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PeopleSoft Enterprise Policy and Claims Presentment 9 PeopleBook

August 2006

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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.

Policy and Claims Presentment Preface

This preface discusses:

- PeopleSoft Enterprise CRM application fundamentals.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleSoft Enterprise PeopleTools documentation.

PeopleSoft Enterprise CRM Application Fundamentals

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

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

There are six parts to the *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook:*

- PeopleSoft Enterprise CRM Multi-Product Foundation.

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

- Workforce Management.

  This part discusses the administration of the worker component used to perform tasks such as customer support or field service in PeopleSoft Enterprise CRM. This part also includes information on competency management and assigning workers to tasks.

- Interactions and 360-Degree Views.

  This part discusses interaction management and the administration of 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 the set up, administration, and use of 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.

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Getting Started with PeopleSoft Enterprise Customer Relationship Management 9 Applications"

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals

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

The *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook* consists of important topics that apply to many or all industry-specific applications within the PeopleSoft Enterprise CRM product suite. Whether you are implementing a single application or multiple PeopleSoft Enterprise CRM applications, you should be familiar with the contents of this central PeopleBook.

There are four parts to the *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook:*

• Application Security.

  This part discusses setting up security including the security matrix and navigation security.

• Financial Accounts.

  This part discusses administration of financial accounts, legacy account systems integrations, product applications, and account default set up.

• Churn Management.

  This part discusses churn scoring, churn scores, and churn rules as applied to financial accounts. This chapter also covers churn scripts and automated churn.

• Accounts Receivable and 360 - Degree View Integration.

  This part discusses the integration between an Accounts Receivable system and PeopleSoft Enterprise CRM.

See Also

PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook, "Getting Started with PeopleSoft Enterprise CRM 9 Industry Applications"

PeopleSoft Enterprise CRM Automation and Configuration Tools

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

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

• Correspondence management.

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

- Automation tools.

  This part discusses PeopleSoft Enterprise CRM workflow, Active Analytics Framework (AAF), business projects, 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.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Getting Started with PeopleSoft CRM Automation and Application Configuration Tools"

PeopleSoft Enterprise CRM 9 Services Foundation

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

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

- Entitlement management.

  This part discusses how solution management enables users to establish a set of predefined solutions that call center agents and field service technicians use to resolve customer problems.

- Transaction Billing Processor Integration.

  This part discusses how PeopleSoft Transaction Billing Processor enables PeopleSoft Enterprise FieldService, PeopleSoft Enterprise Support, and PeopleSoft Enterprise Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. Also covered is how this integration enables PeopleSoft Enterprise CRM users to bill and book revenue for recurring, one-time, and on demand service.

- Environmental Systems.

  This part covers the Research Institute (ESRI) integration. The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities through the Map Dashboard.

See Also

PeopleSoft Enterprise CRM 9 Services Foundation PeopleBook, "Getting Started with PeopleSoft CRM Services Foundation"

PeopleSoft Enterprise PeopleTools Documentation

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

CHAPTER 1

Getting Started with PeopleSoft Enterprise Policy and Claims Presentment

This chapter provides an overview of Policy and Claims Presentment and discusses:

- Policy and Claims Presentment business processes.
- Policy and Claims Presentment integrations.
- Policy and Claims Presentment implementation.

Policy and Claims Presentment Overview

Policy and Claims Presentment utilizes the power of PeopleSoft Enterprise CRM and provides industry-specific functionality to meet your business needs. Policy and Claims Presentment enables you to provide full-featured support for all the products and services you offer to customers.

To support the unique data requirements of life, health, and property and casualty policy types, service representatives can:

- Respond to customer inquiries by accessing policy details.

  This includes status, type, and coverage period, deductibles, limits, options, as well as covered people and assets.

- Make changes to a policy.
- Retrieve billing and payment history in real-time.

Policy and Claims Presentment provides the ability to work with industry-specific policy requirements including:

- Property & Casualty policies

  Displays for each covered person or asset the coverage that has been selected, as well as the deductible amounts, limits, options, and exclusions.

- Health plan policies

  Displays the benefits that apply to the plan, coinsurance for each service, yearly deductible, and lifetime limits.

- Life plan policies

  Displays the death benefit amount and financial terms associated with the policy, insured party and beneficiaries, and current policy cash value.

- All policy type

Displays premium information, policy status, agent and broker associated with selling the policy, and the entity responsible for servicing the policy.

Regardless of the channel, Policy and Claims Presentment enables the representative to respond to customer inquiries including claim status, claimant information, assigned adjusters, assessed damages, and settlement payments processed.

A customer, or an insurer's representative on behalf of a customer, can file a first notice of loss via the web-based user interface. Policy and coverages are verified and then, based on policy type, details of the loss such as; date/time, location, policy report, injuries and damages, and other parties/property involved are captured. When submitted, the report is packaged as an XML message and is sent to the insurer's claims management system. The claims management system responds by creating and sending back a claim number that is stored in the PeopleSoft CRM database. Users can then inquire on claim status and details.

Note. This PeopleBook focuses on the set up and usage of Policy and Claims Presentment functionality and does not discuss core PeopleSoft Enterprise CRM setup or usage. It is highly recommended that you review the references that appear in each chapter before beginning the implementation.

Policy and Claims Presentment Business Processes

The following summarizes Policy and Claims Presentment business processes:

- Policy management
- Claims management.
- Self-service transactions.

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

Policy Management

Policy and Claims Presentment enables users to:

- Work with covered assets.
- Manage policies, including relationships, terms and conditions, address history, asset details, manage billing history and payment history.
- Make policy changes.

Claims Management

Policy and Claims Presentment enables users to:

- Manage first notice of loss (FNOL) reporting through a customer service representative.

  This includes initiating a first notice of loss (FNOL) and confirming policy details.
- Work with First Notice of Loss (FNOL).

  This includes associating a first notice of loss (FNOL) to related claims.
- Work with claims, including viewing claims and claim details.

Self-Service Transactions

Policy and Claims Presentment enables self-service users to:

- Perform customer care transactions, including creating a first notice of loss (FNOL), searching for solutions, and viewing frequently asked questions and troubleshooting guides.

- Make policy changes.

- Select and apply for products.

- Report a first notice of loss (FNOL).

- View claims.

Policy and Claims Presentment Integrations

PeopleSoft provides the flexibility to address your unique requirements for integrating applications and data. PeopleSoft's Integration Broker supports real-time, two-way integration to legacy systems whether it be your ratings engine, policy administration system, claims management system, or billing system. Our pre-built integration enables users to access data in these legacy systems, without requiring them to extract, load and continuously synchronize that data into the CRM solution. The Integration Broker provides pre-built Enterprise Integration Points (EIPs) that support message triggers, message routing, and any data transformation that must take place for both inbound and outbound messages. With it, the PeopleSoft CRM for Insurance solution can retrieve data from your legacy systems at run time, unify and display that data, manipulate it, and send it back to the source. This is a huge advantage in terms of solution deployment time and cost, ongoing cost of ownership, and quality customer service.

Policy and Claims Presentment Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features 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, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, 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 appears in the preface in the *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

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

PeopleSoft Enterprise Setup Manager for CRM 9 PeopleBook

Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Component Interfaces, "Using the Excel to Component Interface Utility"

CHAPTER 2

Understanding Policies and Claims

This chapter introduces the main concepts for policy and claims presentment. It discusses:

• The policy data model.

• Insured items.

• Claims

• First notice of loss (FNOL)

• Claims submission

• Claims management

The Policy Data Model

A *policy* is an insurance contract that states what is being insured, by whom, and for how much. It contains data that both the policyholder and the insurance company need to understand what the policyholder is insured for, the insured item, what coverages apply, for how long the insurance is effective, and how much the policyholder agrees to pay in premiums. In Policy and Claims Presentment, an insurance policy is a type of financial account.

A *financial account* represents a holding by the customer of a product that an insurance company provides. The financial account presents information from various legacy systems in a consistent interface. The financial account maps to the product, inheriting the terms and conditions from the product that the customer purchased.

The legacy administration systems create the financial account record and its sub-records as a policy. These accounts are not created in the PeopleSoft Enterprise CRM system. The Product Sales functionality queues up a transaction to the legacy system, which starts the process of creating a new account header record for the policy and its sub-records; the legacy system performs the actual creation of these records, and a message comes back from the legacy system to create the data structure in the PeopleSoft Enterprise CRM system.

Each financial account record represents one policy. If a business contact has two policies, there will be one financial account instance in the database for each. You can attach coverage at several levels in the data model. Coverage can be at either the policy or the covered asset level.

Use the Financial Account pages to view general account information, insurance account details, and policy information. Use the View Policy pages to view covered assets, including coverages, deductibles, limits, and options.

Insured Items

This section provides an overview of insured items and discusses:

• Covered assets in property and casualty (P&C).

• Policy changes.

Insured items, or *covered assets,* are related to a policy as the specific thing insured against loss. Policies may be written for many insured items, or for only one. For example, usually, a life policy has one insured item for a person's life while a household policy insures many items. Some companies write a car insurance policy that includes many vehicles, while other companies create a one-to-one policy to insured items. For group policies, there are many insured items.

Insured items can be a person, a place, or a thing. You must collect specific information regarding the item that is to be insured. This data includes the specific attributes that make up the item to avoid confusion regarding what or who is insured, and so you can price the policy accurately. Based on the type of insured item, you may need different types of information.

Each insurance policy has at least one covered asset. In property and casualty (P&C) lines of business, these assets are the items that the policy insures. In life or health policies, the covered asset is the insured person or persons. Covered assets can be of different types, and each can have different attributes. For example, when a car is insured, you must capture the vehicle identification number (VIN), whereas when a person is insured, you must capture the social security number. You can view a given policy's details, such as insured items for P&C, coverage, dollar limits, deductibles, options, and exclusions. The data elements that appear depend on the policy type.

Covered Assets in P&C

For P&C, insured items are assets. These assets may include a car, a boat, a home, a wine collection, and so on. Assets have a value, and the purpose of insuring them is to protect the use or enjoyment of the asset. Covered assets are insured against loss by the policy.

Generally, P&C covered assets or insured items include:

• Personal vehicles, including cars, minivans, pickup trucks, and sport utility vehicles.

• Commercial vehicles, including trucks, commercial vans, tractors, and combines.

• Boats, including sail, motor, and yachts.

• Commercial boats, including fishing boats.

• Mobile homes.

• Personal real estate, including single-family dwellings such as apartments, condominiums, townhouses, houses, duplexes, triplexes, and four-unit or fewer apartments where the owner also lives.

• Commercial real estate, including major apartment buildings, office buildings, commercial stores, shopping centers, and undeveloped, raw land.

• Personal property, including art work, jewelry, furs, computers, and wine collections.

• Commercial property, including equipment, machinery, and aircraft.

Insured items share some common characteristics. Each item:

• Is either owned or leased for use and is associated in some way to a business contact as owner, primary user, or lessor.

- Is related to insurance policies (a type of financial contract).

- Has a dollar value.

- Has a location or primary location.

  For example, a boat is moored at an address, a car is garaged at an address, a house has an address, an apartment building has an address, equipment is located in a primary location (an address or maybe a site), and personal property is either at one's home or in a safe deposit box, both of which would have an address or location.

- Has attributes that are necessary to describe the item for authentication.

  For example, the VIN, make, model, type, and year uniquely describe a car. A home's particular location, address, or housing tract number in the county records uniquely authenticates a house (title insurance information). The name of the producer, vineyard, or estate name; country of origin; and the year of vintage authenticate a bottle of wine.

- Can have additional attributes to provide more detail to the description.

  For example, attributes that may be related to risk, help the insurance company determine ratings or assess risk.

Policy Changes

An insurance policyholder may request a change to the policy. The PeopleSoft Enterprise CRM system captures all of the modification information and transmits it to the legacy system. Modifications to the policy may or may not require a quote, depending on the requested change. For example, changing the beneficiary on a life insurance policy does not require a quote because it does not impact the premium; however, a change in coverage on an automobile policy does require a quote because the premium may change. If a quote is required because of the requested change, the system returns the quote that the legacy system generates. If the user chooses to continue with the new quote, a message is sent to legacy system requesting the modification. The actual modification takes place in the legacy system.

Modification options are product-specific. The owner of an auto insurance policy may want to add a driver to the policy; however, this is not an option for a life insurance policy. Each modification is set up as an action type, and the actions are linked to the product itself. When you link the action to the product, that modification option becomes available to the policyholder. Set up the allowable actions in the Action component (for example, adding a driver is a valid action that can be linked to auto insurance product).

This diagram illustrates the process flow for policy changes:
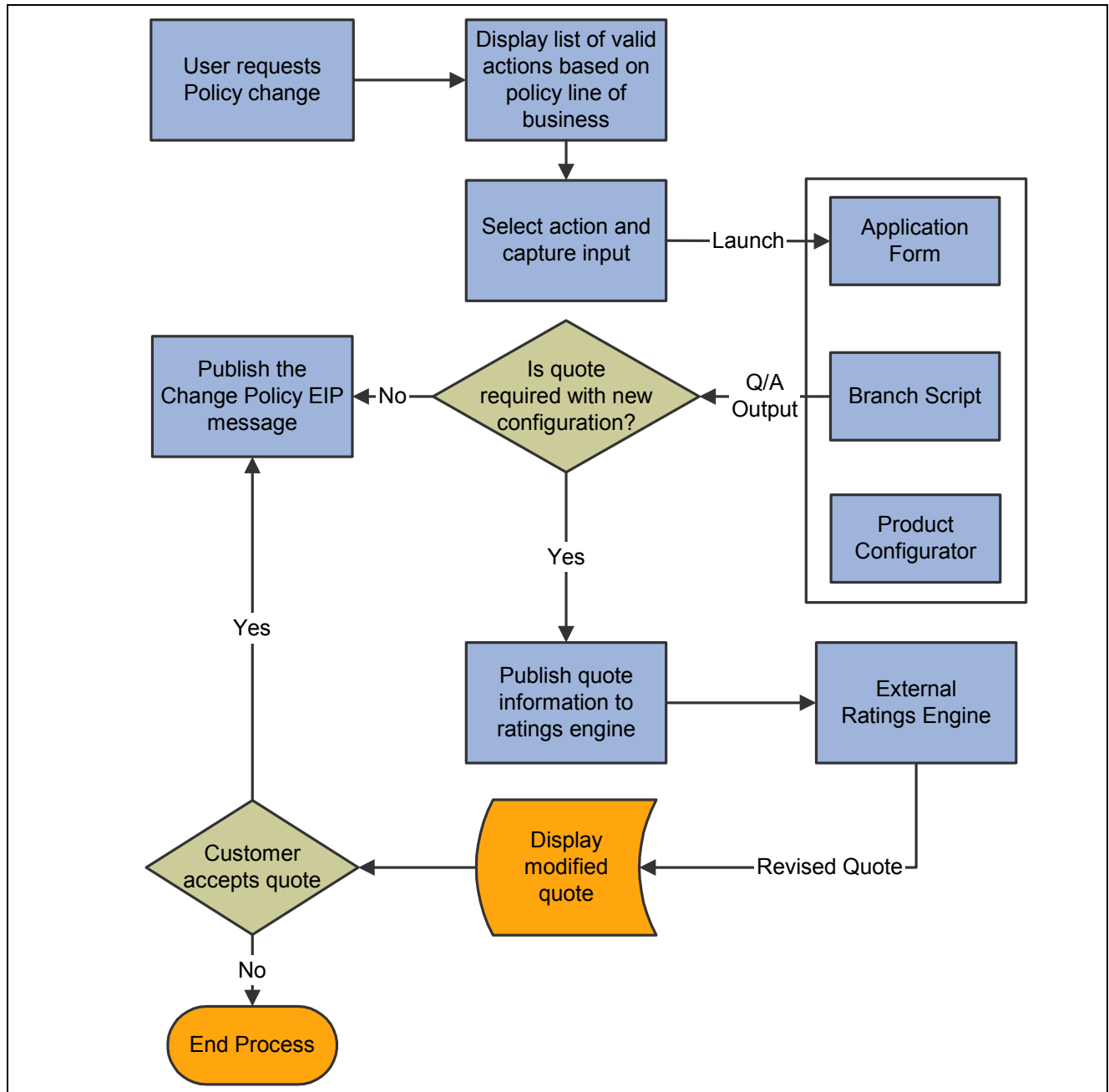
Policy change process flow

Claims

In Policy and Claims Presentment, self-service users and customer service representatives can file claims. The first notice of loss initiates the claims process by capturing the event information that eventually triggers a business project. At the end of the business project, a message is sent to the legacy system with all of the captured information.

The legacy system creates, stores, and maintains claim details. Each claim has a header and a detail section. The claim header is stored in the PeopleSoft Enterprise CRM system and is created by an asynchronous message from the legacy system to the PeopleSoft Enterprise CRM system. Claim details can be either fetched from the legacy system on request using synchronous messaging or stored in the PeopleSoft Enterprise CRM system using asynchronous messaging functionality.

The customer service representative can view the FNOL, claim header, and claim details.

This diagram illustrates the claims process:
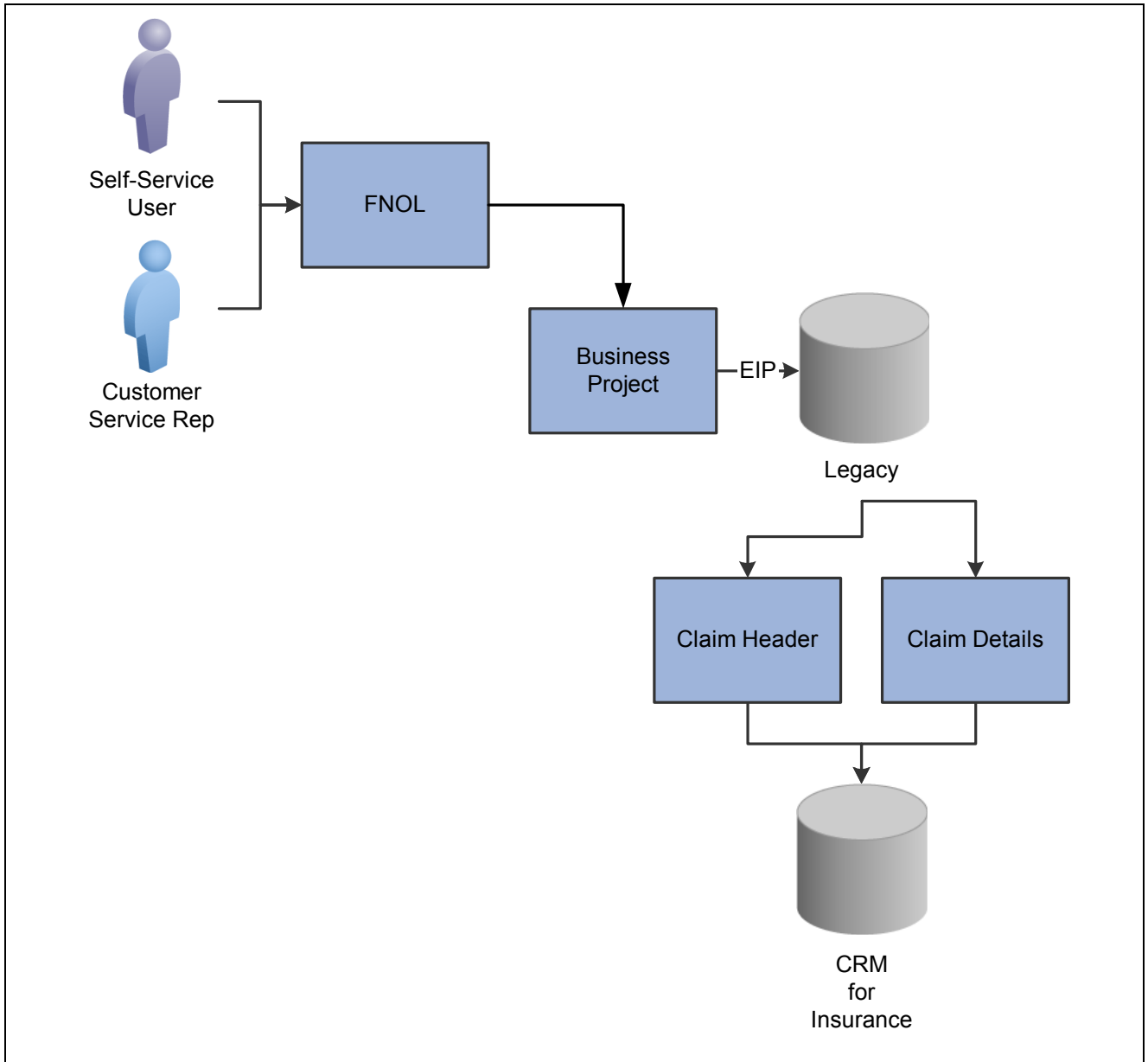
Overview of the claims process

9

First Notice of Loss

The FNOL initiates the claims process. A policy owner can create a FNOL using a customer care transaction, or a customer service representative can do so through the 360-Degree View.

For the FNOL transaction option to be available, you must associate an action of *First Notice of Loss (code FNOL)* with the product of the policy for all of the setIDs. If you do not, you cannot launch a claim. You establish association between the policy type and the mechanism application form or branch script in the product action definition. Each action is also setID driven; for each setID, you must associate this action code with the product.

A FNOL results in one or more claims and the Claim Header enterprise integration point (EIP) establishes the relationship between the FNOL and claims.

This diagram illustrates the FNOL process:
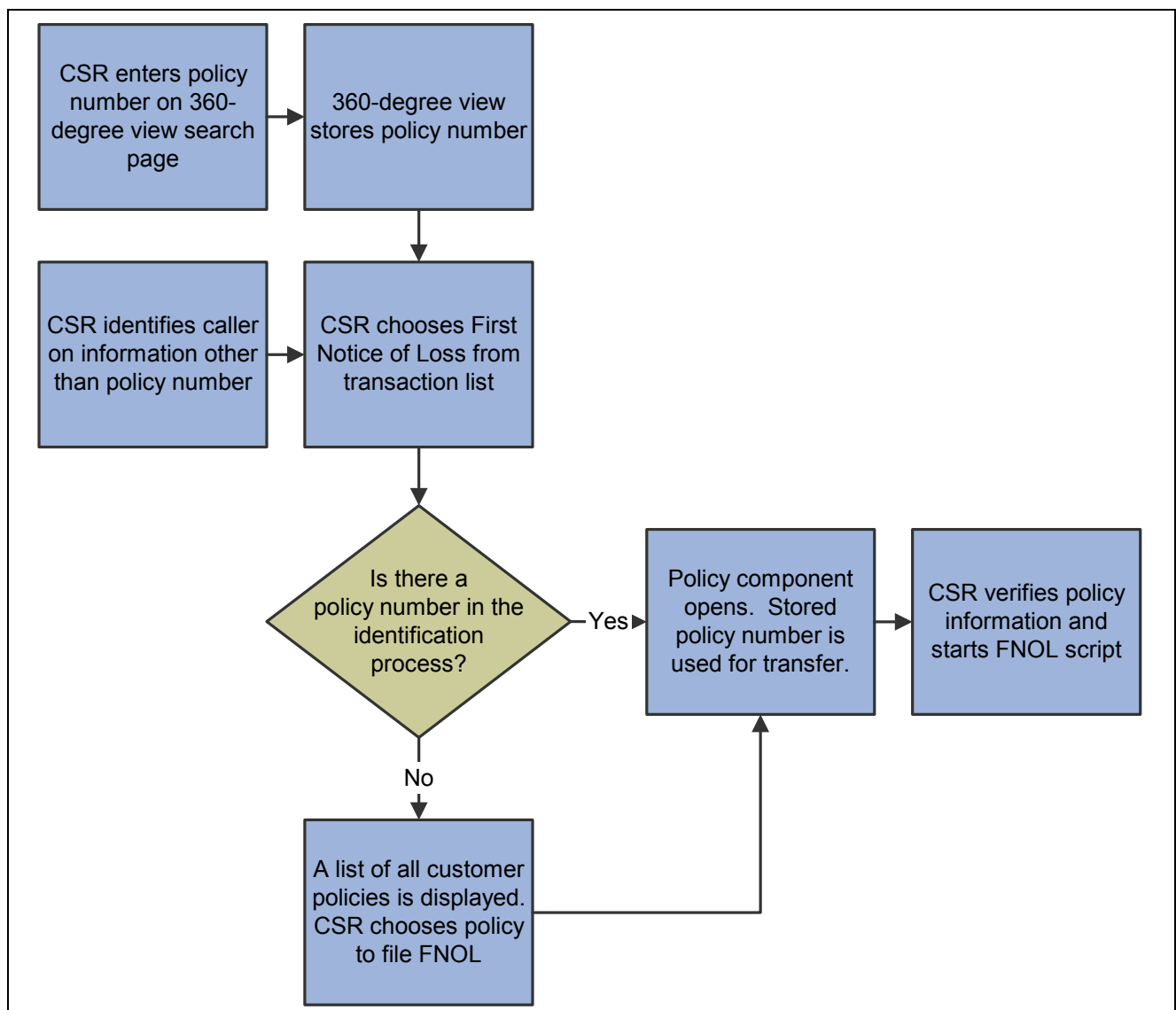
FNOL process

See Also

Claims Submission

Claims processing takes place in the legacy system; Policy and Claims Presentment gathers claims data through the FNOL process and triggers a business project before data is sent to the legacy system.

This section discusses:

• FNOL business projects.

• FNOL business project modifications.

FNOL Business Projects

Once a FNOL is created, a business project is instantiated. You may have many procedural tasks to be performed before submitting FNOL for claim processing. The business project RBI_BP_FNOL is targeted for this purpose.

Policy and Claims Presentment supplies the business project as system data. The business project is triggered when the FNOL is created. Use standard Active Analytics Framework to instantiate business projects. The delivered business project contains at least one manual task that must be completed before publishing the FNOL message to claims administration. You can add or modify steps and phases to meet your business needs. However, the delivered step that publishes the message must be the business project's last step.

Note. The FNOL business project is delivered disabled and must be enabled to initiate the FNOL process and publish the message.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Setting Up Business Projects"

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Using Business Projects"

Business Project Modifications

You can add logic to the Active Analytics Framework (AAF) as needed for the implementation:

• Define the business project.

• Define the AAF to identify the condition on which the business project will be instantiated.

  Policy and Claims Presentment delivers a simplified AAF rule to initiate the business project upon save.

• Use a PeopleSoft Application Engine program to publish the message.

  This program publishes the message with data from the branch script or application form and the policy number to the third-party system.

Claims Management

Once the FNOL data has been submitted to the legacy system and a claim has been processed, the customer service representative can access the claim header and claim details. All claims processing and administration takes place in the legacy system. The claim header is stored in PeopleSoft Enterprise CRM; claim details are either retrieved from the legacy system through the use of synchronous messaging or stored in PeopleSoft Enterprise CRM system using an asynchronous message.

CHAPTER 3

Working with Policies

This chapter discusses how to:

- Work with policies.
- Change policies.

Working with Policies

This section discusses how to:

- Establish insurance asset types.
- View insurance financial accounts.
- View relationships.
- View terms and conditions.
- View address history.
- View policies.
- View asset details.
- View billing history.
- View payment history.

To establish insurance asset types, use the RBI_ASSET_TYPE component.

Pages Used to Work with Policies

Page Name	Object Name	Navigation	Usage
Asset Type	RBI_ASSET_TYPE	Set Up CRM, Product Related, Financial Services, Asset Type	Establish categories of assets for insurance policies.
Financial Account	RBF_FIN_ACCOUNT	Customer Accounts, Review Financial Accounts, Financial Account	View detailed information about the customer's financial account for insurance.

Page Name	Object Name	Navigation	Usage
Financial Account - Relationships	RBF_ACCT_RELATIONS	Customer Accounts, Review Financial Accounts, Financial Account, Relationships	View relationships for the financial account. The account relationship message may be used to create relationships with the policy or policy owner. For example, you can establish a beneficiary relationship to the policy or you can relate the insured to the policy owner.
Terms and Conditions	RBF_ACCT_ATTR	Customer Accounts, Review Financial Accounts, Financial Account, Terms and Conditions	View the terms and conditions that are associated with the policy.
First Notices of Loss	RBI_FNOL	Customer Accounts, Review Financial Accounts, Financial Account, First Notices of Loss	View information about any FNOL on policy.
Address History	RBF_ACTADR_HIST	Customer Accounts, Review Financial Accounts, Financial Account, Address History	View the customer's address history.
View Policy	RBI_POLICY	Customer Accounts, Review Financial Accounts, Financial Account Click the View Policy button on the navigation toolbar.	View details on covered assets, coverage, deductibles, limits, and options for the policy.
Asset Details	RBI_ASSET_DETAILS	Click the Details link on the View Policy page.	View specific details of a covered asset such a property name and value.
Billing History	RBI_BILL_HIST	Select the Billing History tab in the View Policy component.	View the policy's billing history. You can define the date range for the data that the legacy system returns.
Payment History	RBI_PAY_HIST	Select the Payment History tab in the View Policy component.	View the policy payment history. Policy payment history data can be viewed by a date range for the data that the legacy system returns.

Establishing Insurance Asset Types

Access the Asset Type page.

Asset Type page

Type   Short description for the asset type. These types of assets are associated with
                                 insurance policies.

Description   Long description for the asset category.

Viewing Insurance Financial Accounts

Access the Financial Account page.

Financial Account page (1 of 3)

Insurance Account

Policy Type	Auto Insurance	Policy Name	AUTO
Policy Status	Policy is issued and available for change	Policy Version	1
Insured Name	William Brown	State	CA
Premium Amount	660.00	Payment Terms	Monthly
Carrier Name	PROGRESSIVE	Payor Name	William Brown
Product Code		Line of Business Code	Automobile - Personal
NAIC Code		Line of Business Subcode	Comprehensive General Liability
Beneficiary Name	Jennifer Brown		

Financial Account page (2 of 3)

▽ Policy Information

Current Term Amount	13000.00	Contract Term Duration	
Billing Method Code	Agency Billed	Contract Term Effective Date	02/02/2002
Producer Code		Contract Term Expiry Date	02/02/2003
Group ID	454		
Signed Date	01/02/2002	Customer Servicing Code	Agency Responsibility
Language Code		Original Inception Date	01/02/2002
Payor Code	Insured	Mailing Responsibility Code	Agency Responsibility
Signed by Code	Insured or Applicant	Rate Effective Date	01/02/2002
Renewal Payor Code	Insured	Other Insurance Company	No
Renewal Term Duration		Renewal Billing Method Code	Renew Automatically
Total Paid Loss Amount	2000.00	Renewal Term Effective Date	02/02/2003
Number of Years Loss	1	Renewal Term Expiration Date	02/02/2003
Branch Code		Total Number of Losses	1

Financial Account page (3 of 3)

Note. For insurance policies, the ATM Cards and Fees tabs are hidden. For other types of accounts, the First Notices of Loss tab is hidden.

Account Type	Displays the type of account. Values are *Checking, Savings, Credit, Insurance,* and *Investment.*
	Note. Two other tabs, ATM Cards and Fees, appear for all account types except *Insurance.*
Registration Type	Displays the account registration type.
	Under personal accounts, the values are *Individual, Joint with rights of survivorship, Tenants in common, Community property, Named beneficiary, Custodial account for minor,* and *Trust.*
	Under business accounts, the values are *Corporation, Partnership,* and *LLC.*
Registration Name	Displays the name that the insurer gave to the account while registering it.
Asset Type 1, Asset Type 2, Asset Type 3	Displays the type of assets linked with the account. The assets types are used to categorize the policy or the account.

Status	Displays the policy's status.
Begin Date and **End Date**	Display the policy's beginning and end dates.
Last Statement Date	Displays the issue date of the last statement.
TIN Type (tax identification number type)	Displays the taxpayer identification type. Values are *Social Security Number* and *Federal Employer ID*.
	For personal policies, this field is named National ID Type, and the available values depend on the Country value.
Tax ID	The customer's tax identification number entered in the Consumer component.
Policy Type	Displays the specific insurance-policy type.
Policy Status	Displays the policy's current status. Values are *Issued and available for change, Not in force, Has been rated, Quoted and awaiting review, Submission has been quoted but not bound, Non renew,* and *Cancel*.
Insured Name	Displays the insured's name. The customer may not be the insured but a beneficiary or a contact of the insured.
Premium Amount	Displays the amount of the premium for the policy.
Carrier Name	Displays the policy carrier's name.
Product Code	Displays a company-unique code that indicates the policy's product classification.
LOB Code (line of business code)	Displays a code that identifies the line of business classification. This element uses the line of business code list.
Policy Name	Displays the name that the insurer gave to the policy.
Policy Version	Displays a number or other identifier with which the company identifies this version of the policy.
State	Displays the state in which the policy was issued.
Payment Terms	Displays the time frame, such as monthly, semiannual, or annual, for the premium payment.
Payor Name	Displays the name of the person or entity who is paying for the policy.
NAIC Code	Displays an industry code that uniquely identifies an organization that is chartered under state or provincial laws to act as an insurer.
LOB Subcode (line of business subcode)	Displays the line of business subcode, if applicable.
Current Term Amount	Displays the total gross amount including premiums, plus taxes, fees, discounts, surcharges, and so on for the current term. When a policy is issued for its normal full term, this value is the full term amount at inception.
Contract Term Duration	Displays the contract's duration in units.
Contract Term Effective Date	Displays the period for the contract, policy, binder, and so on.
Contract Term Expiry Date	Displays the period for the contract, policy, binder, and so on.

Billing Method Code	Displays a code that identifies whether the policy is to be billed directly (by company) or through an agency.
Group ID	Displays the identifier for the group or association for a policy that is written as part of group or association business.
Customer Servicing Code	Displays a code that identifies who services customer calls for the associated policy.
Signed Date	Displays the date when the application form was signed.
Original Inception Date	Displays the date when this insurer first issued a policy to the insured.
Language Code	Displays a code that indicates the language in which the policy is written.
Mailing Responsibility Code	Displays a code that identifies the organization that is responsible for mailing the policy and any related materials to the insured.
Payor Code	Displays a code that identifies the entity who is paying for the policy.
Rate Effective Date	Displays the rate's effective date.
Signed by Code	Displays a code that identifies or certifies that the signature-required application or endorsement has been signed and that the agent has the signed document.
Other Insurance Company Code	Displays a code that indicates if the insured is known to have other insurance policies with the insurer on this policy, and if additional information is available.
Renewal Payor Code	Displays a code that identifies the person or entity who is paying for the policy renewal.
Renewal Billing Method Code	Displays a code that indicates whether the renewed policy is to be billed directly (by company) or through an agency.
Renewal Term Duration	Displays the renewal policy's term.
Renewal Term Expiration Date	Displays the date that coverage under the renewal policy ends.
Renewal Term Effective Date	Displays the date that coverage under the renewal policy begins.
Total Number of Losses	Displays the total number of losses that occurred for the past number of years as you specify in the Number of Years Loss Info field. This field applies to P&C.
Total Paid Loss Amount	Displays the total amount paid for the losses that are incurred during the period that you define in the Number of Years Loss Info field. This field applies to P&C.
Number of Years Loss	Displays the number of years of loss information that the insurer requires. This field applies to P&C.

Note. System administrators can use Insurance Translate Values to define valid prompt values for various fields in the application. The navigation is Set Up CRM, Product Related, Financial Services, Insurance Translate Values. Insurance Translate Values enable administrators to add, remove, or change values without logging into PeopleSoft Application Designer. This capability applies to both Financial Account and Policy pages (Agent-facing and Self-Service). The component name is RBI_XLAT_VALUE.INS.

See *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook*, "Setting Up Industry-Specific Functionality".

Viewing Relationships

Access the Financial Account - Relationships page.

Financial Account - Relationships page

The Relationships page displays the relationship between financial accounts and other business objects.

See *PeopleSoft Enterprise CRM 9 Business Object Management PeopleBook*, "Working with the Relationship Viewer".

Viewing Terms and Conditions

Access the Financial Account - Terms and Conditions page.

Financial Account - Terms and Conditions page

The system displays the terms and conditions associated with the financial account.

Viewing First Notices of Loss

Access the First Notices of Loss page.

First Notices of Loss page

| Transaction Number | Click to access the First Notice of Loss information. |

Viewing Address History

Access the Address History page.

Address History page

The system displays the address that is associated with the financial account.

Viewing Policies

Access the View Policy page.

View Policy page

The system displays details about coverage of policy assets or insured items. The policy creation EIP populates the fields.

Asset Type	Displays the type of covered asset or insured item.
Details	Click to view details about the covered asset.
Asset Description	Displays a description of the covered asset.
Coverage Code	Displays the coverage type. This information comes from the Product table.
Start Date and **End Date**	Displays the beginning and end dates for the coverage.

Current Term Amount	Displays the current coverage under the policy.
Rate	Displays the rate for this coverage. The rate for each coverage is included in the total premium.
Premium Basis Code	Displays a code that indicates the basis for determining the premium.
Territory Code	Displays the territory that is applicable to the coverage. The territory may be used in determining the rate or premium.
Iteration Number	Displays the iteration of the coverage information.

The system displays the details of deductibles, limits, and options for each policy asset in the Deductibles/Limits/Options group box.

Deductible Amount	Displays the portion of the claim that is not insured under the policy. The insurer is responsible for the amount over the deductible up to the policy limit. The deductible applies to each covered loss that appears in the Deductible Applies to Code column.
Currency Code	Displays the currency that is used for the deductible or limit amount.
Deductible Basis Code	Displays the deductible's basis, such as per loss or per year.
Deductible Type Code	Displays the deductible type.
Deductible Applies to Code	Displays the specific claim to which the deductible applies.
Limit Amount	Displays the limit of the coverage.
Limit Basis Code	Displays the limit's basis, such as the total limit of liability.
Limit Applies to Code	Displays to what the limit applies, whether it is the specific coverage or the entire policy.
Valuation Code	Values are *Appraisal, Comparable Sales,* and *Sales Receipt.*
Option Code	Displays the option that is associated with the coverage.
Option Type Code	Displays the option type.
Option Value	Displays the value of the option.

Note. System administrators can use Insurance Translate Values to define valid prompt values for various fields in the application. The navigation is Set Up CRM, Product Related, Financial Services, Insurance Translate Values. Insurance Translate Values enable administrators to add, remove, or change values without logging into PeopleSoft Application Designer. This capability applies to both Financial Account and Policy pages (Agent-facing and Self-Service). The component name is RBI_XLAT_VALUE_INS.

See *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook*, "Setting Up Industry-Specific Functionality".

Viewing Asset Details

Access the Asset Type Details page.

Asset Type Details page

| **Property Name** | The description of the type of property. Every insured asset has properties. |
| **Value of Property** | Property values of the associated insured asset. |

Viewing Billing History

Access the Billing History page.

Billing History page

Start Date and **End Date**	Enter the date range for the billing history information.
Get Billing History	Click to retrieve the billing history.
Bill ID	Displays the bill ID from the legacy system.
Bill Status	Displays the bill status from the legacy system.

Viewing Payment History

Access the Payment History page.

Payment History page

Start Date and **End Date**	Enter the date range for the payment history.
Get Payment History	Click to generate the payment history.
Payment ID	Displays the company ID that is used for the payment.
Payment Status	Displays the payment status.
Payment Method	Displays the payment method.

Changing Policies

Policy owners can modify their policies. Policy changes can be made by the customer service representative through the 360-Degree View or by the policy owner as a self-service transaction. Certain types of policy changes can result in premium changes. For those types, a new quote is given to the end user following the policy change request. If the customer agrees to the new quote, then a message is sent to the legacy system to actually change the policy. For other types of changes, once all the policy change detail is captured, the message is published to the legacy system. After the policy is changed in the legacy system, an update policy message is sent to update the policy in the CRM system.

To change policies, use the Action (RBT_ACTION) component.

This section discusses how to:

• Set up actions.

• Change policies.

• Run the policy change script.

Pages Used to Change Policies

Page Name	Object Name	Navigation	Usage
Action	RBT_ACTION	Set Up CRM, Product Related, Order Capture, Action	Define the action or changes that can be performed on specific coverages, and select the appropriate application method for the change.
Change Policy	RBI_CHG_POLICY	Select Change Policy on the 360-Degree View page and click Go.	Select the policy number and the modification type for the change.

Setting Up Actions

Access the Action page.

Action page

Action Code	Displays the action code that you entered on the search page.
Action Name	Enter the name of the action or change.
Action Type	Select an action type.
Re-Quote	Select whether the action requires a re-quote for a changed premium.
Action Reference	This field does not apply to insurance.
Do Not Publish to Billing	Select if you do not want the application published to the billing system.
Application Method	Select the application method to be associated with the change. Values are *Application Form*, *Configurator,* and *Branch Script.*
Script Name	The script associated with the change when the application method value of *Branch Script* is selected.
Form Name	The form associated with the change when the application method value of *Application Form* is selected.
Description	The configurator model associated with the change when the application method value of *Configurator* is selected.

Changing Policies

Access the Change Policy page.

Change Policy page

Account Number	Select the policy number to be changed. The system displays only those policies that the customer owns.
Modification Type	Select the change request for the policy. Modification types are the action types that are attached to the policy. For example, automobile insurance polices allow you to *Add Driver, Change Address, Change Vehicle,* or *Delete Driver.*
Change Policy	Click to launch the associated branch script, PeopleSoft Enterprise Advanced Configurator link, or application form.

Running the Change Policy Script

Access the Execute Script page.

Execute Script page

The Execute Script page displays the application form, the PeopleSoft Enterprise Advanced Configurator link, or the branch script that is associated with the policy change. This example shows one model, but any change model can be used.

See *PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook*, "Running Scripts".

CHAPTER 4

Working with Claims

This chapter discusses how to:

• Manage first notice of loss (FNOL) through a customer service representative.

• View claims.

See Also

Chapter 2, "Understanding Policies and Claims," Claims Submission, page 11

Managing FNOL Through a Customer Service Representative

This section discusses how to:

• Initiate the FNOL.

• Confirm policy details.

• Create the FNOL.

• Review the FNOL.

See Also

Chapter 6, "Working with Policy and Claims Presentment Self-Service," page 43

Pages Used to Manage FNOL Through a Customer Service Representative

Page Name	Object Name	Navigation	Usage
360-Degree View	RB_TD_AGENT_VIEW	Enter the customer's name, contact's name, social security number or tax identification number, or policy number on the 360-Degree View search page.	Review customer information.
View Policy,	RBI_POLICY	Customer Accounts, Review Financial Accounts, View Policies On the 360-Degree View page, select a *Policy* from the Policies grid.	Confirm the details of the policy, including covered assets, coverages, limits, deductibles, and options before creating the FNOL.
First Notice of Loss,	RBI_FNOL_PG	On the 360-Degree View page, select *Add First Notice of Loss* from the Actions field and click Go. Select the policy. On the Policy page, click the Create FNOL button. Financial Services, First Notice of Loss	Report a new FNOL including loss details.

Initiating the FNOL

Access the 360-Degree View page.

360-Degree View page

Actions	Select *Add First Notice of Loss* to access the Policy Details page to confirm details. Click the Create FNOL button on the toolbar to access the FNOL script.
First Notice of Loss	Click the First Notice of Loss link in the Activities tree to access an existing FNOL.

See *PeopleSoft Enterprise CRM 9 Industry Application Fundamentals PeopleBook*, "Understanding the 360-Degree View for Industries".

Confirming Policy Details

Access the View Policy page.

View Policy page

A customer service representative can view the covered assets on the policy and the details about assets, coverages, deductibles, limits, and options.

Creating the FNOL

Access the Create First Notice of Loss page.

Create First Notice of Loss page (1 of 2)

Create First Notice of Loss page (2 of 2)

Note. These examples show a completed FNOL. You must set up an application form or branch script to create a FNOL. The name of this Application form page is RBI_FNOL_APFOR_PG1.

The system displays customer and policy information under Personal Details on the Create First Notice of Loss page.

Policy Number	Enter the policy number, which comes from the Financial Account component.
Policy Name	Enter the policy name, which comes from the Financial Account component.
Policy Status	Enter the policy status, which comes from the Financial Account component.
Beneficiary Name	Enter the beneficiary who is designated for the policy, if applicable.
Insured Name	Enter the name of the insured, who may or may not be the policy owner.
Registration Name	Enter the name that the insurer gave to the account while registering it.
Owner Name	Enter the policy owner's name.
State	Enter the state of issue for the policy.
Policy Number	Enter the policy number, which comes from the Financial Account component.
Save for Later	This field should not be used when you create a FNOL.
Driver's License	Enter the insured driver's license number.
DL Expiry Date (driver's license expiry date)	Enter the driver's license expiration date.
Accident Date	Enter the date of the accident.
Details	Enter details of the loss.

Note. The fields under Additional Information on the Create First Notice of Loss page are delivered as sample data. You can modify the page to meet your business needs.

At the end of the FNOL process, a FNOL number is given to the customer. It appears on the First Notice of Loss page. The FNOL number is mapped to one or more claim numbers.

Reviewing the FNOL

Access the First Notice of Loss page.

First Notice of Loss page

Transaction Type	Indicates the type of transaction, such as *First Notice of Loss*.
Policy Number	Policy number associated with the FNOL
Transaction Status	Indicates the status of the FNOL
Review Information	Link to application form or branch script completed to create this FNOL.
Related Actions	Business Project and actions associated with the claim. At the successful completion of all the tasks of this business project, a message is sent to the legacy system to create the claims.
Claims	Claims created as a result of this FNOL being created.

Reviewing Claims

This section discusses how to:

• Review claims.

• View claim details.

• Add notes to claims.

Pages Used to Review Claims

Page Name	Object Name	Navigation	Usage
Review Claim	RBI_CLAIM_HEADER	Financial Services, Review Claim Click the Claim link on the 360-Degree View page.	View basic claim information, including claims resulting from reported FNOLs. Claim headers are created in PeopleSoft CRM using an inbound asynchronous EIP message from the legacy system. The claim header is saved in the PeopleSoft Enterprise CRM system.
Review Claim Details	RBI_CLAIM_HEADER	Click View Claim Details link on the Claim page.	View current details about the claim. Retrieve claim details from the legacy system through asynchronous messaging using the claim details EIP or using a synchronous message. The system can be configured to use the preferred mechanism.
Claim Notes	RBI_CLAIM_NOTES	Click Claim Notes tab on the Claim page.	Add notes or attachments to the claim.

Reviewing Claims

Access the Review Claim page.

Claim Details | Claim Notes

Claim Header

Claim Number	GC-647-89	**Claim Date**	09/09/2002
Status	Open	**Description**	Claim filed for auto accident
Account Number	100001	Auto Insurance Policy	
Customer	William Brown		
Contact Name			

First Notice of Loss

No First Notice of Loss Found

[View Claim Details]

Review Claim page

Claim Number	Displays the unique identifier for the claim.
Status	The system displays the current status for the claim. The claim status is updated by the EIP.

Claim status is set up in Set Up CRM, Product Related, Financial Services, Claim Status. (To set up claim status, use the RBI_CLAIM_STATUS component.) Delivered values are *Open, Closed,* and *Paid.* These values are system data and must not be deleted.

Account Number   Displays the policy number for the claim.

Customer   Displays the customer's name. This should be the policy owner.

Contact Name   Displays the name of the contact who represents the customer, if applicable. This could be a contact for a consumer, company, partnership, or alternate capacity.

Claim Date   Displays the date when the claim was filed.

Description   Displays a brief description of the claim.

First Notice of Loss   FNOL that triggered the creation of the claim.

View Claim Details   Click to view detailed information about the claim.

Viewing Claim Details

Access the Claim - Claim Details page.

Claim - Claim Details page

This page includes claim details, adjuster information, and payment information. The claim details EIP retrieves the information from the legacy system. The setup of the claim details EIP determines what information appears on the Review Claim Details page.

See <u>Chapter 5, "Understanding Enterprise Integration Points for Policy and Claims Presentment," page 37</u>.

Adding Notes to Claims

Access the Claim Notes page.

Claim Notes page

This page enables the agent to add notes and attachments to the claim.

Understanding Enterprise Integration Points for Policy and Claims Presentment

This chapter discusses enterprise integration points (EIPs) for Policy and Claims Presentment.

EIPs for Policy and Claims Presentment

This section discusses:

- Policy creation EIP.
- Policy application EIP.
- Billing history EIP.
- Payment history EIP.
- Change policy EIP.
- First notice of loss (FNOL) EIP.
- Claim header EIP.
- Claim detail display EIP.

These EIPs are designed for the insurance industry.

Policy Creation EIP

When a customer completes the policy application, the PeopleSoft CRM system sends the completed application information to the legacy system. The legacy system then creates the policy in its own system and performs all the checks and business processes that are required. Next, the legacy system sends a message to Integration Broker to create the policy in the CRM system. Translation is not required for the incoming message, but a subscription code is required to read the message content and create the policy and associated records in the PeopleSoft CRM table structure. The code uses the policy number to determine whether this is a new or existing policy. For a new policy, the system inserts new sets of data into the CRM tables. For existing policies, the system issues an update statement on the account header part and deletes and reinserts policy detail and coverage data in the remaining tables. The message structure includes policy information, covered assets, covered asset details, coverages, deductibles, options, and limits.

This table describes the Create Policy EIP:

EIP Name	Description	Message Name	Direction of Integration	Technology
Create Policy	Receive policy information.	RBI_POLICY	CRM ← External System	Integration Broker

Policy Application EIP

The policy application EIP is used to send the information captured in the application process to the legacy system where the policy is created.

This table describes the Request Policy Creation EIP:

EIP Name	Description	Message Name	Direction of Integration	Technology
Request Policy Creation	Send accepted quote to legacy system for policy creation.	RBF_SALES_ ENTRY	CRM → External System	Integration Broker

Billing History EIP

Billing data is stored and maintained in an external system. The billing history EIPs request and receive billing history information from external systems.

This table describes the Billing History EIPs:

EIP Name	Description	Message Name	Direction of Integration	Technology
Billing History	Synchronous request to obtain the billing history from the external system.	RBI_BILLING_ HISTORY_REQ	CRM → External System	Integration Broker

EIP Name	Description	Message Name	Direction of Integration	Technology
Billing History	Synchronous reply to billing history request from the external system.	RBI_BILLING_ HISTORY_RES	External System → CRM	Integration Broker
Billing History	If the customer chooses to store billing data in the CRM system as well, then this asynchronous message is used. It is indicated by clearing the synchronous messaging checkbox in Account Options under Set Up CRM, Product Related, Financial Services, FSI Options. This message is asynchronous.	RBI_BILLING_ HISTORY	External System → CRM	Integration Broker.

Payment History EIP

Payment data is stored and maintained in an external system. The payment history EIPs request and receive payment history information from external systems. Payment history is available in the Financial Account record.

This table describes the Payment History EIPs:

EIP Name	Description	Message Name	Direction of Integration	Technology
Payment History	Synchronous request to obtain payment history from external system.	RBI_PAYMENT_ HISTORY_REQ	CRM → External System	Integration Broker

EIP Name	Description	Message Name	Direction of Integration	Technology
Payment History	Synchronous Reply to payment history request from external system.	RBI_PAYMENT_ HISTORY_RES	External System → CRM	Integration Broker
Payment History	If the customer chooses to store payment data in the CRM system as well, then this asynchronous message is used. It is indicated by clearing the synchronous messaging checkbox in Account Options under Set Up CRM, Product Related, Financial Services, FSI Options This message is asynchronous.	RBI_PAYMENT_ HISTORY	External System → CRM	Integration Broker

Change Policy EIP

The change policy EIP is used to communicate the policy modification messages to the legacy system. If the Policy Modification requires a new quote, then a quote is generated and it follows the sales entry process.

This table describes the Change Policy EIPs:

EIP Name	Description	Message Name	Direction of Integration	Technology
Change Policy Request	Asynchronous request to change policy to external system.	RBF_SALES_ ENTRY	CRM → External System	Integration Broker
Update Change Policy Status	Asynchronous reply to Policy change request from external system.	RBI_CHANGE_ POLICY_STATUS	External System → CRM	Integration Broker

FNOL EIP

The FNOL EIP is used to publish the message when a FNOL is saved in the PeopleSoft CRM system and the associated business project tasks are completed. The message consists of the FNOL number, policy number, and the questions and answers from the branch script or application form. The FNOL number is stored and mapped to a claim in the PeopleSoft CRM system.

This table describes the FNOL EIP:

EIP Name	Description	Message Name	Direction of Integration	Technology
Publish FNOL Details	Sends the FNOL information from the PeopleSoft CRM system to the claims administration system.	RBI_ISSUE_ PUBLISH	CRM → External System	Integration Broker

Claim Header EIP

The claim header EIP is used to create the claim header in the Policy and Claims Presentment system. This one-way message creates the claims in the CRM system that was created in the legacy system as a result of a FNOL . One or more claims may be generated from a FNOL. The subscription code creates the claim records and establishes the relationship between the FNOL and the claim.

This table describes the Claim Header EIP:

EIP Name	Description	Message Name	Direction of Integration	Technology
Get Claim Header	Receive claim information.	RBI_CLAIM_HDR	CRM ← External System	Integration Broker

Claim Detail Display EIPs

The claim detail display EIPs retrieve claims data from the claims system and display the data on the View Claim page. This synchronous message retrieves the claim header number and claim detail.

This table describes the Claim Detail EIPs:

EIP Name	Description	Message Name	Direction of Integration	Technology
Get Claim Details	Synchronous request to obtain claim details from external system.	RBI_CLAIMNO_ RES	CRM ← External System	Integration Broker
Get Claim Details	Synchronous reply to claim details request from the external system. This synchronous message retrieves real-time claim information.	RBI_CLAIMNO_ SYNC	External System → CRM	Integration Broker
Get Claim Details	If the customer chooses to store claim data in the CRM system as well, then this asynchronous message is used. It is indicated by clearing the synchronous messaging checkbox in Account Options under Set Up CRM, Product Related, Financial Services, FSI Options. This message is asynchronous.	RBI_CLAIM _DETAILS	External System → CRM	Integration Broker

CHAPTER 6

Working with Policy and Claims Presentment Self-Service

This chapter provides an overview of Policy and Claims Presentment self-service, lists prerequisites, and discusses how to:

• Change policies in self-service.

• Report a First Notice of Loss (FNOL) in self-service.

• View claims in self-service.

Understanding Policy and Claims Presentment Self-Service

This section discusses:

• Self-service access.

• Self-service management.

Self-Service Access

Two types of self-service users can access the site:

• Guest users.

• Registered users.

Guest User Access

When users first access the site, they are automatically logged in using the INSGUEST ID that is identified in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access.

Then, users can sign in with their own user ID and password to further identify themselves and get additional access. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics, such as the site language.

If you have more than one guest ID, users can switch to a different one by selecting a value from the drop-down list box on the page. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics.

Registered User Access

Visitors can register as personal users by clicking the Personal User Registration link on the Sign In page and establishing a personal user ID. This sign-in prompts the system to create a consumer record for that person, and the registration causes the system to create a user ID that is associated with the new consumer record. The visitor can use this ID to sign in on subsequent visits to the site. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options and, in some cases, page appearance depend on the user's role or roles.

Users who forget their passwords can click the Password Hint link to request a new password.

Self-Service Management

This table describes the self-service menu items:

Menu Item	Description
Policy Administration	Modify policies.
Find Products	View or search product catalogs, view information about product offerings, and request quotes online.
Profile	Change the username, password, default address, phone number, and email address; view and maintain an address book; and view internal contact information.
Customer Selection	Select the role for the current transaction.
Contact Us	Create an email that will be directed to the appropriate area in the organization.
Customer Care	Create an FNOL, update claims, and log complaints.

Prerequisites

Self-service functionality for Policy and Claims Presentment is based on core functionality for case and product catalogs. This table lists chapters in this PeopleBook in which you can find detailed information about setting up and managing self-service:

Process	Details	More Information
Setting up customer self-service	• Define guest IDs. • Set up user registration features. • Set up Contact Us features.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Setting Up Customer Self-Service".
Working with customer self-service	• Sign in to PeopleSoft self-service. • Register as a personal user. • Maintain name and sign-in information. • Maintain a customer's contact and address information. • Maintain a customer's address book. • View internal contacts. • Send messages.	See *PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook*, "Working with Customer Self-Service Transactions".
Configuring self-service	• Hide specific fields in self-service case components. • Configure 'Contact me' notifications. • Associate solutions with reasons that self-service users provide for closing cases. • Update descriptions of the predefined searches that the users of self-service components use. • Set up FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Configuring Self-Service Applications".
Working with self-service transactions	• Create an FNOL. • Manage existing FNOL. • Search for solutions. • Use FAQs and troubleshooting guides.	See *PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook*, "Working with Self-Service Application Transactions".

Changing Policies in Self-Service

The self-service user can make changes to policies online.

This section discusses how to administer policies in self-service.

Pages Used to Change Policies in Self-Service

Page Name	Object Name	Navigation	Usage
Policy Administration	RBI_CHG_POLICY_SS	Click the Policy Administration link on the main menu in self-service.	Access the Change Policy component.
Change Policy	RBF_PROD_APPLY_SA	Click the Change Policy button on the Policy Administration page in self-service.	Modify policies.

Administering Policies in Self-Service

Access the Policy Administration page.

Policy Administration page

Account Number	Select a policy number that is associated with the user's role. You can modify only those policies that are authorized for the user in the security matrix.
Modification Type	Select the action that is associated with the product. This field defines the changes a policy owner can make to a policy.
Change Policy	Click to submit the policy change request. When the user clicks this button, more information will be captured to complete the change and a confirmation number is returned. If the Policy change requires re-quoting, a new quote provided. After the quote is accepted and purchased, a change policy request is sent to the legacy system to modify the policy. The legacy system updates the policy and sends the changes back to the PeopleSoft Enterprise CRM system. The PeopleSoft Enterprise CRM system subscribes to the published changes to the policy and eventually updates the policy.

Reporting a FNOL in Self-Service

Access the policy through the My Policies pagelet to create a FNOL.

This section discusses how self-service users:

• Review financial account information.

• Review insurance policy details.

• Report FNOL.

Pages Used to Report a FNOL in Self-Service

Page Name	Object Name	Navigation	Usage
Financial Account	RBF_FIN_ACCOUNT_SS	Click the policy number link on the My Policies pagelet in self-service.	Review policy details.
Insurance Policy	RBI_POLICY_SS	Click the View Policy button on the Financial Account page in self-service.	Review covered assets, coverages, deductibles, limits, and options for the selected policy.

Reviewing Financial Account Information

Access the Financial Account page.

Financial Account page

View Policy   Click to access the Insurance Policy page.

View Claim Summary   Click to access the Claim Summary page.

See <u>Chapter 3, "Working with Policies," page 13</u>.

Reviewing Insurance Policy Details

Access the Insurance Policy page.

Insurance Policy page

View Billing History   Click to access detailed billing history by date range.

View Payment History   Click to access detailed payment history by date range.

Change Policy   Click to initiate a policy modification request such as changing an address or
                                  adding an authorized driver.

Create First Notice of Loss   Click to create a new FNOL.

Details   Click to access asset information details.

Reporting FNOL

Access the Create First Notice of Loss page.

Create First Notice of Loss

①—②   Next

Personal Details

Policy Information

Policy Number	21017
Policy Name	AUTO POLICY
Policy Status	ISSUED
Beneficiary Name	JENNIFER PEPPER
Insured Name	STAN PEPPER
Registration Name	Pepper Auto Acct
Owner Name	William Brown
State	CA 🔍

Create First Notice of Loss page (1 of 2)

Create First Notice of Loss

①—②   Previous

Additional Information

Driver and Loss Information

Driver's License	A0000000
Expire Date	05/05/201 📅
Accident Date	01/12/200 📅
Details	Single vehicle accident. Slick pavement due to wet road conditions. No injuries reported.

Create First Notice of Loss page (2 of 2)

Policy Number	Enter the policy number.
Policy Name	Enter the policy name.
Policy Status	Enter the policy status.
Beneficiary Name	Enter the beneficiary who is designated for the policy, if applicable.
Insured Name	Enter the name of the insured, who may or may not be the policy owner.

Registration Name	Enter the name that the insurer gave to the account while registering it.
Owner Name	Enter the policy owner's name.
State	Enter the state of issue for the policy.
Save for Later	Do not use this field when you create a FNOL.
Driver's License	Enter the insured driver's license number.
DL Expiry Date (driver's license expiration date)	Enter the driver's license expiration date.
Accident Date	Enter the date of the accident.
Details	Enter details of the loss.

Viewing Claims in Self-Service

The self-service user can view claims information using the Claims link on the self-service homepage.

This section discusses how to review claim details.

Page Used to View Claims in Self-Service

Page Name	Object Name	Navigation	Usage
Review Claim	RBI_CLAIMHDR_SS_PG	Click the claim number link on the My Claims pagelet in self-service.	Review claim details and access the FNOL that is associated with the claim.

Reviewing Claim Details

Access the Review Claim page.

Review Claim
Claim Header

Claim Number	GC-647-89	**Claim Date**	09/09/2002
Status	Open	**Description**	Claim filed for auto accident
Account Number	100001	Auto Insurance Policy	
Customer	William Brown		
Contact Name			

First Notice of Loss

No First Notice of Loss Found

[View Claim Details]

Details   Find | View All   First ◀ 1 of 1 ▶ Last

```
CLAIM STATUS DATE: 04-04-2002
REPORTED DATE: 01-23-2002
LOSS DATE: 01-22-2002
LOSS TIME: 11:30 AM
WHERE OCCURRED: Northbound I-93 Burlington exit ramp.
PREVIOUSLY REPORTED: No
INCIDENT DESCRIPTION: Vehicle 1 driven by insured party John Smith struck Vehicle 2 driven by Matthew Jones at the north
bound Interstate 93 exit ramp in Burlington, MA. Vehicle 1 sustained front-end body and engine damage, and driver 1
sustained a broken right leg. Vehicle 2 sustained rear-end body damage and suspension and drive train damage. Driver 2
was not apparently injured. State Police were notified. Both vehicles were towed to Al's Body Shop in Arlington. Driver 2
claims that personal property he left in his car was missing when he went back to the body shop to retrieve it.
ADDITIONAL CLAIM INDICATOR: Yes
VIOLATIONS/CITATIONS INDICATOR: Yes
PROBABLE INCURRED AMOUNT: 32000 USD
--------------------------------------------------------------
ADJUSTER SECTION: (Section may repeat)
Adjuster ID 1: HC-9938
```

Review Claim page

Claim Number	Displays the unique identifier for the claim.
Account Number	Displays the policy number for the claim.
Customer	Displays the customer's name, which should be the policy owner.
Contact Name	Displays the name of the contact who represents the customer, if applicable. This name could be a contact for a consumer, company, partnership, or someone in an alternate capacity.
Claim Date	Displays the date when the claim was filed.
Description	Displays a brief description of the claim.
First Notice of Loss	FNOL that triggered the creation of the claim.
View Claim Details	Click to view detailed information about the claim.

Delivered Web Services and Service Operations

This appendix discusses the delivered web services and service operations for policies and claims.

Delivered Web Services

This section discusses:

- The policy web service.
- The claims web service.
- How to view the message elements.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services"

Policy Web Service

A web service is available with the following operations:

- Create Policy

  Takes insurance policy data as input and creates an insurance policy record and associated child records in the CRM system.

- Get Policy

  Returns a policy record and its associated child record based on a passed unique identifier.

- Search Policy

  Returns a list of policy records and their associated child records based on criteria field values passed via the input message.

- Update Policy

  Modifies the attributes of the policy structure.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	Operation Type	Request Message	Response Message
Create Policy (RBI_POLICY_CREATE)	Synchronous	RBI_POLICY_CREATE_REQ	RBI_POLICY_CREATE_RES
Get Policy (RBI_POLICY_GET)	Synchronous	RBI_POLICY_GET_REQ	RBI_POLICY_GET_RES
Search Policy (RBI_POLICY_SEARCH)	Synchronous	RBI_POLICY_SEARCH_REQ	RBI_POLICY_SEARCH_RES
Update Policy (RBI_POLICY_UPDATE)	Synchronous	RBI_POLICY_UPDATE_REQ	RBI_POLICY_UPDATE_RES

Claims Web Service

A web service is available with the following operations:

• Create Claim

Takes claim related data as input and creates a claim record and associated child records in the CRM system

• Update Claim

Takes claim information as input and updates the claim data in the CRM system.

This table provides the technical names, operation type, and messages names of the service operations that are related to the web services:

Service Operation	Operation Type	Request Message	Response Message
Create Claim (RBI_CLAIM_CREATE)	Synchronous	RBI_CLAIM_CREATE_REQ	RBI_CLAIM_CREATE_RES
Update Claim (RBI_CLAIM_UPDATE)	Synchronous	RBI_CLAIM_UPDATE_REQ	RBI_CLAIM_UPDATE_RES

Viewing the Message Elements

You can view the elements and fields that are included in each operation message through PeopleTools.

To view a list of field names and aliases for a particular message:

1. Select PeopleTools, Integration Broker, Integration Setup, Messages.
2. Enter *RBF* or *RBI* in the Message Name field and click Search.

    The system lists all the messages that are related to financial services or insurance.
3. Select the message you want to view.
4. Click the message name link under the Parts grid.

    The system opens the Message Definition page in a new browser.

5. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

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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