PeopleSoft®

PeopleSoft 8 SP1 Campus Directory Interface PeopleBook

August 2002

PeopleSoft 8 SP1
Campus Directory Interface PeopleBook
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Contents

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft 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 applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. 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 applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. 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 this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode 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 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 number 0, not 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 W.
`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.

Typographical Convention or Visual Cue	Description
. . . (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 (|).
[ ] (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.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below 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.

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 system.

Note. Example of a note.

A note that is preceded by *Important!* 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.

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 PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These 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.

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).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
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.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Campus Directory Interface Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.

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

PeopleSoft Application Fundamentals

The *PeopleSoft Campus Directory Interface PeopleBook* provides you with implementation and processing information for your PeopleSoft Campus Directory Interface. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook.* Each PeopleSoft application has its own version of this documentation.

PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft Student Administration Solutions and Contributor Relations Solutions applications. Whether you are implementing only one application, some combination of applications within the product line, or the entire PeopleSoft Student Administration Solutions and Contributor Relations Solutions system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

In addition to the *PeopleSoft Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook,* you should review the *PeopleSoft Campus Community Fundamentals PeopleBook.* This PeopleBook provides an overview of the Campus Community setup tables, and describes many features that are the basic building blocks for both PeopleSoft Student Administration Solutions and Contributor Relations Solutions.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook

CHAPTER 1

Getting Started with PeopleSoft Campus Directory Interface

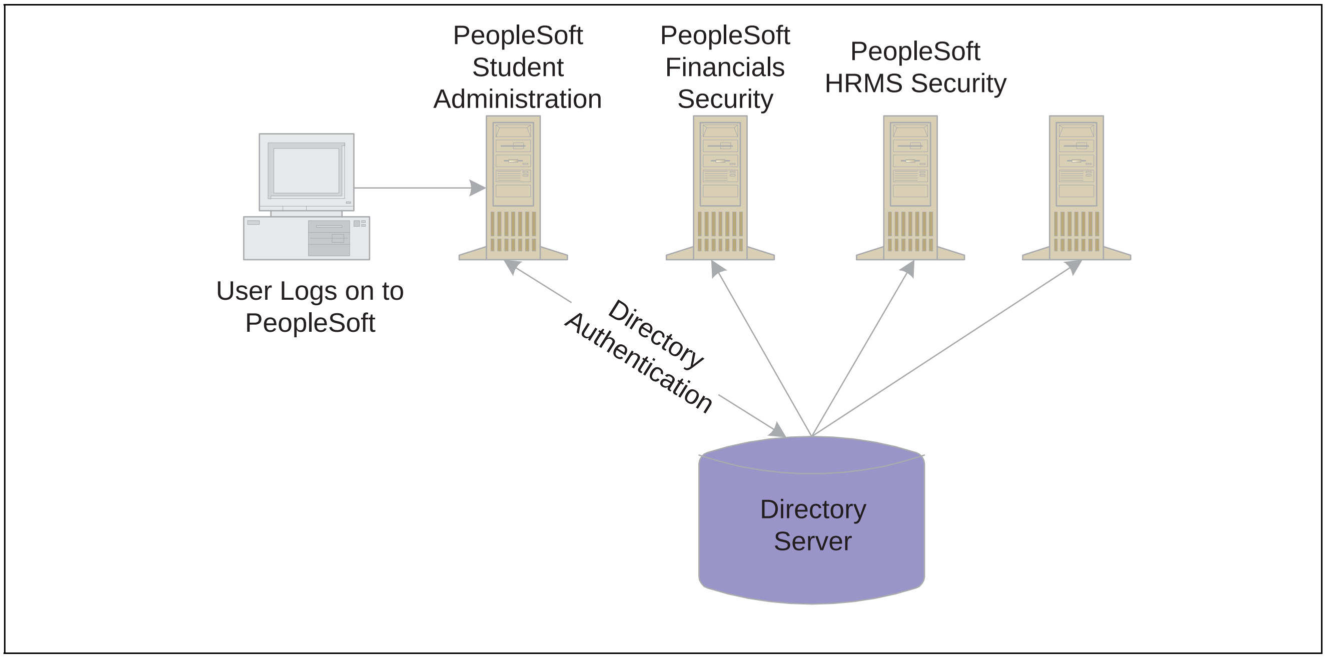
This chapter provides an overview of PeopleSoft Campus Directory Interface (CDI) and discusses how to:

- Share PeopleSoft information with your directory.
- Review application requirements.
- Run the directory load process.

Understanding PeopleSoft Campus Directory Interface

PeopleTools 8.1 enables you to integrate PeopleSoft security with LDAP (Lightweight Directory Access Protocol) directories to authenticate directory users. With PeopleSoft Campus Directory Interface, you can share the data that already exists and is maintained in your PeopleSoft Student Administration Solutions database with your directory. PeopleSoft Campus Directory Interface simplifies directory setup and ensures that the user data in the directory matches the selected PeopleSoft data and simplifies data maintenance.

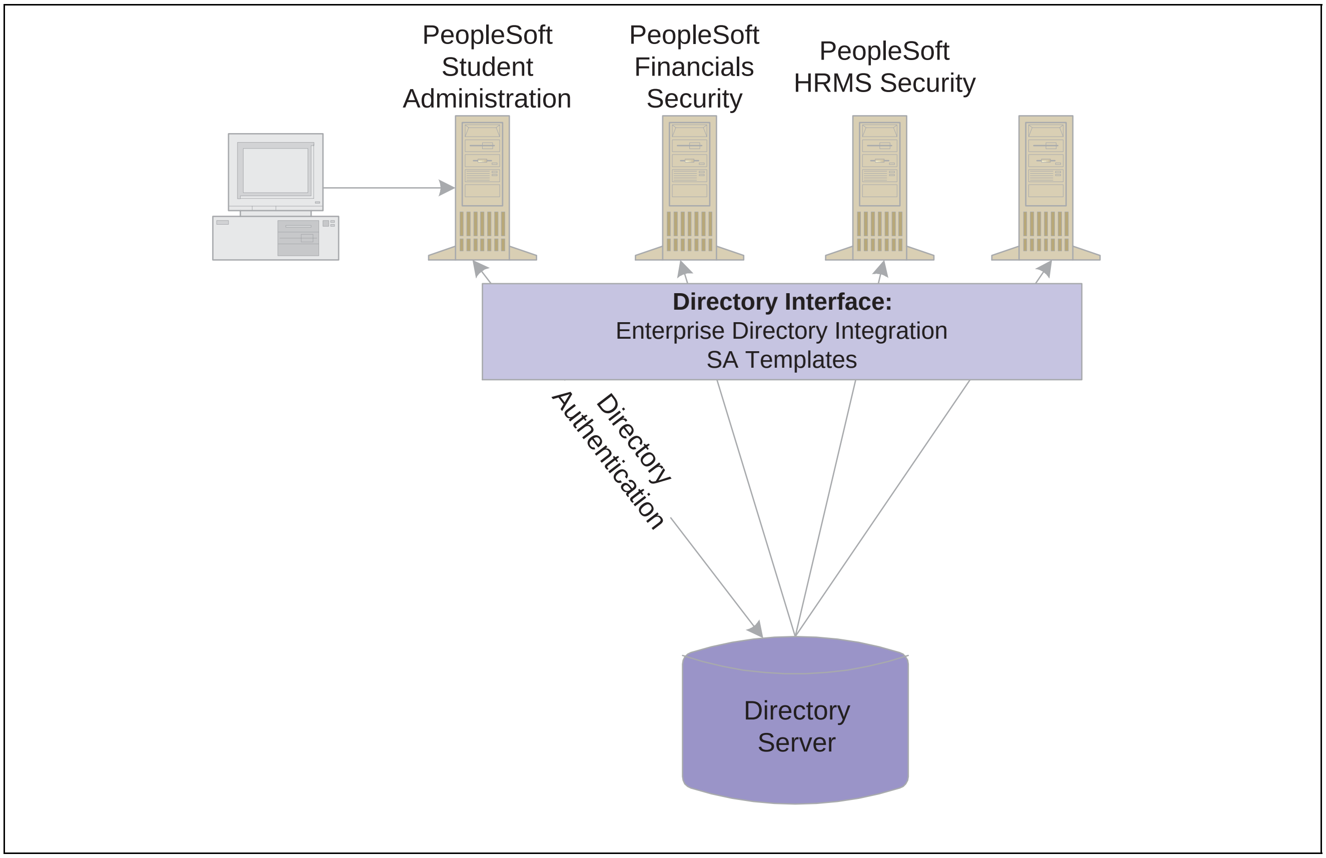
The LDAP integration delivered with PeopleTools 8.1 enables PeopleSoft applications to authenticate users against pre-existing authentication data in an LDAP directory service. However, the data in the directory still needs to be maintained separately from the user data maintained in the PeopleSoft Student Administration Solutions database.



PeopleTools' LDAP authentication functionality validates the credentials of PeopleSoft user's credentials against the directory

Most of the user data that is typically used in a directory is data that you also maintain in your PeopleSoft Student Administration Solutions database, such as user ID, name, location, and email address. Without PeopleSoft Campus Directory Interface, you would need to enter and maintain this information both in PeopleSoft Student Administration Solutions and Contributor Relations Solutions and in the directory schema.

When you use PeopleSoft Campus Directory Interface, you can select the pieces of data in PeopleSoft Student Administration Solutions and Contributor Relations Solutions that you want to make available to the directory while still maintaining that data in the PeopleSoft system. Using the mapping information that you set up, PeopleSoft Campus Directory Interface maps the data that you select in PeopleSoft Student Administration Solutions and Contributor Relations Solutions to the information tree in your directory. When information changes in the PeopleSoft database, PeopleSoft Campus Directory Interface captures that information and instantaneously updates the directory server or writes to a file for you to apply at another time. PeopleSoft Campus Directory Interface makes the PeopleSoft Student Administration Solutions and Contributor Relations Solutions user information available to all your LDAP-enabled enterprise applications.



PeopleSoft Campus Directory Interface provides enhanced directory integration across the enterprise

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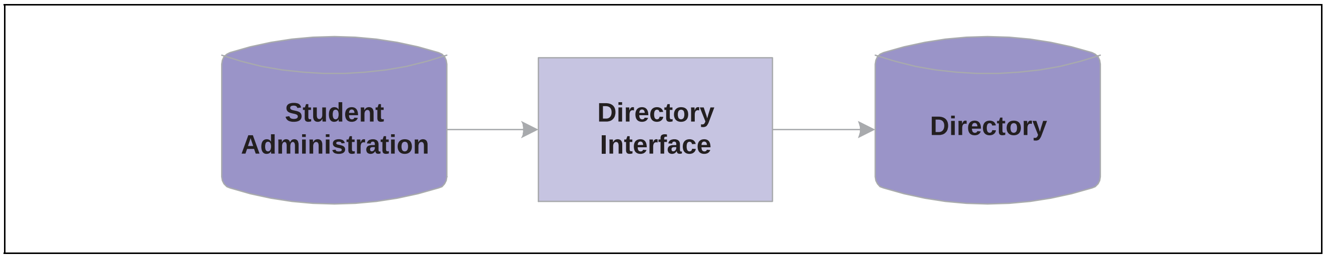
Warning! Deploying a directory is a significant undertaking. PeopleSoft strongly recommends that you have a good understanding of directories and your directory documentation before installing PeopleSoft Campus Directory Interface. PeopleSoft Campus Directory Interface documentation is not intended to replace your directory documentation.

Sharing PeopleSoft Information With Your Directory

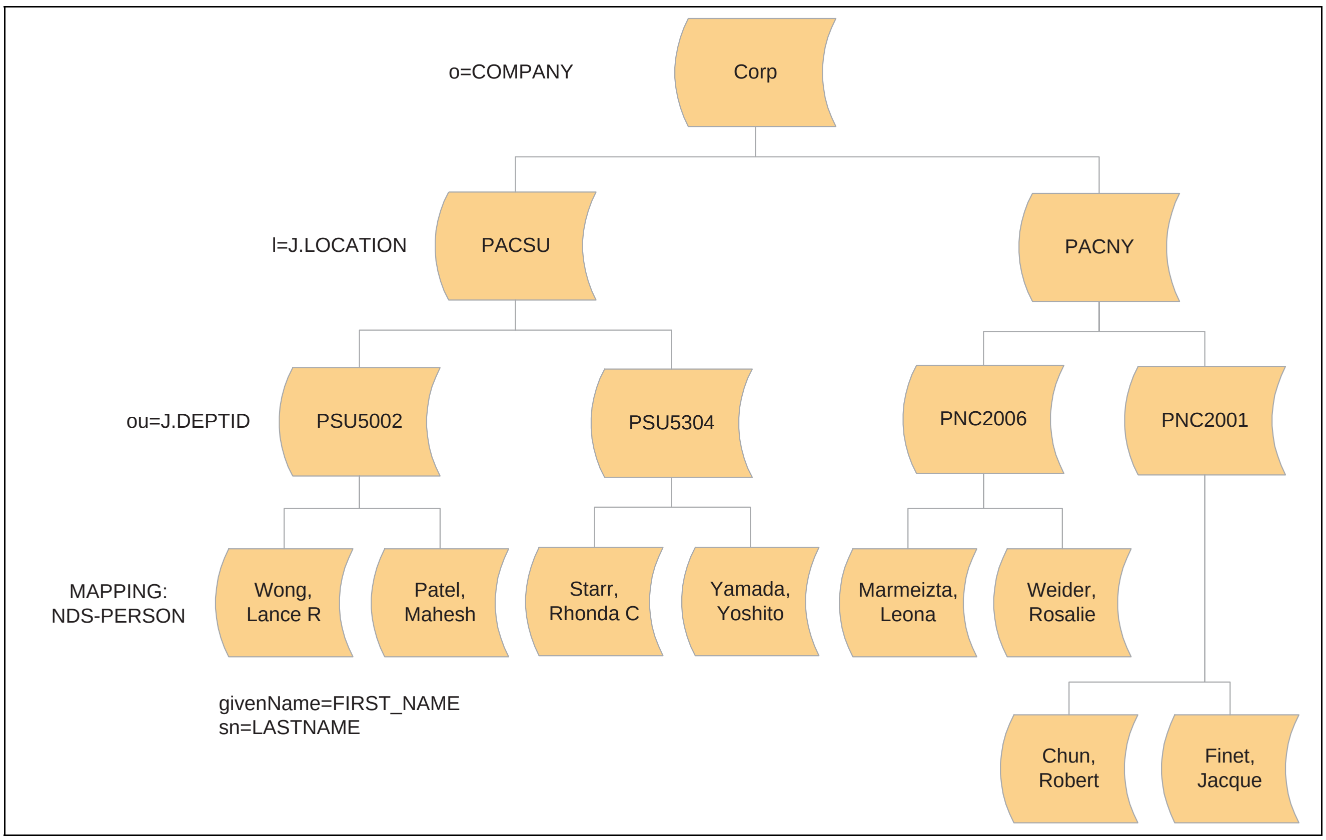
Because your PeopleSoft system is a relational database and your directory follows a hierarchical model, you must indicate how the information in selected PeopleSoft tables corresponds to the entries in the directory. Using the mapping pages in PeopleSoft Campus Directory Interface, you indicate the relationship between the PeopleSoft objects and the directory objects. When PeopleSoft Campus Directory Interface receives user data from the PeopleSoft database, it uses this information to map the data objects to the corresponding objects in the directory.



The Campus Directory Interface maps data from PeopleSoft's relational database to the hierarchical directory structure

For PeopleSoft Campus Directory Interface to be able to map PeopleSoft information to your directory, it needs to have information about the hierarchical structure that you've set up in your directory. This structure is called a *directory information tree.*

The directory information tree is the hierarchical relationship among the entries that make up your directory database. Entries are made up of a distinguished name and attributes/value pairs. The distinguished name identifies an entry's position in the tree and the entry's attributes hold the data that comprise the entry. For example, in addition to uniquely identifying the person in the directory database, the distinguished name of the NAME entry indicate that it is below J.DEPTID on the information tree. The entry's attributes and values would tell us more about the person beyond their uniquely identifying information.



Entries in a directory database are organized in a hierarchical relationship

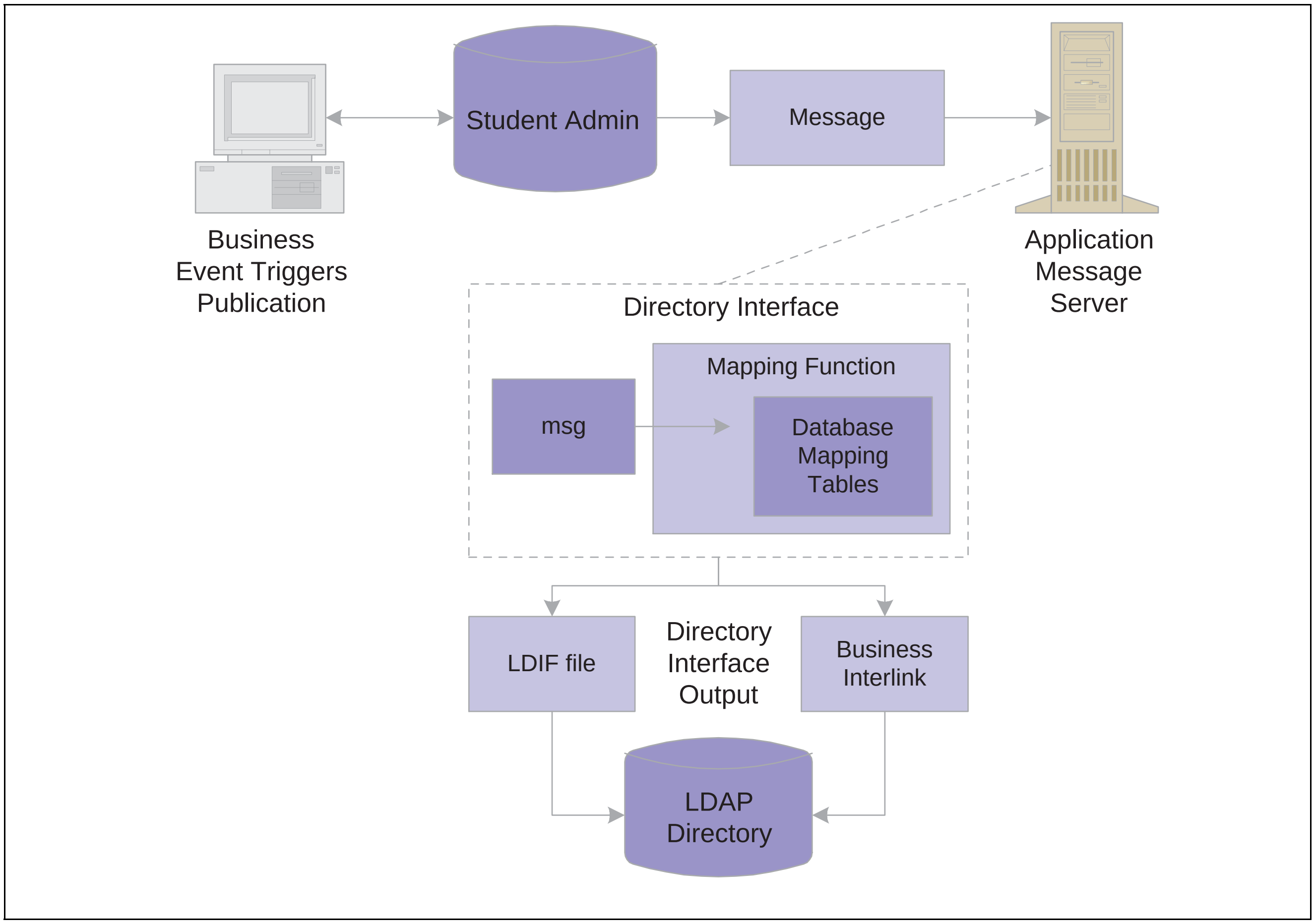
The attributes that are available for a particular type of entry, known as an Object Class, are specified in the directory *schema.* You must load the schema into the Campus Directory Interface before you can map PeopleSoft data to the directory.

Use PeopleSoft Campus Directory Interface mapping tables to map attributes to application messages. Each application message contains selected information about a PeopleSoft record and its fields. For example, the DSPERSON_BASIC_SYNC message contains selected information from the PERSONAL_DATA record and its fields (such as Name, Marital Status, and Address).

For each mapping, select one or more object classes (to identify the types of entries that are relevant to the map) and an associated message. Then map the attributes, linking PeopleSoft fields to the attributes available for the chosen object class. Then, whenever data in the fields contained in that message change, PeopleSoft Campus Directory Interface can update the corresponding data in the object class in the directory. For example, map the J.LOCATION object class to the LOCATION message and the location fields (address, city, state, and so on) to the appropriate attributes so that PeopleSoft Campus Directory Interface can update the directory's J.LOCATION object class whenever any information in the Location record changes in PeopleSoft.

Once you've initially loaded PeopleSoft data into your directory, you can keep the data in your directory up to date with PeopleSoft Business Interlinks or LDIF (LDAP Data Interchange Format) files. PeopleSoft Business Interlinks update the data in real time so that your directory information is always in sync with PeopleSoft. You can load the LDIF files at user-defined intervals.

As exhibited in the following diagram, when a user saves changes to a record, the system triggers an application message that is sent to the application server. PeopleSoft Campus Directory Interface's mapping function, which runs in the application message server, maps the PeopleSoft field data contained in the message to the directory's attributes. Once the information has been mapped, PeopleSoft Campus Directory Interface updates the directory with the PeopleSoft information (using PeopleSoft Business Interlinks) or it writes the information to an LDIF file, depending on what you've specified on the mapping tables.



PeopleSoft Campus Directory Interface maps the information in the message using the mapping tables and then updates the directory

Reviewing Application Requirements

This section outlines the items that PeopleSoft assumes are in place prior to installing PeopleSoft Campus Directory Interface.

Note. For the most current requirements of our LDAP support, always refer to the PeopleSoft Platforms Database on Customer Connection, or refer to the most current PeopleSoft Hardware and Software Requirements guide.

Software

PeopleSoft supports the following LDAP-enabled directory servers:

- Novell NDS eDirectory V 8.5 or better
- IPlanet Directory Server V 4.11 or better
- Microsoft Active Directory

Prior to installing PeopleSoft Campus Directory Interface, you are required to have at least one directory server installed and configured at your site.

If you do not already have a directory server installed at your site, PeopleSoft provides you with Novell NDS eDirectory, which is bundled with PeopleTools.

Note. If you did not receive Novell NDS eDirectory bundled with PeopleTools you can obtain eDirectory V8.5 from http://www.novell.com/downloads

If you are using the Novell eDirectory, PeopleSoft requires that you are use one of the following versions: 8 (with 8.3 patch) or 8.5. This is required so that the schema extensions are available online within the PeopleSoft database through PeopleSoft Business Interlinks.

Hardware

The speed of your server machine, the amount of RAM (Random Access Memory), the amount of disk space, and so on depends on numerous variables, including the size of your directory and the type of directory that you are using. PeopleSoft recommends that you consult the documentation delivered with your LDAP directory server for specific hardware requirements to meet your site-specific needs.

Expertise

PeopleSoft assumes that the individuals responsible for implementing PeopleSoft Campus Directory Interface have expert knowledge in the following areas:

- LDAP

  PeopleSoft does not document general information about LDAP protocol. PeopleSoft documents LDAP features and functionality as it relates specifically to a PeopleSoft Campus Directory Interface implementation. There are numerous books and classes available that specialize in explaining the administration of an LDAP directory server. In addition, you should have expert knowledge of your chosen directory server platform, such as the NDS eDirectory.

- PeopleSoft Application Messaging

  PeopleSoft Campus Directory Interface takes advantage of PeopleSoft Application Messaging. During the implementation, you are required to activate messages, channels, nodes, and so on. This document assumes that you have a working knowledge of application messaging design and administration.

- PeopleSoft Business Interlinks

  PeopleSoft Campus Directory Interface takes advantage of PeopleSoft Business Interlinks. During the implementation, you may be required to modify PeopleSoft Business Interlinks definitions. This document assumes that you have a working knowledge of PeopleSoft Business Interlinks design and administration.

Directory Setup

Your directory setup must meet the following criteria:

- The registry key HKLM\System\CurrentControlSet\Servies\NTDS\Paramteres\Schema Update Allowed must be present and set to a nonzero DWORD on the Active Directory FSMO Role Owner.
- When creating structural object Classes in Active Directory it is necessary to specify "containment." This means psftJobs can be children of only the following classes of objects: builtinDomain, organizationalUnit, and domainDNS.

- You must add the server names in the Directory Setup component as they appear on the dNSHost Name attribute on the server entries under the CN=Sites entry.

Recommendations

The following items are not technical requirements but are methods or guidelines that PeopleSoft recommends you consider for best results:

- Some LDAP searches may generate LDAP referrals to other servers participating in your directory. You must be able to ping by hostname all servers in the directory from the application server.

  If any server is unreachable by hostname from the application server, you can add a line for the server to the application server's hosts file.

- In the directory, configure the entry limit value to be larger than the number of rows that you expect will be returned.

  The default value is usually not sufficient.

- If you want to set up a demo environment using the demo data provided with PeopleSoft Campus Directory Interface, use the Novell eDirectory.

- Regarding your PeopleSoft Application Messaging configuration, PeopleSoft recommends that all of the application messages related to your PeopleSoft Directory Server configuration flow through the same message channel.

  Furthermore, PeopleSoft recommends that you create a dedicated message channel used solely for PeopleSoft Campus Directory Interface messages. This ensures that if any message fails, the subsequent messages remain queued in sequence after the failed message.

- PeopleSoft assumes that your directory information tree has the user entries at the leaf level.

  This is required in cases where an entry needs to be moved from one branch to another. The entry needs to be at the leaf level so that the system can read various user attributes, one of which is the password.

- When constructing distinguished names in your directory, PeopleSoft strongly recommends that you use only PeopleSoft code values for relative distinguished names (RDNs).

  PeopleSoft code values, in most cases, will not likely change. Also, PeopleSoft recommends that you do not use a description value as an RDN because descriptions are more likely to change and many are quite long and therefore pose issues for searching.

CHAPTER 2

Running the Directory Load Process

This chapter discusses how to run the directory load process.

Running the Directory Load Process

Use the Directory Load process to load PeopleSoft data into your directory. The Directory Load process is designed to be used when there is no existing data in the directory.

Warning! This process will overwrite any data that is in the directory when the process is run.

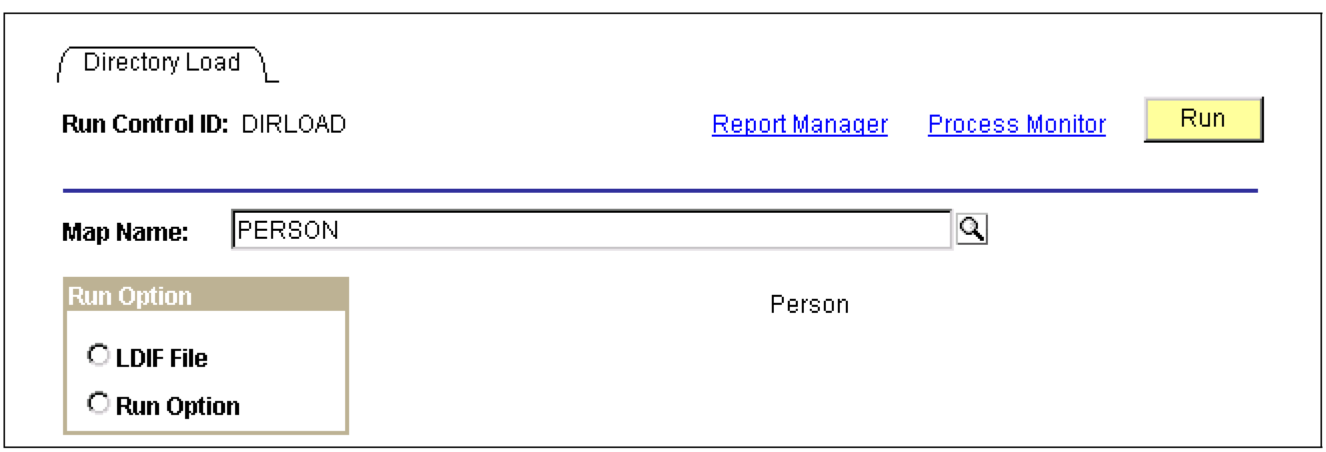
If you do have data in your directory, you should use the Directory Audit Process instead of the Directory Load process. The audit process compares the PeopleSoft data to your existing data and enables you to review and resolve conflicts.

Page Used to Run the Directory Load Process

Page Name	Object Name	Navigation	Usage
Directory Load	RUNCTL_DS_LOAD	Design Student Administration, Manage Directory Interface, Process, Directory Load	Run the Directory Load process.

Running the Directory Load Process

Access the Directory Load page.



Directory Load page

Map Name	Select the mapping for the information for the data to load. Mappings are defined in the Directory Mapping component.
LDIF File	Select to have the process send the data to an LDIF file for you to load in the directory.
Run Option	Select to have the process directly update the directory.
Run	Click to run the DS_AUDIT process using the Process Scheduler.

CHAPTER 3

Configuring PeopleSoft Campus Directory Interface

This chapter provides an overview of CDI configuration and discusses how to:

- Configure the directory.
- Load the schema cache.
- Set up directory mappings.
- Review sample messages.
- Track your reporting structure (HRMS only).
- Set up user authentication mapping.
- Set up user profiled mappings.
- Set up role membership options.
- Set up entry membership rules.

Understanding CDI Configuration

The Configure Directory component contains four pages that you use for specifying connection information and testing directory server connections. The LDAP servers that you are planning to incorporate into your PeopleSoft Campus Directory Interface implementation must already be installed, configured, and functional.

To enable your PeopleSoft system to successfully connect to your directory server, you must enter the appropriate connection information. This includes the server name (DNS or IP address) and the listening port number. You also need to enter the User DN (user distinguished name) and associated password.

The PeopleSoft application server uses the User DN and password to connect to the LDAP server to retrieve user profile information about the specific user signing on to the system. The User DN must reflect a user with the appropriate LDAP browse rights.

Use the schema cache process to load your directory's schema into PeopleSoft Campus Directory Interface. The schema includes information such as object classes, attributes, and the relationship between them.

To set up PeopleSoft Campus Directory Interface:

1. Configure directory connection information.

   Use the Configure Directory component to set up and test directory connection information.

2. Load the schema cache.

Load the directory schema.

3. Set up mappings.

   Map PeopleSoft data to directory objects.

4. Map to the authentication server.

   If you are implementing directory authentication, specify the authentication servers and user search information.

5. Set up the user profile mapping.

   Set up the user cache to be stored in the PeopleSoft system.

6. Set up role membership rules.

   This enables you to modify a PeopleSoft role based on directory criteria.

7. Set up entry membership rules.

   This enables you to modify a directory entry, such as a directory group, based on criteria stored in the PeopleSoft database.

8. Load PeopleSoft Data into the Directory

   Once you have completed the above steps, you can load PeopleSoft data into your directory.

Configuring the Directory

This section discusses how to:

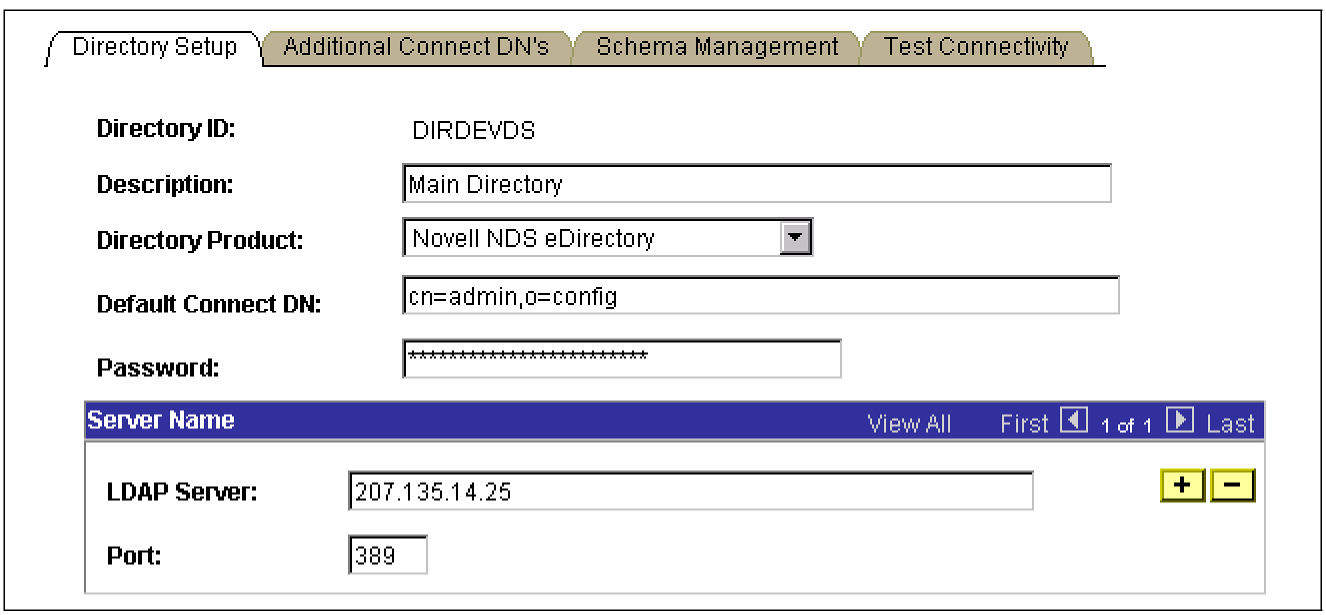
- Specify LDAP server network information.
- Specify additional connect DNs.
- Test CDI connectivity.
- Apply schema extensions.

Pages Used to Configure the Directory

Page Name	Object Name	Navigation	Usage
Directory Setup	DSDIRSETUP	Design Student Administration, Manage Directory Interface, Setup, Configure Directory, Directory Setup	Specify LDAP directory servers network information, such as sign-in IDs and password.
Additional Connect DN's	DSSERVERID	Design Student Administration, Manage Directory Interface, Setup, Configure Directory, Additional Connect DN's	Specify connect DNs in addition to the default connect DN specified on the Directory Setup page.
Test Connectivity	DSSRCHRSLT	Design Student Administration, Manage Directory Interface, Setup, Configure Directory, Test Connectivity	Test the CDI connectivity, including testing the names and search criteria entered on the previous pages of the Configure Directory component, and view the results. The system tests the connectivity when you access this page.
Schema Management	DSEXTINSTALL	Design Student Administration, Manage Directory Interface, Setup, Configure Directory, Schema Management	Apply selected PeopleSoft-specific schema extensions into your directory.

Specifying LDAP Server Network Information

Access the Directory Setup page.



Directory Setup page

Directory ID	The directory ID identifies the directory connection that you are creating. The directory ID that you enter can identify a specific LDAP server or a collection of LDAP servers depending on how many servers you add in the Server Name section.
Directory Product	Select your directory product from the list of options.
Default Connect DN (default connect distinguished name)	The system displays the default connect DN associated with the Directory ID that you entered or selected on the initial search page. The connect DN is the ID that you can use to connect to the directory server. You can enter an alternative connect DN.
Password	Enter the password associated with the directory-based account that appears in the Default Connect DN field.

Note. The password is stored in encrypted form in the database; not even individuals with administration access to the database can view the password.

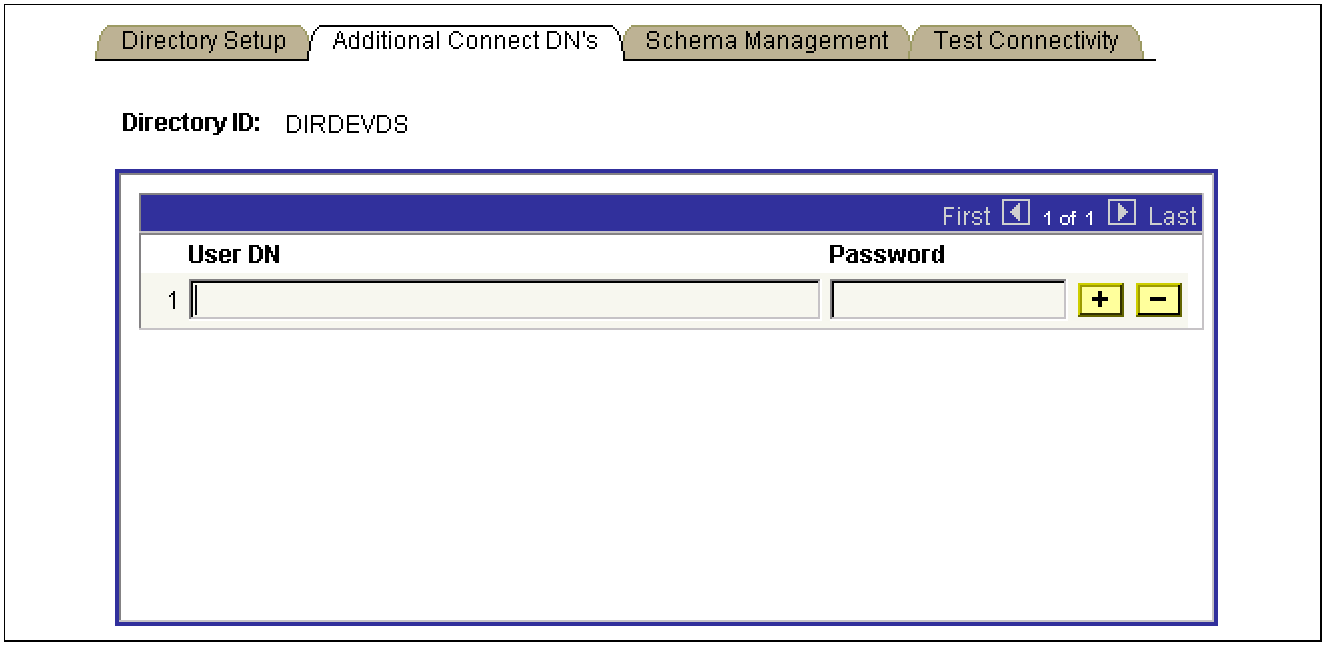
Server Name

In this group box you add LDAP directory servers to a connection list. You can add multiple servers for failover purposes.

LDAP Server	Identify a specific LDAP server. You can use the DNS name or you can use IP address dotted notation. For example, either of the following formats is acceptable: ldap12.yourcompany.com or 192.201.185.90.
Port	Enter the port number on which the LDAP server is configured to receive search requests. The standard LDAP port is 389. If you do not specify the correct port, PeopleSoft Campus Directory Interface can't exchange data with your LDAP server.

Specifying Additional Connect DNs

Access the Additional Connect DN's page.



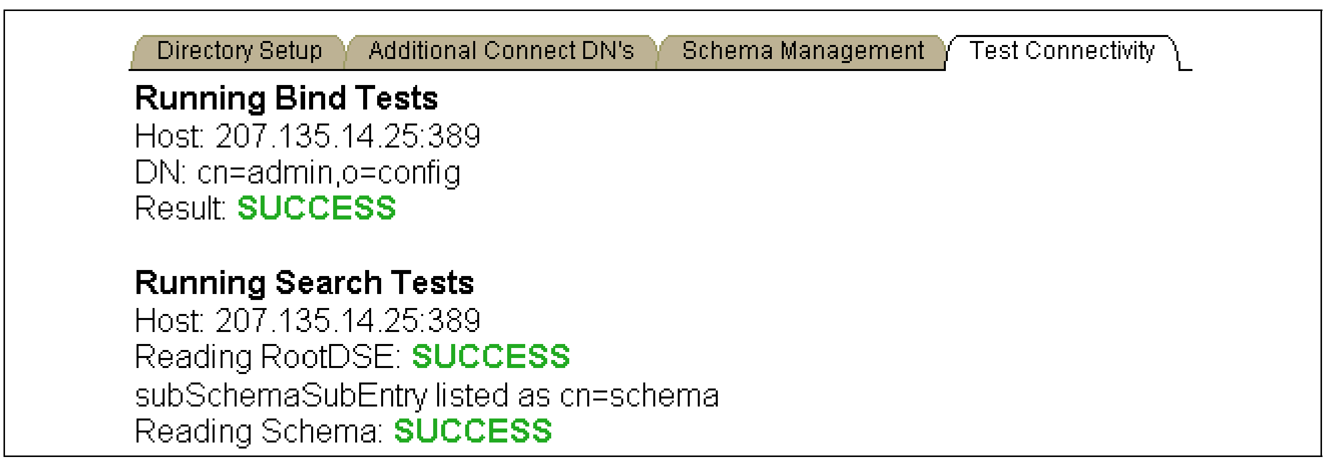
Additional Connect DN's page

User DN Add any DNs that you need in addition to the default connect DN that you entered on the Directory Setup page. The default user ID is most likely an administrative ID. This enables you to set up a more secure user ID for the scope of the mapping.

Password For each additional DN that you enter, add the corresponding password.

Testing CDI Connectivity

Access the Test Connectivity page.

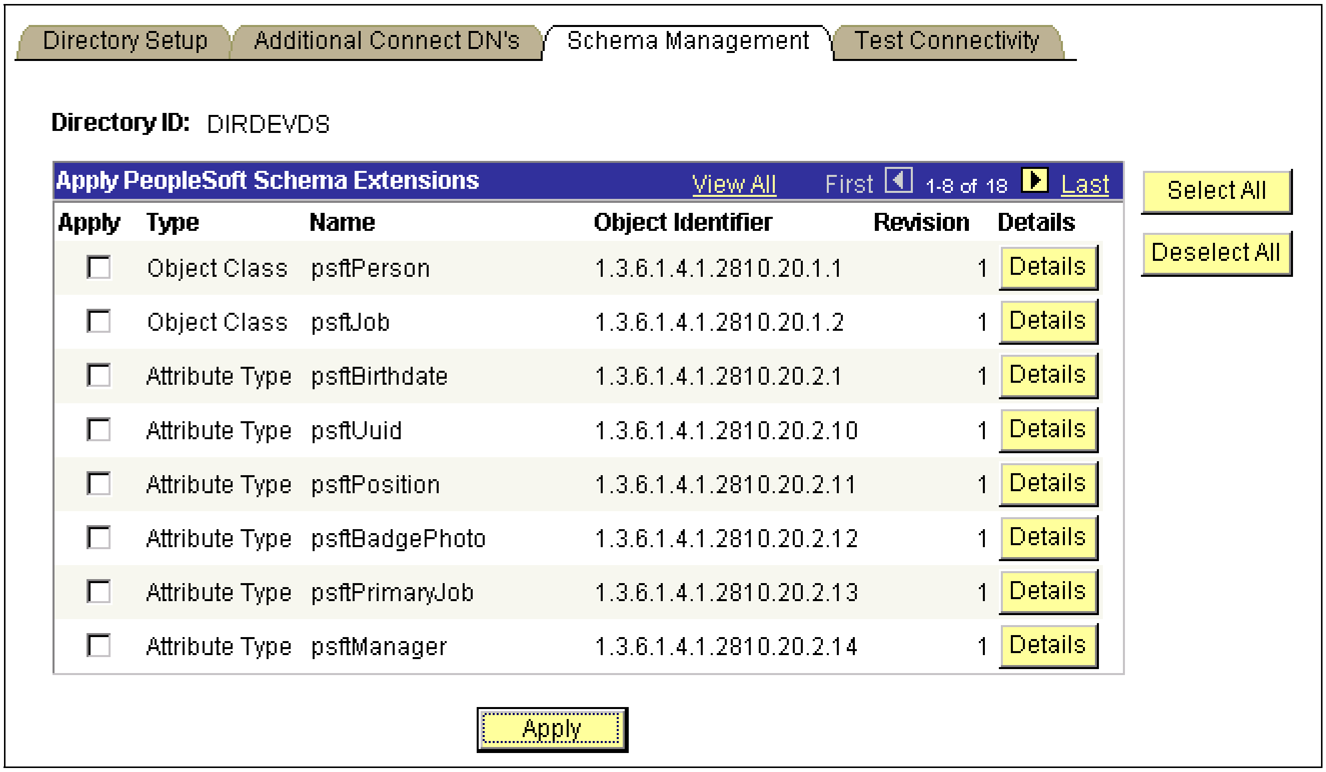


Test Connectivity page

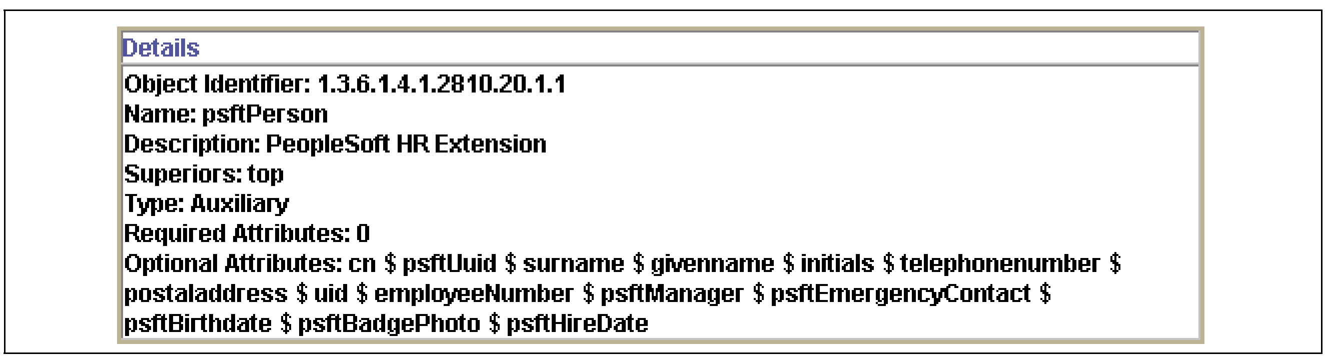
The page displays the results *(SUCCESS* or *FAIL)* of the connectivity test. If connectivity fails, modify the connect information on the Directory Setup and Additional Connect DN's pages.

Applying Schema Extensions

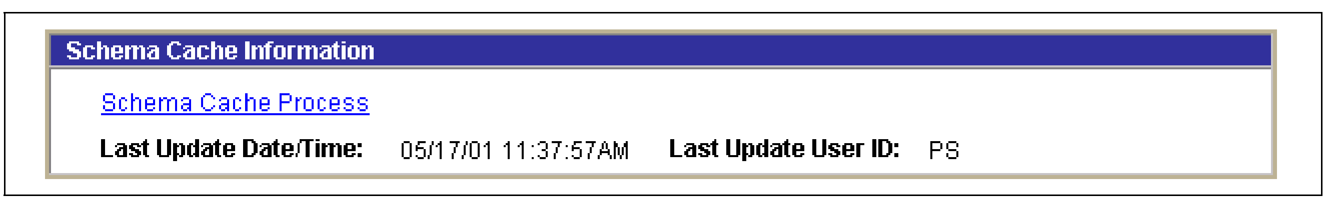
Access the Schema Management page.



Schema Management page (1 of 3)



Schema Management page (2 of 3)



Schema Management page (3 of 3)

Apply Select this check box to apply the selected schema extension type to your directory.

Type Displays the type of schema extension: either an *Object Class* or an *Attribute Type.*

Name Displays the schema extension name.

Object Identifier Displays the schema extension object identifier. The sequence *1.3.6.1.4.1.2810.20* identifies the object as a PeopleSoft object. The second to last number is either a *1* or a *2.* A *1*indicates an object class type and a *2* indicates an attribute type. The last number indicates the sequence in which the extension was created.

Revision Displays the number of times that the schema extension was revised.

Details Click to display details about the selected schema extension in the Details group box on the page.

Select All Click to select all the schema extensions to apply to your directory.

Deselect All Click to deselect all the schema extensions.

Apply Click to apply the selected schema extensions to your directory.

Details(button and group box described) When you click a schema extension's Details button, the system displays the information in the Details group box. In addition to the object identifier and name, you may also be interested in the "Superiors" detail, which indicates which extensions are above this one on the hierarchy, if any. Also of interest is the "Type" detail, which indicates whether the schema extension is a mandatory, optional, or auxiliary extension.

Schema Cache Information

Schema Cache Process Click this link to access the Schema Cache page where you can run the schema cache process (LDAPSCHEMA).

Last Update Date/Time Used to monitor how current the connection information is. Indicates when this page was last updated.

Last Update User ID For auditing information and educatability. Displays the user ID of the individual who last made changes on this page.

Loading the Schema Cache

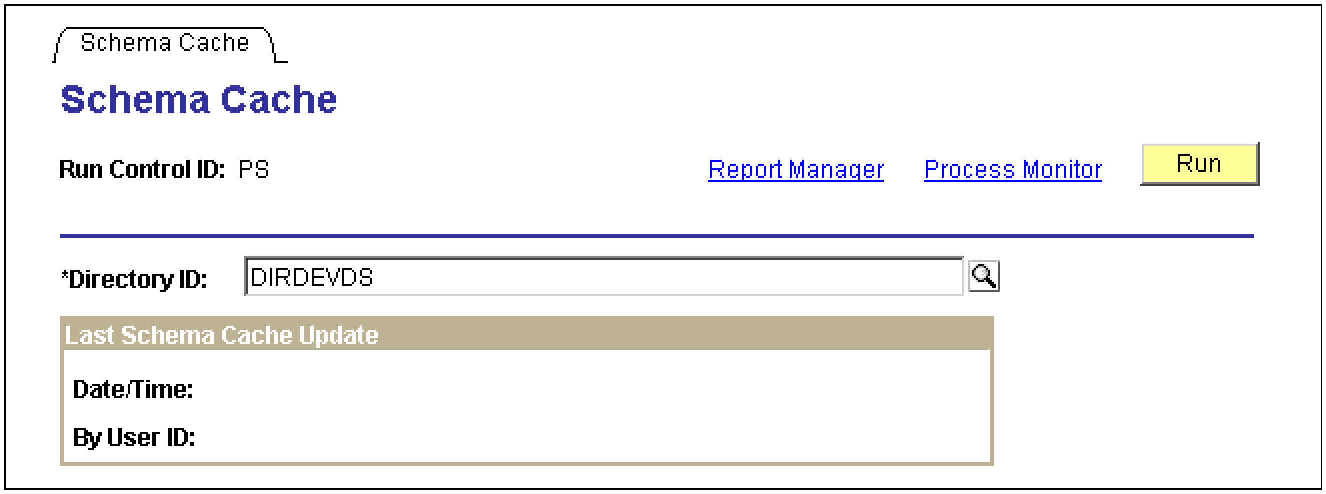
This section discusses how to load LDAP schema into the Campus Directory Interface cache.

Page Used to Load the Schema Cache

Page Name	Object Name	Navigation	Usage
Schema Cache	RUN_DSSCHEMA	Design Student Administration, Manage Directory Interface, Process, Schema Cache	Load the schema from your directory into PeopleSoft Campus Directory Interface.

Loading LDAP Schema into CDI Cache

Access the Schema Cache page.



Schema Cache page

Run Control ID	Displays the run control ID selected.
Directory ID	Select to identify the directory that the system should connect to and retrieve schema information from.
Last Update Date/Time	Displays the last time that the schema cache process was run for this directory ID.
Last Update User ID	Displays the user ID of the user who last ran the schema cache process for this directory ID.
Run	Click to run the load process (LDAPSCHEMA) using PeopleSoft Process Scheduler.

Setting Up Directory Mappings

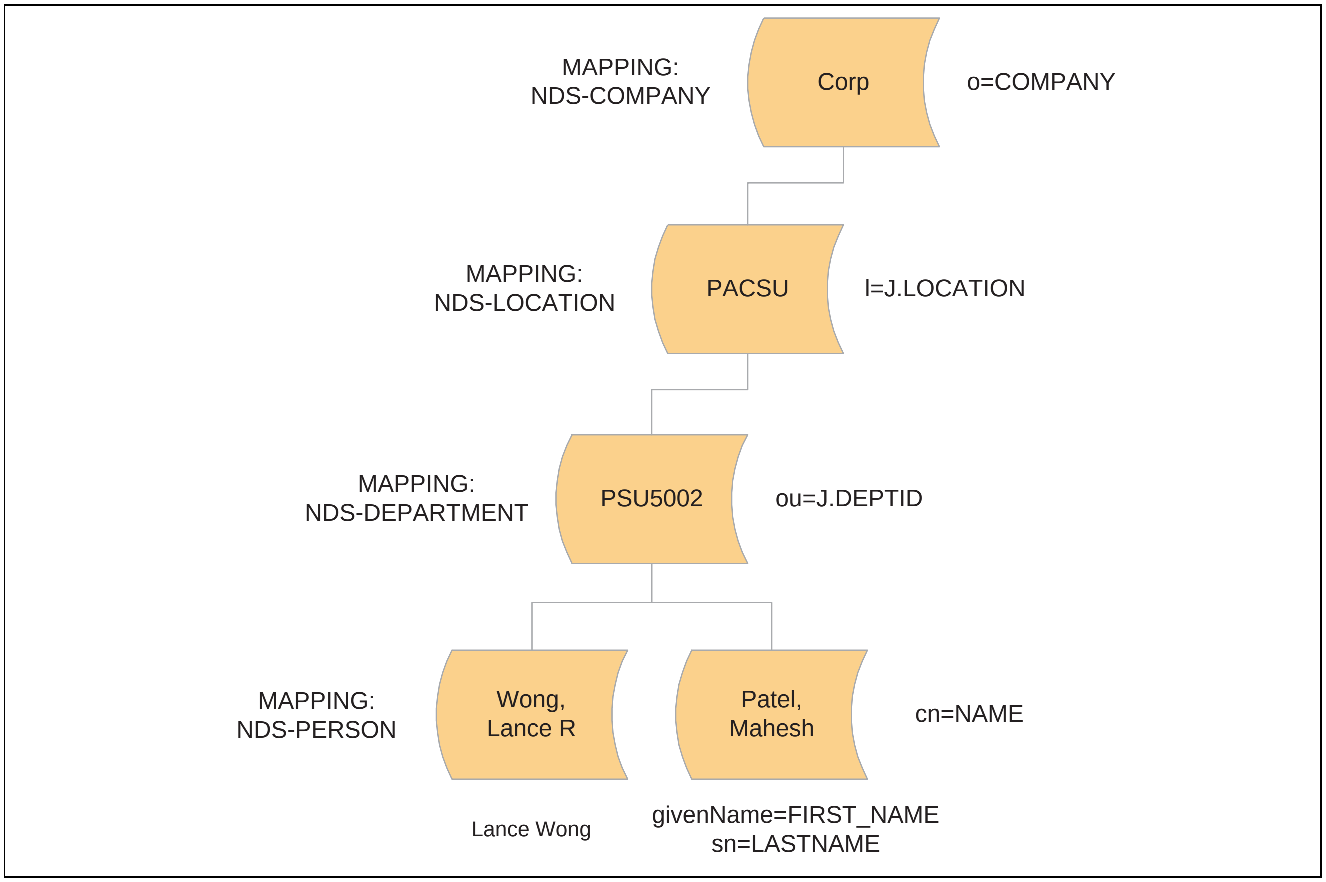
This section provides an overview of directory mappings and discusses how to:

- Map PeopleSoft data to LDAP directory.
- Map an alternate connect DN.
- Map values to attributes.
- Create mapping functions.
- Map attributes to object class.

Understanding Directory Mappings

PeopleSoft Campus Directory Interface receives PeopleSoft data from application messages published whenever there's a business event associated with the messages identified in the Directory Mapping component. Each message contains records and fields and the most recent data for those fields. Using the mapping information that you set up in the Directory Mapping component, PeopleSoft Campus Directory Interface associates the fields in the message to the attributes in the directory and then updates the data in the directory attributes with the field data from the message.

Create a mapping for every entry in your directory that you plan to populate with PeopleSoft data. For example, in the following sample directory information tree, you would create a company mapping, a location mapping, a department mapping, and a person mapping.



Entry mappings as they relate to the directory information tree

The Directory Mapping component contains three pages: the Map Details page, the DN Details page, and the Attribute Details page.

On the Map Details page, enter information about the mapping that you are setting up, such as the directory ID and the valid directory object for the entry that it is mapping to, and the PeopleSoft message containing the records and fields to map from.

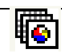
On the DN Details page, associate the data contained in the message that you selected on the Map Details page with the entry's DN. An entry's DN is built by applying the attributes in a sequential order. The order for the department entry in the example would be constructed using the data in the following table:

Sequence Number	Directory Attribute	Attribute Sequence Number	Use Constant Value	Record (Table) Name	Field Name	Constant Value
1	o	1	Yes			Corp
2	l	1	No	LOCATION	LOCATION	
3	ou	1	No	DEPT_TBL	DEPTID	
4	cn	1	No	PERSONAL_ DATA	FIRST_ NAME, LASTNAME	

On the Attribute Details page, associate the fields contained in the message that you selected on the Map Details page with the attributes that provide more detail about an entry. Some attributes are mandatory (an object class's mandatory attributes are defined in the directory schema) and must be mapped to either a constant value or a record/field. You also have the option of adding additional attributes in the Optional attribute section. To further our example of the Department entry, you would have to map PeopleSoft records and fields to the mandatory attributes (such as DeptID) and you could add additional attributes that would give you more information about the object class, such as description.

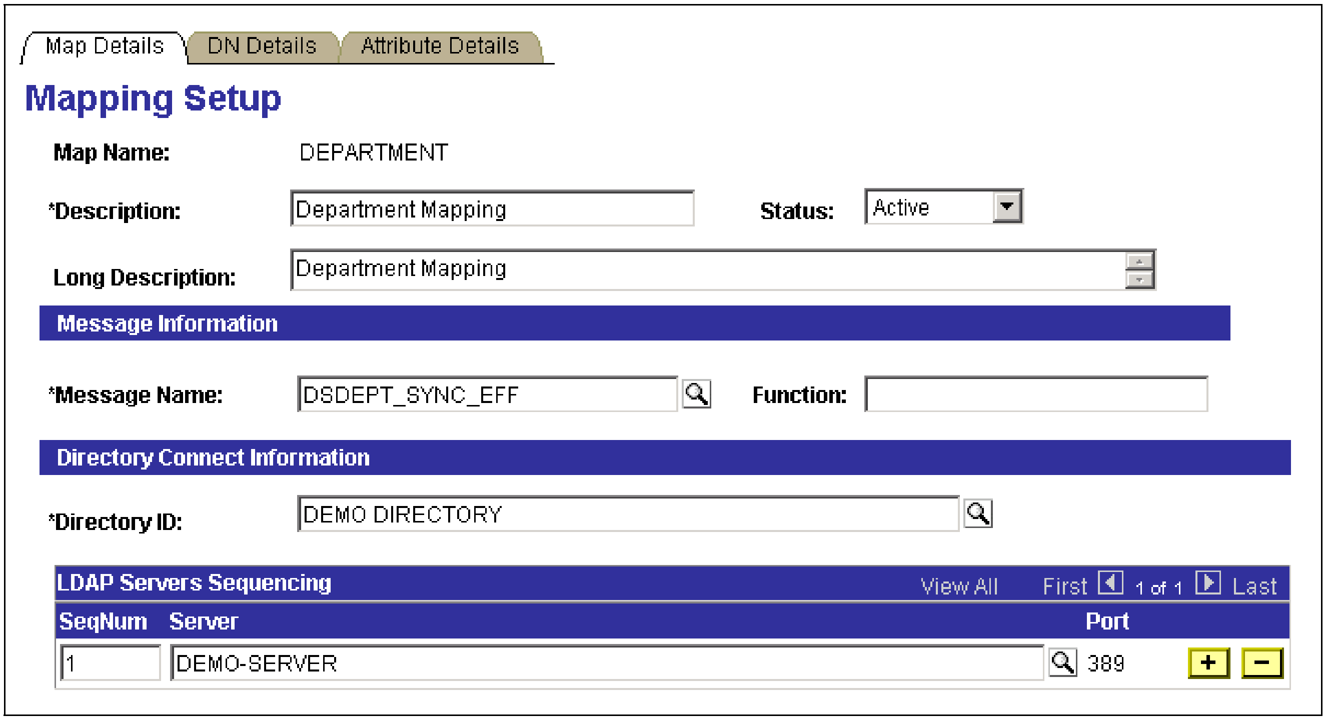
Note. The system does not update related-display field values unless the source field is also mapped. If the source field is not mapped, the audit process will still indicate and enable you to update any discrepancies. For example, when you map to an employee's job code the directory entry also includes the job code description. If you change the job code description on the Job Code component, the system will update the related-display description field on the employee's Job Data page but it will not update to the directory because it is not included in the mapping.

Pages Used to Set Up Directory Mappings

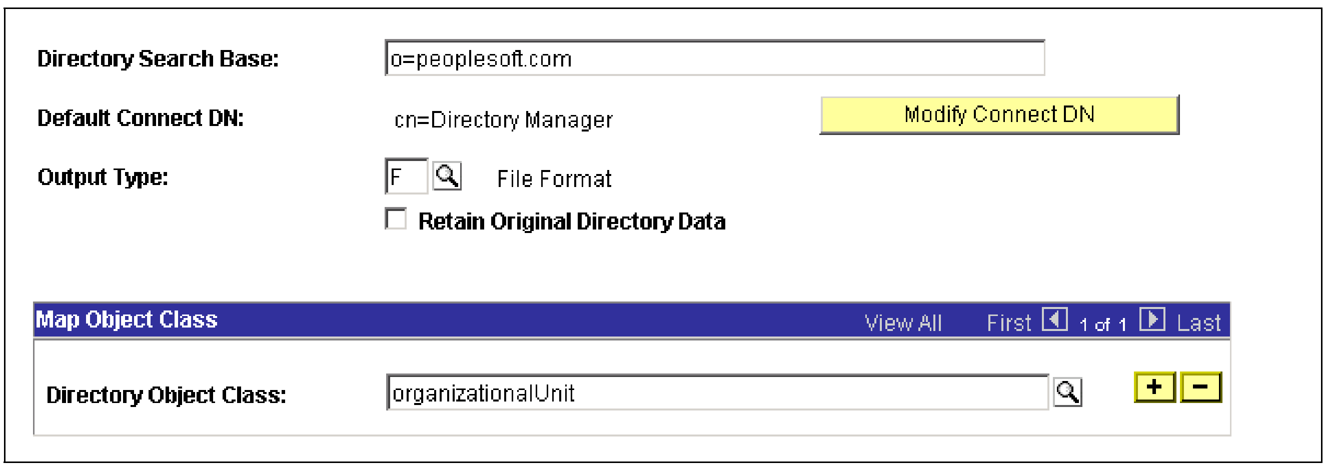
Page Name	Object Name	Navigation	Usage
Map Details	DSMAP	Design Student Administration, Manage Directory Interface, Use, Directory Mapping, Map Details	Map PeopleSoft data to LDAP directory data.
Map Details - Modify Connect DN	DSUSERDN	Click the Modify Connect DN button on the Map Details page.	Map an alternate connect DN.
DN Details	DSDN	Design Student Administration, Manage Directory Interface, Use, Directory Mapping, DN Details	Map values to attributes by setting up the relationship between data in the message on the Message Details page and the directory entry's DN. The attributes that make up the DN indicate the location of the entry in the directory.
Directory Interface	DSDN_XLAT	 Click the button next to the attribute whose value you want to translate.	Map values to attributes.
Attribute Details	DSATTRIB	Design Student Administration, Manage Directory Interface, Use, Directory Mapping, Attribute Details	Map attributes to object class.

Mapping PeopleSoft Data to the Directory

Access the Map Details page.



Map Details page (1 of 2)



Map Details page (2 of 2)

Message Information

Message Name

Select the message to associate with this mapping. The message contains the PeopleSoft records and fields that have the data that you want to associate with the attributes that make up the directory entry that you selected on the Map Details page. For example, if you selected the ou − DEPTID object class, select the department (DSDEPT_SYNC) application message because it contains the fields relevant to the department object class.

Function

Enter the name of the PeopleCode function that you want to execute using this message as an input parameter. The function can use any of the fields contained in the message to produce an output value for one or more of the fields that you map. This enables you to use a field in a function without mapping to it directly. For example, if you want the EmplID value sent to the directory to be a value combining the EmplID and the salary code, enter a function that produces that value. You then only have to map to the EmplID field to insert the derived EmplID in the directory.

Directory Connect Information

Directory ID
Select the directory ID to which to map. Set up directory IDs in the Configure Directory component.

LDAP Servers Sequencing

SeqNum (sequence number)
Indicate the order in which the server should be used when the system processes this mapping. If the first server is unavailable, the system will attempt to access the other servers in sequence until it finds an available one. If you are using multiple servers, this enables you to distribute the load across servers.

Server
Select the LDAP server to map to.

Port
The LDAP server port displayed will depend on the LDAP Server you select.

Directory Search Base
Enter a directory search base. The search base is the entry in the directory information tree from which the system begins a search relating to this mapping. For example, if, on the Attribute Details page, you select to have a field value updated indirectly, PeopleSoft Campus Directory Interface will search for and update all instances of that field in entries from that point in the information tree down.

Default Connect DN (default connect distinguished name)
The system displays the connect DN associated with the directory ID that you selected. The connect DN is the ID that you can use to connect to the directory server.

Output Type
Select the method that the system should use to send the mapped data to the directory data. Select *I* to output data to the directory directly through a Business Interlink. Select *F* to output data to an LDIF (LDAP Data Interchange Format) file to be manually updated in the directory.

Use the same output type for all your mappings to keep data consistent in the directory.

Retain Original Directory Data
When you move data in your directory using the directory interface, the directory interface copies the data to the new location and then deletes the old version. Select this check box to instruct the system to preserve the original data. If you don’t want to use this functionality now but find that you do need it in the future, you can come back and select this check box at a later date provided that you do it before the data move.

Note. Select this check box if your directory contains binary data. Move the binary data with your directory administrative tool.

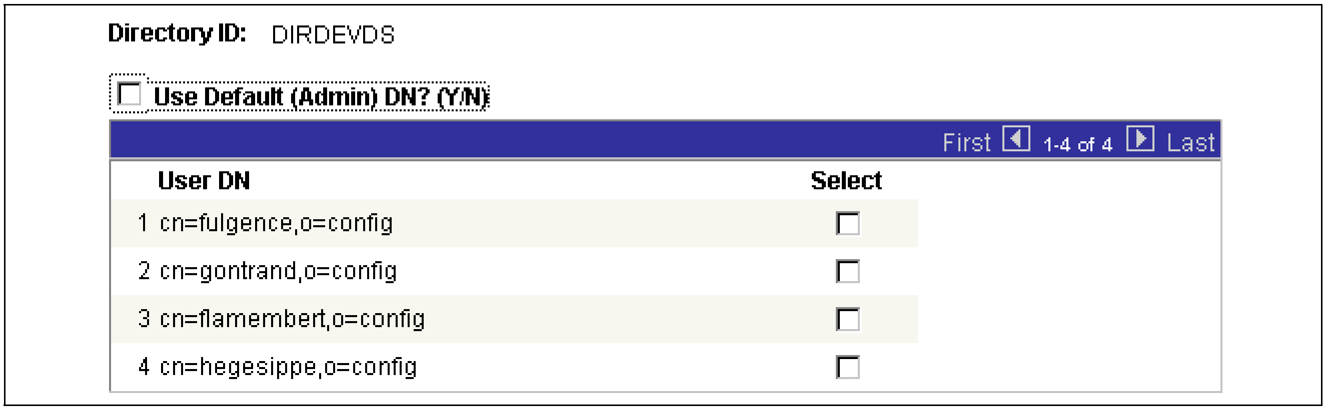
Modify Connect DN
Click to access the Map Details -- Modify Connect DN page.

Map Object Class

Directory Object Class Select one or more directory object classes. The object classes that you select will determine the list of valid attributes you can map to PeopleSoft data.

Mapping an Alternate Connect DN

Access the Map Details - Modify Connect DN Page.



Map Details - Modify Connect DN page

Directory ID Displays the directory ID that you selected on the Map Details page.

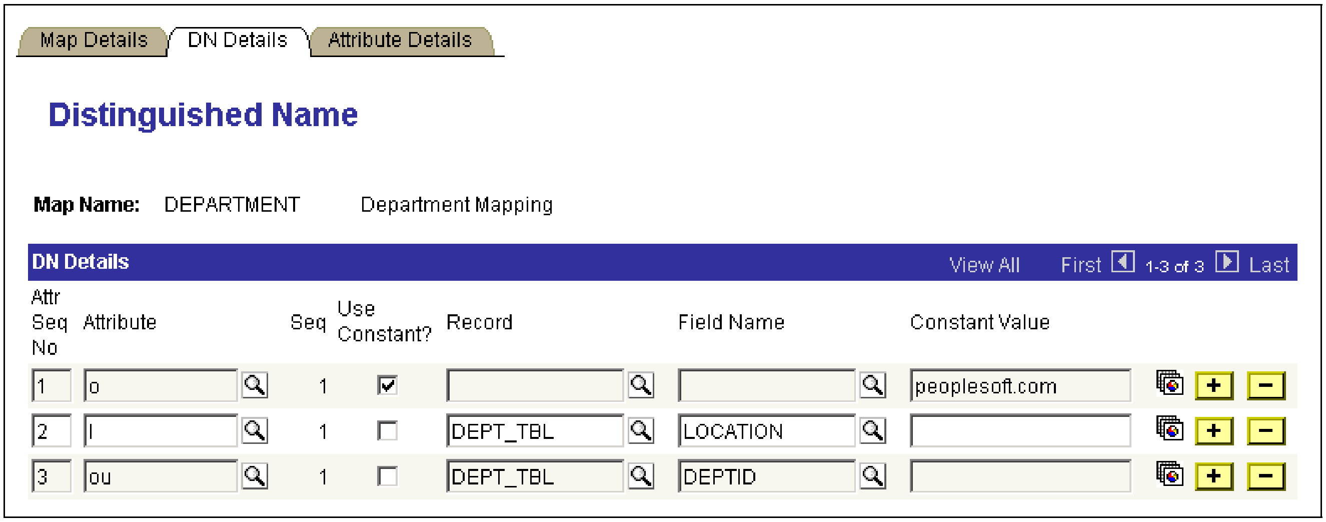
Use Default (Admin) DN? (Y/N) Select to use the default connect DN value from the Directory Configuration component.

User DN The alternative IDs that you can use to connect to the specified directory ID. You can use a User ID (and password) other then the default one listed on the Directory Setup page. Because the default user ID is most likely an administrative ID, this enables you to set up a more secure user ID for the scope of the mapping.

Select Select to indicate the user DN to use.

Mapping Messages to Attributes

Access the DN Details page.



DN Details page

DN Details

Attr Seq No (attribute sequence number)
Enter the attribute sequence number of the directory attribute. The directory builds the entry's DN using the attributes in sequential order.

Attribute
Select the directory attributes associated with the mapping's DN. For example, for the Department entry, map the o − Corporation first, the l − location second, and then the ou − Department attribute.

Seq (sequence)
The system assigns a sequence number to the attributes. Some directory attribute values consist of multiple values. The sequence number distinguishes between the different attribute values and indicates to PeopleSoft Campus Directory Interface the order in which the PeopleSoft and constant values should be assigned to the attribute.

Use Constant?
Select this check box to indicate that the system should use the constant value that you enter in the Constant Value field to populate this attribute instead of a PeopleSoft field value.

Record
Select the name of the record that contains the PeopleSoft field to assign to this attribute.

Field Name
Select the name of the PeopleSoft field containing the value that you want the system to use to populate this attribute.

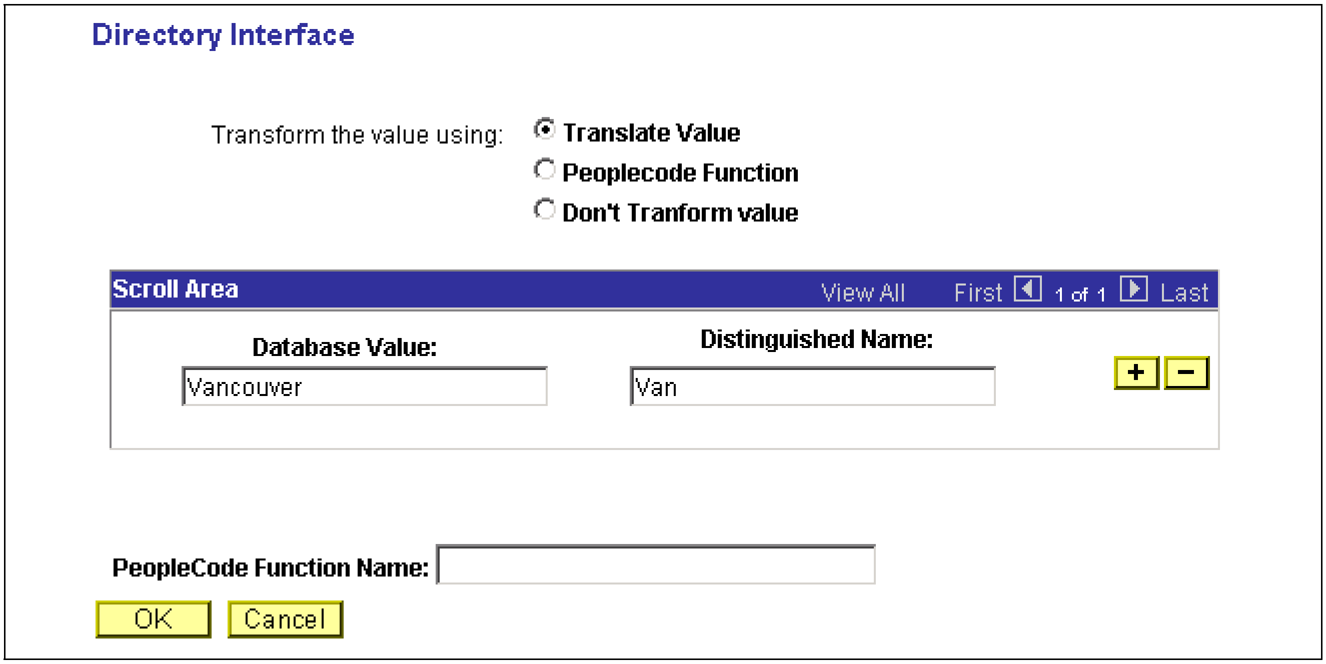
Constant Value
When you select Use Constant?, the system populates this attribute with the constant value that you enter in this field.


Click to launch the Directory Interface page if you want to translate database values or instruct the system to perform functions with database values.

Note. Use this page when constructing DNs (distinguished names) across active directory multiple domains.

Mapping Values to Attributes

Access the Directory Interface page.



Translate Table page

Translate Value

Select to replace the database value with the distinguished name (DN) value in the specified attribute.

For example, every time the database value *Vancouver* appears in the Location attribute, the system replaces it with the distinguished name *Van.*

PeopleCode Function

Select to use the database value as the distinguished name value for the attribute in a PeopleCode function.

Don't Transform value

Select to keep the database value as is. (This is the default value.)

Database Value

Available only when the Translate Value option is selected. Enter the database value for the system to replace.

Distinguished Name

Available only when the Translate Value transformation option is selected. Enter the DN value to replace the database value.

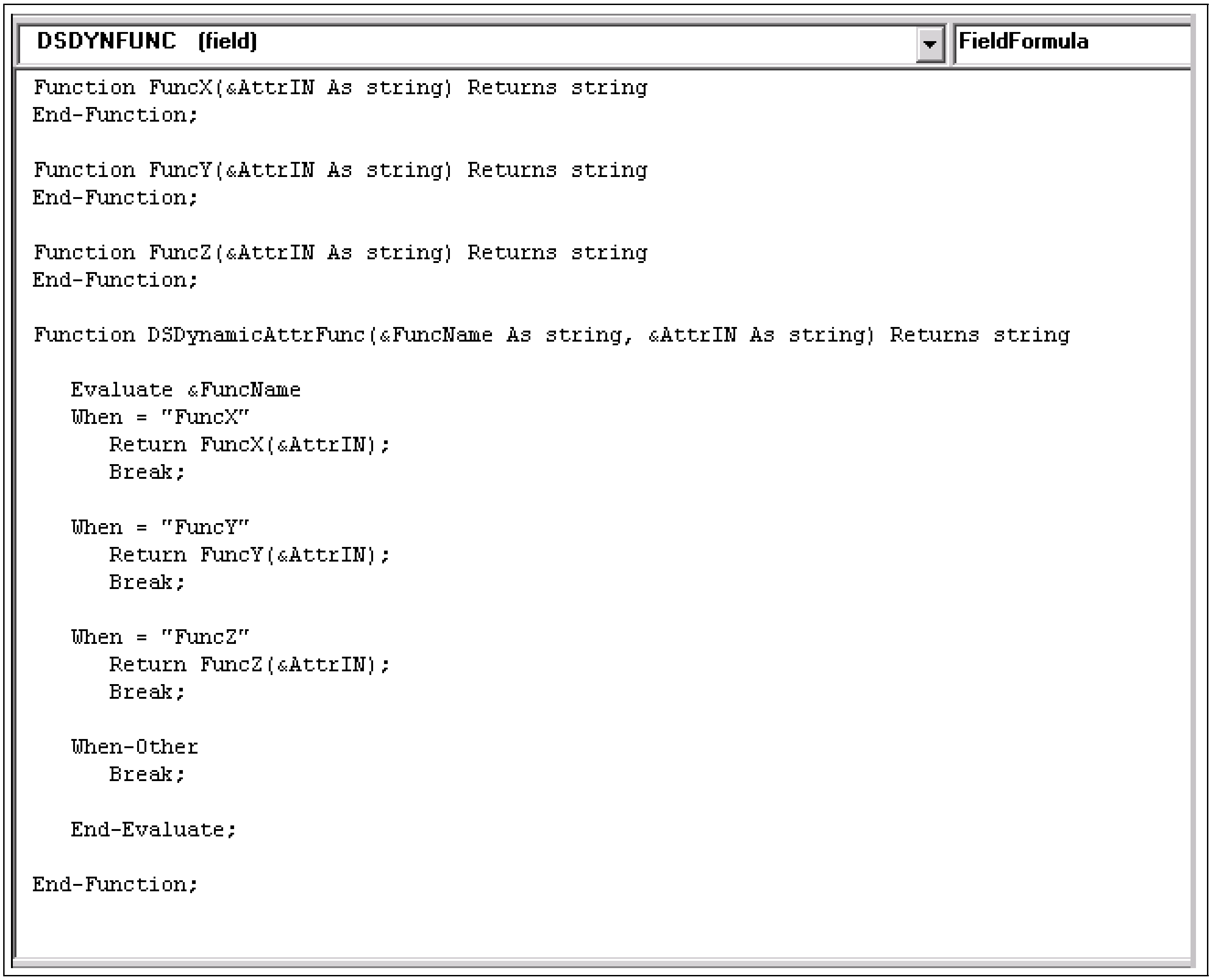
PeopleCode Function Name

Available only when the PeopleCode Function is selected. Enter the PeopleCode function to use in calculating the DN for the selected attribute.

Creating Mapping Functions

Set up PeopleCode mapping functions to execute field values, pass them as parameters to the PeopleCode function, and assign the output to the appropriate attribute in the directory.

The following PeopleCode page shows the setup for functions FuncX, FuncY, and FuncZ.


DSDYNFUNC (field) FieldFormula

```
Function FuncX(&AttrIN As string) Returns string
End-Function;

Function FuncY(&AttrIN As string) Returns string
End-Function;

Function FuncZ(&AttrIN As string) Returns string
End-Function;

Function DSDynamicAttrFunc(&FuncName As string, &AttrIN As string) Returns string

   Evaluate &FuncName
   When = "FuncX"
      Return FuncX(&AttrIN);
      Break;

   When = "FuncY"
      Return FuncY(&AttrIN);
      Break;

   When = "FuncZ"
      Return FuncZ(&AttrIN);
      Break;

   When-Other
      Break;

   End-Evaluate;

End-Function;
```

Setup functions on the FUNCLIB_DS_PC.DSDYNFUNC FieldFormula page

---

Note. Before entering a function in the PeopleCode Function Name field, set up the function in the FUNCLIB_DS_PC.DSDYNFUNC FieldFormula.

To create an attribute level function:

1. Open the FUNCLIB_DS_PC.DSDYNFUNC FieldFormula.
2. Add a section in DSDynamicAttrFunc.
3. In the evaluate statement, add the following section for each function that you want to add (FuncX is equal to your function name):

```
Evaluate &FuncName
When = 'FuncX'
 Return FuncX(&AttrIn, &AttrRT);
 Break;
```

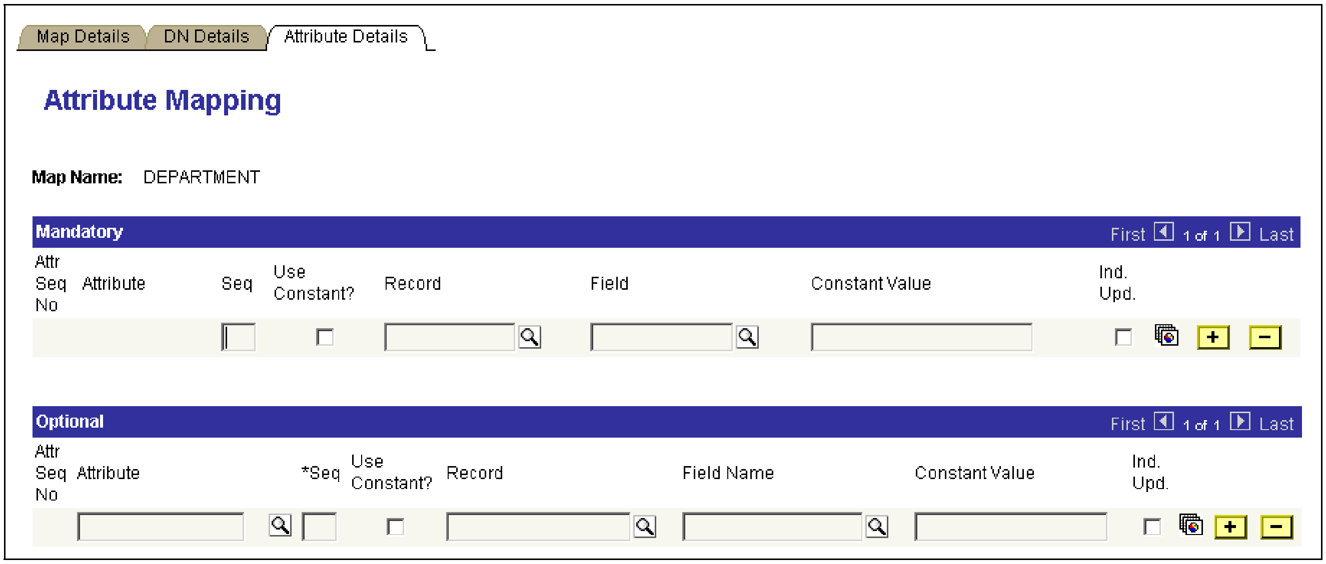
Define a new PeopleCode function (FuncX) to be used by DSDynamicAttrFunc PeopleCode function. The parameter list must contain one parameter, an attribute type string input, as displayed in the exhibit above.

See Also

PeopleTools PeopleBook, Development Tools, PeopleCode Developers Guide, PeopleCode Language, Functions

Mapping Attributes to Object Class

Access the Attribute Details page.



Attribute Details page

You must enter mapping information for the directory attributes listed in the Mandatory group box.

Warning! Map mandatory attributes to required fields. The fields that you map to mandatory attributes must contain data or the mapping will fail. You can guarantee that there will be data in the fields by using only required fields. Use the Optional group box to map optional fields.

You can enter mapping information for additional directory attributes in this group box. Use optional attributes to provide more information about the object class beyond the information provided by the DN and mandatory attributes.

Attr Seq No (attribute sequence number) — The system displays the attribute sequence number assigned to this attribute.

Attribute — In the Mandatory group box, the system displays the mandatory attributes for this object class.

In the Optional group box, select optional attributes.

Seq (sequence number) — Enter a sequence number for this attribute. Some directory attribute values are made up of multiple values. The attribute sequence number distinguishes between the different attribute values and indicates to PeopleSoft Campus Directory Interface the order in which the PeopleSoft and constant values should be assigned to the attribute.

Use Constant? Select this check box to indicate that the system should use the constant value that you enter in the Constant Value field to populate the attribute.

Record Select the name of the record that contains the PeopleSoft field that you want to assign to this attribute.

Field Select the name of the PeopleSoft field containing the value that you want the system to use to populate this attribute.

Constant Value When you select the Use Constant? check box, the system populates this attribute with the value you enter in this field.

Ind Upd (indirect update) Select this check box if the field that you selected is used as an attribute in the directory outside of this mapping and you want it to be updated when this field is updated. The system will only update attributes in entries at lower levels on the Directory Information tree than this entry.

Click to launch the Directory Interface page if you want to translate database values or instruct the system to perform functions with database values.

Note. Use this page when constructing DNs across active directory multiple domains.

Reviewing Sample Messages

PeopleSoft Campus Directory Interface delivers sample messages for mapping PeopleSoft data to your directory. The following table lists the sample messages and PeopleCode functions related to your directory mappings.

Message Name	Directory Entry
DSLocation	Location Entry
DSDept_tbl	Department Entry
DSWorkforce_Sync	Job Entry
DSPerson_Basic_Sync	Person Entry
DSPerson_Sync	An alternate Person Entry
DSStudent_Sync	Student Entry
DSApplicant_Sync	Student Applicant Entry

Message Name	Directory Entry
DSAdvsr_Sync	Instructor/Advisor Entry
DSStaff_Sync	Contributor Relations Staff Entry

See Also

PeopleTools PeopleBook, Integration Tools Application Messaging.

Reviewing the Publish Message

The following is an example of Publish PeopleCode used in SavePostChange PeopleCode in a component.

```
Local Message &MSG;
Local Rowset &COMPONENTROWSET;

&COMPONENTROWSET = GetLevel0();
&MSG = CreateMessage(MESSAGE.WANDA_PERSPUB);
&MSG.CopyRowsetDeltaOriginal(&COMPONENTROWSET);
&MSG.Publish();
```

Note. When publishing mapping data use CopyRowsetDeltaOriginal rather than CopyRowsetDelta.

Reviewing the Subscription Message

The following is an example showing subscription PeopleCode in a message.

```
Declare Function ProcessMappingMessage PeopleCode FUNCLIB_DS_PC.DSMAPMESSAGE FieldFormula;
Local Message &msgIn;

/* Build the Mapping messages from the input message */
&msgIn = GetMessage();
ProcessMappingMessage(&msgIn, "DSMAPINPUT", True, "");
```

Reviewing the DSMAPINPUT Message

The DSMAPINPUT message corresponds to Directory Input. DSMAPINPUT message is a sample message that combines the information from an employee’s job and personal data into one message. DSWORKFORCE_SYNC message publishes an employee’s job information. DSPERSON_BASIC_SYNC message publishes an employee’s personal information.

Important! DSMAPINPUT is provided as a sample only of how PeopleCode and Application Messaging can be combined to synchronize PeopleSoft and a directory in a more complex fashion. This sample contains hardcoded values that may not be present in your own production environment.

In the subscription of the DSWORKFORCE_SYNC and DSPERSON_BASIC_SYNC the message is passed as input into the BuildMappingMessage, which populates the DSMAPINPUT message with the both the employee's job and personal data. This enables you to map both job and personal data for one message to one entry in the directory.

Reviewing the Build Mapping Message

This section lists the syntax, description, and parameters of the BuildMappingMessage

Syntax

The syntax of the BuildMappingMessage is as follows.

```
BuildMappingMessage(input message, output message, on-line flag, [, map name])
```

Description

The BuildMappingMessage is used to populate a message using data stored in another message and data stored in the local database. After populating the message from the two data sources it calls the mapping function. It is necessary to use this function instead of directly calling the mapping function in cases where all the data required for the directory mapping is not contained in the originally published message.

The function performs the following tasks:

- Copies data contained in the same record from the input message into the output message.
- Searches for empty records in the output message.
- Examines the existing data in the message to find key values for the empty records.
- If the key values for the empty records are found, the function populates the empty records in the output message by retrieving its current rows in the database.
- If a map name is provided, it calls the mapping function for this provided name. Otherwise, it calls the mapping function for each map referencing the output message.

The BuildMappingMessage code is located in the FUNCLIB_DS_PC derived record, DSMAPMESSAGE field, Field Formula event.

Parameters

Name	Type	Description
input message	Message	Pass the message containing the originally published data
output message	String	Specify the name of the message to be created, filled up and pass to the mapping function

Name	Type	Description
on-line flag	Boolean	Set to true if the function is called after an online message publication. This flag is not used by the BuildMappingMessage function but is just passed to the mapping function
map name	String	Specify the name of the map to be used, if the function should not call every map associated with the output message

Example

The following is an example of the BuildMappingMessage.

```
Local Message &MsgIn;
BuildMappingMessage(&MsgIn, "DSMAPINPUT", True, "PERSON_NDS");
```

Tracking Your Reporting Structure (HRMS Only)

The reporting structure tracking functionality is designed to update the directory with all the reporting data pertaining to any processed employee within your organization.

Important! Reporting structure tracking is a PeopleSoft Human Resources Management function. If you have not licensed or installed PeopleSoft HRMS, reporting structure tracking will not work in your environment.

Reporting structure tracking leverages the data stored in the following records:

- DSPRIMMNGR
- DSMANAGERS

  The following list reveals the PeopleSoft reporting data that you can track:

- The Supervisor ID (from the JOB record).
- The Reports To ID (From the JOB Record).
- The Department Manager ID (From the DEPT_TBL record).
- The incumbent of the Manager Position Number stored in the Department record (DEPT_TBL).
- The Report Dotted Line ID, from the POSITION_DATA table, in case a Position Number is assigned to the employee on the JOB record.

The Reporting Structure Tracking application automatically updates the directory with all the managers defined for the Employee being currently processed provided that the corresponding data is available in the PeopleSoft database.

Understanding Reporting Structure Tracking

In order to perform this task, this process uses the following records and fields.

The following records are automatically populated with the correct data during the Mapping process. These tables are then used to update any mapped attributes of the directory with the current Reporting Data.

DSPRIMMNGR Record

The following table describes the DSPRIMMNGR record.

EMPLID	The Employee's ID
DSMANAGERUID	Stores the DN in the Directory of the employee's Supervisor, or Reports To ID (depending on which one is used on the JOB record).
DSMANAGERDEPTUID	Stores the DN in the directory of the manager of the Department that the employee is in.
DSINDMANAGERUID	Stores the DN in the directory of the Dotted-Line manager of the employee.

Table DSPRIMMNGR only stores data pertaining to the Employee's Primary Job row. The Primary Job of an employee is defined as the current Job where JOB_INDICATOR is set to *P*.

Note. If the JOB_INDICATOR is not set, then the Primary Job is assumed to be the current Job with the lowest Employee Record number.

DSMAMANGERS Record

The following table describes the DSMAMANGERS record.

EMPLID	The Employee's ID
EMPL_RCD	The Employee's Record Number.
DSMANAGERUID	Stores the DN in the Directory of the employee's Supervisor, or Reports To ID (depending on which one(s) is/are used on the JOB record)
DSMANAGERDEPTUID	Stores the DN in the directory of the manager of the Department that the employee is in.
DSINDMANAGERUID	Stores the DN in the directory of the Dotted-Line manager of the employee.

The DSMANAGERS table stores all the reporting information for all the Job Rows of the Employee. It therefore also stores the Employee's Primary Job row.

Setting Up Reporting Structure Tracking

In order to set up Reporting Structure Tracking, do the following:

- Add any (or both) of the DSPRIMMNGR and/or DSMANAGERS records to the Message Definitions of the Messages that you intend to use to update the external directory. For example, the delivered Message DSMAPINPUT integrates those two tables. It is not necessary to add both tables to the Message Definition if the data stored in one of records is not relevant to the directory.
- Map all the relevant fields in DSPRIMMNGR and/or DSMANAGERS to the Directory Attribute(s) that will store the DN(s) of the manager(s) of the employees. You should complete this using the Mapping pages, as you would any other Record.Field.

The Report Structure Tracking process is inactive if any of the previous steps have not been completed.

Setting Up User Authentication Mapping

This section provides and overview of user authentication and discusses how to:

- Map the authentication directory.
- Map an alternate DN.
- Map mandatory user profile properties.
- Map optional user profile properties.

Understanding User Authentication

If you are going to use directory authentication, you must make some user attributes available for the signon PeopleCode at log in time. These properties appear on the Mandatory User Properties page. Other properties are optional, and these appear on the Optional User Properties page.

The user profile mapping enables you to manage your user cache in the PeopleSoft database. Every user of the system requires a row in the PeopleTools security table, PSOPRDEFN, and the properties that you specify in the Mandatory and Optional User Properties pages are the columns in PSOPRDEFN that the system populates with user values.

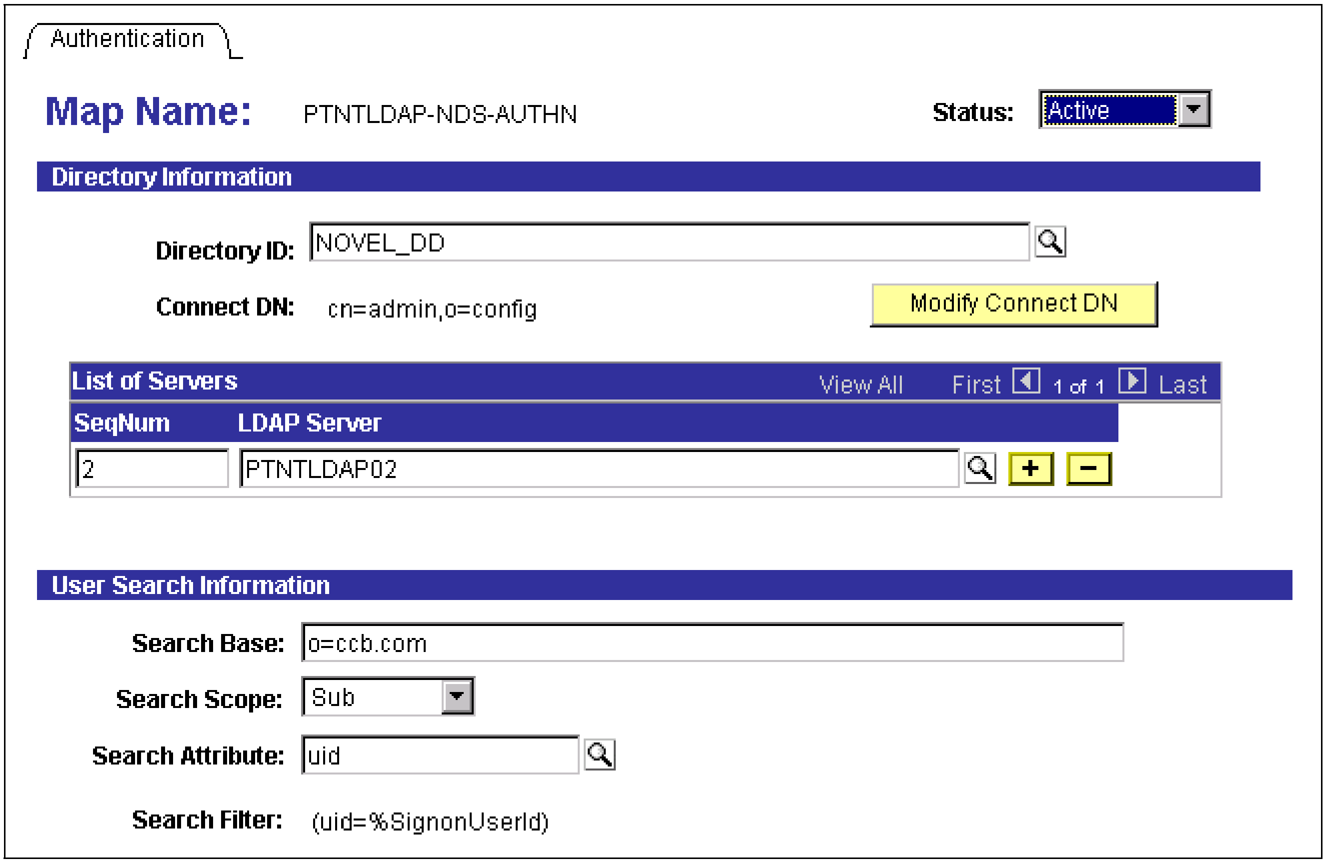
Note. You only need to supply user properties to signon PeopleCode if you intend to authenticate users with your LDAP directory.

Pages Used to Set Up User Authentication Mapping

Page Name	Object Name	Navigation	Usage
Authentication	DSSECMAPMAIN	Design Student Administration, Manage Directory Interface, Use, Authentication Map	Map the authentication directory. **Note.** Note. Use this page only if you are implementing directory authentication.
Authentication Mapping - Modify Connect DN	PSDSUSERDN	Click the Modify Connect DN button on the Authentication Mapping page.	Map an alternate connect DN to connect to the directory server.
Mandatory User Properties	DSUSRPRFCMANMAP	Design Student Administration, Manage Directory Interface, Use, User Profile Map	Map mandatory user profile properties by specifying the attributes required for sign on. You can select to have the system retrieve these mandatory values from the directory server or you can enter default values.
Optional User Properties	DSUSRPRFLOPTMAP	Design Student Administration, Manage Directory Interface, Use, User Profile Map	Map optional user profile properties by specifying other properties to store in and retrieve from the directory, including general properties, permission list, and workflow attributes.

Mapping the Authentication Directory

Access the Authentication page.



Authentication page

Note. After installing the Campus Directory Interface, the Authentication page described here replaces the Directory Authentication page in the Maintain Security menu.

Status Activate an authentication mapping by selecting *Active.* To disable an authentication mapping, select *Inactive.*

Directory Information

Directory ID Select the directory ID of the directory that you intend to use for authentication.

Connect DN The value that appears on the page is the default connect DN that you specified on the Directory Setup page. To select one of the DNs specified on the Additional Connect DN's page, click Modify Connect DN.

Modify Connect DN Click to access the Authentication Mapping -- Modify Connect DN page.

List of Servers

SeqNum (sequence number) Set the order in which the system should access the servers for authentication.

LDAP Server Select the name of the LDAP server. Add additional servers if needed.

User Search Information

Search Base Enter the root of the directory schema under which the system should search for user information.

Search Scope Select the search scope for this search. You can select from the following options:

Base: The query searches only the value in the Search Base field.

One: The query searches only the entries one level down from the value in the Search Base field.

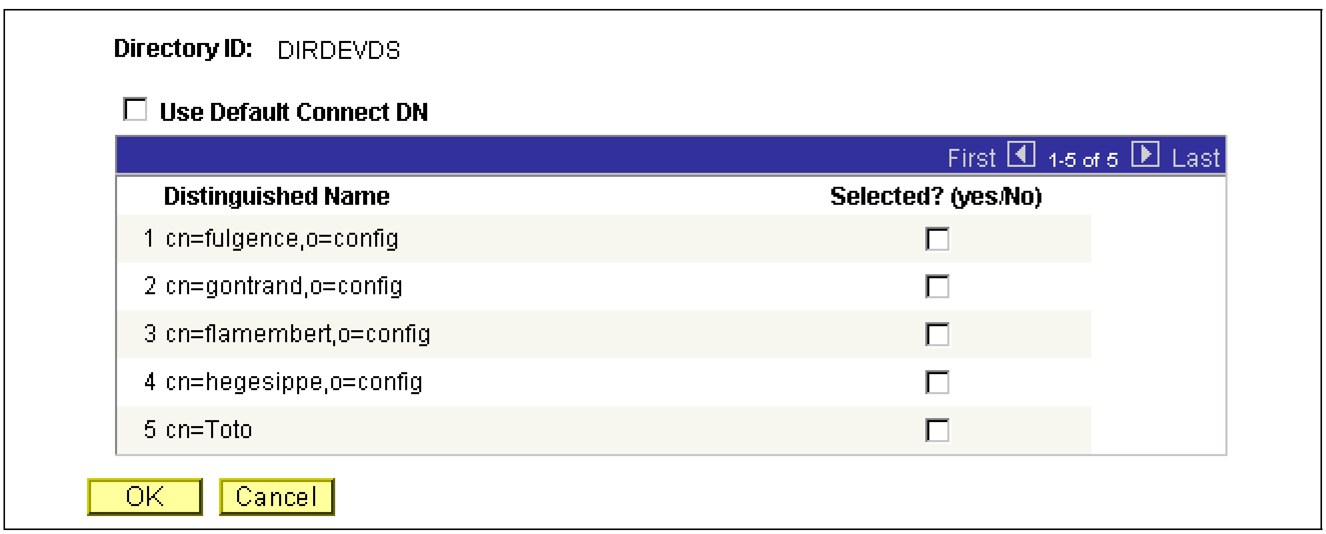
Sub: The query searches the value in the Search Base field and all entries beneath it.

Search Attribute Enter the attribute to be returned by the search, such as user ID *(uid)* or customer ID *(cid)*.

Search Filter Displays the LDAP search filter that the system uses to search the directory for equal entries.

Mapping an Alternate DN

Access the Authentication Mapping - Modify Connect DN page.



Authentication Mapping - Modify Connect DN page

Directory ID Identifies the directory definition you are modifying.

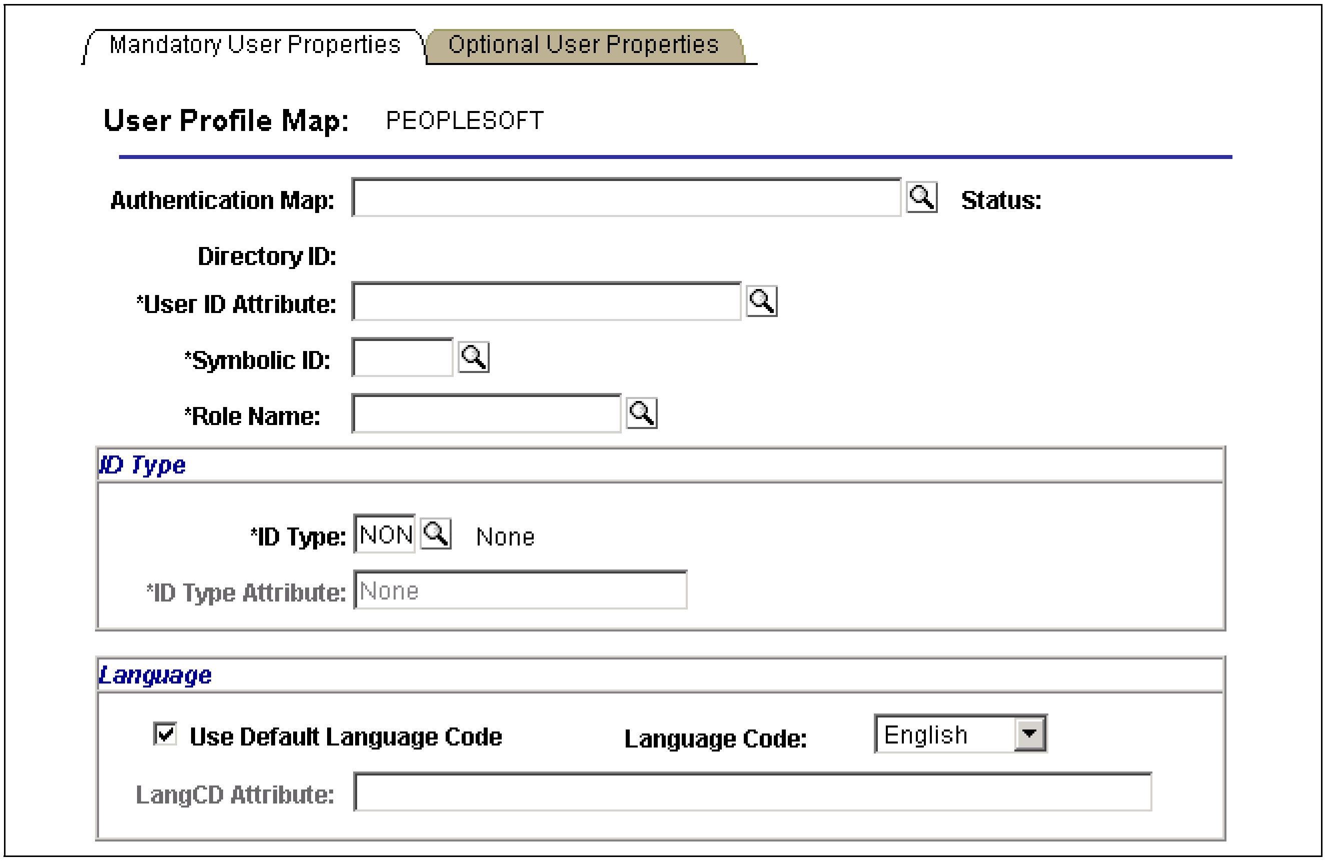
Use Default Connect DN Select this check box if the default connect DN is the only DN that the system should use. By selecting this option, you disable the option to select additional DNs.

Distinguished Name Displays the list of DNs specified on the Additional Connect DN's page.

Selected? (yes/No) Select the DNs that the system should use for connection. If a DN is not selected, the system bypasses it during connection.

Mapping Mandatory User Profile Properties

Access the Mandatory User Properties page.



Mandatory User Properties page

Authentication Map Select the authentication map to associate with this user profile mapping.

Status Displays the status of the selected authentication map.

Directory ID Displays the directory ID associated with the authentication mapping.

User ID Attribute Select the attribute that the system will authenticate against for this profile.

Symbolic ID Enter a valid symbolic ID for your PeopleSoft database. The symbolic ID is never stored in LDAP. You enter it here on this page, and you enter one value for all users.

Role Name Enter the name of a default role to be assigned to new users. This value applies to users the first time that they sign on and have not had any roles dynamically assigned to them. Typically, this role has only basic access authorizations, such as for the self-service pages only. Users should get most of their permissions through dynamically assigned roles.

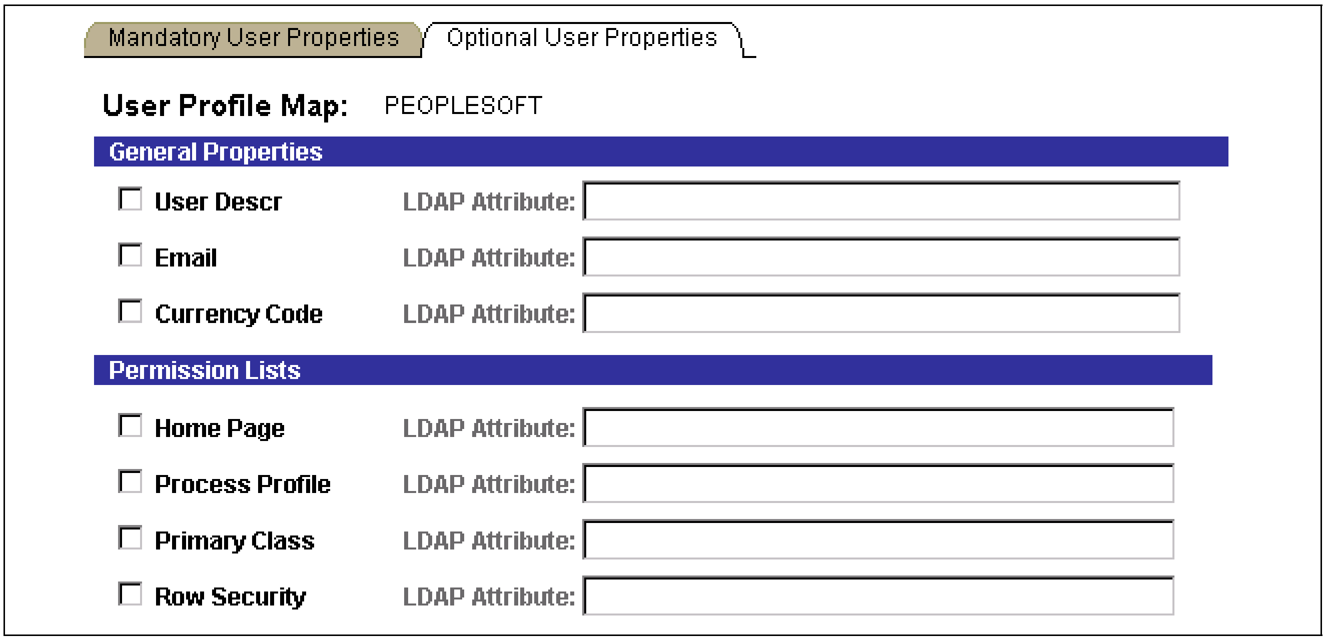
ID Type Similar to Symbolic ID. This is the default ID type for new users, such as Employee ID, Customer ID, and so on.

ID Type Attribute Specifies the LDAP attribute in the directory that holds the selected ID value. For instance, the ID value might be Employee ID.

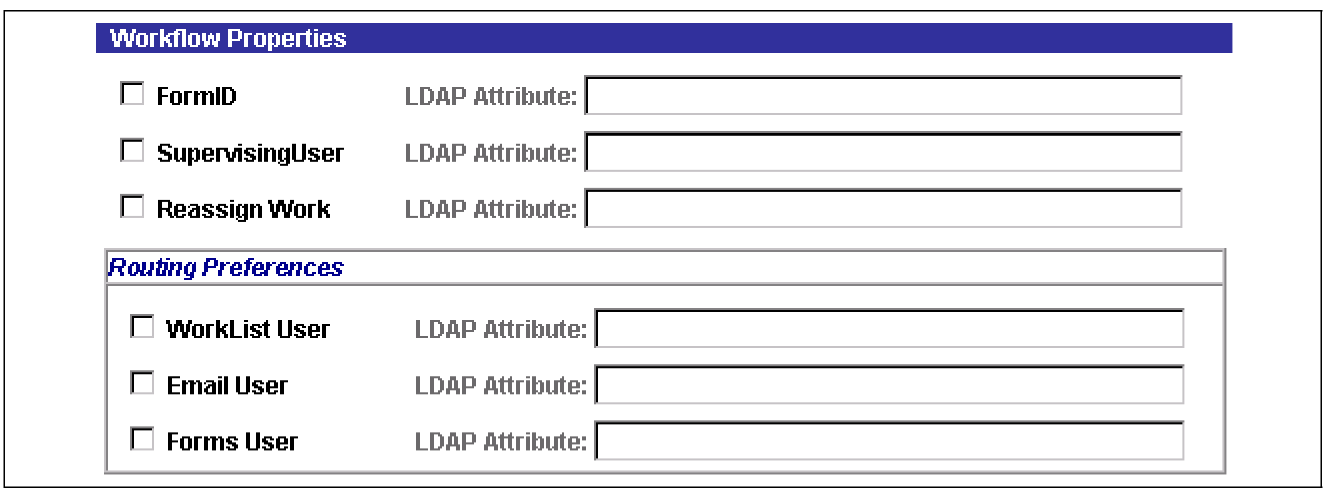
Use Default Language Code	Select this check box if you do not maintain language codes in the directory.
Language Code	If the default language code is not stored in the directory, then select a default value from the drop-down list box.
LangCD Attribute (language code default attribute)	The name of the LDAP attribute containing a valid language code. The value retrieved from the attribute must be a valid PeopleSoft language code.

Mapping Optional User Profile Properties

Access the Optional User Properties page.



Optional User Properties page (1 of 2)



Optional User Properties page (2 of 2)

General Properties

User Descr (user description) — Typically the name of the user, such as an employee name or a vendor name.

Email — Enter an email address if a user is part of your workflow system or you have other systems that generate emails for users.

Currency Code — If the user deals with international prices, set the currency code to reflect the native or base currency so that values appear in the currency with which the user is familiar.

Permission Lists

Home Page — The homepage is associated with PeopleSoft Workflow (Navigator Homepage).

Process Profile — The process profile contains the permissions that a user requires for running background processes through Process Scheduler. For example, the process profile authorizes users to view output, update run locations, restart processes, and so on. Only the process profile comes from this permission list, not the list process groups.

Primary Class and Row Security — PeopleSoft determines which data permissions to grant a user by looking at the Primary Permission List and Row Security Permission List. Which one is used varies by application and data entity (Employee, Customer, Vendor, Business Unit, and so on). Consult your application documentation for more detail. PeopleSoft also determines Mass Change, and Object Security permissions from the Primary Permission List.

Workflow Properties

Form ID — Enter the appropriate Lotus Notes form ID used for routing forms.

Supervising User — Select the user ID of the user's supervisor. The system uses this value to forward information to the user's supervisor. The system uses the PERSONAL_DATA record to determine the user's supervisor.

Reassign Work — Use this field to reassign any pending work for this role user if positions change or a user is going on a temporary leave, such as a vacation.

If this user has work items waiting for attention (as indicated by the Total Pending Worklist Entries in your workflow interface), select the Reassign Work check box and select the user to forward their work items to. When you save the page, the system reassigns existing worklist entries to the specified user.

Routing Preferences

WorkList User — If the user is part of your PeopleSoft Workflow worklists, select the check box and add the corresponding LDAP attribute (the attribute that contains the names of the worklists).

Email User If the user is part of your PeopleSoft Workflow email routings, select the check box and add the corresponding LDAP attribute (the attribute that contains the names of the email routing).

Forms User If the user needs access to Lotus Notes forms, select the check box and add the corresponding LDAP attribute (the attribute that contains the names of the Lotus Notes forms).

To incorporate an existing LDAP attribute to an equivalent PeopleSoft field, use this page to map the LDAP attribute to the PeopleSoft field. To do so, select the check box next to the PeopleSoft field. This makes the LDAP Attribute edit box available for entry; enter the corresponding LDAP attribute name.

This page enables you to take advantage of LDAP information. PeopleSoft retrieves the LDAP information and creates a local cache in database tables. PeopleSoft applications use this cache rather than using LDAP each time that a transaction requires user information. This means that after a user signs on to the system and the signon PeopleCode executes, there is a row for that user in the user definition table. You do not need to maintain the local cache of user information; signon PeopleCode maintains this row automatically. Any changes made in the directory server are reproduced in the local cache.

Setting Up Role Membership Options

This section provides an overview of the role membership options and discusses how to define role membership rules.

Understanding Role Membership Options

PeopleSoft security roles are comparable to LDAP Directory Groups. Roles enable you to group user IDs in logical sets that share the same security privileges. PeopleSoft Campus Directory Interface enables you to keep your external directory groups synchronized with the data stored within the PeopleSoft database. It is also important to keep the data within PeopleSoft consistent with any changes made to the structure or content of the external directory server. This is especially crucial when dealing with security data.

The membership components, Role Membership Rules and Entry Membership rules, help you to enforce security throughout the whole system. You do this by defining security rules to update both the external directory groups and the PeopleSoft security roles.

The membership components are distinguished by their underlying purpose:

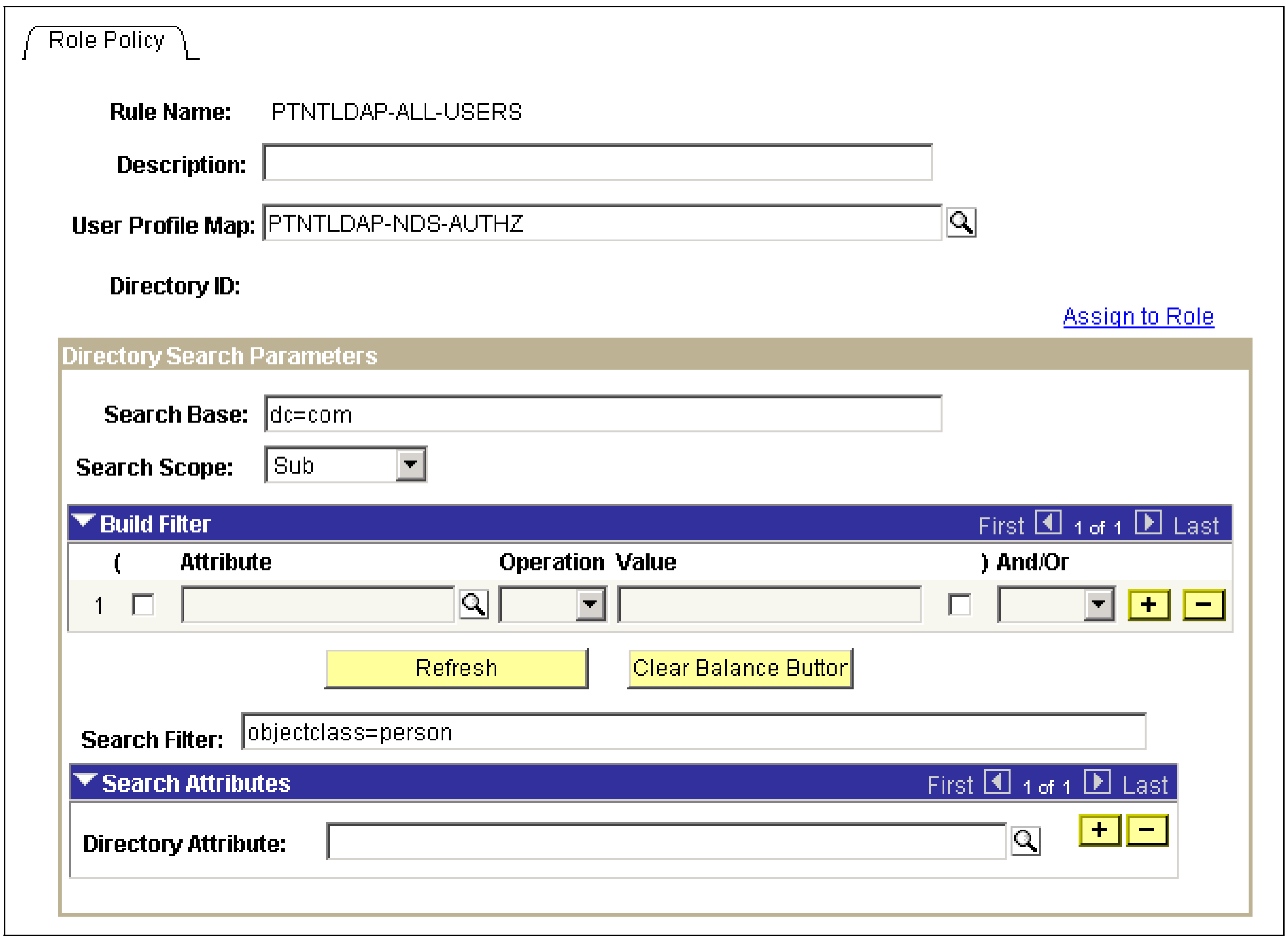
- The Role Membership Rules component enables you to modify a PeopleSoft role based on directory criteria.
- The Entry Membership Rules component enables you to modify a directory entry, such as a group, based on criteria stored in the PeopleSoft database.

Page Used to Set Up Role Membership Options

Page Name	Object Name	Navigation	Usage
Role Policy	DSSECROLERULE	Design Student Administration, Manage Directory Interface, Use, Role Membership Rules	Define role membership rules to be read by Dynamic Role Rule PeopleCode and populate PeopleSoft roles with members. The rules return the DNs of "people" directory entries, which supply the system with the user IDs specified on the user profile mapping.

Defining Role Membership Rules

Access the Role Policy page.



Role Policy page

Rule Name The directory search name that you entered on the search page.

User Profile Map Select the user profile map to associate with the rule.

Directory ID The user profile map that you select.

Assign to Role Click this link to automatically launch the Dynamic Members page in the Roles component of the Maintain Security menu. On that page, select Directory Rule Enabled and specify the server on which to execute the rule.

Directory Search Parameters

Search Base Select the directory entry that is the search base for this search. The search base is the entry in the directory information tree at which the search begins querying.

Search Scope Select the search scope for this search from the following options:

Base: The query searches only the value in the Search Base field.

One: The query searches only the entries one level down from the value in the Search Base field.

Sub: The query searches the value in the Search Base field and all entries beneath it.

Build Filter

( ) (parentheses) On either side of the filter expression select the check boxes below the parentheses to group expressions. You can group more than one line together using the check box on the left for the first line and the check box on the right for the last line.

Attribute Enter the name of the attribute whose data you want filter.

Operation Assign an operator to your rule such as <, <=, <>, =, >, or >=.

Value Enter the value to assign to the attribute that you specified.

And/Or To add another line to your rule, select *AND* or *OR* depending on your rule logic. Select *END* to signify the end of the search. Select *NoOp* if you are not using this kind of filter.

Refresh After you make changes using the Build Filter options, click this button to update the Search Filter edit box to reflect the changes.

Clear Balance Button Click this button to delete all values from the Search Filter edit box and the Build Filter selections.

Search Filter The filter that the system applies to the search for the defined container.

When you enter a query in the Build Filter group box then click the Refresh button, the query is displayed in this field. You can also directly type the desired search query into this field. The query you type must respect the LDAP syntax. For example, `objectclsass = GroupOfUniqueNames` or `(&(cn=john johnson)(uid=jjonson))`.

For more information about LDAP syntax, see your directory documentation.

Search Attributes

Directory Attribute Select the attribute that identifies the user to add to this membership.

Note. Technically, the role membership can involve more than directory groups. You can determine role membership using any arbitrary LDAP search criteria, such as conditions other than just group membership. For example, you could assign everyone whose last name starts with *S* to a role.

Setting Up Entry Membership Rules

This section provides an overview of entry membership rules and discusses how to:

- Create a membership entry container definition.
- Establish entry membership container rules.

Understanding Entry Membership Rules

Entry Membership rules enable you to modify a directory entry, such as a group, based on criteria stored in the PeopleSoft database. This feature leverages the security features of LDAP directories by associating Directory Groups to PeopleSoft rules and business events. This feature provides a method to match any type of directory entry to rules that are meaningful in PeopleSoft, and because of this, you can use membership rules to create any type of logical grouping in the directory. The groupings are not restricted to security purposes.

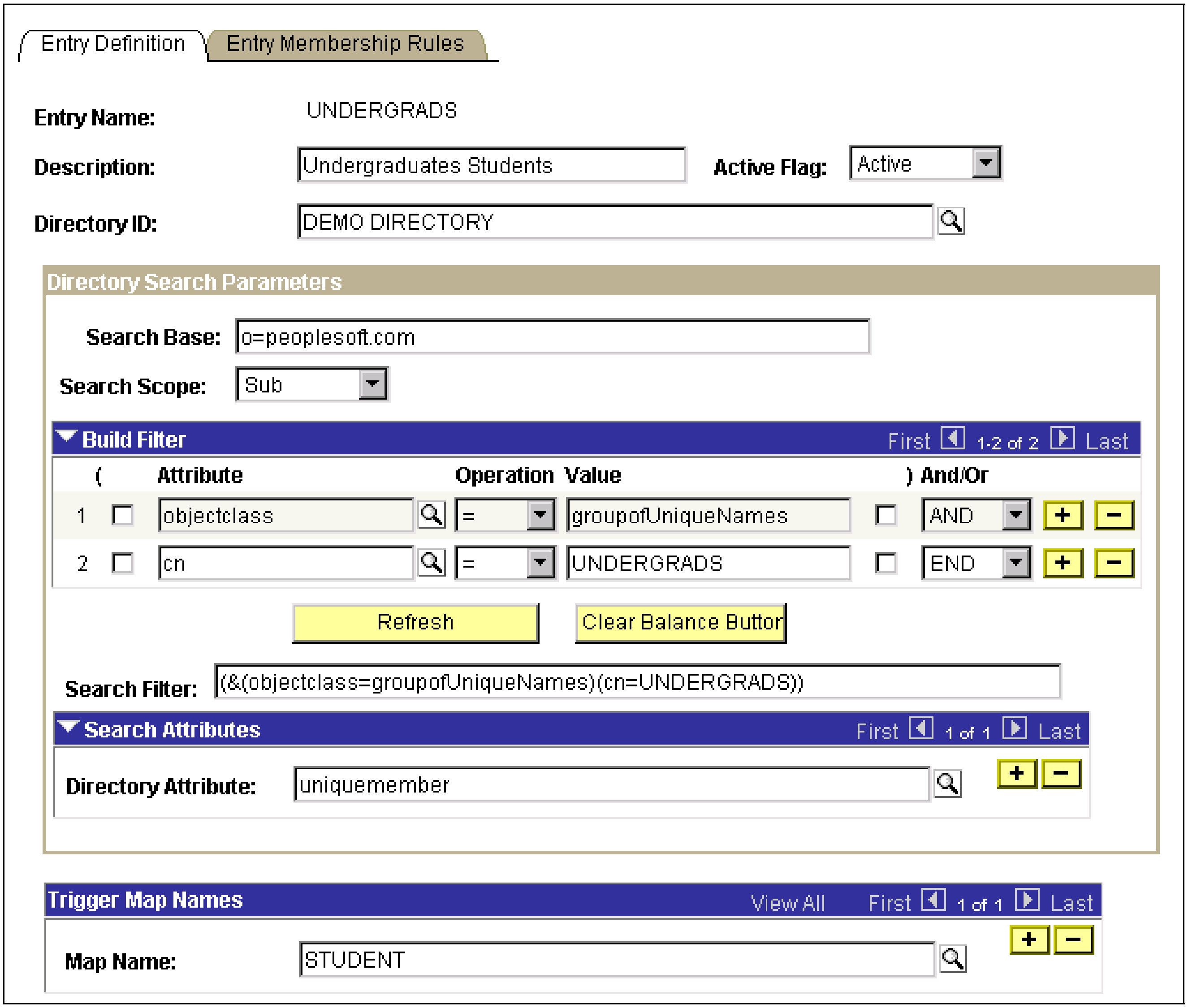
The following pages enable you to map LDAP elements to counterparts in the PeopleSoft system.

Pages Used to Set Up Entry Membership Rules

Page Name	Object Name	Navigation	Usage
Entry Definition	DSCONTAINTERDEFN	Design Student Administration, Manage Directory Interface, Use, Entry Membership Rules	Create a membership entry container definition.
Entry Membership Rules	DSSECRULES	Design Student Administration, Manage Directory Interface, Use, Entry Membership Rules	Establish entry membership container rules.

Creating a Membership Entry Container Definition

Access the Entry Definition page.



Entry Definition page

Entry Name The entry name that you entered on the search page. The system uses this value for the container name throughout the application, so it must be the name of an existing container in the external directory. PeopleSoft assumes that the name is unique in the directory.

Directory ID Select the directory ID of the directory that contains the current directory entry.

Active Flag Use this check box to enable and disable rules. Rules that aren’t active do not execute.

Directory Search Parameters

Search Base Select the directory entry that is the search base for this search. The search base is the entry in the directory information tree at which the search begins querying.

Search Scope Select the search scope for this search from the following options:

Base: The query searches only the value in the Search Base field.

One: The query searches only the entries one level down from the value in the Search Base field.

Sub: The query searches the value in the Search Base field and all entries beneath it.

Build Filter

For descriptions of the page elements in this group box follow the reference, then find the Build Filter section.

See Chapter 3, "Configuring PeopleSoft Campus Directory Interface," Defining Role Membership Rules, page 42.

Search Attributes

Directory Attribute Select the attribute of the entry being defined that will contain all the members of this entry. This attribute must be valid for the current entry in the directory. The employees that satisfy the entry membership rules of this entry will be added under this entry as a new value of this attribute. Because of this, there will be as many attribute values as there are employees satisfying the entry membership rules. If this field is left blank, the application uses "member" as a default attribute name.

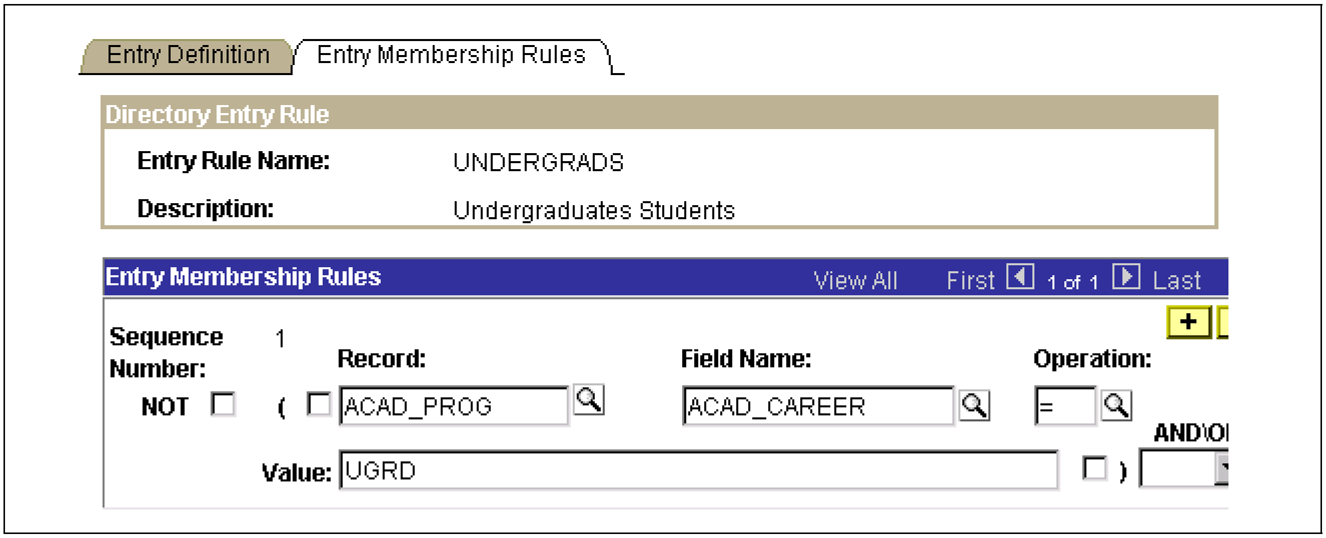
Trigger Map Names

Map Name Select the names of the maps that you want to associate with the container definition. Besides being a security feature, this will also improve performance at runtime because only applicable rules will be evaluated.

Note. Run the Directory Audit Process if a container rule has changed or if you want to initialize the directory containers.

Establishing Entry Membership Container Rules

Access the Entry Membership Rules page.



Entry Membership Rules page

Directory Entry Rule

Entry Rule Name The current entry rule.

Description The description for the current entry rule entered on the container definition.

Entry Membership Rules

Sequence Number The sequence or order of appearance of a rule within a rule set. The sequence becomes significant when you enter more than one rule. Add additional rules as needed.

NOT Select this check box to negate the rule that you enter. This is similar to using the symbol *!* to reverse the truth value of an operand.

( ) Parentheses; select the check boxes to add parentheses around your rule. You can optionally group more than one line together using the check box on the left for the first line and the check box on the right for the last line.

Record Enter the name of the PeopleSoft record containing the information to be tested.

Field Name Enter the name of the PeopleSoft field (or column) to be containing the information to be tested.

Operation Enter the appropriate operator, such as < , <= , <> , = , > , or >=.

Value Enter the value that the employee’s data needs to be tested on. This can be any value of the same type as the field used in the rule, such as string, number, date, and so on.

AND/OR To add another line to your rule, select *AND* or *OR* depending on your rule logic. Select *END* to signify the end of the search. Select *NONE* if you are not using this kind of filter.

The entry rules are logical expressions that can be either true or false. They are composed of filters on database objects associated by logical operators. Rules have the following form:

```
[NOT] [ ( ]  Record . Field   operator   Constant [ ) ] [AND/OR]
```

The symbols between square brackets are optional. The *operator* can be <, <=, <>, =, >, or >=. A rule set is composed of single rules joined by AND or OR Boolean operators if necessary. The following example shows a series of single rules joined to make one compound rule.

(ACAD_PROG.ACAD_CAREER = ‘GRAD’ AND [1]

ACAD_PROG.PROG_STATUS = ‘ACTV’) OR [2]

NOT INSTR_ADVISOR.INSTR_TYPE = ‘PROF’[3]

There are no limits to the number of rules used within a rule set.

CHAPTER 4

Auditing Directory Data

This chapter provides an overview of the directory audit process and discusses how to process directory data auditing.

Understanding the Directory Audit Process

After you set up and use PeopleSoft Campus Directory Interface to copy PeopleSoft data into your directory, you will want to review the data. PeopleSoft Campus Directory Interface provides two tools for reviewing directory data: Directory Audit process and Directory Search component.

Use the Directory Audit process to ensure that your directory database has the same data as your PeopleSoft database. The process compares the data in the directory to the data in the PeopleSoft database identified in the selected map and creates an LDIF (LDAP Data Interchange Format) file containing any discrepancies using PeopleSoft as the authority. You can then use the LDIF file to update the directory. (For more information about running an LDIF file in the directory, see your directory documentation.) You can also generate the Directory Audit Report to determine the discrepancies found by the Directory Audit process so that you can update the directory with the latest PeopleSoft data.

Use the Directory Search Component to define search parameters to query the directory and view the results. The system displays the results on the Search Results page as they appear in the directory. You can save the search parameters that you set up on the Execute Search page and use them in the future without having to enter them again.

Note. Use the Directory Audit process instead of the Directory Load Process to load PeopleSoft data into your directory if you have an existing directory and you are using PeopleSoft Campus Directory Interface for the first time. The audit process enables you to compare your existing data to the PeopleSoft data before uploading the PeopleSoft data.

Processing Directory Data Auditing

This section discusses how to:

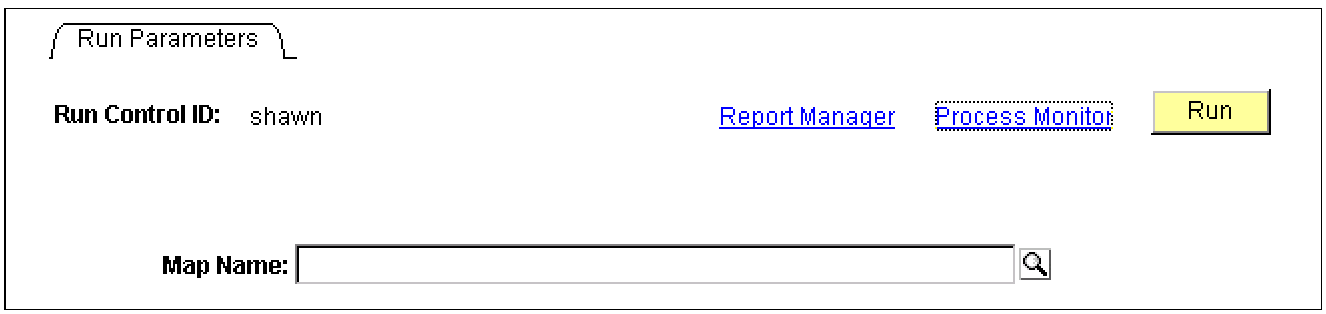
- Run the directory audit process.
- Execute the query.
- View query results.

Pages Used to Process Directory Data Auditing

Page Name	Object Name	Navigation	Usage
Run Parameters	RUNCTL_DS_AUDIT	Design Student Administration, Manage Directory Interface, Process, Directory Audit	Run the Directory Audit process.
Directory Search	DSSRCHDIRECTORY	Design Student Administration, Manage Directory Interface, Inquire, Directory Search	Execute the query and define search parameters for the query of the directory. The component saves the search parameters for future use.
Search Results	DSSRCHRSLT	Click the Search button on the Directory Search page	View the results of the query search set up on the Directory Search page.

Running the Directory Audit Process

Access the Run Parameters page.

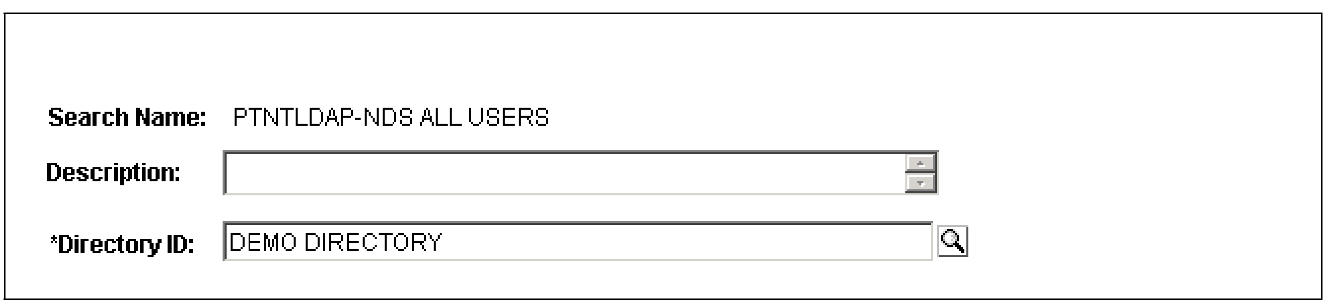


Run Parameters page

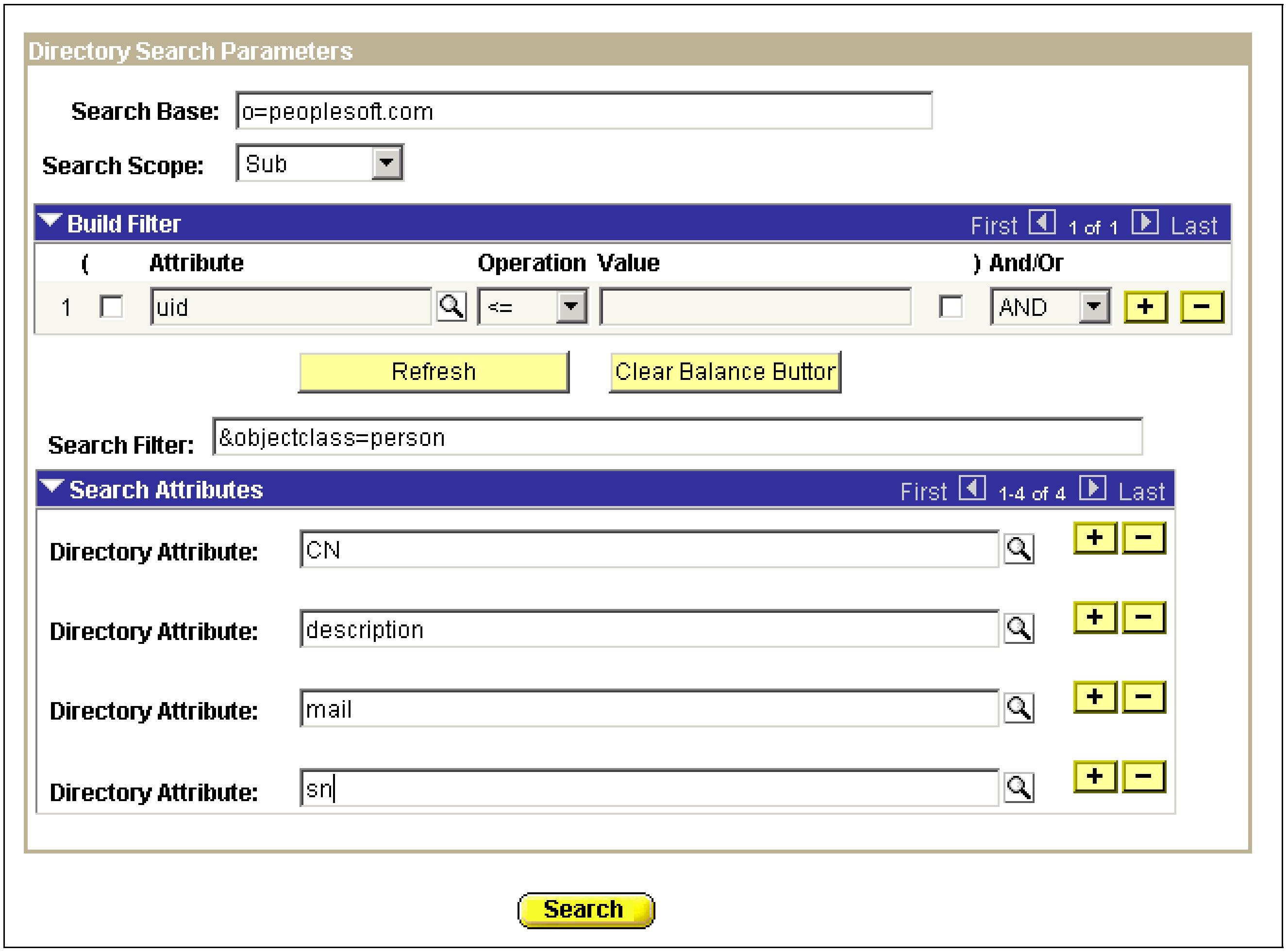
Map Name Select the name of the map that the audit should be run against. Map names are set up in the Directory Mapping component.

Executing the Query

Access the Directory Search page.



Directory Search page (1 of 2)



Execute Search page (2 of 2)

Search Name Enter the search name. The system saves the search parameters that you enter on this page and stores them under this name for future use.

Description Enter a description of the search that you are setting up.

Directory ID Select the directory ID of the directory whose data you will be querying.

Directory Search Parameters

Search Base Select the directory entry that is the search base for this search. The search base is the entry in the directory information tree at which the search begins querying.

Search Scope Select the search scope for this search from the following options:

Base: The query searches only the value in the Search Base field.

One: The query searches only the entries one level down from the value in the Search Base field.

Sub: The query searches the value in the Search Base field and all entries beneath it.

Build Filter

Use the fields in the Build Filter group box to create an attribute-specific filter. For example, if you want data on a single person, enter the Attribute *Person,* Operation =, and enter the person's name in the Value field. You can construct multiple filters.

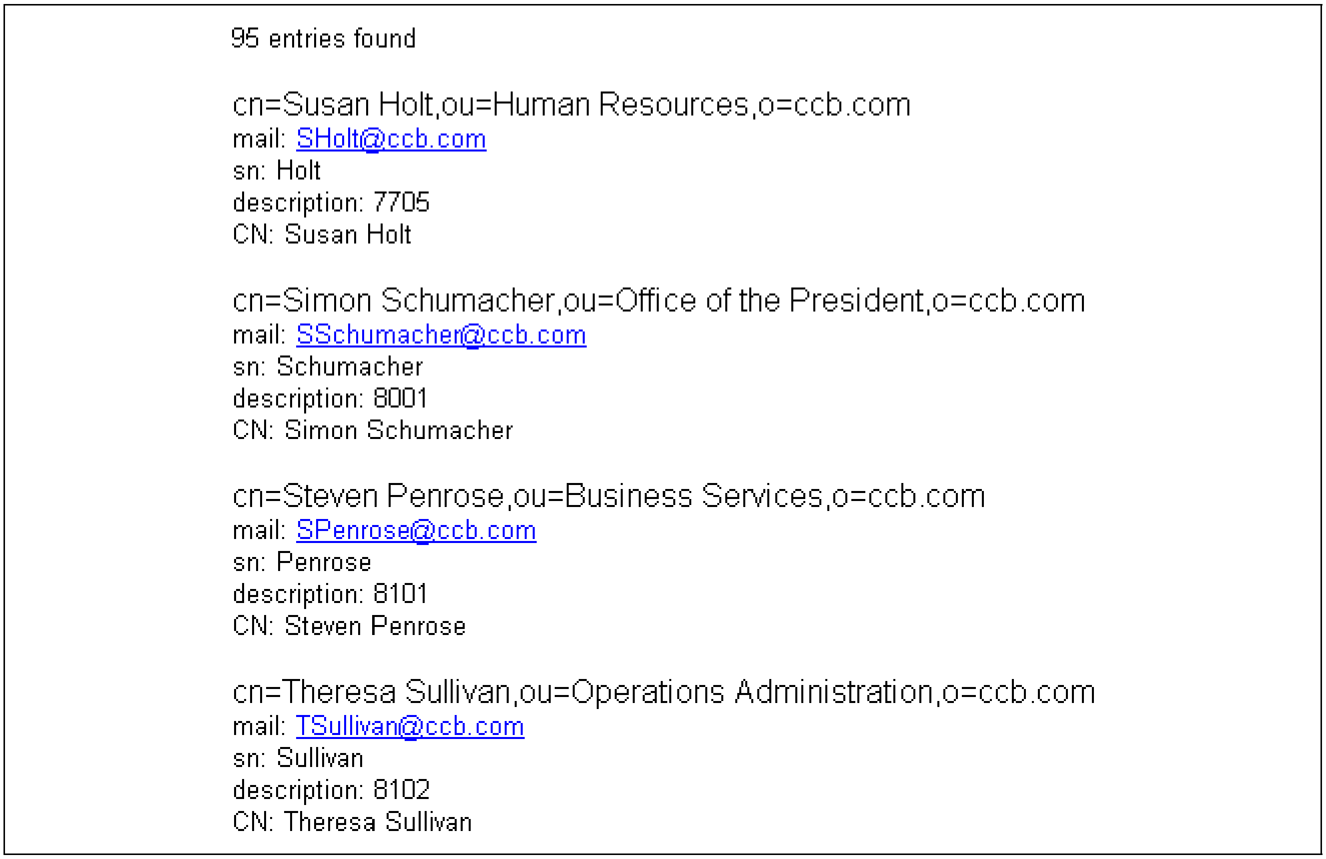
( )(parenthesis)	On either side of the filter expression, select the check boxes below the parentheses to group expressions. You can group more than one line together by using the check box on the left for the first line and the check box on the right for the last line.
Attribute	Enter the name of the attribute whose data you want to filter.
Operation	Assign an operator to your rule such as <, <=, <>, =, >=,or >.
Value	Select the value to compare against when filtering.
And/Or	To add another line to your rule, select *And* or *Or* depending on your rule logic. Select *End* to signify the end of the search. Select *NoOp* if you are not using this kind of filter.
Refresh	After you make changes using the Build Filter options, click this button to update the Search Filter field to reflect the changes.
Clear Balance Button	Click this button to delete all values for the Search Filter field and the Build Filters selections.
Search Filter	The filter that the system applies to the search for the defined container. When you enter a query in the Build Filter group box then click the Refresh button, the query is displayed in this field. You can also directly type the desired search query into this field. The query you type must respect the LDAP syntax. For example, `objectclsass = GroupOfUniqueNames` or `(&(cn=john johnson)(uid=jjonson)).` For more information about LDAP syntax, see your directory documentation.

Search Attributes

Directory Attribute	Select the attribute that you want the query to search. You can select multiple attributes. Leave this field blank to indicate that the query should search all attributes.
Search	Click to have the system search the directory using the parameters you set out here. The results are displayed on the Search Results page.

Viewing Query Results

Click the Search button on the Directory Search page to view the Search Results page.



Search Results page

The system retrieves data from the directory according to the parameters set on the Execute Search page and displays the data in directory format. To print these results, print the contents of your screen. To save the results select, copy, and paste them into a document file.

APPENDIX A

PeopleSoft Campus Directory Interface Reports

This appendix provides an overview of PeopleSoft Campus Directory Interface reports and enables you to:

- View a summary table of all reports.
- View report details and tables accessed for selected reports.

PeopleSoft Campus Directory Interface Reports: A to Z

This table lists the PeopleSoft Campus Directory Interface reports, sorted alphabetically by report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
DS001 Directory Audit	Compares PeopleSoft data to the directory data and identifies any discrepancies. Run the Directory Audit process before running this report. This report runs off the temporary table (PS_DSCOMPARE) created by the Directory Audit.	Design Student Administration, Manage Directory Interface, Report, Directory Audit Rpt	RUNCTL_DS_AUD_RPT
DS002 Business Interlink Status	Lists all errors that have been produced while using PeopleSoft Business Interlinks to update the directory. This source record for this report is PS_DS_BILOAD_ERR.	Design Student Administration, Manage Directory Interface, Report, Directory BI Status Rpt	RUNCTL_DS_BI_RPT

PeopleSoft Campus Directory Reports Details

This section provides detailed information about the CDI reports.

DS001 – Directory Audit

The Directory Audit report locates and reports on any discrepancies between the PeopleSoft database and your directory. Before you can run the Directory Audit report, run the Directory Audit process. The Directory Audit process populates a comparison record containing the data that differs between the PeopleSoft database and the directory and creates an LDIF (LDAP Data Interchange Format) file with this data that can be used to update the directory. The Directory Audit report is based on this record, so you can verify what will be updated in the directory if you apply the LDIF file in the directory.

The report will report the following errors:

- 1 DN not found in Directory
- 2 DN not found in PeopleSoft
- 3 Attribute in PeopleSoft but not in Directory
- 4 Attribute in Directory but not in PeopleSoft
- 5 Value in PeopleSoft but not in Directory
- 6 Value in Directory but not in PeopleSoft

See Also

Chapter 4, "Auditing Directory Data," page 49

DS002 – Business Interlink Status

If you selected an output type of Business Interlinks when setting up a map on the Directory Mapping component to map PeopleSoft fields to directory attributes, the system uses PeopleSoft Business Interlinks to make all modifications to the directory. If any errors are produced as a result of the interlinks, the system writes the errors to an error record. The Business Interlink Status report is based on this error record.

Glossary of PeopleSoft 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.

account — You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

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 entry — A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

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 anotherand a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

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 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.

application agent An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attachment In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.

background process In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

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 event In PeopleSoft 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).

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.

category In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.

ChartField A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft 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.

child In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.

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.*

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.

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, PeopleSoft maintains a set of collections (one per language code) for each search index object.

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.

configuration parameter catalog Used to configure an external system with PeopleSoft. 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.

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 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.

corporate account Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.

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.

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 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.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If youre working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values 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 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 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 job	Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
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.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event — Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect benefits eligibility.

event propagation process — In PeopleSoft 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. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

external system — In PeopleSoft, any system that is not directly compiled with PeopleTools servers.

fact — In PeopleSoft 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.

filter — In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.

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.

group — Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

homepage — Users can personalize the homepage, or the page that first appears when they access the portal.

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, user interaction objects, and so on.

incentive rule — In PeopleSoft 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.

key — 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.

learner group — In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.

learning activity — See *activity.*

learning history — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.

learning plan — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.

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.

level	A section of a tree that organizes groups of nodes.
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.
load	The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft 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 addressesfor 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 locationindicated by a *1*is the address you use most often and may be different from the main address.
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.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
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	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage 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 and non-PeopleSoft content.

parent node A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

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 *participant object.*

payout In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.

PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an 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.

per seat cost In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.

plan In PeopleSoft 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 contextif 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 section In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.

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.

portal registry In PeopleSoft 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.

private view A user-defined view that is available only to the user who created it.

process See *Batch Processes.*

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 an SQR, a COBOL 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 category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record definition A logical grouping of data elements.

record field A field within a record definition.

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 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 Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft 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.*

reference data In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

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.

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.

results management process In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

routing Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

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.

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.

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.

self-service application Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

session 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 activitycharacteristics 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.

sibling A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft 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.

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.

SQR See *Structured Query Report (SQR).*

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

Structured Query Report (SQR) A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

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 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.

table — The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).

TableSet sharing — Specifies control table data for each business unit so that redundancy is eliminated.

target currency — The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

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, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory — In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan — A relative period, such as year-to-date or current period, that can be used in various PeopleSoft 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 Projects.

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 loading process — In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.

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.

transaction type — In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.

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 systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

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.

uniform resource locator (URL) — In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

universal navigation header — Every PeopleSoft 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.

URL

See *uniform resource locator (URL).*

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All 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 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.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

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.

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.

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