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PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook

August 2006

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PeopleSoft Enterprise Strategic Account Planning 9 PeopleBook
SKU CRM9SAP-B 0806
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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.
Italics	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Oracle's PeopleSoft Enterprise CRM Strategic Account Planning Preface

This preface discusses:

• PeopleSoft Enterprise products.

• PeopleSoft application fundamentals.

• PeopleSoft Enterprise CRM automation and configuration tools.

• 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.

PeopleSoft Enterprise Products

This PeopleBook refers to the following PeopleSoft Enterprise product: CRM Strategic Account Planning.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft 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 CRM system, including security considerations.

• Workforce Management

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

• Interactions and 360-Degree Views

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

• Self-Service for Customers

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

• Relationship Management

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

• Entitlement Management

This part discusses setting up agreements and warranties.

- SmartViews

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

See Also

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

PeopleSoft 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 CRM applications. This is an essential companion to the PeopleSoft CRM Application Fundamentals PeopleBook.

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

- Correspondence Management

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

- Automation Tools

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

- Configuration Tools

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

- Knowledge Management

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

- Business Process Management

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

  - The setup of the BPEL infrastructure to initiate and manage BPEL process instances.

  - The setup of Business Process Monitor to view the status information of initiated BPEL process instances.

  - The setup of BPEL worklist integration to send CRM worklist entries (both notifications and action items) from BPEL processes.

  - The setup and execution of business projects.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "PeopleSoft CRM Automation and Configuration Tools Preface"

PeopleTools PeopleBooks

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

Getting Started with PeopleSoft Enterprise Strategic Account Planning

This chapter provides an overview of PeopleSoft Enterprise Strategic Account Planning and discusses:

• PeopleSoft Strategic Account Planning business processes.

• PeopleSoft Strategic Account Planning integrations.

• PeopleSoft Strategic Account Planning implementation.

PeopleSoft Enterprise Strategic Account Planning Overview

PeopleSoft Enterprise Strategic Account Planning provides tools that enable you to leverage customer value data to drive strategic planning and budgeting for the entire customer life cycle—marketing, sales, and service. With this application you can:

• Evaluate customer value and needs.

• Develop sales and support strategies to maximize customer value.

• Allocate resources based on customer value.

• Identify new opportunities to increase customer value.

• Collaborate with account team members and partners.

• Measure and improve account performance.

PeopleSoft Enterprise Strategic Account Planning Business Processes

The following process flow illustrates the PeopleSoft Enterprise Strategic Account Planning business processes. We discuss these business processes in the business process chapters in this PeopleBook:

Plan
- Segment and tier define account portfolio
- Determine go to market strategy
- Define specific account plans with goals aligned
- Define territory and assignment of accounts

Communicate
- Communicate account plans to account team
- Communicate goals to account team
- Gather knowledge to address customer issues

Execute
- Implement account plans
- Address customer issues
- Collaborate with teams
- Close business

Measure
- Account Portfolio performance
- Account Plan performance
- Account Plan effectiveness

Discover
- Opportunities to improve
- Reinforce desired behaviors
- Strategies to continue, change, or drop

PeopleSoft Enterprise Strategic Account Planning business processes

Using PeopleSoft Enterprise Strategic Account Planning, you can:

- Organize account portfolio by segment or tier.
- Plan market strategy.
- Define specific account plans with goals aligned with market strategy.
- Define territory and assignment of accounts.
- Communicate account plans, goals, and their target values to account team members.
- Identify and address customer issues.
- Measure account portfolio performance, account plan performance, and the effectiveness of the account plan.

PeopleSoft Enterprise Strategic Account Planning Integrations

By leveraging the Active Analytics framework, you can integrate PeopleSoft Enterprise Strategic Account Planning with any of the other products in the PeopleSoft Customer Relationship Management (PeopleSoft CRM) product line to obtain goal and metric data for account plans. For example, integration with PeopleSoft Sales enables you to set goals and track goal attainment using the information captured in PeopleSoft Sales (for example, leads and opportunities). Integration with PeopleSoft Client Manager enables you to set and track account plan goals based on a client's personal goals, such as target retirement age.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Understanding AAF.

In addition to supplying additional goal and metric data, integration with the following products expands the features of your strategic account planning solution:

PeopleSoft Enterprise Marketing

Integrate with PeopleSoft Enterprise Marketing to enable account plans at the segment level. Segmenting the customer base enables you to group like customers and enables uniform planning across them. Account managers who are responsible for a large set of accounts or consumers can segment them into smaller groups based on revenue, profitability, and common characteristics, such as industry, geography, or buying requirements.

See *PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook*, "Using Audiences," Understanding Audiences.

SmartViews

Integrate with the SmartViews feature to make it easy to identify specific issues to address in the account. You can track performance in individual accounts or roll up key metrics to see aggregate performance in a single view. For each metric, account managers can compare actual versus target goal attainment.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up SmartViews".

PeopleSoft Enterprise Mobile Account Planning

Integrate with PeopleSoft Enterprise Mobile Account Planning to enable your traveling field representatives to view goals and objectives for their accounts on their laptops. Mobile users can view account plans while they are on the road to make sure that they are well informed about the account's history and performance targets before calling on the customer.

See *PeopleSoft Enterprise CRM 9 Mobile Applications PeopleBook*, "Using PeopleSoft Enterprise Mobile Account Planning," Working with Accounts on a Mobile Device.

PeopleSoft Enterprise Partner Planning

Integrate with PeopleSoft Partner Relationship Management to improve collaboration by clearly identifying key tasks, due dates, and owners to meet the plan objectives. Managers control who can access and edit the account plan.

PeopleSoft Enterprise Strategic Account Planning Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, as well as links to the corresponding PeopleBook documentation.

Other Sources of Information

In the implementation planning phase, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is in the preface in the *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook,* and *PeopleSoft Enterprise CRM 9 Product and Item Management PeopleBook,* with information on where to find the most up-to-date version of each.

See Also

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 9 PeopleBook

CHAPTER 2

Understanding PeopleSoft Enterprise Strategic Account Planning

This chapter discusses:

- Strategic account planning.
- Strategic account planning business processes.
- Account assignment.
- Account planning.
- Audience segmentation.
- Reporting and metrics.

Strategic Account Planning

PeopleSoft Enterprise Strategic Account Planning enables your organization to capture maximum value throughout the customer's life cycle. It helps you align your strategy with customer needs and corporate objectives, and measure progress against metrics-driven goals. You can segment your customers and consumers and work with partners to identify opportunities in high-potential or underperforming accounts. You can customize performance metrics for your business, leveraging both internal and external data sources. You can also improve your execution of the account strategy by triggering recommended actions based on actual versus target goal attainment. With PeopleSoft Enterprise Strategic Account Planning, you can manage your resources proactively to extract more value from every customer relationship.

At the simplest level, strategic account planning is the process of managing accounts at a company or client level rather than at the opportunity level. An account can be a company, consumer, site, or partner. Account planning is the process of setting the goals for the accounts and measuring those goals. Account management represents a fundamental shift—regardless of business model—away from a transaction-oriented approach to an account-based model.

Strategic Account Planning Business Processes

PeopleSoft Enterprise Strategic Account Planning enables you to plan for and manage the customer relationship through the following stages:

- Evaluate customer value and needs.

PeopleSoft Enterprise Strategic Account Planning helps your organization identify the customers who will bring you the most value and greatest profit. It helps your account team evaluate each customer's current and long-term revenue potential, as well as strategic importance, so that you can invest an appropriate level of resources to serve them profitably.

You can manage your customers at both the company and account manager level. Accounts are typically grouped into customer portfolios at the company level. Your account managers can further segment their territories based on criteria that they define.

Global account managers who cover a few major customers can segment these customers into smaller divisions to identify cross-sell and up-sell opportunities. Account managers who are responsible for a large set of accounts or consumers can segment them into smaller groups based on revenue, profitability, and common characteristics such as industry, geography, or buying requirements.

- Develop a measurable strategy.

  The account strategy drives your plan for managing the customer life cycle. It determines how you can capture more value from both high-potential and underperforming accounts. Different customers require different strategies. Each strategy must be based on measurable goals and objectives to help you track the progress that your team and partners are making in the account.

  Account managers can use PeopleSoft Enterprise Strategic Account Planning to:

  - Define metrics-driven goals and qualitative objectives for each account.

  - Align account goals and compensation with corporate objectives.

  - Identify critical success factors for reaching plan targets.

  - Outline the value proposition required to meet the customer's specific needs.

- Allocate resources based on customer value.

  The next step is to determine how you will allocate limited resources to execute your account strategy. To drive profitable revenue growth, you must choose the most cost-effective channels while ensuring a seamless experience that optimally meets your customers' needs.

  PeopleSoft Enterprise Strategic Account Planning enables you to match your resources to marketing, selling to, and servicing your customers. Team members are automatically or manually assigned to accounts based on criteria that you define. Territory changes are automatically updated so that your accounts are always assigned to the most appropriate account managers. You can also create account plans to leverage partners in capturing more value from key customers. Finally, you can quickly adjust your resource allocation by measuring and monitoring performance against account goals and objectives.

- Identify new opportunities to increase customer value.

  PeopleSoft Enterprise Strategic Account Planning provides a centralized repository of all account information, delivering a complete, 360-degree view across the enterprise of all the sales, marketing, and service interactions with the customer. PeopleSoft Strategic Account Planning also has prebuilt integration to third-party data sources so that account managers can leverage real-time information to uncover new opportunities to increase customer value.

- Collaborate with account team and partners.

  PeopleSoft Enterprise Strategic Account Planning improves collaboration by clearly identifying key tasks, due dates, and owners to meet the plan objectives. Managers control who can access and edit the account plan. You can also use PeopleSoft online analytics to drive plan execution. Based on progress against account goals, the application triggers alerts and recommended actions.

The account plan helps the team identify which relationships that they can leverage to influence key decision makers. The account team can view all the contacts associated with the account and track metrics, such as the number of meetings with key contacts, to evaluate how well they are executing against the relationship strategy.

Account Assignment

This section discusses:

- Global account programs.

- National and regional account programs.

- Organizational structure.

Global Account Programs

A global account program is an integrated, multinational framework for implementing a strategic, global account management process. A closer look at global account programs in practice reveals the difficulty in both defining and understanding what exactly constitutes a global program versus a national, regional, international, or multinational program, and what is a global account. Companies use varying criteria of geography and customer characteristics in classifying their accounts and programs. Yet, in-depth research with individual companies suggests that factors such as a high level of process and systems integration, geographical spread, and worldwide coordination of resources and operations distinguish the global account programs.

National and Regional Account Programs

A national or regional account program uses a number of key processes to successfully implement corporate strategy for strategic accounts. These processes include securing senior management support; creating the appropriate internal systems to coordinate activity nationally or regionally; building the appropriate product or service delivery model, maintaining account planning, program, and account metrics; training and educating personnel; using compensation to drive behavior that will achieve account objectives; and optimizing technology and IT systems for national and regional account communications and knowledge management.

National account programs establish centralized decision making and operate within a uniform culture. Regional account programs may cross national boundaries, but they tend to develop semi-autonomous operations defined around geographical locations, such as Europe, North America, or the Pacific Rim. Within these programs, decision making is more decentralized, organizational processes are more complex, and the culture is more diverse.

By contrast, global account programs coordinate worldwide process and operations, using both centralized and decentralized decision making to implement a corporate global strategy at regional and local levels worldwide. Organizational complexity is high, and cultural sensibilities are a critical success factor for global account relationships.

Organizational Structure

Organizational structure for a strategic accounts program refers to the company reporting structure and design of infrastructure for the delivery of products, services, and solutions to key customers.

In some corporations, organizational structure for strategic accounts is integrated into an existing centralized structure. Where existing corporate structure is decentralized, however, a strategic accounts organization can be created as an *umbrella*, while the underlying structure is left in place. Functionally effective strategic account programs have been implemented using each of these approaches.

Internal alignment coupled with internal selling by the strategic accounts group makes the business case for strategic account management among all the stakeholders in the corporation. The sales force architecture that has territory and division salespeople staking claim to accounts and geographical areas is deeply rooted in many corporate cultures.

Organizational structure for a global accounts program versus a national or regional program typically involves a higher degree of structural complexity, flexibility, and a combination of both centralized and decentralized authority.

Account Planning

Account planning is a process of planning for a strategic account that provides an understanding of the customer or client's position, compiles and analyzes data, sets goals, establishes responsibilities, allocates resources, and sets measurable objectives. Unlike most traditional account planning, strategic account planning is meant to be a flexible, collaborative, and ongoing activity that is both comprehensive and linked to the day-to-day management of a strategic account.

Account planning usually involves the strategic account manager, the strategic account manager's manager, the account team, and possibly the customer. The focus of an account plan differs according to the go-to-market strategy developed for that account. Components of a plan frequently include a mission statement, industry/market/customer overview, business objectives alignment, position/performance in the account, resource allocation, strategic opportunities, and value-based account plan objectives.

Audience Segmentation

Audience segmentation tools enable organizations to finely target customers and prospects based on customer or profile attributes. These tools are invaluable for organizations that must prioritize customer investments and strategies based on tangible criteria, such as customer value, customer profitability, and other custom metrics.

Audience segmentation tools provide an interactive graphical segmentation tree display and show hierarchical segment relationships and real-time counts. The visual and detailed nature of these new capabilities enables marketers to support the natural, iterative segmentation process while quickly gaining insight into customer segments.

Audience segmentation includes:

• A visual segment builder.

   You can define segments (groups of customers defined by selection criteria). Hierarchical relationships between segments are included, and you can clearly and easily view them in a visual and interactive tree structure. Using the visual segment builder, you can see the hierarchies created by parent-child relationships of segments. Further, segments can be contained in segment groups, which enable you to group segments and segment hierarchies logically.

• Enterprise segment definitions.

Segments can be published to be actionable. When a segment is published, it is available for use by various components, including the Active Analytic Framework (AAF), Strategic Account Planning, and SmartViews. In the AAF, these terms can be used to build any conditions in an AAF policy. For PeopleSoft Enterprise Strategic Account Planning and SmartViews, users can select published segments to create a segment plan. They can set objectives and goals, and they can view the overall performance of the segments through PeopleSoft Enterprise Strategic Account Planning and SmartViews.

• Integration with a virtual data library.

New types of selection criteria are supported, enabling you to select from the AAF data library terms, audience and segment membership, campaign execution data (for example, marketing contacts this month via email), and campaign response data (for example, individuals who placed an order and referenced a campaign's promotion code).

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Understanding AAF

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Setting Up SmartViews," Understanding SmartViews

Reporting and Metrics

This section discusses:

• Metrics of a strategic account program or strategic account.

• Account selection and segmentation.

Metrics of a Strategic Account Program or Strategic Account

The metrics of a strategic account program or strategic account are the measurements by which the objectives of an individual account plan, relationship, or portfolio of account relationships are evaluated. The criteria for these assessments cover a range of expectations established individually and jointly by the supplier and the customer who anticipate mutually beneficial results from the relationship.

Metrics define the value or set of values that the supplier brings to the customer, the value the customer provides to the supplier, and the shared value. Value is represented in both financial and relationship-based terms and, ideally, is incorporated into the account plan at the beginning of the partnership.

Examples of value and measurements include segment loyalty and growth achievement, expanse of executive relationships (breadth and depth), mutual gain in productivity and efficiency, increased share of client's total spend, acknowledgement of client and of the value of partnership, and improvement in client's business results.

Account Selection and Segmentation

The process of account selection and segmentation is a systematic method for optimum customer portfolio management. Account selection is part of determining the go-to-market strategy for each customer. Using a set of tools and criteria, accounts are selected as well as cleared, and they can be segmented or tiered according to varying levels of resource allocation, funding, and service. The process of account selection requires the supplier to first define a strategic account. For example, one company may define strategic accounts as *those accounts that are managed separately from the organization's traditional sales channels, by account managers who have total responsibility for the sales, business processes, value proposition, and customer satisfaction.*

The account team's perspective and input contribute to objective evaluations of accounts, helping to match the supplier's comparative capability to customer opportunities. The process can determine in which accounts a supplier is overinvested or underinvested, a critical determinant of business success. Appropriate account selection is considered a critical step in the design of a strategic account program.

Setting Up PeopleSoft Strategic Account Planning

This chapter provides an overview of setup for PeopleSoft Strategic Account Planning and discusses how to:

• Set up objectives.

• Set up supported roles for planning.

• Define plan types.

• Define assessments.

• Define goals.

• Create a territory tree for accounts.

Understanding Setup for PeopleSoft Strategic Account Planning

This section provides overviews of:

• Objectives.

• Supported roles for planning.

• Plan types.

• Assessments.

• Goals.

Objectives

Strategic objectives relate to outcomes that strengthen an organization's overall business position and competitive vitality. Objectives are defined at a higher level than goals. For example, an objective might be to increase revenue from additional sales. At the goal level, this objective would be defined in measurable terms, such as increasing revenue by 25 percent.

Objectives are provided by default from the plan type to the template, but you can select additional objectives by either selecting from predefined objectives or by creating custom objectives.

Supported Roles for Planning

PeopleSoft Enterprise Strategic Account Planning delivers four supported roles for planning: company, consumer, partner, and site. You use supported roles when you define accounts. Role types are associated with plan types to identify the plan types applicable to specific roles.

Plan Types

You use plan types to create the account template. The definition of a plan type controls the free-form text fields that are available in the Details section of the Account Planning component.

Assessments

Assessments are the quantifiable definition of plan goals. The assessments are associated with plan goals in the template and in the account plan itself.

Assessment name specifies the visual status breaks that appear (green, red, yellow, and so on) and the variance indicator associated with the associated assessment.

The assessments show visual icons to depict the plan goal's status break. For example, if the plan meets 100 percent of the target, the system shows a green icon. It shows a red icon when the actual is less than 60 percent of the target. These icons appear in the Dashboard, as well. The purpose of the variance indicator is to indicate whether the high attainment is good or bad for a goal. For example, achieving a high revenue number is good and is shown in green, but having a high number of reported bugs is not good and is shown in red.

Goals

Goals are the quantifiable measurements of objectives. A goal has a target and an attainment. You can measure the attainment using the data library or you can enter it manually.

In a template or in a plan, you can add a new goal either by selecting a shared goal, which is already set up, or by manually entering all the details. You can also add a minimum or maximum limit on the goal target.

Setting Up Objectives

To set up objectives, use the Objectives (RSP_OBJECTIVE) component.

This section discusses how to set up objectives for account or segment planning.

Pages Used to Set Up Objectives

Page Name	Object Name	Navigation	Usage
Objectives,	RSP_OBJECTIVE	Set Up CRM, Product Related, Strategic Account Planning, Objectives	Create objectives for account or segment planning.
Strategic Plan Objectives - Objective Details	RSP_OBJECTIVE_SEC	• Click the link in the Description column for an existing objective. • Click the Enter Objective Description link for a new objective.	Create descriptions of your objectives.

Setting Up Objectives for Account or Segment Planning

Access the Objectives page.

Objectives page

Objective Code	Enter a four-character code for the objective.
Objective Name	Enter a name for the objective.
Description	Click the text in the Description column to access the Objective Details page, where you can enter or modify a description of the objective.

Setting Up Supported Roles for Planning

To set up supported roles for planning, use the Supported Roles for Planning (RSP_ROLES) component.

This section discusses how to set up supported roles for account planning.

Page Used to Set Up Supported Roles for Planning

Page Name	Object Name	Navigation	Usage
Supported Roles for Planning	RSP_ROLES	Set Up CRM, Product Related, Strategic Account Planning, Supported Roles for Planning	Define supported roles for account planning.

Setting Up Supported Roles for Account Planning

Access the Supported Roles for Planning page.

Supported Roles for Planning page

Rolename	Select a role for account planning. Possible values are *Company, Consumer, Partner,* and *Site.*
Role # (role number)	Displays the role number for the Rolename that you entered.
Status	Select a status for the role. Possible values are *Active* and *Inactive.*

Defining Plan Types

To define plan types, use the Plan Type (RSP_PLAN_TYPE) component.

This section discusses how to define plan types for account or segment planning.

Page Used to Define Plan Types

Page Name	Object Name	Navigation	Usage
Plan Type	RSP_PLAN_TYPE	Set Up CRM, Product Related, Strategic Account Planning, Plan Types	Define plan types for account planning.

Defining Plan Types

Access the Plan Type page.

Plan Type page

You use plan types to define goals and create account templates.

Description	Enter a description for the plan type. This is a required field.
Status	Select a status for the plan type. Possible values are *Active* and *Inactive.*
Subject Area	Select a default subject area to specify terms for the automatic attainment calculation.
Usage	Select the usage for the plan type. Possible values are *Account Planning* and *Segment/Audience Planning.* This is a required field. If you want the plan type to be used for both account planning and segment/audience planning, add a row and select both values.
Sequence	Enter a number that orders the objectives.
Objective Name	Select an objective that you defined on the Objectives page. Add lines as necessary to define additional objectives for the plan type.
Role Type	Select a role type that you defined on the Supported Roles For Planning page. Add lines as necessary to define additional role types for the plan type.
Status	Select a status for the role type. Possible values are *Active* and *Inactive.*

Defining Assessments

To define assessments, use the Assessments (RSP_ASSESSMENT) component.

This section discusses how to define assessments for evaluating plan goals.

Page Used to Define Assessments

Page Name	Object Name	Navigation	Usage
Assessments	RSP_ASSESSMENT	Set Up CRM, Product Related, Strategic Account Planning, Define Assessments	Define assessments for evaluating plan goals.

Defining Assessments for Evaluating Plan Goals

Access the Assessments page.

Assessments page

Assessment Code	Enter a two-character code for the assessment.
Assessment Name	Enter a name for the assessment.
Variance Indicator	Select either *High* or *Low* to denote whether a high value or a low value is a positive for a goal. For example, if the goal is revenue generation, then select *High.* If the goal is product failures, then select *Low.*
Seq (sequence)	Enter a sequence number for the assessment line.
Operator	Enter an operator for the assessment line. Possible values are *<, <=, =, >= >,* and *Between.*
Value	Enter a numeric value to compare against the actual value. If you enter *Between* in the Operator field, enter a numeric value that is at the low end of the range.

Value2	If you enter *Between* in the Operator field, enter a numeric value that is at the high end of the range.
Label	Enter a label that describes the outcome specified on the assessment line. For example, if the actual is greater than 125 percent of the target, you can enter a label of *Very Good*.
Image Name	Select an image file that the system displays on the Dashboard and plan results pages when the actual results match the criteria specified on the assessment line. After you select the image file, the system displays the actual image to the right of this field.

Defining Goals

To define goals, use the Goal (RSP_GOAL_TBL) component.

This section discusses how to define goals. Each account or segment plan that you create contains goals. You can manually enter goals on each account or segment plan. Also, if you have goals that are used on multiple account and segment plans, you can define shared goals on the Goal page and then associate these shared goals with the appropriate account and segment plans.

Pages Used to Define Goals

Page Name	Object Name	Navigation	Usage
Goal	RSP_GOAL_TBL	Set Up CRM, Product Related, Strategic Account Planning, Define Goal	Define goals for account planning.
Term Selection	RSP_GOAL_EOCF_SEC	Set Up CRM, Product Related, Strategic Account Planning, Define Goal Click the Select Term (🔍) button next to the Term Name label.	Select a term for the goal.

Defining Goals

Access the Goal page.

Goal page

Goal Name	Enter a name for the goal.
Short Name	Enter a short name for the goal.
Usage	Select the usage for the goal. Possible values are:
	Planning: This goal is used only for planning.
	SmartViews: This goal (metric) is used within SmartViews for reporting purpose only.
	Both Planning and SmartViews: This goal can be used for planning, as well as for reporting purposes within SmartViews.
Status	Select a status for the goal. Possible values are *Active* and *Inactive.*
Plan Type	Select a plan type for the goal.
Calc Method (calculation method)	Specify whether the attainment for the goal will be calculated automatically from the system or manually entered by the user.
Term Name	Click the Select Term link to access the Term Selection page. PeopleSoft Strategic Planning integrates Terms setup under Active Analytics Framework (AAF) to calculate the attainment of a goal.
Can Be Aggregated	Select this check box to indicate that this value can be used in an aggregate calculation.
Type	Select a value based on the type of goal. Possible values are *Amount, Other, Percent,* and *Quantity.* For example, if the goal is revenue generation, select *Amount.* If the goal is number of new accounts, select *Quantity.*
Variance Indicator	Select where a high or low value is positive for the goal. Possible values are *High is Positive* and *Low is Positive.*
Min Target (minimum target)	Enter the minimum target value for the goal.
Max Target (maximum target)	Enter the maximum target value for the goal.
Default Target	Enter the default target value for the goal.

Assessment   Select an assessment name that you defined on the Define Assessments page.

Creating a Territory Tree for Accounts

To set up a management structure for account planning and to set up automatic assignment of sales representatives to accounts, you must create a territory tree for accounts.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, "Creating Territory Trees".

CHAPTER 4

Setting Up Planning Templates

This chapter provides an overview of planning templates and discusses how to:

- Set up planning templates.
- Clone planning templates.

Understanding Planning Templates

A planning template specifies a set of data that is used to create a plan. Planning templates enable you to define a template that contains a default set of objectives and goals, and create multiple plans from the template. Templates are keyed by setID. They are used by PeopleSoft Strategic Account Management to define goals that are measured against set targets and by Smart Views to report metrics.

You can create a template that is similar to an existing template by cloning the existing template and modifying the new template.

Planning templates are composed of these main sections:

- Template Details
- Objectives
- Identify Goals
- Template Editors

You can also attach tasks or notes to an account plan. The tasks added to the account plan for a company appear when you view the tasks for the associated company. You can also define tasks for planning templates.

Template Details

The Template Details section captures high level information, such as the template name, the plan type to which a template belongs, the planning period, template status, currency, and the purpose for which the template is used. The template usage differentiates whether a template is applicable to the account plan or to the segment plan (both for Strategic Account Management). Only active templates can be associated with plans or with segment groups.

The plan type controls which free-form text fields appear in the Details section. For example *Value Statement* and *Critical Success Factors* appear for Sales plans, because they are set up for the sales plan type. The template has a currency code associated with it; all the goal targets that have a type of amount are entered in this currency.

Objectives

Objectives are the purposes for the plan, and are either selected from a list of predefined objectives or entered free-form.

Identify Goals

To identify goals, the user enters the details of each goal, such as the name of the goal, the target score expected, and how this is to be calculated (automatic or. manual). Target type specifies whether the target score being specified is an amount value, quantity, percentage, or some other type. The assessment name specifies which visual status breaks are to appear (green, red, yellow, and so on), as well as which variance indicator is associated with the associated assessment.

Template Editors

Template editors are the people are allowed to view or modify the template. When there is at least one Editor marked as Owner then only an Owner can change the template from Active to Draft.

Setting Up Planning Templates

To set up planning templates, use the Planning Template (RSP_PLANNING) component.

This section discusses how to:

- Define planning templates.
- Add tasks to a planning template.
- Add notes and attachments to a planning template.

Pages Used to Set Up Planning Templates

Page Name	Object Name	Navigation	Usage
Planning Template - Header Details	RSP_PLANNING	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template Select the Header Details tab.	Define planning templates. Header details that you enter include: template parameters, objectives, goals, and template editors.
Planning Template - Tasks	RB_TSK_EDIT_GRID	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Planning Template Select the Tasks tab.	Add tasks to planning templates.
Planning Template - Notes	RSP_PLANNING_NOTE	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates, Notes Select the Notes tab.	Add notes and attachments to planning templates.

Defining Template Details

Access the Planning Template - Header Details page.

Planning Template - Header Details page (1 of 2)

Planning Template - Header Details page (2 of 2)

Template Details

Name	Enter a name for the planning template.
Status	Select a status for the planning template. Values are:

Draft: The default value when you create a planning template. You can edit the template when it has this status. You must change the status to *Active* before you can use the template.

Active: The template can be used to create a new plan . When a plan has this status, the system does not allow you to edit the objectives or goals. Only template owners who have *write with override access* can change the status back to *Draft.*

Inactive: The planning template can no longer be used when it is inactive.

Canceled: The planning template is canceled and cannot be used.

Completed: The validity of the template has expired, so it is not available for use.

Description	Enter a description for the planning template.
Usage	Select the whether the template is being created for segment planning or for account planning. Values are *Account Planning* and *Segment/Audience Planning.*
Plan Type	Select a plan type for the planning template. The list of available plan types differs depending on the usage that you select.
Frequency	Select a frequency for the planning template. Values are *Annual, Bi-Weekly, Daily, Monthly, Quarterly, SemiAnnual,* and *Weekly.*
Currency	Select a currency for the planning template.
Start Time Frame	Select the starting time period for which this planning template is valid. The Start Time Frame and End Time Frame fields prevent a user from using this template for a timeframe which falls out of this range.
End Time Frame	Select the ending time period for which this planning template is valid.
Start Date	Displays the date for the start time frame selected.
End Date	Displays the date for the end time frame selected.
Lock Down Changes to Plan Targets	Select to prevent the user from modifying target values in plans that are created from this template.
Task Group Template	Select a task group template from which to populate tasks on plans that are created from this template.

Objectives

Add Objective	Click this button to access the Select Objectives page. You can choose a predefined objective or create a new objective for the planning template. This button appears only when the template is in *Draft* status.
View All Objectives	Click this link to access the Objectives page and view all the objectives for the planning template. You can delete an objective on this page.

Note. When you select a plan type for the template, the system adds the plan type's objectives to the template.

Identify Goals

Add New Goal	Click this button to add a new goal. This button only appears when the template is in *Draft* status.
Goal Name	Select a predefined goal or enter a goal name to add a custom goal.
Target Value	Enter the target value for the goal.
Type	Displays the type of value for the goal. Values are *Amount, Percent Quantity* and *Other*.
Prorate	When the value for the Prorate field is set to *Yes,* the attainment is compared with a prorated value of the target. The prorating is done based on number of days in the plan period.
Calc Method (calculation method)	Displays how the attainment for the goal is calculated. Possible values are *Automatic* or *Manual.*
Measured By	Displays the term name used to measure the goal.
Assessment	Select an assessment name for the goal. The assessment name determines the images that the system displays and the variance indicator.
Variance Indicator	Click this tab to display the variance indicator that is associated with the assessment.

Template Editors

Add New Editor	Click this button to add a new template editor.
Owner	Specifies that one of the editors owns the template. You do not have to specify a template owner. If you do not specify an owner, then anyone can change the status of the template, otherwise only the owner or the owner's manager can change the status.

See Also

Defining Tasks

Access the Planning Template - Tasks page.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Company Business Objects," Defining Company Information.

Defining Notes and Attachments

Access the Planning Template - Notes page.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Defining Company Business Objects," Defining Company Information.

Cloning Planning Templates

This section discusses how to clone a planning template.

Page Used to Clone Planning Templates

Page Name	Object Name	Navigation	Usage
Clone Template	RB_CLONE_TXN_SEC	Set Up CRM, Product Related, Strategic Account Planning, Planning Templates Select a template and click the Clone button on the toolbar.	Define parameters for cloning planning templates.

Cloning Planning Templates

Access the Clone Template page.

Clone Template page

Number of Clones	Enter the number of templates that you want to create.
New Template	Enter a name for the cloned template.
Select	Select to copy Goals, Objectives,, Tasks, or Template Editors to the new template.

CHAPTER 5

Managing Accounts

This chapter discusses how to:

• Access accounts.

• Assign a team to an account.

• Reorganize and reassign accounts.

Accessing Accounts

This section provides an overview of accounts and discusses how to:

• Use the Strategic Account Planning toolbar.

• Access accounts.

Understanding Accounts

An account is represented in the customer data model as a business object keyed by BO_ID (business object identifier) + Role Type ID, where the role type is either Company, Consumer, Partner, or Site.

Page Used to Access Accounts

Page Name	Object Name	Navigation	Usage
My Accounts	RD_ACCOUNTS	My Accounts	View accounts and add plans.

Using the Strategic Account Planning Toolbar

Toolbars are configurable and customizable. In addition, you can give end-users the ability to personalize their toolbar.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars," Understanding the Configurable Toolbar.

PeopleSoft Enterprise CRM delivers these toolbar buttons for Strategic Account Planning:

Click the My Tasks button to access a list of the tasks that are associated with the account.

Click the Add Call Report button to add a call report for the selected account.

Click the Add Task button to add a task for the selected account.

Click the My Calendar button to access the My Calendar page, where you can see daily, weekly, and monthly views of your calendar.

Please see Delivered Common Toolbar Buttons for descriptions of buttons that do not appear in the preceding table.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook,* "Configuring Toolbars," Delivered Common Toolbar Buttons.

Accessing Accounts

Access the My Accounts page.

My Accounts page (1 of 3)

My Accounts page (2 of 3)

My Accounts page (3 of 3)

View Accounts	Select to filter the list of accounts using a new search that you create or a saved search that you previously created.
Create Plans for Selected Accounts	Click to create account plans for one or more accounts that you select.

Account List

360	Click this button to access the 360-degree view of the account.

Create Plan	Click this link to create a new plan.
View Account Plans	Click this link to view existing plans.

Show in Results

Select the following check boxes to select which accounts appear when you perform a search.

Note. The check boxes available in this section depend on how you set the configurable search options.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages," Configuring Searches.

Accounts as Plan Owner	Select to have the system display accounts for which you are the plan owner.
Accounts as Manager	Select to have the system display accounts for which you are the manager or a representative on the account team.
Accounts as an Owner	Select to have the system display accounts for which you are the owner.
Accounts as Plan Team Member	Select to have the system display accounts for which you are a member of the plan team.
Accounts as Team Member	Select to have the system display accounts for which you are a team member.
Customers as Lead Team Member	Select to have the system display customer accounts that are associated with a lead on which you are a team member.
Customers as Oppy Team Member (customers as opportunity team member)	Select to have the system display customer accounts that are associated with an opportunity on which you are a team member.
Partners as Lead Team Member	Select to have the system display partner accounts that are associated with a lead on which you are a team member.
Partners as Oppy Team Member (partners as opportunity team member)	Select to have the system display partner accounts that are associated with an opportunity on which you are a team member.
Sites as Lead Team Member	Select to have the system display site accounts that are associated with a lead on which you are a team member.
Sites as Oppy Team Member (sites as opportunity team member)	Select to have the system display site accounts that are associated with an opportunity on which you are a team member.
Accounts as Temporary Assignee	Select to have the system display accounts on which you are a temporary assignee.
View All Accounts	Select to have the system display all accounts.

Assigning a Team to an Account

This section provides an overview of account team assignment and discusses how to:

• Assign a team to an account.

• Add members to the account team.

Understanding Account Team Assignment

You can assign teams automatically to accounts if you establish team structures and the assignment criteria for selecting one team from within the structure of teams. Assigning account teams is similar to assigning sales reps and sales teams to leads or opportunities and is based on comparable structures of trees and territories. Once you set up the criteria to enable automated selection, the system scans the available account teams and identifies the best-qualified choice. Assignment normally occurs when the account object (company, site, partner, or consumer) is created. You can explicitly invoke assignment and review the account team or assign a default team using a background event during the save. The component or application class that creates an object can initiate team assignment whenever there is no existing account team if you set a user preference for automated assignment.

The team to assign is found on a territory tree as a specific territory. Both the tree that is searched and the assignment group are supplied by user preference. The assignment group's criteria with weights, plus the territory's specific values for each assignment criterion, produce a score—a degree of match to the new account—for each territory. Values for fields, such as region, size, or zip code, are captured from the component buffer or from parameters passed from the application class. The field values that correspond to assignment criteria are compared with the territory values, and results are weighted and summed per territory. The best score among the territories is used for selecting the optimal team. That team is then attached to the object account's page for account team.
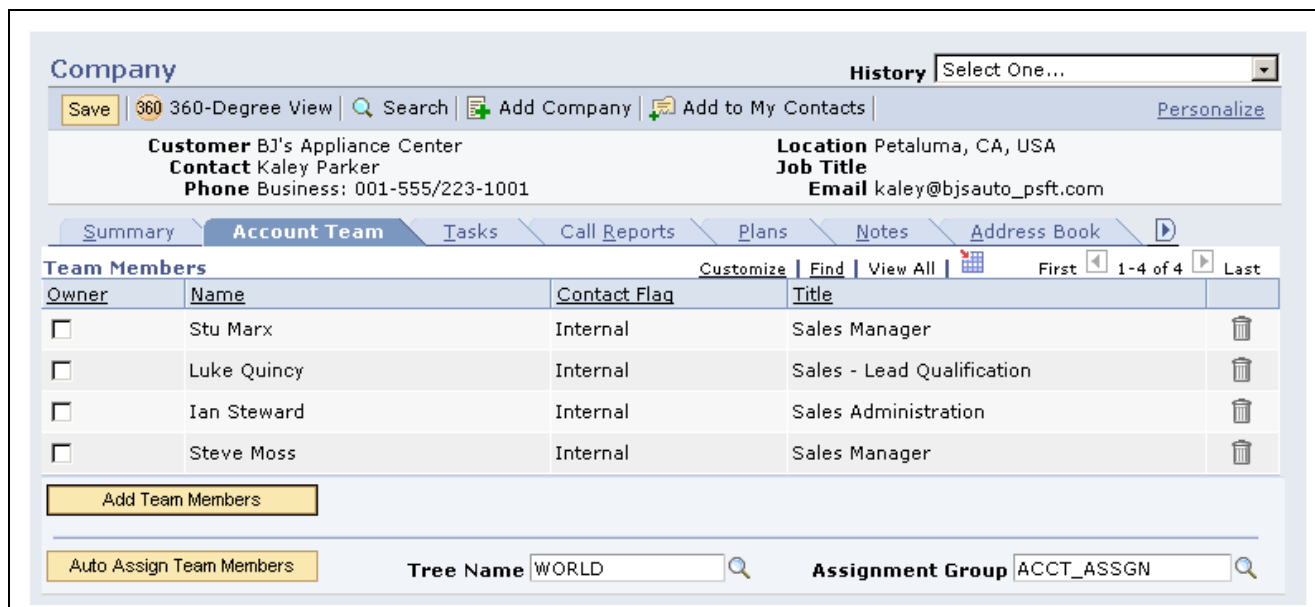
Pages Used to Assign a Team to an Account

Page Name	Object Name	Navigation	Usage
Account Team, Company - Account Team, Site - Account Team, Person (Consumer) - Account Team, Partner Company - Account Team	RD_ACCOUNT_TEAM	• Select the Account Team tab from any page in the Company, Site, Person (Consumer), or Partner Company components. • My Accounts Click a listed Account Name or Owner.	Assign the account team for a company, site, consumer, or partner company account.
Add Team Member	RD_PERS_SRCH_SEC	Click the Add New Team Member button on the Account Team page.	Add members to the account team.

Assigning a Team to an Account

Access the Company - Account Team page.

Note. The page that is shown here is from the Company component. Pages from other account components are similar in appearance and usage.

Company - Account Team page

Click Add Team Members to add company representatives manually to the account team.

Enter a tree name and assignment group, and then click Auto Assign Team Members to have the system assign team members to the account based on the configurable account assignment criteria set up on the territory tree.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, "Oracle's PeopleSoft Enterprise CRM Sales Preface".

Adding Members to the Account Team

Access the Add Team Member page.

Add Team Member page

Contact Flag	Select *Internal* to limit the search to internal people and *External* to limit the search to external people.
Search Only Eligible Account Representatives	Select to limit the search for new team members to persons who are already assigned the role of account representative in the system.

Reorganizing and Reassigning Accounts

This section provides an overview of account team reorganization and reassignment and lists the pages used to reorganize and reassign accounts.

Understanding Account Team Reorganization and Reassignment

An organization needs the ability to reorganize or reassign accounts. Generally, an account administrator is responsible for reassigning accounts. This activity could occur when one or more account managers leave the company or their positions. The account administrator has the ability to reassign a set of accounts. Each reassigned activity automatically inherits the predefined tasks of the new owner.

If you make changes to the account territory tree, you can use the Reorganize Territories component in PeopleSoft Enterprise Sales to reorganize the account team. If you want to reassign accounts to different account representatives, you can use the Reassign Sales Activities component in PeopleSoft Enterprise Sales.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, "Oracle's PeopleSoft Enterprise CRM Sales Preface".

Pages Used to Reorganize and Reassign Accounts

Page Name	Object Name	Navigation	Usage
Tree Reorganization	RSF_TR_REORG	Sales, Reorganize Territories	Reorganize the territories on a tree.
Territory Reassignment	RSF_TR_REASSIGN	Sales, Reassign Sales Activities	Reassign a sales user's leads, opportunities, and accounts to another sales representative.

CHAPTER 6

Creating Account Plans

This chapter provides an overview of account plans and discusses how to:

• Create account plans.

• Create plans for multiple accounts.

Understanding Account Plans

Account plans contain the specific goals and objectives that have been established to manage a company, partner, site, or consumer. You can associate a template with an account plan, or manually enter the information for a plan. An account plan has three main sections:

• Plan details

  Contains detailed information about the plan, including the plan type, objectives, and status.

• Goals

  Specifies the quantifiable results that are expected for the account.

• Plan team

  Lists the people who can view or modify the plan.

You can create a plan for an account by either accessing a company, partner, site, or consumer in the Customers CRM or Partner Profile component or by using the My Accounts page.

Understanding Account Access

A plan has two types of application security, in addition to PeopleTools security, that use the permission list. The row-level application security is implemented by using dataset rules. Plan edit control security ensures that the user has been granted appropriate access before any status changes can be made to the plan.

Plan access follows these guidelines:

• When an account and a plan on that account are unassigned, everyone with visibility to the plan can edit and change status.

• When a plan has team members, but no one is identified as an owner, everyone with visibility to the plan can edit and change status.

• When a plan has team members, and one or more is identified as the owner, everyone with visibility can edit in *Draft* status, but only the owners or owners' managers can change status from *Draft* to *Active* and back.

- When a plan has no team members, but an account team exists with no owners, everyone with visibility to the plan can edit and change status.

- When a plan has no team members, but an account team exists with one or more owners, everyone with visibility can edit in *Draft* status, but only the account owners or owners' managers can change status from *Draft* to *Active* and back.

Creating Account Plans

This section discusses how to:

- Create account plans.

- Identify goals and their targets.

- Define the plan team.

Pages Used to Create Account Plans

Page Name	Object Name	Navigation	Usage
Account Plan - Header Details	RSP_PLANNING	• My Accounts Select an account and click the Create Plan link on the account line. • My Accounts Click the View Account Plans link for any account in the Account List. The account plan page from the component definition for the account appears. Select an existing plan or click the Create Plan button. • You can also create or modify account plans from the component where the account is defined.	Create or modify an account plan, including objectives, goals, and team members.
Account Plan - Tasks	RB_TSK_EDIT_GRID	Select the Tasks tab on the Account Plan - Header Details page.	Manage tasks for an account.
Account Plan - Notes	RSP_PLANNING_NOTE	Select the Notes tab on the Account Plan - Header Details page.	Add notes for an account.

Creating Account Plans

Access the Account Plan page.

Account Plan page (1 of 2)

Account Plan page (2 of 2)

If you create an account plan from a template, the system automatically populates the plan with the information from the template, including objectives, goals, tasks, and so on. You can then modify or add information for the specific account plan.

Plan Details

Plan Type	Select a plan type for the plan. Values might include *Field Service, Marketing and Telemarketing, Partner Commerce, Sales,* and *Support.*
Select Template	Select a template to populate the data for the plan.
Plan Name	Enter a name for the plan.
Plan Status	Select a status for the plan. Values are:

Draft: The default value when you create a plan. You can edit the plan when it has this status.

Active: The plan is in use. When a plan has this status, you cannot edit the goals. Only users who act as plan owners can change the status back to *Draft.*

Inactive: The plan is no longer in use and attainment does not need to be calculated.

Canceled: The plan is canceled and attainment does not need to be calculated.

Completed: The plan attainment has been calculated and there are no more transactions expected that would change the goal attainment.

Description	Enter a description for the plan.
Time Frame	Select the time frame for the plan.
Currency	Select a default currency for the plan that is used to show all attainment and goals that have to do with a monetary value.
Start Date	Displays the start date for the plan time frame selected.
End Date	Displays the end date for the plan time frame selected.

Objectives

Add New Objective	Click this button to access the Select Objectives page, where you can choose a predefined objective or create a new objective for the plan.
View All Objectives	Click this link to access the Objectives page, where you can view all the objectives for the plan. You can also delete objectives on this page.

Identify Goals

The fields that are available in the Identify Goals page region depend on whether you are adding goals or viewing the progress against existing goals. You can only add goals to an account plan that is in *Draft* status.

Example of Identify Goals for Adding a Goal

Add Goal	Click this button to add a new goal.

Goal/Metric Name	Select a goal name for the plan.
Target Value	Enter the expected value for the goal.
Type	Select the type of value for the goal. Values are *Amount, Percent, Quantity,* and *Other.*
Prorate	This should be set to *Yes* when the attainment needs to be compared with a prorated value of the target. The prorating is done based on the number of days in the plan period. For example, if the target is to increase revenue by $3 million in 90 days, and the attainment is being measured on the 30th day of the plan, the prorated target appears as $1 million and the assessment appears based on this value.
Calc Method (calculation method)	Displays how the attainment for the goal is to be calculated. Values are *Manual* or *Automatic.* If you specify *Automatic,* select a term to use for the calculation.
	See Chapter 8, "Measuring the Attainment of Plan Goals," Understanding the Measurement of Plan Goals, page 51.
Measured By	Click this link to select the term name used to measure the goal.
Assessment	Select an assessment name for the goal. The assessment name determines the image that the system displays and the variance indicator.
Attainment	Enter a measure of the goal attainment. This field is enterable for goals with a calculation of *Manual*.
	If the calculation method is *Automatic*, the calculated attainment appears.
Calculate Attainment	Click to calculate the goal attainment according to the term that you specified.
Variance %	Displays the variance percent associated with the assessment. The unlabeled column to the right of this column displays an indicator of whether this is a positive or negative variance.
Copied From Template	Displays whether the system copied the goal from a template.
	See Chapter 4, "Setting Up Planning Templates," Understanding Planning Templates, page 21.

Plan Team Members

Add Team Member	Click this button to add a team member to the plan. A new page opens where you can search for persons to add to the team if the values you entered in the First Name and Last Name fields do not uniquely identify a person.
Owner	Specifies that one of the team members is the owner of the plan. You do not have to specify anyone as the owner of the plan. If you do not specify an owner, then anyone who can access the plan (according to dataset security) can change the status of the plan. If you specify one or more owners, then only the owners or the owners' managers can change the status.

Managing Tasks for an Account

Access the Account Plan - Tasks page.

See *PeopleSoft Enterprise Sales 9 PeopleBook*, "Creating Sales Tasks and Adding Notes for a Lead or Opportunity".

Note. If you create task from a planning template, task dates are derived from the template. The task start date is the plan start date plus the offset days from the task group template. The task end date is the task start date plus the duration days from the template.

Adding Notes for an Account

Access the Account Plan - Tasks page.

See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Notes and Attachments," Viewing Lists of Notes.

Creating Plans for Multiple Accounts

This section discusses how to create plans for multiple accounts.

Page Used to Create Plans for Multiple Accounts

Page Name	Object Name	Navigation	Usage
Selected Accounts	RD_SEL_ACCOUNT	My Accounts Select one or more accounts from the results list. Click Create Plans for Selected Accounts.	Enter parameters to create plans for one or more accounts. **Note.** All selected accounts must have the same role.

Creating Plans for Multiple Accounts

Access the Selected Accounts page.

Selected Accounts page

Note. You must select accounts with the same role and setID to create plans for multiple accounts.

Plan Type	Select a plan type for the plan.
Select Template	Select a template to populate the data for the plan.
Frequency	This field appears only if a template is selected. The frequency displayed is the same as specified in the selected template.
Plan Name	Enter a name for the plan.
Description	Enter a description for the plan.
Time Frame	Select the time frame for the plan.
Start Date	Displays the start date for the plan time frame selected.
End Date	Displays the end date for the plan time frame selected.
Select Plan Status	Select Create in Draft Status to create the plan with a status of *Draft* or select Activate Automatically to create the plan with a status of *Active.*

CHAPTER 7

Creating Segment and Audience Plans

This chapter provides an overview of segment and audience plans and discusses how to:

• Create segment plans.

• Roll over segment plans.

• Create audience plans.

• Roll over audience plans.

Understanding Segment and Audience Plans

You can create plans for a group of accounts by creating a plan for an audience. You can roll over that plan and allocate the target values to individual accounts. For example, if an audience contains 10 contacts who work for five distinct companies (two people for each company), it creates five account plans for those five companies. It does not create 10 plans, one for each person. Similarly, you can create plans for a segment. Segment plans contain the specific goals for a segment of customers, consumers, sites, or partners. You can use PeopleSoft Marketing to create segments. A segment plan can be created only for published segments.

The difference between a segment and an audience is that segments can contain a hierarchy of segments that at the bottom level finally contains accounts. When a segment plan is rolled over from the segment to the child segment group, segment plans are created for those subsegments.

You can roll over plans multiple times; but when you do, any plan that was created in the previous rollover is set to *Cancelled.*.

A segment plan has three main sections:

• Plan details

Contains detailed information about the plan, including the plan type, plan start, plan end date, high-level plan objectives, and status.

• Goals

Specifies the quantifiable results that are expected for the account.

• Plan team

Lists the people who can view or modify the plan.

You can create a plan for a segment by accessing a segment in the Manage Audiences component (RA_CAMPAIGN_MANAGEMENT).

See Also

PeopleSoft Enterprise CRM 9 Marketing Applications PeopleBook, "Using Audiences," Creating and Managing Audiences

Creating Segment Plans

This section discusses how to create segment plans.

Pages Used to Create Segment Plans

Page Name	Object Name	Navigation	Usage
Segment - Plans	RA_LIST_PLANS	Marketing, Manage Audiences Select a segment from the Audience Summary list. Select the Plans tab.	View plans for a segment.
Segment Plan	RSP_PLANNING	Click the Create Plan button on the Segment - Plans page.	Create a segment plan.

Creating Segment Plans

Access the Segment Plan page.

Segment Plan page

The Segment Plan page is identical to the Account Plan page, except that it has the Rollover Plan button. The system displays this button when you change the status of the plan to *Active.* Click this button to roll over the segment plan to child segments. The Rollover Plan button appears when the current segment contains any child segments.

Rolling Over Segment Plans

This section discusses how to roll over a segment plan to child segments.

Page Used to Roll Over Segment Plans

Page Name	Object Name	Navigation	Usage
Rollover Segment Plan to Child Segments	RSP_TP_ROLLOVR_SEC	Click the Rollover Plan button on the Segment Plan page.	Roll over a segment plan.

Rolling Over Segment Plans

Access the Rollover Segment Plan to Child Segments page.

Rollover Segment Plan to Child Segments page

Allocation Method   Specify how to allocate the target value among the child segments. Values are:

# of Accounts in Segments (number of accounts in segments): The target value is assigned to a segment based on number of accounts it contains. For example, we need to distribute a 3 million USD target between two segments. The first segment has 100 accounts, and second segment has 200 accounts. In this scenario, the target value for the first segment is allocated as 1 million USD and for the second segment as 2 million USD.

# of Selected Segments: The target value is distributed by number of selected segments. This distribution depends on the tree level on which the segment resides. To distribute targets from the root node of the tree, only the first level of selected segments is considered. For example, if the current (root) segment has three child segments and only two are selected, each of the selected segments is allocated a target value of 50 percent. Similar target distribution logic is implemented when you are allocating targets from first level to second level and so on.

Copy as is: This method copies the target value (as it appears on the current plan) to the new plan.

Set Target to 0: This method sets the target value to zero on the new plan. A user can select this value if the purpose is to create the new plan so as to enable the user to view that plan and set the target values manually.

Select Plan Status   Select *Create Plans in Draft Status* to create the plans with a status of *Draft,* or select *Activate Automatically* to create the plans with a status of *Active.*

Create Plans   Click this button to create plans for the child segments.

Creating Audience Plans

This section discusses how to create audience plans.

Pages Used to Create Audience Plans

Page Name	Object Name	Navigation	Usage
Audience - Plans	RA_LIST_PLANS	Marketing, Manage Audiences Select an audience from the Audience Summary list. Select the Plans tab.	View plans for an audience.
Audience Plan	RSP_PLANNING	Click Create Plan on the Audience - Plans page.	Create an audience plan.

Creating Audience Plans

Access the Audience Plan page.

Audience Plan page

The Audience Plan page is identical to the Account Plan page, except that it has the Rollover Plan button. The system displays this button when you change the status of the plan to *Active.* An audience plan that is in the active stage can be rolled over to the member accounts. The Rollover Plan button appears only when the current audience contains any member accounts. The system captures the rollover date and the user who rolled over the plan on the current audience plan.

You can roll the plan over only to member accounts that are in the appropriate setID and have a role that is valid for the plan type. You can roll over an audience plan multiple times as long as member accounts exist that don't already have the plan. Users also have the option of canceling the existing plan, as long as they have appropriate access to the plan according to the dataset and edit control security.

See <u>Chapter 6, "Creating Account Plans," Creating Account Plans, page 36</u>.

Rolling Over Audience Plans

This section discusses how to roll over an audience plan to member accounts.

Page Used to Roll Over Audience Plans

Page Name	Object Name	Navigation	Usage
Rollover Audience Plan to Member Accounts	RSP_TP_ROLLOVR_SEC	Click the Rollover Plan button from the Audience Plan page.	Roll over an audience plan.

Rolling Over Audience Plans to Member Accounts

Access the Rollover Audience Plan to Member Accounts page.

Rollover Audience Plan to Member Accounts page

Allocation Method	Specify how to allocate the target value among the member accounts. Values are:
	# of Accounts in Audience (number of accounts in audience): The goal target is evenly distributed and then applied to the selected members when creating a new plan. For example, the audience has 10 member accounts and the manager selects only two of them to create the plan; eight other accounts are not selected. The goal target is to increase revenue by 10 million USD. Therefore, you need to earn 1 million USD in revenue from each account. To do this, you must allocate a target value of 1 million USD for each of the two plans created.
	# of Selected Accounts (number of selected accounts): The goal target is distributed based on newly selected accounts and members who already have the plan. This allocation method should be used when the manager wants to target a few specific accounts in the audience. For example, the audience has 10 member accounts and the manager selects only two of them to create the plan; three members already have the plan. The goal target is to increase

revenue by 10 million USD. Therefore, you need to earn 2 million USD in revenue from each account. To do this, you must allocate a target value of 2 million USD for each of the two plans created.

Copy as is: This method is used primarily for allocating targets that are of *Percent* type. For example, the purpose of a goal is to increase customer satisfaction to 80 percent. This target should be met by all members, not just one member.

Set Target to 0: This allocation method is used when the user wants to create the plan but wants to drill into the newly created plan and set the target manually.

Select Plan Status   Select the Create Plans in Draft Status option to create the plans with a status of *Draft* or select the Activate Automatically option to create the plans with a status of *Active*.

Create Plans   Click this button to create plans for the member accounts.

CHAPTER 8

Measuring the Attainment of Plan Goals

This chapter provides an overview of the measurement of plan goals and discusses how to:

• Establish plan goal metrics.

• Calculate goal attainment.

Understanding the Measurement of Plan Goals

To measure the success of a strategic plan, base each strategy on measurable goals and objectives that help you track the progress that your team and partners are making in the account.

PeopleSoft Strategic Account Planning delivers configurable templates for setting up the account strategy. Sales, marketing, and service managers can tailor these plan templates to track performance objectives for each plan. Each plan template contains suggested goals, or you can create new performance indicators that are specific to your business needs.

You define a metric once and deploy it across all account plans. Both internal and third-party data sources can be leveraged for metric calculations. For example, you can use market share data to track your competitive position or you can import survey results to measure customer satisfaction.

Dashboard views make it easy to identify specific issues that must be addressed in the account. You can track performance in individual accounts or roll up key metrics to see aggregate performance in a single view. For each metric, account managers can compare actual versus target goal attainment and adjust the customer strategy in real time.

Establishing Plan Goal Metrics

This section discusses how to:

• Enter goal metrics.

• Select the attainment measurement.

Pages Used to Establish Plan Goal Metrics

Page Name	Object Name	Navigation	Usage
Account Plan	RSP_PLANNING	My Accounts Click an account name in the Account List. Select the Plans tab from the Company, Person (Individual Consumer), or Partner Company components.	Enter goal metrics to measure goal attainment.
Strategic Plan Term Selection	RSP_TP_EOCF_SEC	Click the Select Term link on the Account Plan page.	Select a term to measure the calculation of attainment. **Note.** This link is available only when you are adding a new goal.

Entering Goal Metrics

Access the Account Plan page.

Account Plan page

Calc Method (calculation method)   Select *Manual* to enter the goal values. Select *Automatic* to select the strategic plan term.

See Chapter 6, "Creating Account Plans," Creating Account Plans, page 36.

Selecting the Attainment Measurement

Access the Strategic Plan Term Selection page.

Strategic Plan Term Selection page

Select a term to measure the calculation of attainment.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Understanding AAF.

Calculating Goal Attainment

This section discusses how to:

• Calculate attainment for one plan.

• Calculate attainment for multiple plans.

Pages Used to Calculate Goal Attainment

Page Name	Object Name	Navigation	Usage

Account Plan	RSP_PLANNING	• My Account
		
		  Select an account on the My Accounts page.
		
		• Customers CRM, Add Company or Search Company, Plans
		
		  Select an account.
		
		• Customers CRM, Add Site or Search Site, Plans
		
		  Select an account.
		
		• Partner CRM, Add Person (Consumer) or Search Person, Plans
		
		  Select an account.
		
		• Partner CRM, Add Partner Company or Search Partner Company, Business Plans
		
		  Select an account.
			Calculate the attainment of goals for one plan.

Auto Calculate Plan Goals Attainment	RSP_PLANNING	Set Up CRM, Product Related, Strategic Account Planning, Auto Calc Plan Attainments	Calculate the attainment of goals for multiple plans.

Calculating Attainment for One Plan

Access the Account Plan page.

Note. You can calculate attainment for plans in *Active* status only.

Account Plan page

Target Value   Displays the target value assigned to the goal.

Type	Displays the type of value defined by the Target Value. Options are *Amount, Percent, Quantity,* and *Other.*
Prorated Target	Displays the target value with proration applied, if applicable.
Attainment	Displays the actual attainment for the goals.
	Note. If the goal is a manual goal, enter a number for the goal in the Attainment field.
Variance % (variance percentage)	Displays the percentage difference between the target and the attainment.
Prorate	Displays whether proration is applied to the target value.
Calculate Attainments	Click this button to calculate attainments.
View in Currency	Select a currency to use for all monetary amounts that appear on the page.

Calculating Attainment for Multiple Plans

Access the Auto Calculate Plan Goals Attainment page.

Auto Calculate Plan Goals Attainment page

Based on specified parameters, a batch Application Engine program runs to select matching plans to which the current user has access and to calculate attainment for each of the matching plans. The last calculated date for each of these plans is updated. An administrator running this program can view batch program status by clicking the Process Monitor link.

Plan Type	Select a plan type. The system calculates goal attainment for plans of this type.
Template Name	Select a template name. The system calculates goal attainment for plans that use this template.
Time Frame	Select a time frame for calculating attainments.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Understanding AAF.

Glossary of PeopleSoft Enterprise Terms

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Application Messaging PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan 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 *detailed business process*.
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 *course*.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification*.
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.
	See also *population* and *division*.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See *communication key*.
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
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 *population* and *cohort*.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.
	In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event 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 *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.
	See also *business unit.*
GL entry template	Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft 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 *update access*.

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

integration
A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.

integration point
An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.

integration set
A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

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

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

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

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

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 *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft 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 *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a

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

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

transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

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

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

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

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

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

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

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

See also *compensation object.*

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

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

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

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

PeopleCode
PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.

PeopleCode event
See *event.*

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

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

period context
In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

	a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.
	See also *division* and *cohort*.
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
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 *record input value-added tax flag*. Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for *record output value-added tax flag*.
	See *record input VAT flag*.
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

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

seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.
	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
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 *communication key.*
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.

system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).
	When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
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 *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft 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 *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also *inquiry access*.
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception*. A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt*. Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

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

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