
PeopleSoft Enterprise CRM Portal Pack 9 PeopleBook

August 2006

PeopleSoft Enterprise CRM Portal Pack 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 CRM Portal Pack Preface

This preface discusses:

- Additional resources.
- PeopleSoft Enterprise Customer Relationship Management (CRM) application fundamentals.
- PeopleSoft Enterprise CRM industry application fundamentals
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleSoft Enterprise CRM business object management.
- PeopleTools PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

Additional Resources

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

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Data Models
Enterprise Integration Point (EIP) catalog	Support, Documentation, Enterprise Integration Point (EIP) Catalog
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
PeopleBook documentation updates	Support, Documentation, Documentation Updates

Resource	Navigation
PeopleSoft support policy	Support, Support Policy
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table-loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Implement, Optimize + Upgrade, Upgrade Guide

PeopleSoft Enterprise CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains essential information that describes the setup and design of the PeopleSoft Enterprise CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft Enterprise CRM product line.

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

- CRM Multi-Product Foundation

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

- Workforce Management

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

- Interactions and 360-Degree Views

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

- Self-Service for Customers

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

- Relationship Management

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

- Entitlement Management

This part discusses setting up agreements and warranties.

- SmartViews

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

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Getting Started”

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook* discusses configuration options including security and financial account administration common to PeopleSoft vertical solution applications.

The *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook* contains essential information describing the setup and design of PeopleSoft CRM industry-specific applications and the use of features that are common to multiple applications within PeopleSoft CRM industry applications, including information about:

- Industry-specific tables.
- Industry-specific setIDs and roles.
- Products for industries.
- Arrangements and contracts.
- Industry-specific business objects.
- Application security for financial services.
- Financial accounts.
- Churn management.
- Fraud management.

See Also

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook, “PeopleSoft Enterprise CRM Industry Application Fundamentals Preface”

PeopleSoft Enterprise CRM Automation and Configuration Tools

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

There are four parts to the *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*.

- Correspondence Management

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

- Automation Tools

This part discusses PeopleSoft Enterprise CRM workflow, the Active Analytics Framework, business projects, and scripts.

- Configuration Tools

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

- Knowledge Management

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

- Business process management

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

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

See Also

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

PeopleSoft Enterprise CRM Services Foundation

The *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise Integrated FieldService, PeopleSoft Enterprise Order Capture, and the PeopleSoft call center applications (PeopleSoft Enterprise Support, PeopleSoft Enterprise HelpDesk, and PeopleSoft Enterprise HelpDesk for Human Resources).

There are three parts to the *PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook*:

- Solution management.

Solution management enables users to establish a set of predefined solutions that call center agents and field service technicians can use to resolve customer problems.

- Transaction Billing Processor Integration.

PeopleSoft Transaction Billing Processor enables PeopleSoft Enterprise Integrated FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. The integration enables PeopleSoft CRM users to bill and book revenue for recurring, one-time, and on demand services.

- Environmental Systems Research Institute (ESRI) integration.

The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities through the Map Dashboard.

See Also

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

PeopleSoft Enterprise CRM Business Object Management

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

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

- Business Object Management Basics.

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

- Data Management for Organization Business Objects.

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

- Data management for Individual Business Objects.

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

- Business Object Management.

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

- Customer and Worker Data Integrations.

This part discusses how to integrate customer and worker data with other systems. PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook.

See Also

PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook, “PeopleSoft Enterprise Customer Relationship Management Business Object Management Preface”

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.48 PeopleBooks.

CHAPTER 1

Getting Started with PeopleSoft Enterprise CRM Portal Pack

This chapter provides overviews of the PeopleSoft Enterprise CRM Portal Pack and PeopleSoft Enterprise CRM Portal Pack implementation.

PeopleSoft Enterprise CRM Portal Pack Overview

PeopleSoft CRM Portal Pack provides a collection of pagelets that can be individually selected to appear on a corporate intranet or extranet homepage. The individual pagelets provide information that is gathered from various PeopleSoft Enterprise CRM applications.

PeopleSoft Enterprise CRM Portal Pack Implementation

PeopleSoft Enterprise CRM Portal Pack does not require table-loading implementation steps.

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

See Also

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

CHAPTER 2

Understanding PeopleSoft Enterprise CRM Portal Pack

This chapter discusses:

- PeopleSoft Enterprise CRM Portal Pack.
- Customer Selection page.
- PeopleSoft CRM Portal Pack pagelets.
- PeopleSoft CRM Pagelet Wizard pagelets.
- Web libraries.

Understanding PeopleSoft Enterprise CRM Portal Pack

PeopleSoft Enterprise CRM Portal Pack is a collection of portal pagelets for corporate intranet or extranet homepages that provides access to key data and transactions within PeopleSoft Enterprise CRM applications for use in the employee and customer portal registries. The portal pack supplements the PeopleSoft Enterprise CRM applications that provide the underlying data.

When you install PeopleSoft Enterprise CRM Portal Pack, your users can personalize their portal homepages by adding the pagelets that they need. Standard PeopleSoft system role-based security ensures that users can access only the pagelets that are appropriate to their roles. You click the Content link (located above the left navigation menu) to access a list of role-appropriate pagelets.

Users can configure their portal homepages with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. You click the Layout link (located above the left navigation menu) to modify pagelet layout. When this documentation provides two object names for a pagelet, the first one refers to the narrow version.

To use the pagelets in PeopleSoft Enterprise CRM Portal Pack, you must first install the enabling CRM application. The CRM pagelets and the enabling application are listed in the PeopleSoft Enterprise CRM Portal Pack Pagelets section of this document.

You can also design your own pagelets when your installation includes PeopleSoft Enterprise CRM Portal Pack.

See Also

PeopleTools Internet Technology PeopleBook

Audience

The PeopleSoft Enterprise CRM Portal Pack pagelets are targeted for specific functional roles, which generally fit into three audiences (which mirror the different portal registries):

- Employee
- Customer
- Partner

Pagelet Security

You control pagelet security at the component level by associating it with a permission list, which is then associated with a role; each pagelet has its own component to enable more granular access. You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system (or object) name.

Pagelets are grouped into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before your users can access them, or use the permission list definitions that are provided in the delivered system data. The PeopleSoft system also delivers sample roles that you can use as an example of how to set up pagelet access.

Here is an example of some of the roles that include access to PeopleSoft Enterprise CRM Portal Pack pagelets:

- Call center agent
- Customer
- Consumer
- Broker
- Field sales representative
- Help desk agent
- Guest

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences"

Pagelet Personalization

Some pagelets require that you first select default settings on a related customer selection page prior to using the pagelet. The system retrieves the transactional information that is associated with the selection to display in the pagelet.

To configure a pagelet, you click the Customize button:



Customize button

If you don't specify values on a pagelet's customer selection page, the pagelet does not display any data. Pagelets that do not have configuration options do not display this button.

Each of the following pagelets provide information about a specific type of customer interaction, such as sales leads, support cases, and service orders. Collectively, these pagelets provide a 360-degree view of your organization's relationship with the customer. Many of these pagelets provide links that enable you to navigate to further details about the interactions; some enable you to add new interaction information:

- Agreements
- Installed Products
- RMA
- Recent Interactions
- Recent Leads
- Recent Support Cases
- Recent Service Orders
- Recent Opportunities
- Relationship Grid

Note. You must first select a customer or contact by using the Customer Selection page. After you identify the customer or contact, the other configurable pagelets display information that is related to that customer or contact.

Customer Selection Page

You use the Customize button to select the customer, consumer, or contact for the information that you want to view. When you click the Customize button, the system displays the Customer Selection page:



Customer Selection page

Enter search criteria and click the Search button to select the customer, consumer, or contact for whom you want to view interaction information. After you select a customer, consumer, or contact and save your selection, information that is related to your selection appears on the configurable pagelets until you make another selection.

PeopleSoft CRM Portal Pack Pagelets

This section lists the pagelets that make up PeopleSoft CRM Portal Pack and identifies:

- The audience for the pagelet: employees or customers.
The audience also identifies the portal registry where the pagelet is registered.
- The role of the person who uses the pagelet.
These are functional roles, not delivered PeopleTools roles.

- The pagelet's enabling application.

The enabling application provides the information that appears in the pagelet.

Pagelet Name	Audience	Functional Role	Enabling Application
Accounts CR_RBT_SERV_PGT_ CMP_COM	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Bill Presentment and Account Management
Catalog Search RX_PROD_SRCH_PGT	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Order Capture Self Service
My Accounts CR_RBF_CUST_ACT_ PGT_FIN	Customer	Customer or consumer	PeopleSoft Enterprise Banking Transactions
My Information CR_RBT_INFO_SS_ COM	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Order Capture Self Service
My Information CR_RBF_CUST_CONT_ PGT_FIN	Customer	Customer, consumer	PeopleSoft Enterprise Banking Transactions
My Reports RC_CASE_SW_SS_ RPT.GBL	Customer	Customer	Any PeopleSoft Enterprise CRM application
Recent Cases RC_SS_SW, RC_SS_SW_W	Customer	Customer, consumer, or broker	PeopleSoft Support Self Service
Recent Orders RE_C_QUO_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Recent Quotes RE_C_ORD_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Services RBT_SERV_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture Self Service

Pagelet Name	Audience	Functional Role	Enabling Application
Shopping Cart RE_CART_PGT	Customer	Customer, consumer, or broker	PeopleSoft Order Capture
Site Selection RX_LANG_SEL_PGLTL	Customer	Guest user	PeopleSoft Order Capture
Quotes RBI_CUST_QUOTE_PGT	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Policy and Claims Presentment
Claims RBI_CUST_CLAIM_PGT	Customer	Customer, consumer, or broker	PeopleSoft Enterprise Policy and Claims Presentment
Agreements RI_PE_AGREEMENT_GBL	Employee	Customer service representative	PeopleSoft Support or PeopleSoft Integrated FieldService
Catalog Search RX_PROD_SRCH_PGT	Employee	Employee	PeopleSoft Order Capture Self Service
CRM Chart 1, 2, and 3 (iScript)	Employee	Manager or employee	PeopleSoft Support, PeopleSoft Order Capture
CRM Worklist PE_WRKLST_PGT	Employee	Employee	Any PeopleSoft Enterprise CRM application
Installed Products PE_PROD_PGT	Employee	Customer service representative	Any PeopleSoft Enterprise CRM application
My Forecast REP_FCAST_PGT	Employee	Salesperson	PeopleSoft Sales
My Leads PRTL_LEADS_PGT	Employee	Salesperson	PeopleSoft Sales

Pagelet Name	Audience	Functional Role	Enabling Application
My Monthly Calendar PRTL_CAL_MTH_PGT	Employee	Salesperson	PeopleSoft Sales
My Opportunities PRTL_OPP_PGT	Employee	Salesperson	PeopleSoft Sales
My Reports PT_PSRF_REPRT_ PAGELET_GBL	Employee	Employee	Any PeopleSoft Enterprise CRM application
My Tasks RSF_PRTL_ACTLIST_ PGT	Employee	Salesperson	PeopleSoft Sales
My Call Reports	Employee	Salesperson, marketing representative, field service agent, customer service representative	PeopleSoft Wealth Management
Recent Interactions RI_PE_REC_INT_PGT	Employee	Customer service representative	Any PeopleSoft Enterprise CRM application
Recent Service Orders RI_PE_SO_PGT	Employee	Customer service representative	PeopleSoft Integrated FieldService
Recent Support Cases PE_SUPPORT_PGT	Employee	Customer service representative	PeopleSoft Support
Relationship Grid CR_RI_REL_GRID_ PGT_GBL	Employee	Employee	Any PeopleSoft Enterprise CRM application
RMA RI_PE_RMA_PGT	Employee	Customer service representative	PeopleSoft Support
Self Service Help Desk RC_SS_HD, RC_SS_HDW	Employee	Employee	PeopleSoft HelpDesk

PeopleSoft CRM Pagelet Wizard Pagelets

Pagelet Wizard provides a user-friendly, browser-based graphical user interface that guides you through a series of steps to create and publish a pagelet. The following pagelets that are available with the CRM Portal Pack were built using the Pagelet Wizard feature: EOPP_CREF_BY_DATE_ID, RC_CASES_AVG_AGE, RC_CASES_BY_PRIORITY, RC_CASES_BY_SOURCE, RC_CASES_CLOSED_FIRSTCONTACT, RC_CASES_CREATED_CLOSED, RO_PRT_MGR_ORD, RO_PRT_MGR_QUO, RO_PRT_REP_ORD, and RO_PRT_REP_QUO.

The primary users of these pagelets are call center agents and managers and sales representatives and managers.

Authorized users can easily modify and maintain these pagelets using the Pagelet Wizard.

See Also

PeopleSoft Enterprise Components for CRM 9 PeopleBook, “Using Pagelet Wizard”

Web Libraries

These are the web libraries that are associated with Enterprise CRM pagelet functionality. You must ensure that users have access to the proper web libraries for the pages they need to access.

See *Enterprise PeopleTools 8.48 PeopleBook: Internet Technology*

Web Library Name	Owner	Description
WEBLIB_CAL_SYNC	RB	Starfish - Used for XML Link synchronization for the Calendar and Task items, between PeopleSoft and Starfish.
WEBLIB_CAMPAIGN	RA	Marketing - Campaign Viewer code
WEBLIB_IMAGEMAP	RGB	Demo - Image map processing demo - first one is server side, second one is client side.
WEBLIB_RB	RB	Web Library record for Integration and Technology
WEBLIB_RBF_MENU	RFB	Industry - Used in 8.1 for FSI application to transfer to a particular page upon log in. It has not been used from 8.4 onwards.
WEBLIB_RC	RC	Call Center - This derived record holds all the code for the Charts.
WEBLIB_RF	RF	FieldService - Business Interlink Defn
WEBLIB_RI	RI	Interaction Management - iScript Pagelet Search
WEBLIB_RS_SCHD	FRS	This code uses iScript and generates the HTML Table for the calendar page;
WEBLIB_SU	RB	JustTalk - WebLib for JustTalk Single User synchronization.

Web Library Name	Owner	Description
WEBLIB_WAP	RW	Mobile Sales for WAP Phones - Screen Display Libraries
WEBLIB_WAP_84	RW	Mobile Sales for WAP Phones - Screen Display Libraries

CHAPTER 3

Working with CRM Employee-Facing Pagelets

This chapter provides an overview of employee-facing pagelets and discusses how to:

- Use employee-facing pagelets common to CRM applications.
- Use PeopleSoft Sales pagelets.
- Use PeopleSoft Support pagelets.
- Use PeopleSoft Integrated FieldService pagelets.
- Use PeopleSoft Client Management pagelets.

Understanding Employee-Facing Pagelets

Employee-facing pagelets enable employees to view and update their own information and view customer information. Pagelets that display customer or contact information can be configured by using the Customize button.

Using Employee-Facing Pagelets Common to CRM Applications

This section discusses how to use the CRM employee pagelets that are common to the PeopleSoft CRM applications.

Pagelets Used to View Customer Information

This table describes the pagelets that you use to view information about a customer:

Pagelet	Usage	For More Information
Installed Products	Displays the product ID and quantity of each product installed at a customer's site and provides a link to the product ID details.	See <i>PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook</i> , "Tracking Installed Products and Assets".

Pagelet	Usage	For More Information
Recent Interactions	Lists the most recent interactions that a customer has had with your organization and provides a link to the details.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Working with Interactions”.
Self Service Help Desk	Enables users to review their own cases.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Working with Customer Self-Service Transactions”.
CRM Worklist	Enables users to see a summary of their worklist items and supports navigation to individual worklist items.	See <i>PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook</i> , “Setting Up PeopleSoft CRM Workflow”.
Relationship Grid	Provides a view of the relationships that a customer has with other customers or contacts in the database.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Interactions and 360-Degree Views”.

Using PeopleSoft Sales Pagelets

PeopleSoft Sales offers several pagelets to help sales representatives manage their sales activities. The system includes pagelets for each of the major sales objects—leads, opportunities, and forecasts—plus pagelets for managing sales tasks. This section discusses how sales representatives manage their sales activities by using the pagelets.

Pagelets Used to View Sales Activities

This table describes the pagelets used to view sales activities:

Pagelet	Usage	For More Information
My Forecast	Displays at-a-glance estimates of future sales revenues for sales opportunities.	See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Managing Sales Leads and Opportunities”. See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Using Forecasts”.
My Leads	Displays the three most recent leads based on the date and time that the lead was added.	See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Managing Sales Leads and Opportunities”.

Pagelet	Usage	For More Information
My Monthly Calendar	Displays your calendar for the current month. You can enter new task information or update existing tasks on your calendar.	See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Creating Sales Tasks and Adding Notes for a Lead or Opportunity”. See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Using Calendars”.
My Opportunities	Displays the opportunity name, customer, telephone number, and status of your three most recently added sales opportunities and provides a link to the details page, where you can edit the opportunity information.	See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Managing Sales Leads and Opportunities”.
My Tasks	Displays a list of upcoming tasks from your calendar.	See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Creating Sales Tasks and Adding Notes for a Lead or Opportunity”.

Using PeopleSoft Support Pagelets

This section discusses how to use the pagelets that PeopleSoft Support enables.

Pagelets Used to View Support Cases

This table describes the pagelets used to view support cases:

Pagelet	Usage	For More Information
Agreements	Displays a summary list of a customer’s existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Setting Up and Managing Agreements and Warranties”.

Pagelet	Usage	For More Information
RMA	Displays a list of a customer's return material authorizations (RMAs), provides a link to the RMA details, and provides an Add link to create a new RMA.	See <i>PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook</i> , "Tracking Installed Products and Assets".
Recent Support Cases	Displays a list of a customer's recent support cases, provides a link to the case details, and provides an Add link to create a new support case. Note. When you add a case from the Recent Support Cases pagelet, the case uses the default display template based on the user preferences.	See <i>PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook</i> , "Managing Cases".

Using PeopleSoft Integrated FieldService Pagelets

This section discusses the pagelets that PeopleSoft Integrated FieldService activities enable.

Pagelets Used to View Agreements and Service Orders

This table describes the pagelets used to view agreements and service orders:

Pagelet	Usage	For More Information
Agreements	Displays a summary list of a customer's existing service or support contract agreements and the status of each, and provides a link to the details of the agreement definition.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , "Setting Up and Managing Agreements and Warranties".
Recent Service Orders	Displays a list of a customer's recent service orders, provides a link to the service order details, and provides an Add link to create a new service order.	See <i>PeopleSoft Enterprise Integrated FieldService 9 PeopleBook</i> , "Creating and Managing Service Orders".

Using PeopleSoft Client Management Pagelets

This section discusses the pagelets that PeopleSoft Client Management enables.

PeopleSoft CRM Client Management offers all the tools necessary for a Financial Advisor (FA) to successfully manage clients. When an FA enters the Client Management application, the FA sees a summary of top clients, referrals, clients at risk, today's tasks, opportunities, and the FA's calendar.

Pagelets Used to Manage Client Activity

This table describes the pagelets used to manage client activity:

Pagelet	Usage	For More Information
My Calendar	Displays the calendar entries of the person for that day. A maximum of five entries are displayed. FAs can expand to view all. Tasks that do not have a start time are not displayed in the My Calendar pagelet. Additional calendar entries can be created from this pagelet.	See <i>PeopleSoft Enterprise Client Management 9 PeopleBook</i> , "Managing Clients".
My Top Clients	Displays the top five clients that the FA owns. The top clients are determined by the sum of all the financial accounts for each client. This list excludes inactive clients. The system displays either the Holding field or the Revenue field. The Configuration Parameter field on the Wealth Management Setup page determines which field to display.	See <i>PeopleSoft Enterprise Client Management 9 PeopleBook</i> , "Managing Clients".
My Referrals	Displays up to five referrals that are assigned to the user. A referral is denoted as belonging to an FA if the FA is listed as the assigned to value on that referral.	See <i>PeopleSoft Enterprise Client Management 9 PeopleBook</i> , "Managing Clients," Managing Referrals.
My Clients at Risk	Displays the clients assigned to the user that are at risk of leaving. A maximum of five appear. The at-risk criteria are predefined. Additionally, customers can create their own rules to define what denotes a client at risk.	See <i>PeopleSoft Enterprise Client Management 9 PeopleBook</i> , "Managing Clients," Viewing Risk Summary Information.

Pagelet	Usage	For More Information
My Tasks	Displays the tasks of the logged-in user for the current day. The only tasks that appear here are those with a due date of today; these tasks do not display on the calendar. A total of five tasks appear. Users can expand to view all.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Working with Tasks”.
My Opportunities	Referrals are converted into opportunities. An opportunity is a potential customer.	See <i>PeopleSoft Enterprise Sales 9 PeopleBook</i> , “Managing Leads and Opportunities”.

CHAPTER 4

Working with PeopleSoft CRM Charts

This chapter provides an overview of CRM charts and discusses how to:

- Define chart names and labels.
- View CRM charts.
- Personalize charts.

Understanding CRM Charts

This section discusses:

- CRM chart pagelets.
- Delivered charts.

CRM Chart Pagelets

Three identical pagelets, CRM Charts 1 through 3, provide charts that give users valuable snapshots of their operations. Each chart pagelet can be configured to show summary information, details, or both:

- Summary charts show the total number of cases that meet a chart's selection criteria during a specified time period.
- Detail charts divide the time period into smaller units and provide subtotals for each period.
- Combined charts show a summary chart followed by a detail chart.

Position the mouse over a chart (over the bar representing the charted data) to display pop-up text with information about the underlying data.

Delivered Charts

The PeopleSoft system delivers charts that display call center and order capture data. When you set up charts, you can change the chart names and the labels that are used for the x- and y-axes on the chart.

PeopleSoft Support Charts

This table describes charts used for Call Center data:

Chart Name	Description
Case Backlog	<p>The number of new cases created during the specified time period minus the number of cases closed during the specified time period. This number is determined based on the Date Created and Date Closed fields in the case.</p> <p>Note that this number may be negative if more cases are closed than created.</p>
Cases Resolved by the First Call	<p>The number of cases closed on the first call during a specified time period. This number is determined based on the Resolved by First Contact field in the case.</p>
Cases with Links to Resolutions	<p>The number of new cases that are resolved. Cases are considered resolved if they are associated with a solution and the solution status is <i>Resolution Successful</i>.</p> <p>This chart differs from the Problem Reports Closed chart because resolving a case does not necessarily close the case.</p>
High Priority Cases	<p>The number of high-priority cases created during the specified time period. This number is determined based on the Priority field in the case. (All priorities are associated with one of three priority types: <i>high</i>, <i>medium</i>, or <i>low</i>.) Cases are counted regardless of the current status, so this chart might include high-priority cases that are closed.</p> <p>The system evaluates the priority at the time that the chart fetches the data; cases for which the priority has changed from <i>high</i> to another value are not included in the count.</p>
New Problem Reports	<p>The number of cases created during the specified time period. This number is determined based on the Date Created field in the case.</p>
Problem Reports Closed	<p>The number of cases closed during the specified time period. This number is determined based on the Date Closed field. (All statuses are associated with one of three status categories: <i>open</i>, <i>closed</i>, or <i>cancelled</i>.)</p>

PeopleSoft Order Capture Charts

This table describes charts used for Order Capture data:

Chart Name	Description
Captures on Hold	The number of captures created during the specific time period whose current status is <i>Hold</i> .
New Orders	The number of sales orders created during the specific time period.
New Quotes	The number of quotes created during the specific time period.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Managing Cases”

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Managing Orders and Quotes”

Defining Chart Names and Labels

This section discusses how to define chart names and labels.

Page Used to Define Chart Names and Labels

Page Name	Object Name	Navigation	Usage
Chart Setup	RB_CHART_SETUP	Set Up CRM, Common Definitions, Chart Setup	Configure labels for the charts that the PeopleSoft system delivers. You access these charts through the CRM Charts pagelets.

Defining Chart Names and Labels

Access the Chart Setup page.

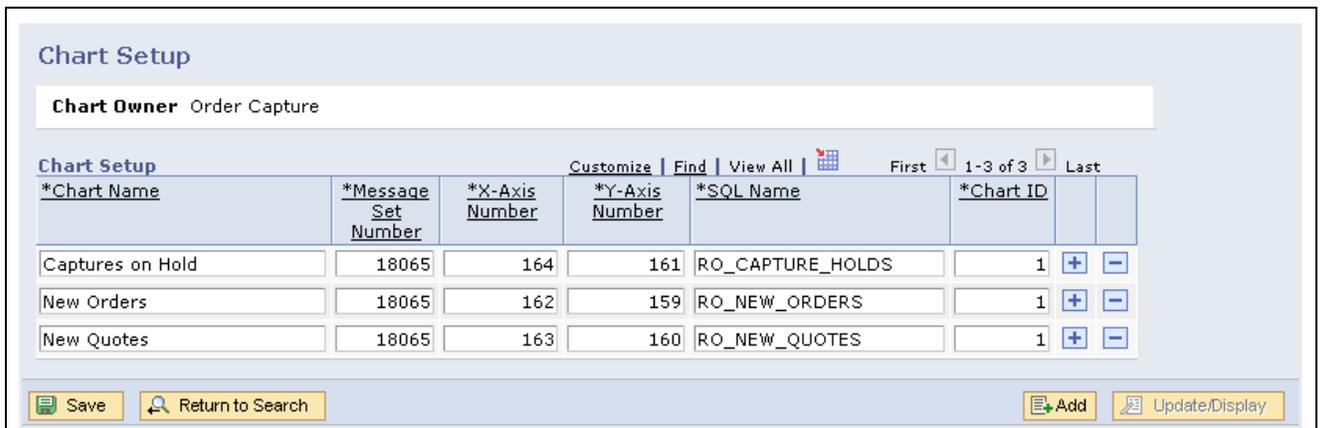


Chart Setup page

This page lists the charts that the PeopleSoft system delivers.

Chart Name	Enter the name to be used as the label in the chart pagelet. When users select which chart to display, they see the name entered here.
Message Set Number, X-Axis Number, and Y-Axis Number	Labels for the x- and y-axes in the chart come from the message catalog. Enter the message set number where the labels are stored, and enter separate message numbers for the x-axis label and the y-axis label.
SQL Name	Enter the name of the PeopleTools SQL object that populates the chart.
Chart ID	Enter the chart ID used to set parameters for the selected SQL program. The charts that the PeopleSoft system delivers use chart ID <i>1</i> , which is appropriate for charts that display numbers of objects (for example, the number of cases or orders) over time.

Viewing CRM Charts

This section discusses how to view the CRM chart pagelets.

Viewing the CRM Chart Pagelets

Use these pagelets to review metrics related to your call center and order capture operations:



Examples of CRM charts 1 through 3

All of the pagelets present data in bar charts:

- A detail bar chart displays a bar for each included time period.
- A summary bar chart displays one bar for the actual data and another bar for a gauge.

The gauge is divided into low (green), middle (yellow), and high (red) zones for easy evaluation of the chart data. Users set low, middle, and high ranges when they personalize the page.

The pagelets also display the following text information:

- The chart name (for example, Case Backlog) appears at the top of the pagelet.
- The business unit appears in parentheses after the chart name.
- A text summary of the number of cases and the included time period appears under the bar graph.

Personalizing Charts

This section discusses how to personalize CRM chart pagelets.

Page Used to Personalize Charts

Page Name	Object Name	Navigation	Usage
Personalize Summary Chart	RB_CHART_1, RB_CHART_2, RB_CHART_3	Click the Customize button for the pagelet to be personalized (CRM charts 1 through 3).	Select a chart and its display options.

Personalizing CRM Chart Pagelets

Access the Personalize CRM Chart page.

Personalize CRM Chart page

- Business Unit** Enter the business unit to be charted.
- Owner ID** Select the owner of the chart. Values are: *Call Center* and *Order Capture*.
- Chart Name** Select a chart associated with the selected owner ID.
- Duration and Units** Select the number of days, hours, months, or weeks to be included in the chart data. You can show up to 24 hours, 7 days, 16 weeks, or 12 months of data.
- Show Chart Type** Select a chart type. Values are: *Detail Chart Only*, *Summary Chart Only*, and *Summary and Detail Chart*.
- Low Gauge Value, Mid Gauge Value, and High Gauge Value** Enter the top number for the low, middle, and high ranges in the gauge that appears in a summary chart. The gauge appears alongside the actual data. The gauge is strictly informational; it does not affect underlying data.
Gauges appear only in summary charts; ignore these fields if the chart type is *Detail Chart Only*.

CHAPTER 5

Working with PeopleSoft CRM Self-Service Pagelets

This chapter provides an overview of self-service pagelets and discusses how to:

- Use PeopleSoft Order Capture Self Service pagelets.
- Use PeopleSoft Support pagelets.
- Use PeopleSoft pagelets for the financial services industry.
- Use PeopleSoft pagelets for the communications and energy industries.
- Use PeopleSoft pagelets for the insurance industry.

Understanding Self-Service Pagelets

Customer-facing pagelets enable customers, consumers, and brokers who are registered users of the system to view and update their own information. Unregistered users can see some pagelets, such as Catalog Search, Shopping Cart, and Site Selection. The Site Selection pagelet is available to unregistered or guest users for the purposes of navigating multiple sites.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, “Self-Service for Customers”

Using PeopleSoft Order Capture Self-Service Pagelets

This section discusses how customers manage their personal information and shopping orders, select websites, and search catalogs by using the following pagelets.

Pagelets Used to View Customer Information

This table describes the pagelets used to view customer information:

Pagelet Name	Usage	For More Information
Catalog Search	Customers can search a specified catalog or all catalogs based on keywords.	See <i>PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook</i> , “PeopleSoft Order Capture Self Service”. See <i>PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook</i> , “Creating Catalogs”.
My Information	Customers can view the name, address, phone number, and email address that are associated with a user who is signed in to the system.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Self-Service for Customers”.
Shopping Cart	Displays the number of products along with the order subtotal of a customer’s shopping cart. Provides the customer with a direct link to checkout.	See <i>PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook</i> , “PeopleSoft Order Capture Self Service”.
Site Selection	Guest users can select a website if multiple sites are implemented. Switches a user to the selected site.	See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i> , “Self-Service for Customers”.
Recent Orders	Customers can view recent orders by order number, order date, and status, and they can link directly to order details.	See <i>PeopleSoft Enterprise Integrated FieldService 9 PeopleBook</i> , “Creating and Managing Service Orders”.
Recent Quotes	Customers can view recent quotes by quote number, quote date, and status, and they can link to quote details.	See <i>PeopleSoft Enterprise Integrated FieldService 9 PeopleBook</i> , “Creating and Managing Service Orders”.

Using PeopleSoft Support Pagelets

This section discusses how customers can review their support cases and search for solutions by using the Recent Cases pagelet.

Pagelet Used to View Recent Cases

This table describes the pagelets used to view recent cases:

Pagelet Name	Usage	For More Information
Recent Cases	<p>Customers can view the five most recent open cases and access pages for reviewing existing cases, creating new cases, and searching for case solutions.</p> <p>Note. The pagelet has a slightly different appearance, depending on whether it is placed in a narrow or a wide column on the portal homepage.</p>	<p>See <i>PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook</i>, “Managing Cases”.</p> <p>See <i>PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook</i>, “Working with Customer Self-Service Transactions”.</p>

Using PeopleSoft Pagelets for the Financial Services Industry

This section discusses how to use the pagelets that PeopleSoft CRM enables for the financial services industry.

Pagelets Used to View Account Information

This table describes the pagelets used to view account information:

Pagelet Name	Usage	For More Information
My Accounts	Customers can view accounts and associated products, including account balance, currency, and the date and time that the account was created.	See <i>PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook</i> , “Working with Financial Accounts”.
My Information	Customers can view their personal information, such as name, address, phone number, and email address.	See <i>PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook</i> , “Working with Financial Accounts”.

Using PeopleSoft Pagelets for the Communications and Energy Industries

This section discusses how to use the pagelets that PeopleSoft CRM enables for the communications and energy industries.

Pagelets Used to View Accounts and Services

This table describes the pagelets used to view accounts and services:

Pagelet Name	Usage	For More Information
Accounts	Customers can view a list of their accounts and account status, and they can link to account details.	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook</i> , “Managing Accounts and Viewing Bills in the Communications and Energy Industries”.
Services	Customers can view and change service details.	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 9 PeopleBook</i> , “Managing Accounts and Viewing Bills in the Communications and Energy Industries”.

Using PeopleSoft Pagelets for the Insurance Industry

This section discusses how customers can view their insurance quotes and claims.

Pagelets Used to View Quotes and Claims

This table describes the pagelets used to view quotes and claims:

Pagelet Name	Usage	For More Information
Quotes	Displays insurance quotes for a customer.	See <i>PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook</i> , “Working with Policy and Claims Presentment Self-Service”.
Claims	Displays insurance claims for a customer.	See <i>PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook</i> , “Working with Policy and Claims Presentment Self-Service”.

Glossary of PeopleSoft Enterprise Terms

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

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

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

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

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

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

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

compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

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

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

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

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

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

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

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

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

person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

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

reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

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

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

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

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

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

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