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Elevate: FIN - Glossary of Terms [1]

Activity Guide

List of tasks or procedures that need to be performed in order to complete a specific transaction in PeopleSoft.

Approvals

Confirmations that transactions are appropriate; made by authorized users with specific fiscal roles prior to posting.

Business Unit

An operational subset of an organization that tracks and maintains its own set of transactions. A list of Business Units is included later in this glossary.

AutoComplete

Feature that suggests values for drop-down fields as the user types in the field, thereby reducing the need to click the magnifying glass icon and search for valid values. Similar to the autocomplete feature in the Google search engine's search box.

SetID (TableSet ID)

Key field used to group control data, such as account and SpeedType.

ChartField

Detailed elements related to the General Ledger; include Fund, Organization Code, Program, Project, SubClass, and SpeedType.

CIW

Central Information Warehouse – CU's system-wide centralized data repository for information sourced from administrative systems, e.g., Human Resources Management System (HRMS), Finance, and Student Information System (CU-SIS).

Contracts

PeopleSoft module used for managing awards and focused on post-award accounting and processes.

Dashboard

Reporting feature offering users a high-level view of their business operations through graphs and charts that provide key information and analytics.

Favorites

Similar to browser bookmarks; used for frequently performed tasks. To access a saved Favorite, go to My Favorites in the Favorites menu and click the hyperlink for the desired page. Favorites can be accessed from any page within the PeopleSoft Finance system.

Grants

PeopleSoft module used for managing awards and focused on the process from proposal to award.

Keyword Search

Navigation feature similar to a Google search.

Pagelet

Small pages that provide display-only snapshots of applicable content in a user-friendly, browser-based graphical user interface. Pagelets provide an alternative to navigating via the left-hand menu in PeopleSoft.

Process Monitor

Used to review the status of scheduled or running processes. Process Monitor consists of two pages: the Process List page and the Server List page

Projects

Module used for managing projects (sponsored research, capital construction, financial aid, etc.) and focused on budgeting, financial accounting, and analysis.

Query

Data retrieval tool that uses selection criteria and prompts.

Related Actions

Feature that allows users to execute or open content from a transaction page. In transactions, the user can mark a field as a related action field. Then, when the user clicks on that field, it will show a pop-up menu offering the desired action.

Related Content

Feature that allows the ability to drop-down to view job aids, Singularity or CIW/m-FIN reports from the specific component. This eliminates the need to navigate separately to those locations, facilitating access to commonly needed itiems.

Role

In PeopleSoft security, the role identifies the particular PeopleSoft functionality that an individual is able to access.

SpeedType

Shortcut to ChartField values, including Fund, Organization Code, Program, Project, and SubClass.

WorkCenter

Streamlined user interface that reduces navigation. Allows users to conduct transactions, run reports, and view data necessary to complete their work.

Workflow

Generic term for steps and rules necessary to complete a specific task. Workflow encompasses routing and approval.

Worklist

Organized list of work items awaiting the user’s attention; generated by an automatic workflow application. The Worklist provides summary information about these items along with links that enable the user to view additional details about the work, and to navigate to pages to perform the work or reassign the work items.

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