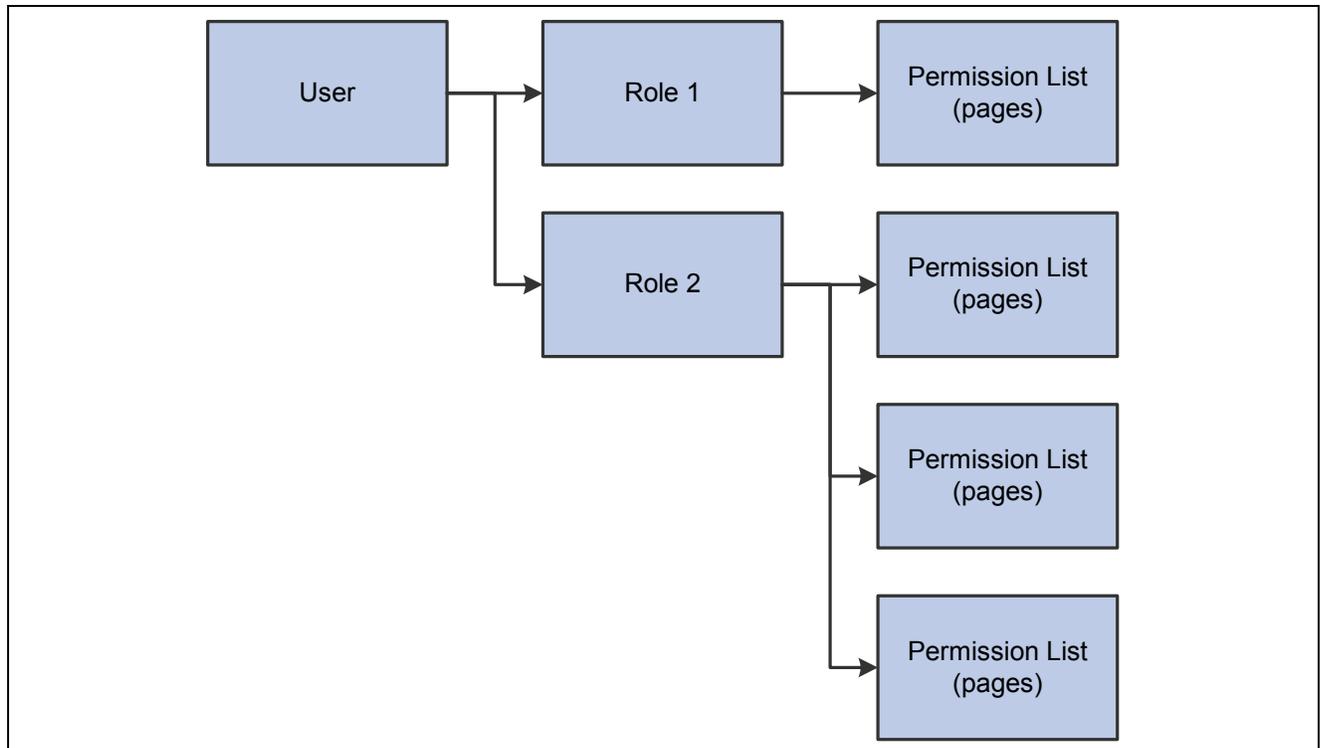
Security Architecture

To understand security synchronization, it is first necessary to compare the PeopleSoft and Oracle Business Activity Monitoring (Oracle BAM) security architectures.

PeopleSoft Security Architecture

PeopleSoft security architecture associates users with roles. Roles are, in turn, associated with permission lists that are made up of specific authorizations such as access to particular pages.

This diagram illustrates the PeopleSoft security objects and their relationships:



PeopleSoft security architecture

Dashboard Security Architecture

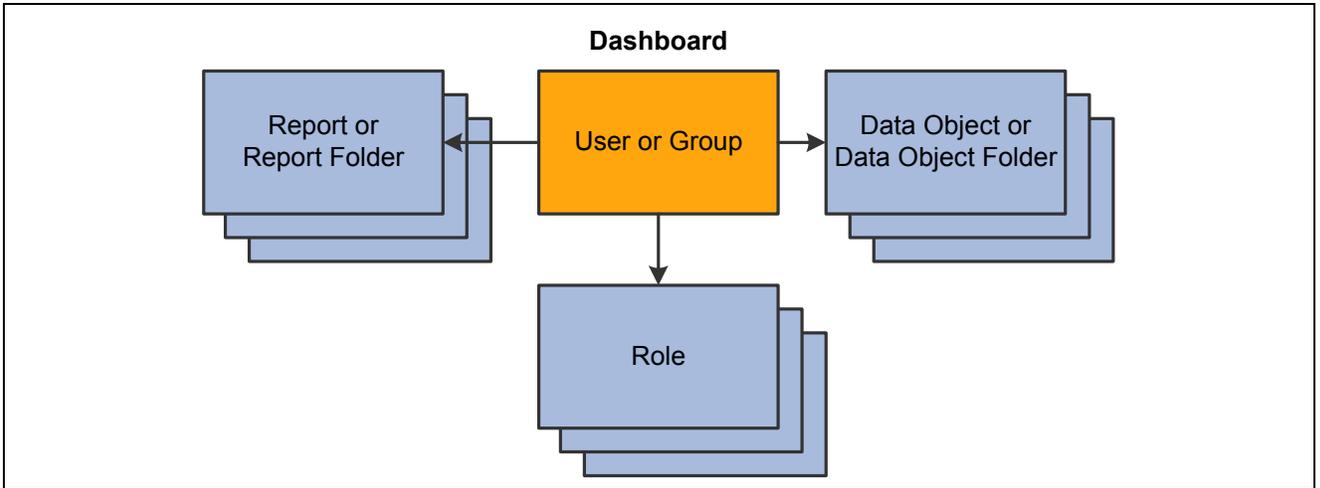
The dashboard equivalent of a role is a *group*. However, rather than being associated with a permission list that references one or more pages, a group is associated directly with a dashboard report or data object (table), or with a folder containing multiple reports or data objects.

Note. To view data in a report, a user must have access to both the report and the data object from which the report pulls information. Access to the data object doesn't give the user the ability to modify the object unless the user also has access to the Architect tool.

The dashboard system also differs from PeopleSoft in that group membership is not required for access to specific reports, data objects, and folders: individual users can be given access directly. However, when you use the security synchronization process to manage dashboard security, all access other than that of the primary security administrator is given through groups.

The dashboard system also includes a security object called a *role*, but it is different from a PeopleTools role. Dashboard roles are somewhat similar to permission lists in that they incorporate specific authorizations. However, the authorizations in a dashboard role are not for specific objects such as reports. Instead, roles are used for broad categories of access such as the ability to use Architect, Administrator, or Active Studio. Users are given these access levels either through direct association with a dashboard role or through membership in a group that is associated with a dashboard role.

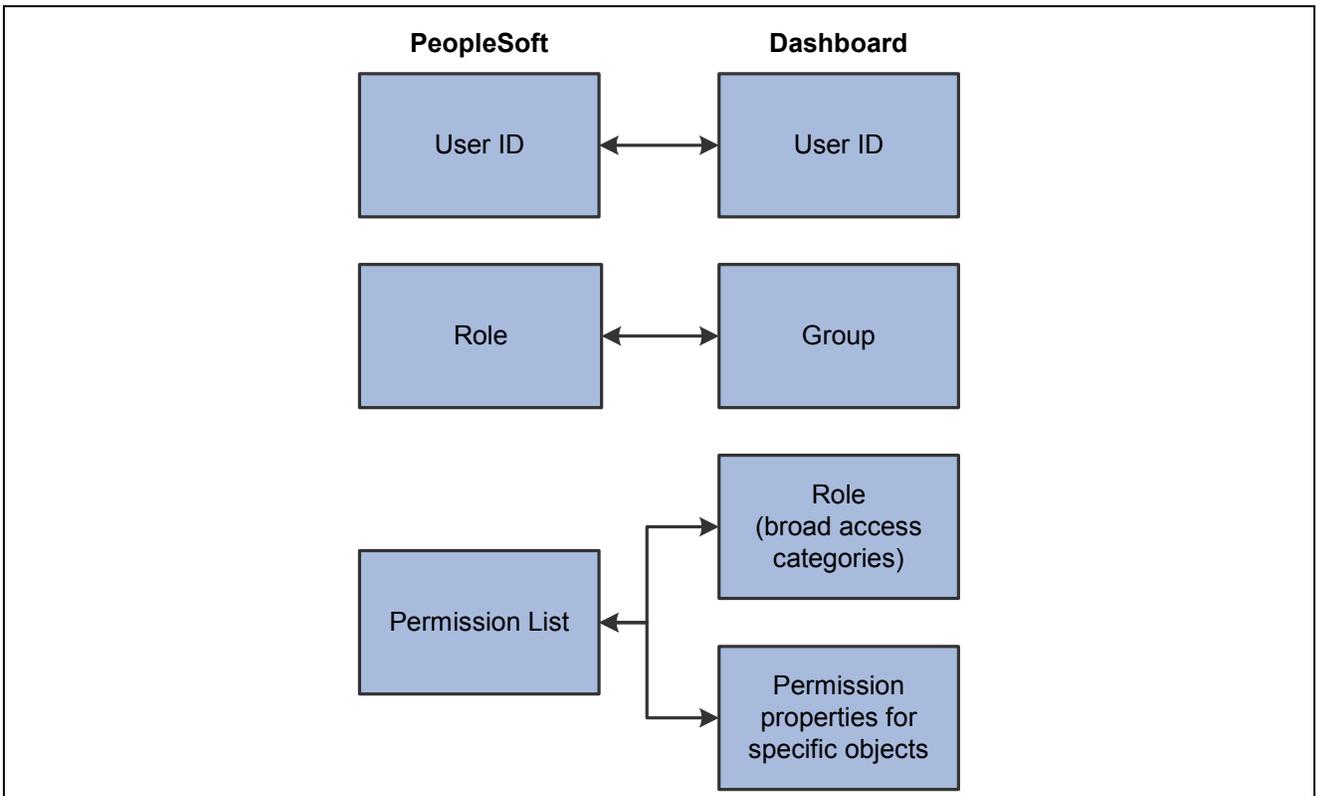
This diagram illustrates the dashboard security objects and their relationships:



Dashboard security architecture

Comparison of PeopleSoft and Dashboard Security Architecture

This diagram maps PeopleSoft security objects to their corresponding dashboard security objects:



Security object comparison

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Oracle BAM Administrator's Guide

Single Signon

Single signon capabilities enable PeopleSoft users to access the dashboard system using links on the PeopleSoft menu even though the dashboard is physically external to the PeopleSoft system and maintains its own security profiles.

To support single signon capabilities, the dashboard integration framework provides a mechanism for sending PeopleSoft user data to the dashboard system. This enables your organization to continue maintaining your user profiles in one place using PeopleTools. Giving PeopleSoft users access to the dashboard system is simply a matter of associating the users with dashboard-specific PeopleTools roles and running the security synchronization process.

The PeopleSoft menu includes the following links for accessing various components of the dashboard system:

- My Dashboards (this link is at the root of the PeopleSoft menu; it is the link that end-users click to access dashboard reports).
- Setup CRM, Product Related, Dashboard, Report Viewer.
- Setup CRM, Product Related, Dashboard, Active Studio.
- Setup CRM, Product Related, Dashboard, Architect.
- Setup CRM, Product Related, Dashboard, Administrator.

Security Synchronization

This section discusses:

- The security synchronization process.
- Object-level security.
- Row-level security.

Note. The security synchronization process uses the same messaging framework that sends all other data from PeopleSoft to the dashboard system. Therefore, the messaging framework must be functional before the security synchronization process runs.

The Security Synchronization Process

The dashboard integration framework enables you to maintain user information in the PeopleSoft system and then send information over to the dashboard system to keep the two systems synchronized.

Determination of Required Security Updates

To support the security synchronization process, PeopleSoft maintains a table that lists dashboard users and the groups to which they belong. Essentially, this table is a mirror of the last known security profiles in the /System/Security/User Group data object in the dashboard system.

At the beginning of the security synchronization process, the system compares the mirror table to the PeopleTools security tables. This comparison results in information about what dashboard data objects need to be added, deleted, or modified to bring the dashboard system up to date. After making the changes in the dashboard system, the security synchronization process updates the mirror table.

Note. During normal dashboard operations, the security synchronization process keeps the dashboard and PeopleSoft security data synchronized. If, however, the data gets out of sync (for example, if data corruption forces you to reinitialize the ADC), you can easily start over by clearing both the /System/Security/User Group data object in the dashboard system and the PSCDBROLEUSER table in the PeopleSoft system and then running the security synchronization process again.

Creation of Dashboard Roles

The security synchronization process creates three fixed dashboard roles and sets their access levels. These roles are:

- Administrator: Has full access to all Oracle BAM tools.
- Implementer: Has access to all Oracle BAM tools except for Administrator, the tool that is used to manage security.
- Viewer: Is able to view reports, but has no other access.

Note. Do not modify or delete these dashboard roles because your changes will be lost the next time you run the security synchronization process.

User Synchronization

When you set up dashboard installation options, you identify PeopleTools roles to use for each of the three dashboard roles that the initial load process creates.

The dashboard integration framework includes three PeopleTools roles that you can use for this purpose: *Dashboard Administrator*, *Dashboard Implementer*, and *Dashboard User*. These roles also give users access to the menu links that are the only way for PeopleSoft users to access the dashboard system.

Note. PeopleSoft CRM dashboard applications deliver additional CRM-specific roles. These roles work the same as the delivered PeopleTools roles, but they also grant access to CRM-specific dashboard setup pages. PeopleSoft CRM implementations should use the application-specific roles instead of the roles that the dashboard integration framework delivers. Refer to your application documentation for more information.

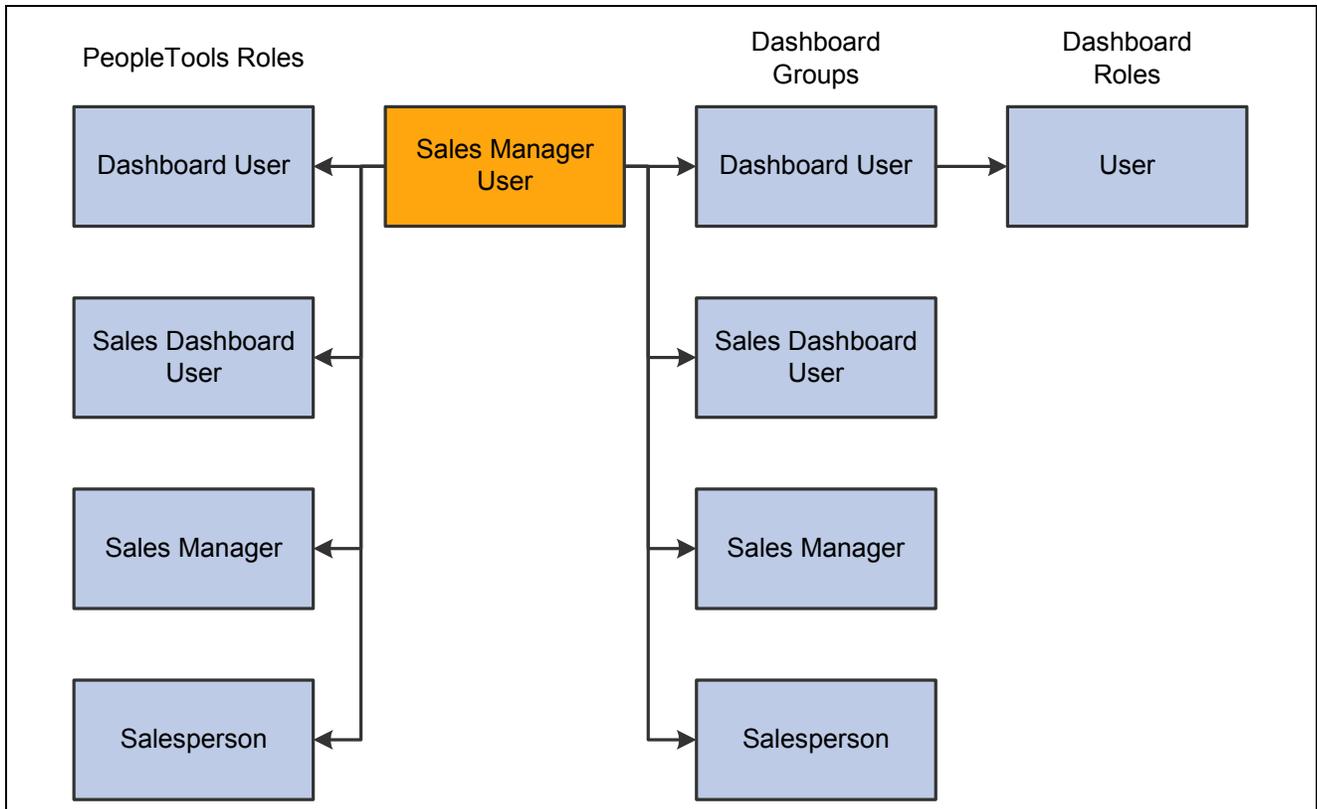
Any PeopleSoft user who is associated with any of the three PeopleTools roles is considered a dashboard user. The synchronization process creates and deletes dashboard user logons based on this association on the PeopleSoft side.

Synchronization of PeopleTools Roles and Dashboard Groups

For every PeopleSoft user who is a dashboard user, the synchronization process creates dashboard groups for every one of the user's roles. This includes the three PeopleTools roles that are used to identify dashboard users as well as the user's other roles. The synchronization process also adds dashboard users to these groups so that user-to-group associations on the dashboard side exactly match the user-to-role associations on the PeopleSoft side.

The groups for the three high-level dashboard roles are automatically associated with their corresponding roles. The other groups are used for object-level security.

This diagram provides a security synchronization example:



Synchronization of PeopleTools roles and dashboard groups

In this example, the user has four PeopleTools roles, one of which is *Dashboard User*, the high-level role that provides access to the dashboard viewer. The synchronization process created dashboard groups that correspond to each of the four PeopleTools roles; and, on the dashboard side, the user belongs to those four groups.

Because the dashboard installation options specify that *Dashboard User* is the PeopleTools role that is used to give access to the dashboard viewer, the corresponding group is automatically associated with the predefined *User* role. The synchronization process itself does not do anything with the other groups, which are used for object-level security.

Synchronization Permission and First-Time Synchronization

Because the synchronization process updates security settings in the dashboard system, only users who already have Administrator access to the dashboard can initiate the synchronization process. As delivered, there is only one user with this access: *PTCDBADMIN*. This user ID is delivered as part of the CRM dashboard installation process and has full access to all parts of the dashboard system. Therefore, you must use the *PTCDBADMIN* user ID the first time that you run the security synchronization process.

Other users who are assigned to the Administrator role in the dashboard system as a result of the initial security synchronization process can perform subsequent security synchronizations.

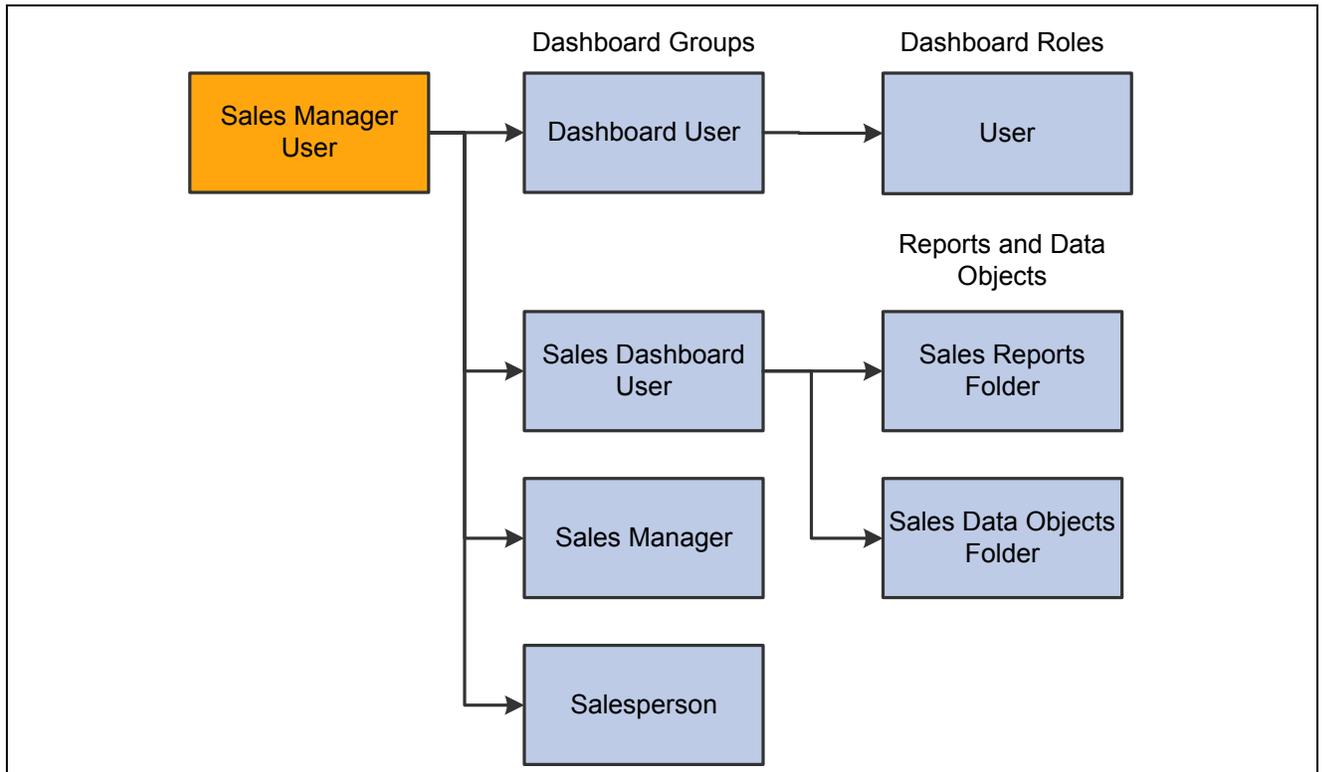
If you upgrade or otherwise reinstall PeopleTools, the delivered settings for the *PTCDBADMIN* role are overwritten until you rerun the data mover script that creates these settings. The dashboard installation documentation explains this step.

See *PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide*

Object-Level Security

As delivered, the reports and data objects in PeopleSoft dashboard applications are secured at the folder level using groups that are derived from existing PeopleTools roles. For example, PeopleSoft Sales Dashboard reports are available only to users who, in the PeopleSoft system, have the delivered PeopleTools role of Sales Dashboard User.

This diagram illustrates the use of groups for object security:



Object-level security for reports and data objects

In this example, a sales manager has, in addition to the general-purpose Dashboard User role, the additional roles: Sales Dashboard User, Sales Manager, and Salesperson. The synchronization process created groups for all three roles and added the manager to all of these groups. Because the manager is associated with the Sales Dashboard User group, the manager automatically has access to the reports and data objects in the PeopleSoft Sales Dashboard application.

Important! The delivered permissions for dashboard objects are based on the PeopleTools roles that are delivered with your PeopleSoft application. If your organization does not use these roles, or uses other roles in addition to these roles, you must use the Architect tool to modify permissions manually for the delivered reports and data objects. This task is simplified by keeping permissions at the folder level rather than the object level.

The manager's other roles, Sales Manager and Salesperson, have been created as groups in the dashboard system, but they aren't used for anything. Remember, PeopleSoft users who have the Salesperson role but not the Dashboard User role are not given dashboard user IDs at all. Therefore, the Salesperson group in the dashboard system includes only a subset of the people who belong to the Salesperson role in the PeopleSoft system.

Row-Level Security

Row-level security refers to the filtering of specific data from dashboard reports. For example, sales managers see only the data from their own sales teams.

Row-level security, including business unit security, is not part of the dashboard integration framework; it is delivered with specific dashboard applications. For information about row-level security, including business unit security, refer to your dashboard application documentation.

CHAPTER 5

Setting Up the Dashboard

This chapter provides an overview of dashboard setup and discusses how to:

- Define system settings.
- Initiate a batch data load.

See Also

[Chapter 3, “Understanding the Messaging Framework,” page 15](#)

[Chapter 4, “Understanding Security Integration,” page 23](#)

Understanding Dashboard Setup

This section discusses:

- General settings.
- Currency settings.
- Security settings.
- Batch data loads.

General Settings

Dashboard installation options include the following general settings:

- A source system ID that is sent to the dashboard system with every row of data.
Although this ID is not used in the dashboard reports, it is stored in the dashboard system for informational and troubleshooting purposes.
- The part of your PeopleSoft URL that is common to all pages in the PeopleSoft system.
This is sent to the dashboard system and used to generate links back to the PeopleSoft system.
- The amount of time that the Change Notification process rests after finding an empty message queue and before checking for new message queue arrivals.
- The maximum size of the messages that the Change Notification process sends to the dashboard.
- Whether to validate the data type (string, integer, and so forth) of any parameters that are included in action requests that PeopleSoft receives from the dashboard system.
- Whether you set up parallel processing at installation time.

See [Chapter 3, “Understanding the Messaging Framework,” The Messaging Framework, page 18](#).

Currency Settings

The currency architecture for PeopleSoft CRM dashboard applications requires that you select a default currency. This is the currency that is used in all delivered dashboard reports. You can use Oracle Business Activity Monitoring (Oracle BAM) to create additional reports that display information using currencies other than the default.

PeopleSoft CRM also provides a daily process for sending currency exchange rates to the dashboard so that the financial data in transactions, which can be in any currency, can be converted to the default currency. Because the PeopleSoft system can store several different exchange rate types, the process that sends the exchange rates to the dashboard system requires you to select which rate type to use.

For detailed information about how PeopleSoft CRM dashboard applications handle currencies, refer to your application documentation.

Security Settings

When you set up dashboard installation options, you select the three PeopleTools roles to be used for assigning users to the three dashboard roles that the initial data load process creates: User, Implementer, and Administrator. Then, to run the security synchronization process, you click the Send Security button on the Installation Options page.

See [Chapter 4, “Understanding Security Integration,” Security Synchronization, page 26](#).

Batch Data Loads

The dashboard integration framework provides a generic batch data load process to move specified subsets of your data into the dashboard system. When you request a batch data load, you can enter parameters to filter which applications or which objects you want to load.

PeopleSoft CRM provides an additional process to use for the initial load of CRM data into the dashboard system. PeopleSoft CRM implementers should load the dashboard system using the CRM process rather than the generic batch data load. The CRM process offers the performance benefits of parallel processing to help handle the high volume of the initial data load.

Note. The dashboard integration framework does not facilitate the deletion of expired data from the dashboard system. Instead, use Enterprise Link plans to handle deletions. PeopleSoft dashboard applications are all delivered with deletion plans; the deletion criteria is documented in your dashboard application documentation. Use Enterprise Link to modify the deletion criteria in those plans.

See Also

PeopleSoft Enterprise 9 Dashboard Applications PeopleBook

Defining System Settings

This section lists prerequisites and discusses how to:

- Set up installation options.
- Verify messaging connections.

Prerequisites

If you prefer not to use the delivered dashboard security roles, use PeopleTools to establish your own dashboard security roles.

Pages Used to Define System Settings

Page Name	Object Name	Navigation	Usage
Installation Options	PT_CDB_INSTALL	Set Up CRM, Product Related, Dashboard, Installation Options, Installation Options	Set up system-wide settings for messaging, security, currency handling, and transfers from the dashboard to the PeopleSoft system.
Message Setup	PT_CDB_EMS_SETUP	Set Up CRM, Product Related, Dashboard, Message Setup, Message Setup	Verify messaging connections by checking whether the dashboard Enterprise Message Sources (EMS) are listening to the correct JMS. Correct the EMS settings if necessary.

Setting Up Installation Options

Access the Installation Options page.

Installation Options

Setting Options

<p>Source System ID <input type="text" value="ECRM"/></p> <p>Transfer to PIA URI <input type="text" value="http://adas0102.peoplesoft.com/psp/c"/></p> <p><input checked="" type="checkbox"/> Validate Action Parameter Type</p> <p><input type="checkbox"/> Parallel Processing Enabled</p>	<p>Maximum Message Size (Byte) <input type="text" value="200000"/></p> <p>Maximum Inactivity Time <input type="text" value="1"/> minute(s)</p> <p>*Default Currency Code <input type="text" value="US Dollar"/></p> <p>Default Exchange Rate Type <input type="text" value="CRRNT"/></p>
--	--

Security

<p>Administrator Role <input type="text" value="CRM Dashboard Administrator"/></p> <p>Implementer Role <input type="text" value="CRM Dashboard Implementer"/></p>	<p>User Role <input type="text" value="CRM Dashboard User"/></p> <p style="text-align: center;"><input type="button" value="Send Security"/></p>
---	---

JMS Connectivity

<p>JMS URL t3://adas0141:8000</p> <p>JMS Provider Weblogic</p> <p>JMS Topic psft.dsh.jms.topic.update</p>	<p>Initial Context Factory weblogic.jndi.WLInitialContextFactory</p> <p>Connection Factory psft.dsh.jms.connection.factory</p> <p style="text-align: center;"><input type="button" value="Ping"/></p>
--	---

Installation Options page

Setting Options

Source System ID

Enter an identifier of up to five characters. The Change Notification process embeds this identifier in each record that is sent to the dashboard system. Although the dashboard reports do not use the source system ID, your dashboard administrator can use this to identify the source of particular data if the dashboard is receiving data from multiple sources.

Transfer to PIA URI
(transfer to PIA uniform resource identifier)

The delivered value is ECRM, which indicates that data originates from the PeopleSoft Enterprise CRM system.

When a dashboard report displays an action form, the list of individual transactions includes links that the dashboard user can click to navigate to the specific transaction in PIA. For the link to work, the dashboard needs to construct a URL that is made up of two parts:

- The URI (uniform resource identifier) is the subset of the URL that points to the location of the resource, but does not include any parameters passed to that resource.

This is the value that you must enter in the Transfer to PIA URI field.

- The query string includes the parameters (such as the page name and values for the transaction's key fields) that are specific to the transaction.

For example, consider the following URL: *http://someserver/psp/CRM89/EMPLOYEE/CRM/c/CALLCENTER.RC_CASE_SEARCH.GBL?DISP_TMPL_ID=RC_SUPPORT*. The URI portion of this URL is: *http://someserver/psp/CRM89*.

Validate Action Parameter Type

Select this check box to make the system validate the data type of all parameters that are included in action requests that are received from the dashboard. Each action definition in the PeopleSoft system includes a list of parameters and their data types; this list is used to validate the action message.

See [Chapter 6, "Setting Up Dashboard Actions," Identifying Action Application Classes and Parameters, page 44](#).

Parallel Processing Enabled

Select this check box if your system has multiple Process Scheduler servers for parallel processing. The change notification process uses this setting to determine whether to process change queue entries from different applications in parallel. If multiple dashboard applications are installed and parallel processing capabilities are available, then selecting this check box improves performance.

Note. Although the CRM initial data load can perform parallel processing on one Process Scheduler server with multiple AESRV process instances, the change notification framework offers parallel processing only if there are multiple Process Scheduler servers.

Refer to your installation documentation for information on setting up Process Scheduler servers for parallel processing.

See *PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide*

Maximum Message Size (Byte)

Enter the maximum size in bytes of the XML messages that the Change Notification process creates. Although larger messages can take longer to transmit, they also result in fewer messages and reduced messaging traffic. As delivered, the maximum message size is 200,000 bytes.

Regardless of the maximum message size you enter, the Change Notification process never splits a single record into multiple messages.

Important! The value here must be the less than or equal to the maximum message size that is defined in the Java Messaging Service (JMS) system. The system discards the messages that exceed the size defined in JMS.

- Maximum Inactivity Time** Enter the number of minutes that the Change Notification process idles before going dormant. Once the process goes dormant, the daemon that you set up during installation must awaken the process before it begins processing more entries.
- Default Currency Code** Select the currency to be used in all delivered currency-related dashboard reports. This does not have to be the same as the base currency for the PeopleSoft system.

Note. Currency handling is part of the dashboard application, not part of the dashboard integration framework. For more information, refer to the dashboard application documentation.

- Default Exchange Rate Type** Enter the type of exchange rate to be used by the process that loads currency conversion rates into the dashboard system. The rate type that you select is used to convert transaction currencies to the default currency. Although this field does not support prompting, you must enter a value that exists in the currency exchange rate table (PS_CUR_RT_TYPE_TBL).
- Delivered values are *ASK*, (Asked Rate) *AVG*, (Average) *BID*, (Bid Rate) *CLOSE*, (Closing Rate) *COMM*, (Commercial Rate) *CRRNT*, (Current Rate) *FINAN*, (Financial Rate) *FLOAT*, (Floating Rate) *FMKT*, (Free Market Rate) *HIST*, (Historical Rate) *HST1A*, (Historical Rate - Issue 1A) *HST1B*, (Historical Rate - Issue 1B) *HSTRE*, (Historical - Retained Earnings) *MID*, (Mid Rate) *OFFIC*, (Official Rate) *SPOT*, (Spot Market Rate) and *VOL* (Volatility).
- Refer to your application documentation for more information about currencies.

Security

This section explains how to use the role fields to implement security for your dashboard applications.

Note. To change the administrator role, implementer role or user role, you must start the PTCDB process scheduler daemon using the PTCDBADMIN user ID. You also need to update the PT_CDB_WEB_SERVICE node with a valid user ID that is not PTCDBADMIN. For example, you could use VP1 as your non-PTCDBADMIN user ID.

- Administrator Role** Select a PeopleTools role that gives its members administrator privileges in Oracle BAM. As delivered, users with administrator privileges have access to all Oracle BAM functionality.
- Implementer Role** Select a PeopleTools role that gives its members implementer privileges in Oracle BAM. As delivered, users with implementer privileges have access to all Oracle BAM functionality except access to the Administrator application, which is used to administer users and their permissions.
- User Role** Select a PeopleTools role that gives its members viewer access to dashboards.

Send Security

Click this button to run the security synchronization process. The first time this process runs, it loads complete user information into the dashboard system. Subsequent synchronizations send only changes to the dashboard system.

Important! You need to run the security synchronization process frequently. It is not possible to set up a Process Scheduler request to do this because of Process Scheduler limitations in PeopleTools 8.48.

JMS Connectivity

The display-only fields in this group box display settings for the PT_CBD_UPDATE PeopleTools Integration Broker node—the node with information about the JMS server where dashboard messages are sent.

Note. Integration Broker does *not* communicate directly with the JMS server. Integration between the PeopleSoft system and the dashboard system bypasses the Integration Broker gateway and instead uses a JMS sender on the application server. Therefore, you cannot use the Integration Broker ping feature or message monitor as a troubleshooting tool for JMS messaging.

Ping

Click this button to ping the JMS server to verify JMS connectivity. You cannot use the ping feature in Integration Broker because Integration Broker is not connecting directly to the JMS server.

See Also

PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide

Verifying Messaging Connections

Access the Message Setup page.

The screenshot shows the 'Message Setup' page with the following details:

- Properties for IB Node PT_CDB_UPDATE:**
 - JMS URL: t3://adas0158:8000
 - JMS Provider: Weblogic
 - Initial Context Factory: weblogic.jndi.WLInitialContextFactory
 - JMS Topic: psft.dsh.jms.topic.update
 - Connection Factory: psft.dsh.jms.connection.factory
- Buttons: Retrieve Message Sources, Fix All EMS
- Dashboard Enterprise Message Sources Table:**

Fix EMS	Difference Found	Message Source Name	JMS URL	JMS Provider	Initial Context Factory	JMS Topic
Fix EMS	<input checked="" type="checkbox"/>	RSFD_FCAST_TYPE	t3://adas0158.peoplesoft.com:8000	EMST.WEBLOGIC	weblogic.jndi.WLInitialContextFactory	psft.dsh.jms.topic.u
Fix EMS	<input checked="" type="checkbox"/>	RSFD_RV_TYPE	t3://adas0158.peoplesoft.com:8000	EMST.WEBLOGIC	weblogic.jndi.WLInitialContextFactory	psft.dsh.jms.topic.u
Fix EMS	<input checked="" type="checkbox"/>	RSFD_STAGE	t3://adas0158.peoplesoft.com:8000	EMST.WEBLOGIC	weblogic.jndi.WLInitialContextFactory	psft.dsh.jms.topic.u
Fix EMS	<input checked="" type="checkbox"/>	RSFD_FALLOUT	t3://adas0158.peoplesoft.com:8000	EMST.WEBLOGIC	weblogic.jndi.WLInitialContextFactory	psft.dsh.jms.topic.u
Fix EMS	<input checked="" type="checkbox"/>	RSFD_SUSER	t3://adas0158.peoplesoft.com:8000	EMST.WEBLOGIC	weblogic.jndi.WLInitialContextFactory	psft.dsh.jms.topic.u
Fix EMS	<input checked="" type="checkbox"/>	RSFD_PRIORITY	t3://adas0158.peoplesoft.com:8000	EMST.WEBLOGIC	weblogic.jndi.WLInitialContextFactory	psft.dsh.jms.topic.u

Message Setup page

Properties for IB Node PT_CDB_UPDATE

The fields in this group box display settings for the PT_CBD_UPDATE PeopleTools Integration Broker node—the node for the JMS server where the system sends dashboard messages.

Buttons for Retrieving and Fixing EMS Information

Retrieve Message Sources Click this button to populate the Dashboard Enterprise Message Sources grid on this page with a list of every EMS in the dashboard system.

This button uses information from the PT_CDB_WEB_SERVICE IB Integration Broker node definition to access the dashboard system and pull the information into PeopleSoft. Both the PT_CDB_WEB_SERVICE, and PT_CDB_UPDATE IB nodes must be set up before you can use the button.

See *PeopleSoft Enterprise Customer Relationship Management 9 Supplemental Installation Guide*

Fix All EMS (fix all enterprise message sources) Click to correct every EMS that listens to a JMS other than the one that is specified in the PT_CBD_UPDATE IB node definition.

Dashboard Enterprise Message Sources

This grid displays information about the Enterprise Link enterprise message sources that receive data from the PeopleSoft system.

Fix EMS (fix enterprise message service) Click to fix a single EMS when the EMS is not listening to the correct JMS.

Difference Found This check box is selected if the EMS listens to the wrong JMS and needs to be fixed.

Message Source Name Displays the name of the EMS in the Oracle BAM Enterprise Link.

JMS URL, JMS Provider, Initial Context Factory, JMS Topic, and Connection Factory These fields display information about the JMS to which the EMS is listening.

See Also

[Chapter 3, “Understanding the Messaging Framework,” Integration Setup, page 17](#)

Oracle BAM Enterprise Link Administrator’s Guide

Initiating a Batch Data Load

This section discusses how to initiate batch data loads.

Note. For the PeopleSoft CRM initial data load, use the process that PeopleSoft provides for that specific purpose.

See *PeopleSoft Enterprise 9 Dashboard Applications PeopleBook*

Page Used to Initiate a Batch Data Load

Page Name	Object Name	Navigation	Usage
Batch Data Load	RBD_BATCH_LOAD	Set Up CRM, Product Related, Dashboard, Batch Data Load, Batch Data Load	Schedule the loading of data into the active data cache (ADC) for all installed objects, for a specific application, or for another subset of objects.

Initiating Batch Data Loads

Access the Batch Data Load page.

Batch Data Load

Run Control ID: Batch
[Run Now](#) [Advance Schedule](#) [Report Manager](#) [Process Monitor](#)

Initial Load

Batch Run Type

Load All

Load by Application

▼ **Dashboard Application Codes** Customize | Find | First 1-4 of 4 Last

Include in Batch	Application Code
<input type="checkbox"/>	Order Capture Dashboard
<input type="checkbox"/>	Common Dashboard
<input type="checkbox"/>	Contact Center Dashboards
<input type="checkbox"/>	Sales Dashboard

Load by Object

▼ **Dashboard Message Objects**

Load Grid Options

All Installed Objects
 For a Specific Application
 For a Specific Group

[Prefill Grid](#)

[Select All](#) [Deselect All](#) [Delete All](#)

Dashboard Message Objects Find | First 1-131 of 131 Last

Include in Batch	*Object Type ID		
<input checked="" type="checkbox"/>	OCD_ACTIV_VW <input type="text" value=""/>	+	-
<input checked="" type="checkbox"/>	OCD_BPSTAT_VW <input type="text" value=""/>	+	-
<input checked="" type="checkbox"/>	OCD_BUSPROJ_VW <input type="text" value=""/>	+	-

Batch Data Load page

Run Now and Advance Schedule	Click one of these buttons to run the Batch Data Load (PT_CDB_BATCH) Application Engine process. This process generates message queue entries for the objects that you specify using the run control parameters on this page.
Initial Load	<p>Select this check box if you want to invoke any application-specific processing that is associated with an initial data load. Refer to your dashboard application documentation for more details.</p> <p>There is a different data load process to use for the CRM dashboard applications initial data load, so you will not normally select this check box.</p>
Load All	Select this option to load all data for all dashboard applications.
Load by Application	<p>Select this option to load all data for selected dashboard applications, and then select the objects for which you want to load data. For PeopleSoft CRM 9, your choices are:</p> <ul style="list-style-type: none"> • Common Dashboard • Contact Center Dashboards <ul style="list-style-type: none"> This includes the dashboards for PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources. • Order Capture Dashboard • Sales Dashboard
Load by Object	Select the Load by Object option to load all data for selected dashboard objects. If you select this option, the system loads the objects that are listed in the Dashboard Message Objects grid.
Load Grid Options and Prefill Grid	If you selected Load by Object, you can generate a list of objects in the Dashboard Message Objects grid by selecting one of the Load Grid Options values and clicking the Prefill Grid button. After the Prefill Grid button has added objects to the grid, you can manually modify the grid contents before running the initial load process.
All Installed Objects	<p>Select to make the Prefill Grid button add all objects for all dashboard applications to the Dashboard Message Objects grid.</p> <p>Unless you then manually delete objects from the grid, this is the same as selecting the overall Load All option.</p>
For a Specific Application and Application Code	<p>Select For a Specific Application to make the Application Code drop-down list box appear. Then select a specific application whose objects the Prefill Grid button will add to the Dashboard Message Objects grid.</p> <p>The values in the Application Code drop-down list box are the same as the list of applications for the overall Load by Application option.</p> <p>Unless you then manually add or delete objects from the grid, this is the same as selecting the Load by Application option for the initial data load except that you can't select multiple applications as you can with the Load by Application option.</p>
For a Specific Group and Object Group ID	Select For a Specific Group to select specific subsets of dashboard objects to load. When you select this option, the Object Group ID drop-down list box appear and you can select specific object groups.

Note. Load dimensions before facts.

See [Chapter 2, “Understanding PeopleSoft Dashboards,” Dashboard Data, page 3.](#)

Dashboard Message Objects

When you select the Load by Object option, the batch data load process loads only the dashboard objects that appear in this grid and that have the Include in Batch check box selected.

The system populates this grid when you click the Prefill Grid button, but you can also modify the grid contents manually. Rather than deleting rows, however, you can clear the Include in Batch check box. Clearing the check box ensures that the associated object will not be included when you run the batch data load process, but it leaves the object name in the grid where you can see it and easily reselect it if necessary.

CHAPTER 6

Setting Up Dashboard Actions

This chapter provides an overview of dashboard actions and discusses how to set them up.

Understanding Dashboard Actions

This section discusses:

- Actions.
- Action architecture.
- Action security.

Actions

Dashboard actions are the “operational” part of operational analytics, enabling a dashboard user to act on the data that the dashboard presents. For example, a user can send email, reassign leads, escalate cases, or cancel orders right in the dashboard, without returning to the underlying PeopleSoft Internet Architecture (PIA) system. For even greater efficiency, the dashboard user can select multiple transactions to include in the actions.

To perform an action, users first select the transactions to act on. Standard dashboard filters enable users to narrow the selection on a report to a particular set of transactions, then the users drill into an action form that presents a list of individual transactions that can be selected for action. The action form also includes group boxes for entering action-specific information such as email content, new lead assignees, and so forth.

For example, if the Support dashboard shows a growing call backlog, the call center manager might start by looking at the data in different ways to discover whether there are specific types of cases or particular provider groups that are responsible for large parts of the backlog. If a particular chart shows that provider group A has a disproportionately high backlog, then the manager can easily navigate to an action form that is already prefiltered to show the cases for that provider group. Depending on the action selected, the manager can reassign cases to another provider group or take another appropriate action.

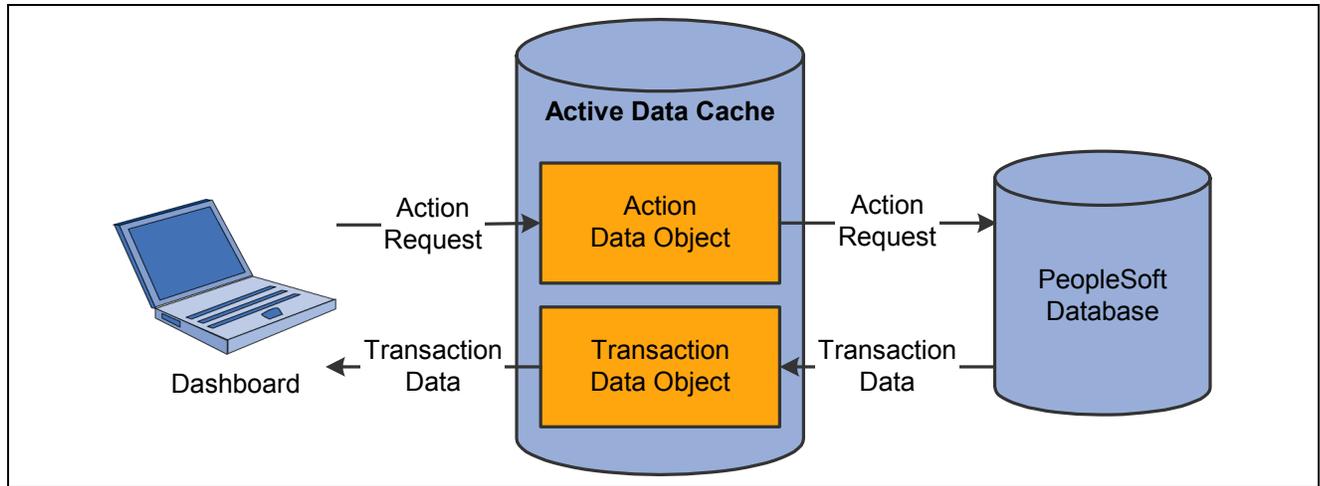
Action Architecture

Users initiate actions from a dashboard action form, a type of report in Oracle Business Activity Monitoring (Oracle BAM). Information about submitted actions is saved to the active data cache (ADC). The data object that stores the action request has one row for each transaction in the action request, regardless of how many transactions the user submitted at once.

An alert monitors the data object where the action information is stored, and for each new row in the data object, the alert sends a message to the transactional system where the actions are performed.

As changes are made in the transactional system, the regular dashboard messaging system sends the updated data to the dashboard where it is immediately reflected in dashboard reports. If there are errors that prevent the action from happening, an error message is sent to the dashboard system and displayed as an alert.

The following diagram illustrates action architecture:



Action architecture

Dashboard-Side Architecture

Every dashboard action has the following Oracle BAM elements:

- An action form where the user triggers the action.

The form is specific to a particular action. On the form, the user indicates which transactions are to be acted on and any additional parameters required by the action. For example, the action that reassigns cases requires an additional parameter for the new assignee. Not all actions require additional parameters.

- A data object where information about submitted actions is stored.

When the user submits the action, the system saves the information to the ADC in a data object that is specific to the action. One row of data is created for each transaction that is impacted. Individual dashboard applications deliver plans that delete old data from action data objects.

- An alert that sends a message to the transactional system for each row of data that is added to the data object.

Each message includes an action ID, transaction keys, and any necessary action parameters.

In addition to the data objects that are specific to individual actions, there is a common data object, `/System/Action/ADC_ACTION`, with fields such as action request ID that are common to all actions. The `PT.Delete Action Request` plan deletes all entries that are over three months old. An administrator must run this plan manually on a regular basis.

PIA-Side Architecture

In the PIA system, a central action handler receives the action messages and invokes the application classes that execute the actions. Actions must be predefined in the system so that the action handler can invoke the appropriate application class based on the action ID.

See Also

Oracle BAM Active Studio User's Guide

Action Security

Within PIA, you associate actions with PeopleTools roles so that only users with the specified roles are able to perform the action. When the PIA action handler processes an action request, it verifies that the requestor has access to the action before performing the action. If the requestor does not have access, the action handler sends an error message to the dashboard system; this message appears on the user's alert list.

To prevent dashboard users from requesting actions that they are not authorized to perform, security for the action request forms in the dashboard system must be the same as the security that you set up in PIA. PeopleSoft dashboard applications are delivered with matching security settings. If you want to change the security settings, you must make your changes twice: once in the dashboard system and once in PIA.

Note. Because the dashboard system also enforces row-level security, users normally can't even submit action requests for transactions to which they do not have access (for example, if your organization secures data by business unit). However, if such a request were to be submitted, row-level security within PIA is still enforced and the action request would not be honored.

Setting Up Actions

This section lists a prerequisite and discusses how to:

- Identify action application classes and parameters
- Define action security.
- Test an action.

Important! If you develop custom actions, you must register them and secure them in the Actions setup component. However, delivered actions are already registered in the Actions setup component. Setup for delivered actions is limited to optionally modifying the security for the action.

Prerequisites

If you are registering and securing custom actions, you must first create the application class that performs the action. To do this, extend the `PT_CDB_ACTION:RUNTIME:ActionHandler` application class and implement the `runAction` method.

If you are modifying the security settings for a delivered action or a custom action, set up the PeopleTools roles that you will use to secure the action.

Pages Used to Set Up Actions

Page Name	Object Name	Navigation	Usage
Action Setup	PT_CDB_ACTION	Set Up CRM, Product Related, Dashboard, Action, Action Setup	Identify the application class that performs the action and identify the parameters that the application class requires.
Action Security	PT_CDB_ACTION_SEC	Set Up CRM, Product Related, Dashboard, Action, Action Security	Grant access to the action based on PeopleTools roles.
Action Test	PT_CDB_ACTION_TEST	Set Up CRM, Product Related, Dashboard, Action, Action Test	Test your custom actions by initiating them from PIA. This page is a tool for developing new actions; it is not necessary to test delivered actions.

Identifying Action Application Classes and Parameters

Access the Action Setup page.

Action Setup page

Actions

Action ID Displays a system-generated unique identifier for the action.

Action Name and Description Enter a meaningful name and description for the action. These do not appear anywhere else—they are used only to identify and describe actions in this component and in the search page for this component.

Application Class Path Enter the full path for the application class that performs this action. The application class must be extended from the PT_CDB_ACTION:RUNTIME:ActionHandler class and implement the runAction method.

Parameter List

Enter a row of data for each parameter that the application class accepts.

Required and Parameter Name Enter the name of each parameter, and select the Required check box if the parameter is required. If the Validate Action Parameter Type check box on the Installation Options page is selected, then the action handler verifies that all required parameters are present before invoking the runAction method in the application class that performs the action.

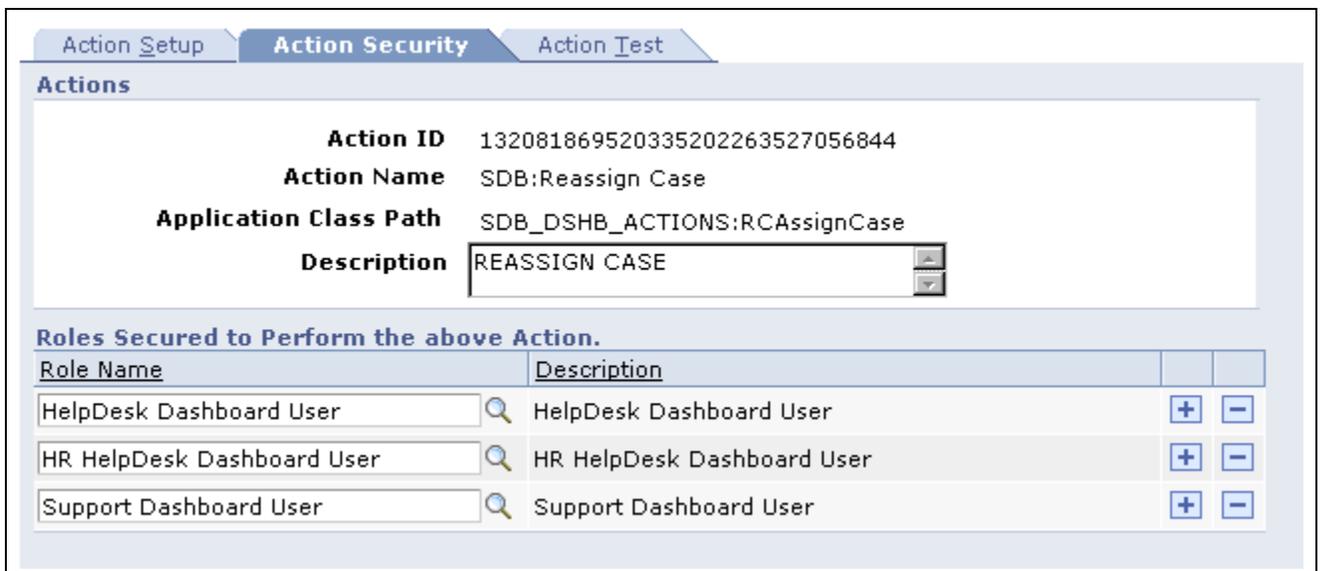
Parameter Data Type Select from the following options: *Date*, *DateTime*, *Number*, *String*, and *Time*. If the Validate Action Parameter Type check box on the Installation Options page is selected, the action handler will verify that all the parameters have the right data type.

See Also

[Chapter 5, “Setting Up the Dashboard,” Setting Up Installation Options, page 33](#)

Defining Action Security

Access the Action Security page.



Action Security page

Role Name Select the PeopleTools role that grants access to the action.

Important! When you set up security for a custom action or when you change the delivered security settings for a delivered action, make the corresponding changes to security for the action forms in the dashboard system. Otherwise, dashboard users might have access to forms for actions that they are not permitted to perform. In this situation, the user can request the action from the dashboard system, but the action request is not honored in PIA.

Testing an Action

Access the Action Test page.

The screenshot shows the 'Action Test' page with the following details:

- Actions Section:**
 - Action ID: 132081869520335202263527056844
 - Action Name: SDB:Reassign Case
 - Application Class Path: SDB_DSHB_ACTIONS:RCAssignCase
 - Description: REASSIGN CASE
- Test Options Section:**
 - Test Asynchronously (Testing asynchronously will schedule the action to be run just like runtime.)
- Parameter List Section:**

Parameter Name	Value
Business Unit Code	<input type="text"/>
Case ID	<input type="text"/>
Display Template ID	<input type="text"/>
Person ID	<input type="text"/>
Provider Group ID	<input type="text"/>
- Test Action Section:**
 - Test Action (button)
- Test Result Section:**
 - Results (label)
 - Results (large text area)

Action Test page

Test Asynchronously

Select to invoke the action handler for action testing. Using the action handler creates test conditions that are closer to true runtime conditions (though not identical because the action request is not coming from the dashboard system).

If you clear this check box, then testing the action calls the application class directly, bypassing the action handler when the focus of your testing is your application class code.

Parameter Name and Value	The page displays the parameter names that you set up on the Action Setup page. Enter the values to use for each parameter during the test.
Test Action	Click this button to invoke the action.
Test Result	Displays any messages that the application class generates as a result of the test.

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 exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
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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