



EnterpriseOne Tools 8.94 PeopleBook: Product Packaging

November 2004

EnterpriseOne Tools 8.94 PeopleBook: Product Packaging
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Contents

General Preface

About This PeopleBookvii

PeopleSoft Application Prerequisites.....vii

PeopleSoft Application Fundamentals.....vii

Documentation Updates and Printed Documentation.....viii

 Obtaining Documentation Updates.....viii

 Ordering Printed Documentation.....viii

Additional Resources.....ix

Typographical Conventions and Visual Cues.....x

 Typographical Conventions.....x

 Visual Cues.....xi

 Country, Region, and Industry Identifiers.....xi

 Currency Codes.....xii

Comments and Suggestions.....xii

Common Elements Used in PeopleBooks.....xii

Preface

PeopleSoft EnterpriseOne Preface.....xv

Product Packaging.....xv

Chapter 1

Getting Started.....1

Understanding Product Packaging Documentation Conventions.....1

Understanding Product Packaging Definitions.....1

Understanding the Product Packaging Process.....3

Chapter 2

Working with Software Masters.....5

Understanding Software Master Creation.....5

Preparing To Create a Software Master.....6

 Setting Up the System TEMP Directory.....6

 Setting Up the UBEs.....6

 Creating Pristine Control Tables.....7

Verifying the Product Packaging Data Source.....	8
Creating a Data Dictionary in the Pristine Data Source.....	9
Creating Change Tables.....	9
Verifying the Creation of Change Tables.....	11
Creating a Software Master.....	12
Understanding Software Master Definitions.....	12
Prerequisite.....	13
Defining a Software Master.....	14
Configuring Change Tables.....	15
Setting the Package Build Application to the Mastering Mode.....	17
Validating a Software Master Definition.....	17
Creating a Final Software Master.....	18
Confirming the Software Master.....	19
Moving the Software Master to a CD ROM.....	19
Updating PeopleSoft EnterpriseOne with the Software Master.....	19
Deleting a Software Master.....	23
Form Used to Delete Software Masters.....	24
Working with a Software Master Definition.....	24
Understanding Software Master Revisions.....	24
Understanding Software Master Validation.....	24
Forms Used to Revise Software Masters.....	25
Revising a Software Master Definition.....	25
Loading a Subdirectory from an Enterprise Network Directory.....	27
Copying a Software Master Definition.....	28
Proofing a Software Master Definition.....	28
Working with Software Master Templates.....	29
Understanding Software Master Templates.....	29
Understanding the All Build Step Processes.....	29
Understanding the ASU CD Template.....	32
Understanding the Custom CD.....	37
Forms Used to Work with Software Master Templates.....	37

Chapter 3

Working with Change Tables.....	39
Understanding Change Table Revisions.....	39
Working with Change Table Configurations.....	39
Forms Used to Work with Change Tables.....	39
Revising or Submitting Change Tables.....	39

Chapter 4

Performing Data Cleanup.....	41
Understanding Data Cleanup.....	41
Working with Data Cleanup Procedures.....	41
Forms Used to Work with Data Cleanup Procedures.....	42
Adding a Data Cleanup Procedure.....	42
Executing a Data Cleanup Procedure and Build Step.....	42
Working with Data Cleanup Templates.....	43
Understanding Data Cleanup Templates.....	43
Forms Used to Work with Data Cleanup Templates.....	44

Chapter 5

Working with Relative and Absolute Paths.....	45
Understanding Path Tokens.....	45
Working with Relative and Absolute Paths.....	45
Form Used to Work with Relative and Absolute Paths.....	46
Using Relative Path Tokens.....	46
Converting Relative and Absolute Paths.....	46

Chapter 6

Performing Product Packaging Troubleshooting.....	47
Troubleshooting Failure During the Check Mastering Items Step.....	47
Troubleshooting Failure To Build the Feature INF File.....	47
Troubleshooting JDELocal Database Not Populated.....	48
Troubleshooting Failure to Copy Change Tables.....	48
Troubleshooting Failure to Copy Custom Tables.....	48
Troubleshooting Unable to Find Product Package after Installation.....	48
Troubleshooting Error Backing Up Tables in the Software Update Application.....	49
Troubleshooting Problems with Object Librarian Records.....	49

Glossary of PeopleSoft Terms.....	51
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Index	71
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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.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- 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, <https://www.peoplesoft.com/corp/en/login.jsp>

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

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

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

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.

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.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other 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 Used in PeopleBooks

Address Book Number

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	<p>Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:</p> <p><i>Blank:</i> Batch is unposted and pending approval.</p> <p><i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.</p> <p><i>D:</i> The batch posted successfully.</p> <p><i>E:</i> The batch is in error. You must correct the batch before it can post.</p> <p><i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E.</p> <p><i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.</p>
Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
Currency Code	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	<p>Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.</p> <p>If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.</p>

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and Fiscal Year

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010)

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne Preface

Product Packaging is the ability to master and package a group of PeopleSoft EnterpriseOne objects. It provides customers a mechanism to move objects from Central Objects and Control Tables from one location to another. PeopleSoft business partners can use the Product Packaging Tools to develop and market software modules that are based in EnterpriseOne. In addition, customers who modify the software can use the Product Packaging Tools to deliver changes to other locations within their company that are not directly connected to the central enterprise.

Product Packaging

The Product Packaging Guide describes how to perform these procedures:

- Create a software master
- Move the software master to a CD ROM
- Update PeopleSoft EnterpriseOne at a remote location
- Troubleshoot the mastering and deployment process

CHAPTER 1

Getting Started

This chapter provides overview of product packaging documentation conventions, product packaging definitions, and the product packaging process.

The Product Packaging Tools manage the task of mastering the software. In this capacity, the tools oversee the entire mastering process, from defining a software master to mastering the CD. The tools start with the definition process, where the user provides as much initial information as possible. After the user enters the critical information, the tools provide a batch process to validate the software mastering information before mastering. Next, the tools provide a batch process to master the software. Finally, the tools provide a batch process to validate the final software master image.

Understanding Product Packaging Documentation Conventions

The section provides an overview of Microsoft SQL Server Desktop Engine (MSDE) databases and fonts.

The following conventions are used in this guide.

MSDE Database

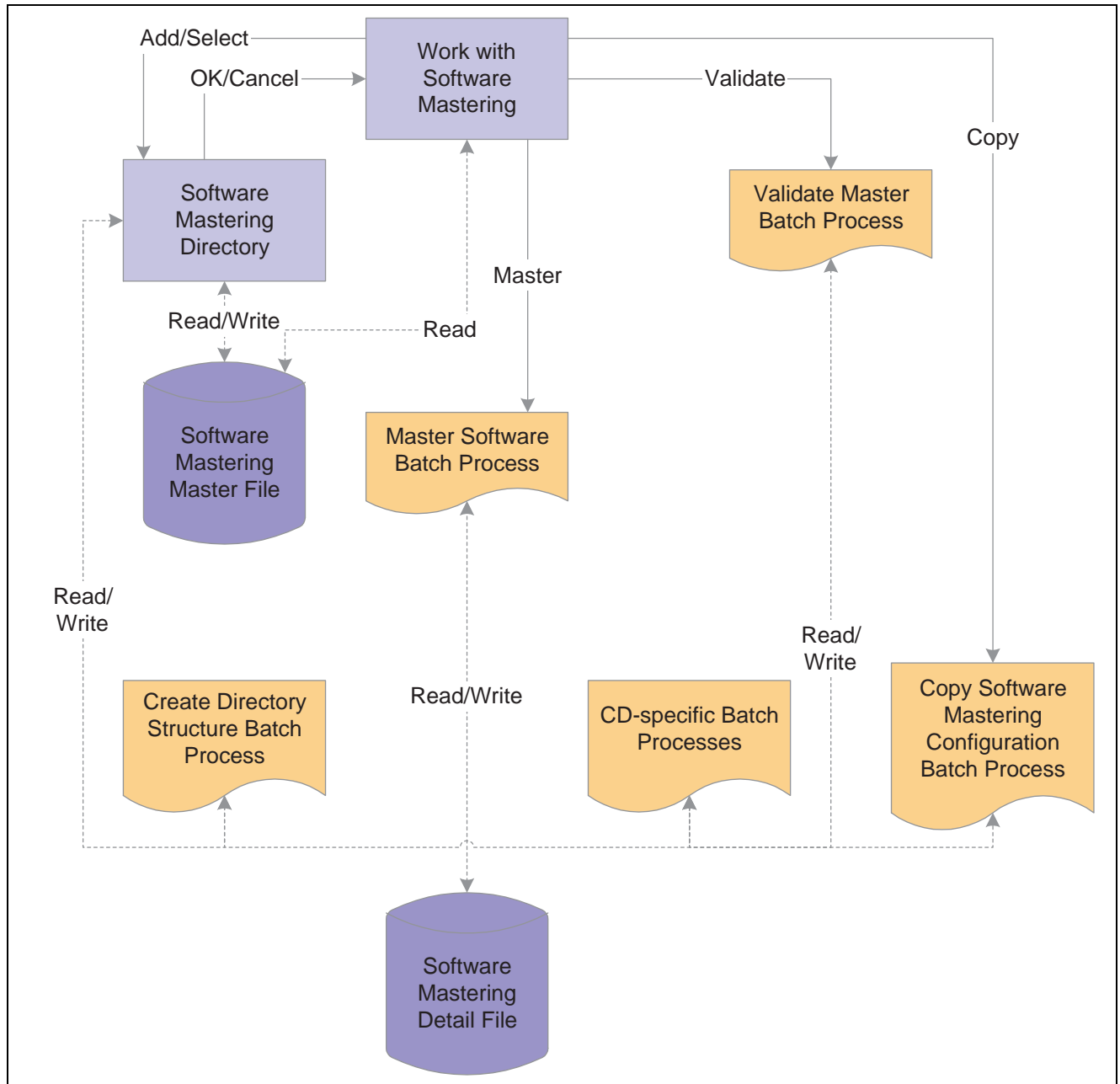
Currently, the PeopleSoft Supported Local Database is in the MSDE format. Throughout this document, whenever *MSDE database* is mentioned, it refers to the PeopleSoft Supported Local Database. The repository for this local database is likely to change in the future.

Fonts

Italic font designates variables used in the guide. For example, if you see the variable *deploymentserver* in a command that you must enter, substitute the actual name of your deployment server for the phrase *deploymentserver*. Also, the names of other PeopleSoft guides are in italic font (for example, the *EnterpriseOne PeopleTools 8.11 Installation Guide*).

Understanding Product Packaging Definitions

This section covers the product packaging flow. This process flow covers product packaging:



Product packaging flow

This guide is designed for Management Information Systems (MIS) managers and administrators of PeopleSoft EnterpriseOne software. Success depends upon your understanding of the relevant concepts and procedures. The recommended method for obtaining this information is to attend training courses; information about course offerings, dates, and locations is available at the PeopleSoft web site. At a minimum, read these PeopleBooks before you begin:

- PeopleSoft EnterpriseOne Foundation PeopleBook
- Configuration Planning and Setup PeopleBook
- Configurable Network Computing Implementation PeopleBook
- System Administration PeopleBook
- Package Management PeopleBook

- Server and Workstation Administration PeopleBook

Understanding the Product Packaging Process

This section provides an overview of the key terms used in product packaging. To better understand the overall process, you should be familiar with these key terms and processes:

Term	Description
Software Mastering Director	This director provides PeopleSoft EnterpriseOne administrators the ability to build a mastered version of objects or modules. The director handles this functionality through a series of batch processes and manual tasks that build all of the components of a master. The final product is an image of the product, in a tree format, that administrators can burn onto a CD.
Change Table Configuration Director	This director enables administrators to define how to build the software master's change tables.
Distributed Development	<p>Distributed development refers to the ability to perform development using one installation of PeopleSoft EnterpriseOne and deploying that development to another installation.</p> <p>For example, a developer in Paris could create new objects using the Paris installation of PeopleSoft EnterpriseOne. An administrator in Paris could then use the Product Packaging Tools to create a CD that includes these new objects. This CD could then be shipped to London, where an administrator updates the London installation of PeopleSoft EnterpriseOne (assuming that both installations are at the same release level). The Product Packaging Tools described in this guide provide this functionality.</p> <p>This ability should not be confused with remote development, which is the creation of PeopleSoft EnterpriseOne objects by a developer who is completely disconnected from any installation. With remote development, the developer can connect to a PeopleSoft EnterpriseOne installation later and merge those objects.</p>

CHAPTER 2

Working with Software Masters

This chapter provides an overview of software master creation and discusses how to:

- Prepare to create a software master.
- Create a software master.
- Delete a software master.
- Work with a software master definition.
- Work with software master templates.

Understanding Software Master Creation

This section discusses the software master creation process. Use this checklist to ensure that you complete all of the processes necessary for creating a software master:

- Verify that at least 1 GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools.
- This memory requirement is the most memory you might need for a software master. The actual size of the master depends on the size of the package you create.
- Complete the tasks in this section.
- Define a software master using the CD Configuration Director:
- Provide information about the type of master that you want to create, such as its name, release number, and so on.
- Select the package that you want built into the master.
- Configure change tables using the Change Table Director:
- Provide the target release number for the change tables.
- Provide source environment information about the change tables.
- Select the change tables and their versions.
- Validate the software master definition.
- Create the final software master, which automatically validates the master.
- Use the software master to update PeopleSoft EnterpriseOne.

Preparing To Create a Software Master

This section discusses how to:

- Set up the system TEMP directory.
- Set up the UBEs
- Create pristine control tables.
- Verify the product packaging data source.
- Create a data dictionary in the pristine data source.
- Create change tables.
- Verify the creation of change tables.

Setting Up the System TEMP Directory

This task creates a temporary directory that will be used to store the PeopleSoft Supported Local Database (in MSDE) for mastering the Product Packaging CD.

To set up the System TEMP directory:

1. From the Windows desktop, select Start, Settings, Control Panel.
2. On Windows Control Panel, double-click the System icon.
3. On System Properties, click the Advanced tab.
4. Double-click Environment Variables.
5. Set the TEMP and TMP variables for both the User and System settings so that they all access the same directory (for example, c:\TEMP).

Note. Ensure that the windows temporary directory on the workstation has at least 1 GB free disk space available (the more space the better). If the temp directory has less than 1 GB of free space, you can create a temp directory on another disk drive with adequate space and set the system environment variables TEMP and TMP to point to the new temp folder. Reboot the system for the change to take effect.

This directory will store the software master that you create in the following tasks.

6. In the temporary directory that you specify in the previous step, create an empty subdirectory called /master.

Note. The name of this subdirectory is case-sensitive and should be all lower case.

Setting Up the UBEs

PeopleSoft EnterpriseOne is initially configured to accommodate internal PeopleSoft naming conventions that are not relevant to customer installations. Therefore, customers must change the configuration of data source names and paths in the UBEs so that they correspond to the naming conventions described in this document.

Note. Unless you check out the versions before making the following changes, these changes will only be available on this workstation until another package is installed.

To set up the UBEs:

1. On the Mastering Workstation, type in *BV* in FastPath to open up Batch Version.
2. For each of the UBEs listed, search for the UBE, select the specified version, and change path or filename to the specified value:

UBE	Version	Parameter	Value
R9640H	XJDE0006	Path of file to rename	\$TEMP\Data\JDELocal
R9640H	XJDE0007	Path of file to rename	\$TEMP\Data\JDELocal
R9640MF	XJDE0001	MSDE Database path	\$TEMP\master
R9640E	XJDE0002	Component File Specifications	JDELocal

3. For each of the UBEs listed, search for the UBE, select the specified version, and change the following processing option for the “Data Source Name” to *Product Packaging – 811*.

UBE	Version
R9640MF	XJDE0001
R9640MG	XJDE0001
R9640MK	XJDE0001
R9640ML	XJDE0001
R9670	XJDE0001
R9670	XJDE0002
R9670	XJDE0003
R96700	XJDE0001
R9600400C	XJDE0001

4. Create an Object Configuration Manager (OCM) mapping to run R9640B locally.

Creating Pristine Control Tables

For control table changes to be included on an update CD, the Product Packaging tool requires a pristine copy of the control tables. If the installation includes the PS811 pristine environment, these tables already exist in the PeopleSoft EnterpriseOne instance and you can skip the following task. If the installation does not include the pristine environment, you can create a set of pristine control tables by copying the Control Table tables from Control Tables Local to a new data source: Control Tables - PS811. You perform this process only once.

To create pristine control tables:

1. On the Deployment Server, log on to PeopleSoft EnterpriseOne in the DEP811 environment.
2. From menu GH9011, select Batch Versions.
3. Type R98403 in the Batch Application field and click Find.
4. On Work With Batch Versions - Available Versions, select version XJDE0501 (Control Tables For Pristine Database), and select Processing Options from the Row menu.

5. Select the Environment tab and change these processing options:

Target Environment (option 1)	Leave this field blank.
Target data source (option 2)	Enter <i>Control Tables - PS811</i> .
Data Load (option 3)	Enter 2 to copy data to the table.
Source data source (option 4)	Enter <i>Control Tables Local</i> .

6. Run the version locally.

The report copies the F9000, F9001, F9002, F0004, F0004D, F9005, F9005D, F9006, F9006D, F91100, F91100D, F91400, F91410, F91420, F91430, F91500, and F91510 tables from the Control Tables Local data source to Control Tables - PS811.

7. Verify the results of the report and the creation of the tables.
8. Exit the Batch Versions application.
9. From menu GH9011, select Object Configuration Manager.
10. On Machine Search and Select, select the machine with the System - 811 data source.
11. For the PS811 environment, add Object Configuration Manager mappings for tables F9000, F9001, F9002, F0004, F0004D, F9005, F9005D, F9006, F9006D, F91100, F91100D, F91400, F91410, F91420, F91430, F91500, and F91510, and assign these new tables to the Control Tables - PS811 data source.
12. Activate the new mappings.
13. Exit Object Configuration Manager.

Verifying the Product Packaging Data Source

The Product Packaging process creates an MSDE database in the TEMP directory on the workstation on which the Product Package CD image is mastered. This database is used to store data that will be mastered on the CD. To copy tables into this database, you must verify that the Product Packaging - 811 data source and the Data Dictionary - PS811 data source are properly configured on the deployment server.

To verify the Product Packaging data source :

1. From the deployment server, log on to PeopleSoft EnterpriseOne in the DEP811 environment and type *GH9011* in the Fast Path field.
2. Double-click Database Data Sources (P986115).
3. On Machine Search & Select, select the machine with the System - 811 data source.
4. On Work With Data Sources, click Find.
5. Select the Product Packaging - 811 data source.
6. On Data Source Revisions, verify that the Product Packaging - 811 data source is defined with these values:

ODBC Data Source Name	<i>Product Packaging - 811</i>
Data Source Type	<i>N - MSDE/ODBC</i>
Database Name	<i>JDELocal</i>

7. Click OK, and exit the Data Source application.

Creating a Data Dictionary in the Pristine Data Source

You must create a data dictionary in the pristine data source. This is a one-time process; after creating these tables, you do not need to create them again.

To create a data dictionary in the pristine data source :

1. From the deployment server, log on to the PSFTPLAN environment.
Use *PSFT* as your user name and *PSFT* as your password.
2. From the System Administration Tools menu (GH9011), select Batch Versions.
3. On Work With Batch Versions - Available Versions, type *R98403* into the Batch Application field and click Find.
4. Select version XJDE0509 and click Copy.
5. On Version Copy, enter a new version name and a new version title, and then click OK.
6. On Work With Batch Versions - Available Versions, select the version that you just created and select Processing Options from the Row menu.
7. Complete these processing options as indicated:

Target data source (option 2)	<i>DATA DICTIONARY - PS811.</i>
Source environment (option 5)	<i>Data Dictionary Local</i> Use these processing options set up the batch process to copy the data dictionary tables from PSFTPLAN environment to the new pristine data dictionary.

8. Set the version that you just created to run in the proof mode first.
9. Run this report locally, not on the enterprise server.
10. Verify the results of this report.
11. When satisfied with the proof mode results, run the version that you just created in final mode.
12. Run Object Configuration Manager (OCM) from the Fast Path and select the enterprise server.
13. For the PS811 environment, add OCM mappings for F9200, F9202, F9203, F9207, F9210, F9211, and F9212 that point these tables to Data Dictionary - PS811.
14. Activate the new OCM mappings.

Creating Change Tables

Product packaging requires that a set of tables, called change tables, exist and be mapped to the Control Tables - <environment> data source. A change table is a table that contains the items that have changed between releases or updates. Normally, these tables are generated during the installation process, when you run the environment workbench. If, however, the environment is populated with demo data, these tables will not be generated even though the environment workbench reports that they were created successfully.

Complete this task and the next if you need to create change tables in the mastering environment.

To create change tables:

1. On the deployment server, log on to the PSFTPLAN environment.
2. From menu GH9011, select Batch Versions.

3. Type *R98403* in the Batch Application field and click Find.
4. Select version XJDE0507 (Change Table) and click Copy.
5. On Version Copy, complete these fields as directed:

- New Version
- Version Title

Type a name for the new version.

CREATECT

6. Click OK.
7. On Batch Version Design, click the Processing Options button on the General tab.
8. Edit these processing options for CREATECT as directed:

Target Environment (option 1)	Type the name of the mastering environment.
Target Data Source (option 2)	Leave this field blank.
Data Load (option 3)	<i>1: Load Production to create the table without data.</i>
Source data source (option 4)	<i>Control Tables Local</i>

9. Click OK.
10. On Batch Version Design, click Run.
11. On Version Prompting, select Data Selection and click Submit.
12. On Data Selection, verify that these tables are listed in the right operand for BC OBNM, and add those that are missing:
 - F960004
 - F960005
 - F967611
 - F969000
 - F969001
 - F969002
 - F969005
 - F969006
 - F9691100
 - F9691400
 - F9691410
 - F9691420
 - F9691430
 - F9691500
 - F9691510

- F969861
- F9698710
- F9698712
- F9755
- F9757
- F9759
- F9760
- F98800DN
- F98800N
- F98800TN
- F98810DN
- F98810N
- F98811N
- F98830N
- F98840N
- F98845N

13. Run the version.

The program creates the change tables in Control Tables - CRP or whichever environment Control Table data source you specified.

Verifying the Creation of Change Tables

For each of the change tables, verify that an Object Configuration Manager (OCM) mapping exists and points to the appropriate data source for the mastering environment.

To verify the creation of change tables:

1. From menu GH9011, select Object Configuration Manager.
2. On Machine Search and Select, select the machine with the System - 811 data source.
3. For the mastering environment, verify that each of these change tables is mapped to the correct data source and that each mapping is activated:

Change Table	Data Source
F960004, F960005, F969000, F969001, F969002, F969005, F969006, F98800DN, F98800N, F98800TN, F98810DN, F98811N, F98810N, F98830N, F98840N, F98845N	Control Tables - <environment>
F969861, F9698710, F9698712	Central Objects - <environment>
F967611, F9691100, F9691400, F9691410, F9691420, F9691430, F9691500, F9691510,	System - 811
F9755, F9757, F9759, F9760	Data Dictionary - 811

4. Exit OCM.
5. Run Universal Table Browser (UTB) to verify that the tables were created in the correct location.

Creating a Software Master

This section provides an overview of software master definitions and discusses how to:

- Define a software master.
- Configure change tables.
- Set the package build application to the mastering mode.
- Validate a software master definition.
- Create a final software master.
- Confirm the software master.
- Move the software master to a CD ROM.
- Update PeopleSoft EnterpriseOne with the software master.

Understanding Software Master Definitions

A software master definition provides the structure for the finished software master. It establishes what template and packages to use, what build steps to follow, and the directory structure of the final master. The software master definition is only the structure or outline of the master. After you set up the software master definition, you validate it and then create the actual software master.

Custom Data Inclusions in the Software Definition

The Product Packaging application enables you to include custom data on the software master. Read the following tips for including custom tables and custom media objects on the software image.

Custom Table Inclusions

If the customer creates a new, customized table that is to be delivered with pristine data, the mastering process should automatically handle this procedure if these conditions are met:

- The table is included in the update package.
- The table is in the environment of the update package.
- The table is not included in the target environment.
- The table and index change table exist.

After the mastering process is complete, the table should be in the JDELocal database referenced by the Product Packaging - 811 data source that you set up earlier. In addition, records should exist in the table and index change table for the new custom table.

Custom Media Object Inclusions

To include custom media objects in the product package, add these build steps to the ASU template:

1. Add a build step to copy table records from the F00165 to the JDELocal database.

2. Add a build step to copy the media object files from the deployment server to the image path directory.

Change Table Configuration

This example illustrates why change table configurations are needed:

Create change table configurations to indicate to the Product Packaging tools the change tables that you want included with the software master. When you install the finished software master, the installation process will update the control tables of the enterprise with the change tables that you indicate.

Assume that the home office in Denver, USA, makes software changes and wants to update an enterprise that is not networked to the Denver enterprise. The other enterprise, which has its own set of PeopleSoft EnterpriseOne software and control tables, is in Paris, France. The Denver enterprise creates a software master that includes the package containing the software changes, as well as the change tables that contain data dictionary and user-defined codes changes, which, for this example, are the only control table changes since the Paris enterprise was last updated. The Denver enterprise writes the software master to a CD and ships it to Paris. When the Paris enterprise installs the software master, the change tables update the Paris control tables, making the tables concurrent with the Denver control tables.

Final Master Creation

This task explains how to create the final software master image from a definition that you previously created. You can master a single definition or master all definitions of a specific PeopleSoft EnterpriseOne release.

The report that accomplishes this task is the Master CD (R9640B) report. This report controls the execution of all of the build steps and the UBEs associated with the build steps. This report also changes the status of each build step from 30 - Validated to a new status of 60 - Built or 50 - Failed.

With an average workstation, network, and ERP environment, the mastering process should take about one hour. However, the software includes many variables that can affect the time necessary to build a product package CD. These variables are:

- Status and level of debugging.
- Number of objects in the update package.
- Size of the objects in the update package.
- Overall size of the parent package.
- Number of change tables to define.
- Network speed.
- Type of database.
- Build machine speed.
- Build machine memory.
- Number of other processes running on the enterprise Server, deployment Server, and build machine.

Prerequisite

Ensure that at least 1 GB of space is available for the TEMP directory of the workstation from which you use the Product Packaging Tools. This memory requirement is the most memory that you might need for a software master. The actual size of the master depends upon the size of the package that you create.

See Also

Chapter 2, “Working with Software Masters,” Working with Software Master Templates, page 29

Defining a Software Master

To define a software master :

1. Log on to a PeopleSoft EnterpriseOne workstation using the development environment where the modifications exist, such as DV811.
2. From Product Packaging (GH962), select Product Packages (P9640).
3. On Work With Software Mastering, click Add.
4. On CD Configuration Director, click Next.
5. On CD Information, complete these fields:

Name	Enter a unique name for the software master definition that you are adding, such as E811 UPDATE. This name must exactly match the name of the package to be included, and must be in all uppercase letters.
Release	Enter the release for the software master definition, such as E811. This is the release currently installed on the client workstation that you are using.
Type	Specify the type of CD that you want to master. In this case, it is an ASU CD (option 09) which is the default. If you select an option other than 09, the software displays an error message when you press Next. This field indicates which software template to use when you further define the master. Templates include the build steps and directory structure necessary to create a software master.
Build Phase	Enter the development phase that the software master definition represents, such as alpha, beta, or general availability.
Description	Optional. Enter a description of the software master definition.
Image Path	Enter the directory path where you want the software master definition to reside on the Product Packaging build machine (for example, d:\E811\PP). If the directory does not exist, the software will create it for you when you run the software mastering process. The directory that you indicate will be the root directory for the software master that you create. It will contain the contents of the master. After you create the image, the CD can be burned through the CD burner software.

6. Click Next.

If you chose a template that appears on the list of values when you click the visual assist button from the Type field, but the template is not on the enterprise, the CD Template Does Not Exist form appears. You have probably entered the incorrect release number. Click OK to continue adding the software master definition, or click Cancel to stop adding the definition.

If the template you chose using the Type field was set up to include packages, the CD Packages form appears.

7. Select the update package that includes the objects for the update disk.

You can either select an existing update package or create a new one. To ensure that the update package is defined correctly, note that:

- You can use only update packages for this process.
- The package name must be the same name as the product package previously defined, and must be in all uppercase letters.
- The package should be created from its very beginning.
- The update package must always include specifications, build specifications, build business functions, and compression.

If the package is not compressed, then product packaging will not work correctly because Product Packaging only looks for cab files to copy to the image.

8. If the package is undefined, the Select Package Build form automatically appears; otherwise, click Select Package.

You can also add packages by clicking New Package Build or Package Assembly.

9. On Select Package Build, if you need to assemble or define a package or both, select one of these from the Form menu:

- Pkg Assembly
- Pkg Build

Note. Make sure that you compress any packages that you build.

10. On the Select Package Build form, find and select a package, and then click Select.

11. On CD Packages, select the package marker that appears.

For an ASU CD, only one package is required. For other types of software masters, more than one package might be required.

12. Click Next.

If the template that you chose was set up to include change table configurations, after you click Next, the Change Table Director form appears.

13. Continue to the next task, which explains how to configure the change tables.

Configuring Change Tables

To configure change tables :

1. On the Change Table Director, which appears automatically during the mastering process if required by the template, click Next.

Alternatively, from Product Packaging (GH962), select Change Table Configurations (P9642) and then click Add.

2. On the Change Table Director, click Next.

3. On the Target Release Selection form, complete the Target Release field.

Change the target release to a custom User Defined Code (UDC) name that you are mastering. This name needs to be unique, such as E811TAX for the 1099 tax update. Select the release name using the visual assist button.

Note. The software will not function correctly if these tables have the same value for the source and target release. To add the custom UDC, press the visual assist and then click Revisions. This action displays the Work with User Defined Codes form. On User Defined Codes, click Add. Scroll to the bottom of the grid and add the new value in the last line of the grid. After you have created the UDC, select the new UDC on the User Defined Code form, and click Select. This action will populate the Target Release field with the new value.

4. Click Next.
5. On Source Environment Selection, complete these fields:

Source Environment	Enter the name of the environment that includes the control tables used as the baseline for the changes. The source is typically the pristine environment (PS811). The software builds the change table records by comparing the target environment to this baseline.
Source Release	Verify that the source release matches the release and the cumulative update level, such as E811, of the source environment that you want. The software automatically populates this field based upon the source environment.

6. Click Next.
- The Batch Application Selection form appears. This form lists the available change tables along with the batch application and version that will create the change table.
7. To select the default change tables that you want with the software master, double-click the gray button to the left of the change table row.

A check mark appears on the button.

Select any or all of the following change tables where you made additions, deletions, or changes. The batch process compares the source and target tables in each selected category and creates a change table that contains all changes.

- Data Dictionary
- User Defined Codes

This batch application should always be chosen because changes always occur to the UDC that defines the release.

- Workflow
- Favorites
- Templates and Smart Fields
- Tips of the Day
- Table and Index Changes
- Solution Explorer Change Tables

You can double-click a check mark to remove it.

8. To select a different version or to select multiple versions, select a change table row, and then select Version Selection from the Row menu.
9. On Version Selection, select one or more versions and click Select or double-click the gray button to the left of a version.

A check mark appears to the left of the versions that you chose.

10. After choosing the versions that you want, click Close.

The Batch Application Selection form reappears.

A check mark appears to the left of the change table row that you chose. The change tables that you want to be built for the software master must have check marks next to them or the software will ignore them. If you chose more than one version, the word *<MULTIPLE>* appears under the Version column for that change table.

11. Either select another change table row and select Version Selection from the Row menu, or click Next.

If you click Next, the Additional Change Table Definitions form appears.

12. On Additional Change Table Definitions, complete one of these actions:

- To define additional change table configurations for a new source and target release combination, select Continue and click OK.

The program displays the Target Release Selection form. Return to the beginning of this task and repeat the steps for a different source and target combination.

- Select Quit and click OK.

This action stops the change table configuration director and displays the final revisions screen for mastering the defined CD.

If you select Quit, the CD Revisions form appears. Use this form to revise the software master definition.

13. On CD Revisions, click OK.

Your software master definition is saved, and the CD Revisions form closes.

14. Continue to the next task, which explains how to validate the definition that you just created.

Setting the Package Build Application to the Mastering Mode

To compress an update package, you must set the package build application to the mastering mode.

To set the Package Build Application to the Mastering Mode:

1. On the Deployment server, log on to the DEP811 environment.
2. From the Package and Deployment Tools menu (GH9083), right-click Package Build, and select Prompt For Values.
3. On Processing Options, type *1* in option 2 to set up the mastering mode.
4. Click OK.
5. Exit the package build application.

Validating a Software Master Definition

This task explains how to run the Pre-Mastering CD Validation Report (R9640A) to validate the software master definition that you set up and what to review in the report to help with the validation. The report runs in final mode. The report lists whether the build step is validated or not. The report will change the status of build steps that do *not* have errors.

To validate a software master definition:

1. From the Product Packaging menu (GH962), select Product Packages (P9640).

2. On Work With Software Mastering, click Find.

The existing software master definitions appear.

3. Select the master that you want to validate, and then select Validate from the Row menu.
4. On Report Output Destination, select to view the report on screen and click OK.

The report runs. All steps without errors whose statuses were In Definition (10) or Defined (20) are promoted to the status of Validated (30); they will work properly during the software mastering process. Otherwise, the build step will have either a warning or an error message. Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.

Warning messages will not stop the creation of a software master. If a build step has a warning message, you should verify that the build step is as you want it before proceeding. Note that the report will always include a warning stating that the build step is different from the template. This warning is always true because the process uses a custom package build.

5. Continue to the next task, which explains how to create the final software master.

Creating a Final Software Master

To create a final software master:

1. From Product Packaging (GH962), select Product Packages (P9640).
2. On Work With Software Mastering, perform one of these actions:
 - To create a software master from one specific definition, click Find, select the definition that you want to create, and then select Master CD from the Row menu.
 - To create software masters for all definitions of a specific release, select Master Release from the Row menu.

A form appears in which you enter the release number of the definitions that you want to master.

Either choice runs a batch process (R9640B) that creates the software master based upon the definition that you chose. Run the report locally and select the option to display the results on screen. Depending on the build steps necessary to complete, the report launches several other reports, each corresponding to a particular build step.

The software mastering process will stop when it encounters a manual build step.

3. To complete the manual build step, select that build step, and select Execute Step from the View menu.

The status of that step is advanced to 60 (Built). Click Master CD or Master Release to continue the software master process. The progress of the build can be monitored from the CD Revisions screen.

4. From the View menu, select Refresh.

As each step is processed and completed, the icon cog will change color and style. The last build step automatically validates the software master and generates a final report (R9840B) This report includes a comprehensive status of the product package build.

5. Review this report for errors.

If the validation report does not indicate any errors, you have successfully created a software master. This report validates that the number of directories match between the software master definition and the final software master. It also provides details about the file counts and the total size of the master in megabytes.

This process automatically creates a self-extracting executable file and a CAB file and places them in the \$TEMP/final directory using the name of the software master followed with the .exe and .cab extensions. Use the executable (.exe) file to update PeopleSoft EnterpriseOne. Both files include the full software master with all of its directories. If you have a size restriction, such as when downloading from the internet, you can use the CAB file (which is always smaller than the executable file), but you will need to use a third-party application to uncompress the CAB file.

Confirming the Software Master

After you create the software master image, you should visually check the directory structure and JDELocal database to verify that the image is complete.

To confirm the software master:

1. In Windows Explorer, open the image path directory.
2. Check that the package directory includes these objects:
 - Install manager files.
 - Planner directory.
 - A data cab in the planner directory.
 - A directory named the same as your package.
 - Cab files in the package directory.
3. Verify that the \$TEMP\final directory includes these two files:
 - packagename.cab
 - packagename.exe
4. Open the JDELocal database in the \$TEMP\master directory, and verify that this database is populated with tables.

Note. If the package includes new custom tables, verify that they are in the JDELocal database and that they and their associated index change tables have records.

Moving the Software Master to a CD ROM

After the software master process has been completed and confirmed, the image can be burned onto a CD.

To move the software master to a CD ROM:

Using a CD burner and CD burner software, copy the *packagename.cab* or *packagename.exe* file from the \$TEMP/final directory on to the CD ROM.

Updating PeopleSoft EnterpriseOne with the Software Master

This task explains how to update PeopleSoft EnterpriseOne using the software master that you created. To perform this update, access the Work with Updates (P96470) application from the System Installation Tools (GH961) menu. This process includes setting merge flags, running the self-extracting executable (*packagename.exe*), running software updates, and executing the installation workbench.

To update PeopleSoft EnterpriseOne using a software master:

1. Run the *Product_Package.exe* executable file from the CD.

This process installs the package into the Planner\Package directory on the deployment server, and extracts the *Product_Package_Name.mdf* and *Product_Package_Name.ldf* files into the Planner\Data directory. The process also creates the software master image in the PLANNER directory.

Note. You can also use the CAB file to create the software master image on the deployment server, but you need to use a third-party application to uncompress the file.

2. If InstallManager.exe exists on the CD, start the installation by double-clicking it.

If this file is not on the CD, double-click the PACKAGE_NAME.exe file to self-extract and uncompress the CAB file. After it is uncompressed, Install Manager will automatically launch.

3. On Installation Setup Screen, click Next.
4. On Installation Setup Type, verify that the machine has the necessary disk space and that the install path is correct, and then click Finish.

When the installation is complete, the Install Manager displays the "Installation Complete" window.

5. Click OK.
6. On the Deployment Server, log on to the Planner environment (PSFTPLAN).
7. Type *GH9612* in the Fast Path.
8. Select Application Software Updates (P96470).
9. On Work with Software Updates, click Find.
10. Select the product package to install, and click Next.
11. On Software Update Environment Selection, select the path code to install the package on to, and click Next.

If you choose unattended mode, the Installation Workbench will automatically perform all the workbench tasks to complete the installation. If you do not choose unattended mode, the Installation Workbench tasks must be done manually. If you choose backup, the process will create an MSDE database (OWBAK_package_name_pathcode) and its corresponding files called OWBAK_package_name_pathcode.mdf and OWBAK_package_name_pathcode.ldf in the Planner\Package\Package_Name\PathCode.bak\data directory. Only the tables and objects affected by the update will be backed up in the database.

The Installation Workbench should stop after the Table Conversion workbench process is complete.

12. Review the PDFs and the log files created by the table conversions, and then continue with Installation Workbench.

When Installation Workbench is complete, the system returns to the Work with Software Updates screen, and the selected software update should have the Completed Normally install status.

13. Click Close to exit Work with Software Updates.
14. Review all PDFs generated on the deployment server by the software update process, and verify that each of report is free of errors.

If a report has errors or does not appear to have run, review the jde.log file to determine the source of the problem. This table provides descriptions of the Software Update reports.

Report	Version	Description
R98405 - Application	XJDE0001	Table Conversion/Merge Driver for Application Tables: Master UBE for creating and regenerating application tables. This report should have only one record—Table and Index Creation (F984072). The status of the record should be, “Completed Normally.”
R98407	XJDE0001	Table and Index Creation: Launched by R98405 UBE, which creates or regenerates all tables specified in the table change table. Page one of the report includes source, target, and environment information. Page two includes the overall status of the table creation in green or red text. Subsequent pages list the status of each table and index to be created or regenerated.
R98405 - Control	XJDE0001	Table Conversion/Merge Driver for Control Tables: The master UBE that specifies the control table merge UBEs to launch. It should list the Data Dictionary UBE (R989200P), and the User Defined Codes UBE (R9600042). The status on all should be, “Completed Normally.”
R989200P	XJDE0001	Data Dictionary Merge: Launched by R98405. This UBE merges all data dictionary changes specified in the data dictionary change tables into the existing data dictionary. Page one of the report has source, target, and environment information. Subsequent pages list the status of each data dictionary addition or change. At the end of the individual listings, the overall status of the data dictionary merge is listed in green or red text. The final page has detailed summary information.

Report	Version	Description
R9600042	XJDE0001	User Defined Code Merge: Launched by R98405. This UBE merges all user-defined code changes specified in the UDC change tables into the existing UDC tables. Page one of the report lists source, target, and environment information. Subsequent pages list the status of each UDC addition or change. The final page has detailed summary information.
R9690002	XJDE0001	Solution Explorer Merge: Launched by R98405. This UBE merges all Solution Explorer changes specified in the SE change tables into the existing SE tables. Page one of the report lists source, target, and environment information. Subsequent pages list each addition, change, or deletion in the change tables. The final page has detailed summary information.
R96911002	XJDE0001	Favorites Merge: Launched by R98405. This UBE merges all Favorites changes specified in the Favorites change tables into the existing Favorites tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each Favorites addition or change. The final page has detailed summary information.
R96914002	XJDE0001	Report Director Templates Merge: Launched by R98405. This UBE merges all changes specified in the Report Director Templates change tables into the existing Report Director Templates tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each addition or change. The final page has detailed summary information.

Report	Version	Description
R96915002	XJDE0001	Tips Merge: Launched by R98405. This UBE merges all Tips changes specified in the Tips change tables into the existing Tips tables. Page one of the report lists the source, target, and environment information. Subsequent pages list the status of each addition or change. The final page has detailed summary information.
R98405 - Spec	XJDE0001	Table Conversion/Merge Driver for specification tables: Master UBE for specification table merge. This report should have only one record—Specification Merge (F98710). The status of this record should be, “Completed Normally.”
R98700	ZJDE0002	Specification Merge: Launched by R98405. This UBE adds, replaces, and merges all specified object specifications into the selected Central Objects path code. This report is the standard specification merge report. Page one of the report lists the source, target, and environment information. Page two summarizes information about the merge status. The remaining pages include the individual object action and status.

15. On the Deployment Server, log on to the DEP811 environment.
16. Find the package in the Package Assembly (P9601), and build and deploy the update package to a client workstation.
17. Open Object Management Workbench and view the new project with all the updated objects that were included in the Product Package.

Deleting a Software Master

This section provides an overview of the form used to delete software masters. All records associated with the definition, such as the change table configurations and repair director records, will be deleted when you delete the software master.

Form Used to Delete Software Masters

Form Name	Form ID	Navigation	Usage
Work With Software Mastering	W9640B	Product Packaging (GH962), Product Packages	Delete a software master.

Working with a Software Master Definition

This section provides overviews of software master revisions and software master validation and discusses how to:

- Revise a software master definition.
- Load a subdirectory from an enterprise network directory.
- Copy a software master definition.
- Proof a software master definition.

Understanding Software Master Revisions

After you have completed the definition of a software master, you can revise any of the information, including the build steps and directory structure. You also can copy the definition information to a new software master definition, delete the definition, and proof and validate it.

You can revise a software master definition that you created. This revision enables you to modify the information that you entered into the CD Configuration Director, as well as the build steps and directory structure included with the template that you chose.

The system uses icons to indicate the status of a software master. The icons have these meanings:

Gray Partial Cog	The status code is 10: In Definition
Gray Full Cog	The status code is 20: Defined.
Gray Cog with Green Check Mark	The status code is 30: Validated.
Yellow-to-Gray Cyclic Arrows	The status code is 40: Processing.
Red Octagon	The status code is 50: Failed.
Gold Cog.	The status code is 60: Built.

Understanding Software Master Validation

You run a report to validate the software master definition that you created. The report runs in final mode, and it changes the status of the build steps that do not have errors. All steps without errors whose status was In Definition or Defined are promoted to the status of Validated. The report lists each build step that will run when you create the master. The report lists whether the build step is validated. If it is validated, the build step will work properly when creating the software master. Otherwise, the build step will have either a warning or error message.

Warning messages will not stop the creation of a software master. The message specifies what the warning is. If a build step has a warning message, you should verify that the build step is as you want it before proceeding.

Error messages will stop the creation of a software master. You must fix any build steps that contain error messages. The message specifies the error.

Forms Used to Revise Software Masters

Form Name	Form ID	Navigation	Usage
Work With Software Mastering	W9640B	Product Packaging (GH962), Product Packages	Select a software master to revise, proof, validate, or delete.
CD Revisions	W9640G	From Work With Software Mastering, select a software master to revise	Verify and revise specifications for a software master. Run one or more steps.
Copy CD Configuration	W9640C	From Work with Software Mastering, select a software master and click Copy.	Create a new master based on an existing one.

Revising a Software Master Definition

Access the CD Revisions form.

To revise a software master definition:

CD Information tab

Status	The status of a build step or directory structure within the mastering process. For example, the build step or directory structure could be at a status of defined, validated, or built. Use the visual-assist button to view a complete list of values for this field.
Comment	Short informational comments provided by the system about each step of the mastering process. You can enter your own comments into this field, but the system will overwrite any text currently in the field during the next mastering process.
Image Path	Verify the directory path where you want the software master to reside on the enterprise. If the directory does not exist, the software will create it for you when you run the software mastering process. The directory that you indicate will be the root directory for the creation of the final software master.

Build Steps tab

Sequence	The order in which the system processes build steps, usually in increments of 10 (for example, 10, 20, 30, and so on). Verify the order in which you want the step performed during the creation of the software master definition. You can use the same sequence number for multiple build steps.
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Type	Type of CD being mastered. Verify which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.
Status	Verify the current status of the build step, which can indicate whether to run the particular step during the mastering process. For example, if you need to perform manual step during the mastering process, you can manually complete the step, change the step's status to 60 (Built) by choosing the step, and then, from the View menu, select Execute Step.
Target Folder	The name of the target folder, such as "planner" or "updatepkg." The system populates this field based upon the template used to define the software master. Change the name of the target folder only if you added the folder yourself.
Executable	The software might populate this field based upon the build step's definition in the software master template. To change this field, click the Executable button and use the Select a Windows Executable form to select an executable for this build step.
Value/Parameter	Verify the value or parameter. To change this information, click the Value/Parameter button, and then enter a value or parameter appropriate to the step you chose. This field is dynamic. The button name is either Value or Parameter, based upon the step that you choose. The form that appears when you click the button also depends upon which step you choose. For example, the Package Build step calls the Select Package Build form, from which you can select a package; and the Build Change Tables step calls the Work With Change Table Definitions form, from which you can modify the change table configuration.

Directory Structure tab

Source Path	<p>The directory on the enterprise that you want to use to populate the highlighted target folder. You can use an absolute (full) directory path name, or you can use a relative path name with a token. The system copies the data contained in the source path, depending upon how you filter those files (see the File Filter field description for this information), into the highlighted target folder of the software master.</p> <p>Verify the directory path of the source that will populate the component. This is the source path name of the data that you want to retrieve for the master and that you placed into the target folder. You can specify this path using either a relative or absolute path. See Appendix A for information about relative and absolute paths.</p>
File Filter	<p>The filter, which you can designate, for the files contained in the source path. For example, you can use *.* to retrieve all files in the source path, or *.exe to retrieve only executable programs.</p> <p>Verify the file filter. The default is *.*. The file filter enables you to filter any data files you retrieve from the source directory. For example, you can use *.* to retrieve all files in the source directory.</p>
Full Path	This field is dynamic and its name and function depend upon the build step that is highlighted. The possible names and functions are as follows:

Value: The value needed to complete the highlighted build step. For example, if the build step is a batch process, the value field contains the name of the batch process and its version, such as R95012\XJDE0001.

Parameter: The parameters needed for the highlighted build steps that process an executable program.

The full (absolute) target path name of the highlighted directory, such as Root/planner/updatepkg.

Task List

Task	Action
To run one or more steps:	<p>Select the build step that you want to run, and from the View menu either select Execute Step to run just that step or select Run From Step to run that step plus any steps that follow it.</p> <p>This option runs the step and updates its status to 60 (Built). You might use this option for manual build steps. Manual steps are those that you need to perform yourself, such as an additional mastering step that is not part of the Product Packaging Tools. After you complete the manual step, use the Execute Step option to update the step to a status of 60 so that you can proceed to the next step in the process.</p>
To renumber the build steps:	<p>From the Form menu, click Renumber.</p> <p>The software renumbers the build steps, updating the Sequence field. The renumbering begins with 10 and increments each step by 10. The software keeps the build steps in the same sequence that you or the software master template established.</p>
To add a subdirectory:	<p>Click a directory for which you want to add a subdirectory and click Add. You can select any directory, including the Root directory.</p> <p>The software creates a new directory labeled Undefined and places it at the bottom of the structure.</p>

Loading a Subdirectory from an Enterprise Network Directory

Access the CD Revisions form.

To load a subdirectory from an enterprise network directory:

1. Select the Directory Structure tab.
2. Select the directory that will be the root of the subdirectory that you want to load, which must already exist on the enterprise, and click Load.

This feature copies any enterprise directory structure into the software master definition.

3. On the Load Folders From Directory form, click Windows Folder.
4. On the Select Directory form, find and select a directory you want to load into the software master, and then click OK.

5. On the Load Folders From Directory form, select one of these options:

- Re-create subfolders

This option deletes the existing subdirectories and replaces them with the subdirectories that you want to load into the software master.

- Append to existing

This option appends to the existing subdirectories the subdirectories that you want to load into the software master.

6. If necessary, select the Setup Source Directories check box.

During software master creation, by having this option enabled, the system automatically creates the structure of the source directories and copies all files within the source directories to the software master.

If you do not check Setup Source Directories, the software will create the source directory structure within the software master and the directories will be empty.

7. Click OK.

Copying a Software Master Definition

Access the Copy CD Configuration form.

You can copy a software master definition that you already created, which enables you to copy the information that you entered into the CD Configuration Director, the build steps, and the directory structure.

Type

Type of CD being mastered. Verify which component type you want the build step to perform. For example, you can define steps to create file structures, build a package, or create INF files.

In most cases, you will not need to change the default value. If you need to, however, you can change the type of the software master when making a copy. For example, you can change the type from a Setup CD to an ASU CD. This change does not change build steps or the directory structure. When you validate the software master, you will receive warning messages that the master does not match the default settings of the ASU CD template. This is because the master is actually based on the Setup CD template. You will not be prevented from creating the software master.

Proofing a Software Master Definition

Access the Work With Software Mastering form.

You can proof software master definitions. To do so, you create a report, which details each build step in the definition and shows the sequence of steps and processes that each step will run when creating the actual master.

Proofing a software master definition does not change any part of the status of a software master.

To proof a software master definition:

Perform one of these actions:

- To proof one software master definition, select the definition that you want to create, and then select Proof CD from the View menu.
- To proof all software master definitions for a specific release, select Proof Release from the View menu.

On the form that appears, enter the release number of the definitions that you want to proof.

Working with Software Master Templates

This section discusses software master templates, the all build step processes, the ASU CD template, and the custom CD.

Understanding Software Master Templates

The Product Packaging tool uses software master templates. These templates provide default information when creating a new software master. For example, to distribute objects to a disconnected enterprise, you would build a master based on the ASU (Application Software Update) CD template. The Mastering Director would use the ASU CD template to determine which director steps, build steps, and directory structure to use when creating the software master. You can customize the default information provided by the templates.

You use build steps to build a template. Build steps are the processes used to create a software master. You also can add, revise, copy, and delete software master templates. After you add a template, you can use the Mastering Director to create a software master definition using that template.

The processes for revising, copying, proofing, and deleting software master templates are identical to those for the software masters themselves.

Understanding the All Build Step Processes

A template can offer all of the following software mastering build step processes. Not all of these processes appear on every template.

Undefined

Type = 00

Performed Automatically = Not applicable

This build step is the default process when adding a new build step to a software master or template. After you add this build step, you need to define it for the master or template.

Create CD File Structure

Type = 01

Performed Automatically = Yes

This build step creates the physical directory structure at the image-path location that you specified when creating the software master definition.

Package Build

Type = 02

Performed Automatically = Yes

This build step builds the assigned package based upon the package assembly and build definitions.

Manual Build Step

Type = 03

Performed Automatically = No (See the specific template definition for complete information about the performance of this build step.)

This build step enables the administrator to instruct the user how to perform a process that has not yet been automated. You should verify the mastering steps and options of this step before beginning the master.

Note. The software mastering batch process stops when it encounters this build step. After you complete this build step, change its status to Succeeded (status code 60), and restart the software mastering batch process.

Pre-Build Package

Type = 04

Performed Automatically = Yes

For PeopleSoft internal use only.

Pre-Build Pristine

Type = 05

Performed Automatically = Yes

For PeopleSoft internal use only.

Build Cross-Reference

Type = 06

Performed Automatically = Yes

For PeopleSoft internal use only.

Build Data Dictionary

Type = 07

Performed Automatically = Yes

For PeopleSoft internal use only.

Build In-House Package Database

Type = 08

Performed Automatically = Yes

For PeopleSoft internal use only.

Build Planner Database

Type = 09

Performed Automatically = Yes

For PeopleSoft internal use only.

Build Pristine Database

Type = 10

Performed Automatically = Partial (See the specific template definition for complete information about the performance of this build step.)

This build step creates the pristine data tables in the final pristine database that corresponds to the given set of modules.

Build Store & Forward Database

Type = 11

Performed Automatically = Yes

For PeopleSoft internal use only.

Build Standalone Database

Type = 12

Performed Automatically = Yes

For PeopleSoft internal use only.

Build Change Tables

Type = 13

Performed Automatically = Yes

This build step builds the change tables based on the change table configuration that was set up as part of the software master definition.

Master Central Objects

Type = 14

Performed Automatically = No

For PeopleSoft internal use only.

Compress

Type = 15

Performed Automatically = Partial (See the specific template definition for complete information about the performance of this build step.)

This build step compresses the final pristine JDE Masters database into the data.cab file in the final image path.

Create INF

Type = 16

Performed Automatically = Yes

DO *not* modify this file manually. This build step updates the deployment.inf file that the installation applications use during the update installation.

Copy CD Directory Files

Type = 17

Performed Automatically = Yes

This build step copies the built package to the target image path. This step also copies any additional files defined in the software master directory structure to the target image path.

Note. If you have already built the package and do not want the mastering process to build the package again, set the status of the Package Build step to 60. When you create the software master, the process skips the package build and, when it runs this Copy CD Directory Files step, copies the package.

Virus Check

Type = 18

Performed Automatically = Partial

For PeopleSoft internal use only.

Windows Executable

Type = 19

Performed Automatically = Partial (See the specific template definition for complete information about the performance of this build step.)

This build step enables you to specify a Microsoft Windows executable or batch file as part of the mastering process.

Data Cleanup

Type = 20

Performed Automatically = No

For PeopleSoft internal use only.

Build Package Database

Type = 21

Performed Automatically = Yes

For PeopleSoft internal use only.

Batch Process

Type = 22

Performed Automatically = Yes

This build step enables you to define a batch process to run as part of the software master definition.

Understanding the ASU CD Template

The ASU CD is the main template used with the Product Packaging Tools. This template is the basis for delivering objects to distributed enterprises. This table shows the build steps and their sequence for an ASU CD:

Sequence Number	Build Step (Type)
10	Check Mastering Items (03 - Manual Build Step)
20	Cleanup Temporary Files (22 - Batch Process)
30	Cleanup Temp Master (22 - Batch Process)
40	Create CD File Structure (01 - Create the CD File Structure)
50	Build (02 - Package Build)
60	Create Database (22 - Batch Process)
70	Build Change Tables (13 - Build Change Tables)
80	Create/Load ASU Change Tables (22 - Batch Process)
90	Create/Load ASU Control Tables (22 - Batch Process)
100	Create/Load ASU Misc Tables (22 - Batch Process)
110	Create/Load New and Regen Tables (22 - Batch Process)
120	Create/Load ASU OL & VL Tables (22 - Batch Process)
130	ASU v/s Package Validation (22 - Batch Process)
140	Compact Database (22 - Batch Process)
150	Detach Database (22 - Batch Process)
160	Copy Database (22 - Batch Process)
170	Rename MSDE database files (22 - Batch Process)
180	Compress/Copy Database (15 - Compress)
190	Copy Package and Feature INFs (22 - Batch Process)
200	Copy CD Directory Files
210	Create INF
220	Create self-extracting executable
230	Validate the mastered CD

This table provides additional information pertaining to a particular build step within the ASU CD template:

Sequence Number	Build Step (Type) with Additional Information
10	<p>Check Mastering Items (03 - Manual Build Step)</p> <p>Verify the mastering steps and options of the step before beginning the master. This build step must be executed manually before the Master CD.</p>
20	<p>Cleanup Temporary Files (22 - Batch Process)</p> <p>Launches the R9640L batch process using versions XJDE0001 through XJDE0005. This process deletes the previous software master from the build machine. This step deletes the contents of the \$TEMP\data directory. It also drops the JDELocal database, if present, by launching UBE R9640MK.</p>
30	<p>Cleanup Temp Master (22 - Batch Process)</p> <p>Launches the R9640L batch process, version XJDE0001 to delete the contents of \$TEMP\Master folder.</p>
40	<p>Create CD File Structure (01 - Create CD Structure)</p> <p>Creates the CD file structure on the Image path.</p>
50	<p>Build (02 - Package Build)</p> <p>Builds the defined update package. This build step can be set to Built status if the package has run through the Package Build application.</p>
60	<p>Create Database (22 - Batch Process)</p> <p>Launches the R9640MF batch process using version XJDE0001. This process creates an empty MSDE database called JDELocal in this directory: \$TEMP/master.</p>
70	<p>Build Change Tables (13 - Build Change Tables)</p> <p>Builds the change tables based on the configuration that was set up during the director phase.</p>
80	<p>Create/Load ASU Change Tables (22 - Batch Process)</p> <p>Launches the R9670 batch process using version XJDE0003. This process creates change tables in the JDELocal database, populating the tables from the Change Table data source.</p>
90	<p>Create/Load ASU Control Tables (22 - Batch Process)</p> <p>Launches the R9670 batch process using version XJDE0001. This process creates control tables in the JDELocal database, and populates the tables from the Control Table data source.</p>

Sequence Number	Build Step (Type) with Additional Information
100	<p>Create/Load ASU Misc Tables (22 - Batch Process)</p> <p>Launches the R9670 batch process using version XJDE0002. This process creates miscellaneous tables in the JDELocal database, and populates the tables based on the selections that you made for the objects in the ASU package, the change tables, and the software master definition.</p>
110	<p>Create/Load New & Regen Tables (22 - Batch Process)</p> <p>Launches the R96700 batch process using version XJDE0001. This process creates tables in the JDELocal database that are marked as new or regenerate in the table change table or the table conversion scheduler.</p>
120	<p>Create/Load ASU OL & VL tables (22 - Batch Process)</p> <p>Launches the R9600400C batch process using version XJDE0001. This process copies to the JDELocal database the Object Librarian, Versions List, and package assembly information for the master. Verify that the data source, which you can set in the processing options for this version, is set correctly.</p>
130	<p>ASU v/s Package Validation (22 - Batch Process)</p> <p>Launches the R9671 batch process using version XJDE0001. This process cross- validates information, ensuring that objects, tables, and specifications in the ASU package definition match with the object change table, table change table, index change table, and table conversion scheduler in the software master.</p>
140	<p>Compact Database (22 - Batch Process)</p> <p>Launches the R9640MG batch process using version XJDE0001, which runs the MSDE compaction tool to compact the JDELocal MSDE database.</p>
150	<p>Detach Database (22 - Batch Process)</p> <p>Launches the R9640ML batch process using version XJDE0001, which detaches the JDELocal MSDE database.</p>
160	<p>Copy Database (22 - Batch Process)</p> <p>Launches the R9640E batch process using version XJDE0002. This process copies the ASU database from \$TEMP\master\JDELocal.*df to \$TEMP\data\JDELocal.*df.</p>

Sequence Number	Build Step (Type) with Additional Information
170	<p>Rename MSDE Database files (22 - Batch Process)</p> <p>Launches the R9640H batch process using version XJDE0006 and XJDE007. This process renames the JDELocal.*df files to packagename.*df files, where <i>packagename</i> is the name of the package associated with the database.</p>
180	<p>Compress/Copy Database (22 - Batch Process)</p> <p>Launches R9640E using version XJDE0003. This process compresses the ASU database (packagename.*df) files and copies them from the \$TEMP/data directory to the final software master image path as Data.cab.</p>
190	<p>Copy Package and Feature INFs (22 - Batch Process)</p> <p>Launches the R9600400E batch process using version XJDE0001. This process copies deployment features INFs, the package INFs, and the feature INFs from the deployment server to the \$TEMP directories.</p>
200	<p>Copy CD Directory Files (17 - Copy CD Directory Files)</p> <p>Copies additional specified items into the image path. For example, all install programs are copied to the root of the image path.</p>
210	<p>Create INF (16 - Create INF)</p> <p>Creates the deployment INF file into the image path directory.</p>
220	<p>Create self-extracting exe (22 - Batch Process)</p> <p>Launches the R9640J batch process using version XJDE0001. This process takes the entire software master image and creates a CAB file and a self-extracting executable file in the \$TEMP/final directory. You can use either of these files to deliver the software master. Uncompress the CAB file or run the executable file on the deployment server, and then refer to the Application Software Update PeopleBook to update PeopleSoft EnterpriseOne with the software master.</p>
230	<p>Validate the Mastered CD (22 - Batch Process)</p> <p>Launches R9640D version XJDE0001, which performs post-mastering validation on the master that has been created. Refer to the report output for details.</p>

Understanding the Custom CD

The Custom CD is for general use; this CD type has no template. A PeopleSoft EnterpriseOne administrator uses this CD type primarily to create backups of source code, documents, and so forth, while still using the Product Packaging Tools. This CD type enables you to enter a directory structure that contains all of the files that you want loaded on to a custom CD image. After the process is completed, the administrator can move that image to a CD burner to create the actual CD.

Forms Used to Work with Software Master Templates

Form Name	Form ID	Navigation	Usage
Work With CD Templates	W9640B	Advanced Operations menu (GH9622), Mastering Templates	Select a template to revise, proof, validate, or delete.
Template Director	W9640D	On the Work With CD Templates form, click Add.	Add a new template.
CD Revisions	W9640G	On the Work With CD Templates form, select a template.	Revise a template.
Copy CD Configuration	W9640C	From Work with Software Mastering, select a template and click Copy.	Create a new template based on an existing one.

See Also

[Chapter 2, “Working with Software Masters,” Revising a Software Master Definition, page 25](#)

[Chapter 2, “Working with Software Masters,” Loading a Subdirectory from an Enterprise Network Directory, page 27](#)

[Chapter 2, “Working with Software Masters,” Copying a Software Master Definition, page 28](#)

[Chapter 2, “Working with Software Masters,” Proofing a Software Master Definition, page 28](#)

CHAPTER 3

Working with Change Tables

This chapter provides an overview of change table revisions and discusses how to work with change table configurations.

Understanding Change Table Revisions

If you need to revise or add change tables, you can build and submit change table configurations to a software master after you have created the software master. Disregard this task if you have not yet created the software master. If the template that you choose for the software master requires change tables, the software master will build the change tables that you specify during the setup of the software master definition.

Working with Change Table Configurations

After you have created the configuration of a change table, you can revise, copy, or delete it.

You copy change table configurations from one master definition to another master definition. This process copies all change table configurations associated with the master from which you are copying.

This section describes how to revise or submit change tables.

Forms Used to Work with Change Tables

Form Name	Form ID	Navigation	Usage
Work With Change Table Definitions	W9642Z	Product Packaging menu (GH962), Change Table Configurations	Revise or delete change tables.
Copy Change Table Definitions	W9642A	On the Work With Change Table Definitions form, select a CD, then select one of its change table definitions and click Copy.	Create a new table definition based on an existing one.

Revising or Submitting Change Tables

Access the Work With Change Table Definitions form.

To revise or submit change tables:

1. Find the software master for which you want to view change table configurations.
Existing change table configurations appear with:
 - A check mark to the left of each table configuration row that either completed its build successfully or is ready to be built.
 - A circle with a line through it to the left of any table configuration that failed its build or is not at a valid status for the configuration to be submitted.
2. If you need to rerun a particular change table batch process and the change table row does not have a check mark to the left of it, correct any issue that might exist, select the change table row, and click Select.
3. On the Change Table Revisions form, ensure that Configuration Status is 30 (Validated) and click OK.
This status enables the change table to be built and submitted to the software master.
4. To submit change tables, perform one of these actions:
 - To submit an individual change table row, select the row and then select Submit from the Row menu.
 - To submit multiple change table rows, select the rows using the Control or Shift keys with your mouse, and then select Submit from the Row menu.
 - To submit all of the change table rows, select Submit from the Form menu.

The software builds the change tables that you choose and includes them with the software master. If you revise existing change tables, they will replace themselves in the software master. If you added change tables, they will be appended to the software master.

CHAPTER 4

Performing Data Cleanup

This chapter provides an overview of data cleanup and describes how to:

- Work with data cleanup procedures.
- Work with data cleanup templates.

Understanding Data Cleanup

Use the data cleanup application to create procedures and templates to clean up the software master data. The data cleanup application can delete obsolete data, standardize existing data, and provide integrity, summary, and error reports about the data. You can clean up these items:

- Data dictionary tables and specifications.
- AutoPilot tables.
- User-defined codes and types.
- Menu tables.
- Object Librarian tables.
- Central Objects tables.

Working with Data Cleanup Procedures

The Product Packaging Tools includes an application that enables you to add, revise, copy, and delete a set of data cleanup steps. You define how you want these steps to clean up the software master data.

You can revise the information and steps within a data cleanup procedure that you already created. If you revise a data cleanup procedure, those revisions are reflected wherever that procedure is used, such as when the revised procedure is nested within another procedure.

This section describes how to:

- Add a data cleanup procedure.
- Execute a data cleanup procedure and build step.

Forms Used to Work with Data Cleanup Procedures

Form Name	Form ID	Navigation	Usage
Work with Procedure	W9646A	Product Packaging menu (GH962), Data Cleanup Procedure Templates	Execute or delete a data cleanup procedure.
Procedure Definition Director	W9646B	On the Work with Procedure form, click Add.	Add a data cleanup procedure.
Procedure Revision	W9646D	On the Work with Procedure form, select a procedure.	Revise or execute a data cleanup procedure.
Copy Procedure	W9646L	On the Work with Procedure form, select a procedure and click Copy.	Create a new data cleanup procedure based on an existing one.

Adding a Data Cleanup Procedure

Access the Procedure Definition Director form.

You can add a data cleanup procedure. This function enables you to add procedure information and the steps necessary to clean up data.

Although this Product Packaging Tools function is primarily used to create data cleanup procedures, you can use it to create any type of procedure to run a batch process or Microsoft Windows executable.

Status	Verify the status of the data cleanup procedure. Set the status to <i>30</i> (validated) before you execute the procedure.
Procedure Release	Enter the release that pertains to the data cleanup procedure, such as E811. This value is the release currently installed on the client workstation that you are using.
Executable	This field appears if you are adding a Microsoft Windows executable program. Enter the name of a Microsoft Windows-compatible executable program. For example, the xcopy.exe program.
Parameters	This field appears if you are adding a Microsoft Windows executable program. Enter the parameters for the executable program. You can enter command-line switches, directories, and files. For example, for the xcopy.exe program, you could enter a copy-from parameter of <i>c:\temp*. *</i> and you can enter a command-line switch of <i>/s</i> .

Executing a Data Cleanup Procedure and Build Step

Access the Work with Procedure form or the Procedure Revision form.

You can execute a data cleanup procedure and build step from the data cleanup application.

Although this task explains how to execute procedures from the data cleanup application, you can also use the software master build steps to define a step that executes the data cleanup.

See Creating a Software Master.

To execute a data cleanup procedure and build step:

1. To execute the entire procedure, perform one of these actions:
 - On the Work with Procedures form, select the procedure and select Execute from the Row menu.
 - On the Procedure Revision form, select the main data cleanup procedure and select Execute Step from the View menu.
 - On the Procedure Revisions form, select Run Main Procedure from the Form menu.

These options execute the entire procedure. If the procedure is executed successfully, the software updates the procedure and the build step statuses to 60 (Built).
2. To execute individual build steps, on the Work with Procedures form, select a procedure and then click Select.
3. On the Procedure Revision form, click the Steps tab.
4. Select the build step that you want to execute and, from the View menu, choose Execute Step to process only that step.

This option executes the step. If the step is executed successfully, the software updates the step status to 60 (Built). If you execute a data cleanup procedure step, all of its subordinate steps are also executed, including any sub-procedures.

Working with Data Cleanup Templates

This section provides an overview of data cleanup templates and discusses how to work with data cleanup templates.

Understanding Data Cleanup Templates

Data cleanup templates are optional for use in data cleanup. You can use them as a guide to building your own data cleanup procedures. As with procedures, you can add, revise, copy, and delete templates.

The processes for adding, revising, copying, and deleting data cleanup templates are identical to those for the data cleanup procedures themselves.

See Also

Chapter 4, “Performing Data Cleanup,” Working with Data Cleanup Procedures, page 41

Forms Used to Work with Data Cleanup Templates

Form Name	Form ID	Navigation	Usage
Work with Procedure	W9646A	Product Packaging menu (GH962), Data Cleanup Procedure Templates	Delete a data cleanup template.
Procedure Definition Director	W9646B	On the Work with Procedure form, click Add.	Add a data cleanup template.
Procedure Revision	W9646D	On the Work with Procedure form, choose a procedure.	Revise a data cleanup template.
Copy Procedure	W9646L	On the Work with Procedure form, choose a procedure and click Copy.	Create a new data cleanup template based on an existing one.

CHAPTER 5

Working with Relative and Absolute Paths

This chapter provides an overview of path tokens and discusses how to work with relative and absolute paths.

Understanding Path Tokens

An absolute path name begins with the root directory and details the entire path, such as Z:\DepServer\CD Templates\Partial Update. A relative path name begins with a token, such as \$DEP. The token represents at least the root directory and possible contiguous directory paths. For example, \$DEP might represent Z:\DepServer. This relative path might appear within an applicable field as \$DEP\CD Templates\Partial Update.

You do not need to define the tokens. The Product Packaging Tool automatically resolves the token values based on your installation and other information available to it.

This list shows the relative path tokens that you can use:

- \$DEP
Represents the root directory where PeopleSoft EnterpriseOne is installed on the deployment server.
- \$IMAGE
Represents the image path of the software master.
- \$CLIENT
Represents the root directory where PeopleSoft EnterpriseOne is installed on the workstation that you are currently using.
- \$TEMP
Represents the Microsoft Windows temporary directory of the workstation that you are currently using.

Working with Relative and Absolute Paths

You use relative path tokens within a field.

The software enables you to convert relative path tokens and absolute path names for those fields that accept them within the Product Packaging Tools. If any fields use a token, you can convert the token into an absolute path or you can convert the absolute path into a token. For example, you can convert any instance of \$DEP into Z:\DepServer or you can convert Z:\DepServer into \$DEP.

This section describes how to:

- Use relative path tokens.

- Convert relative and absolute paths.

Form Used to Work with Relative and Absolute Paths

Form Name	Form ID	Navigation	Usage
Work With Software Mastering	W9640B	Product Packaging menu (GH962), Product Packages	Delete a data cleanup template.

Using Relative Path Tokens

To use relative path tokens:

From a field that allows relative paths, enter a token followed by the remainder of the path needed for that field.

For example:

```
$DEP\CD Templates\Partial Update
```

Converting Relative and Absolute Paths

Access the Work With Software Mastering form.

To convert relative and absolute paths :

1. Select the master for which you want to convert relative and absolute paths, and then select Convert Paths from the Row menu.
2. On Report Output Destination, select the option to send the report to a printer or to the screen, and then click OK.

The software converts the absolute and relative paths for any fields within the Product Packaging Tools to which this applies.

CHAPTER 6

Performing Product Packaging Troubleshooting

This chapter discusses how to :

- Troubleshoot failure during the check mastering items step.
- Troubleshoot failure to build the feature INF file.
- Troubleshoot JDELocal database not populated.
- Troubleshoot failure to copy change tables.
- Troubleshoot failure to copy custom tables.
- Troubleshoot unable to find product package after installation.
- Troubleshoot error backing up tables in the software update application.
- Troubleshoot problems with Object Librarian records.

Troubleshooting Failure During the Check Mastering Items Step

When mastering the CD, the process fails during the Check Mastering Items step.

Solution

This step is a manual build; it must be executed manually. Highlight the step and select Execute Step from the View exit menu. After the step is executed, click Master CD and then proceed.

Troubleshooting Failure To Build the Feature INF File

The product packaging mastering process fails at the build step Copy Package and Feature INFs - report R9600400E. Because features are a part of the Package Build process, update packages do not build feature INF files.

Solution

If Features are included in the chosen update package, be sure that the Feature INF files were created previously.

Troubleshooting JDELocal Database Not Populated

The build process completes without error but no tables exist in the JDELocal database in the \$TEMP\master directory. This error occurs when the Product Packaging - 811 data source is not set up correctly in the database data sources.

Solution

Reconfigure the database data source for Product Packaging - 811, and then repeat the build process.

Troubleshooting Failure to Copy Change Tables

No change tables (for instance, F960004 and F960005) exist in the JDELocal database, and the jde.log file lists several errors indicating that it cannot find these tables in the Control Tables. This problem indicates that the change tables do not exist in the master environment.

Solution

Verify that the tables exist and are set up correctly in the master environment.

Troubleshooting Failure to Copy Custom Tables

Custom tables were not copied to the JDELocal database, even though these tables were included in the update package and exist in the environment that the package is built from. This problem is an indication that the source environment specified in the change table configurator is not set up correctly or that the table exists in that environment.

Solution

Verify that the specified environment is valid, has tables associated with the environment, and that the custom table cannot be found in that environment.

Troubleshooting Unable to Find Product Package after Installation

After you run the install manager to install the Software Master on the new system, the product package is not listed in the Software Updates application. This error occurs because the package name does not match the product package name.

Solution

Remaster the Software Master and ensure that the update package name is the same as the product package name. Also, make sure that you have the latest Planner update installed.

Troubleshooting Error Backing Up Tables in the Software Update Application

In the Software Updates application, after choosing the path code and backup, the error message Create Table Failed appears and the application stops processing.

The jde.log file reports this error:

```
JDB9900245 - Failed to find F98611 OWBAK_PRODPACKUD_PY811 in cache
JDB3100011 - Failed to get location of table F983051 for environment PSFTPLAN
JDB2100004 - Failed to open table
```

Solution

The Software Update application creates a new data source called `OWBAK_PACKAGE_NAME_PATHCODE` that points to a backup database called `Planner\Package\PACKAGE_NAME_PATHCODE.bak\data\OWBAK_packagename_pathcode.mdf` and `OWBAK_packagename_pathcode.ldf`. Perform these actions to troubleshoot the problem:

1. Ensure that the latest Planner update is installed before you install the product package.
2. Open the Database Data Sources application (P986115) and verify that the data source `OWBAK_PACKAGE_NAME_PATHCODE` is created, where `PACKAGE_NAME` is the product package name in all uppercase letters, and `PATHCODE` is the chosen path code from the Software Updates application. If the data source exists but is not in all uppercase letters, manually delete that data source item and create a new data source item as shown:

Object	Setting
Data Source Name:	<code>OWBAK_PACKAGE_NAME_PATHCODE</code>
Data Source Type:	<code>A - Access</code>
DLL Name:	<code>JDBODBC.DLL</code>
Database Name:	<code>OWBAK_PACKAGE_NAME_PATHCODE</code>
Server Name:	<code>LOCAL</code>
Platform:	<code>LOCAL</code>

3. Verify that the Open Database Connectivity (ODBC) data source is created and is pointing to a valid location and database.
4. Exit PeopleSoft EnterpriseOne, log on again, and repeat the process.

Troubleshooting Problems with Object Librarian Records

A potential problem exists for objects that belong to a project in the original system that was created with a SAR that contains an alpha character. This problem would be evident when trying to enter that project after installation on the destination system.

Solution

After the package is installed on the destination deployment server, open the created Product Packaging - 811 JDELocal database and modify the F9861 table. In the SIMSAR column, make sure that no records have alpha characters for values. Change all alpha characters to 0.

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

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

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
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.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event	<p>In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.</p> <p>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).</p>
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class	<p>In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.</p> <p>See also <i>course</i>.</p>
Class ChartField	<p>A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i>.</p>
clearance	<p>In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.</p>
clone	<p>In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.</p>
cohort	<p>In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.</p> <p>See also <i>population</i> and <i>division</i>.</p>
collection	<p>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.</p>
collection rule	<p>In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.</p>
comm key	<p>See <i>communication key</i>.</p>
communication key	<p>In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.</p>
compensation object	<p>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.</p>
compensation structure	<p>In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.</p>
condition	<p>In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.</p>
configuration parameter catalog	<p>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.</p>
configuration plan	<p>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.</p>

constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	<p>In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.</p> <p>In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.</p> <p>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.</p>
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	<p>In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.</p> <p>See also <i>class</i>.</p>
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides

	<p>default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	<p>In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft 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 ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event	<p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	<p>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.</p>
exception	<p>In PeopleSoft Receivables, an item that either is a deduction or is in dispute.</p>
exclusive pricing	<p>In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.</p>
fact	<p>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.</p>
financial aid term	<p>In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.</p>
forecast item	<p>A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.</p>
fund	<p>In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.</p>
gap	<p>In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.</p>
generic process type	<p>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.</p>
gift table	<p>In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.</p>
GL business unit	<p>Abbreviation for <i>general ledger business unit</i>. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.</p> <p>See also <i>business unit</i>.</p>
GL entry template	<p>Abbreviation for <i>general ledger entry template</i>. In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled</p>

by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process

Abbreviation for *General Ledger Interface process*. In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group

In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object

In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, 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.

incur

In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative

In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access

In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access*.

institution

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

item

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

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

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

item shuffle

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

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

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

national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft 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 a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.

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

	number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product 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.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft 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 <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft 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.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, 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.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, 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.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,

and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft 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.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft 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.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

- absolute and relative paths 45
- absolute paths, converting to relative path 46
- adding a change table configuration 15
- adding a data-cleanup procedure 42
- adding a software master definition 12
- additional documentation viii
- application fundamentals vii

B

- Batch Application Selection 16
- batch process, build step process 32
- build change tables, build step process 31
- build cross-reference, build step process 30
- build data dictionary, build step process 30
- build in-house package database, build step process 30
- build package database, build step process 32
- build planner database, build step process 30
- build pristine database, build step process 30
- build standalone database, build step process 31
- build step processes 29
 - batch process 32
 - build change tables 31
 - build cross-reference 30
 - build data dictionary 30
 - build in-house package database 30
 - build package database 32
 - build planner database 30
 - build pristine database 30
 - build standalone database 31
 - build store & forward database 31
 - compress 31
 - copy CD directory files 31
 - create CD file structure 29
 - create INF 31
 - data cleanup 32
 - manual build step 29

- master central objects 31
- package build 29
- pre-build package 30
- pre-build pristine 30
- undefined 29
- virus check 32
- Windows executable 32

build steps

- execute Step command 43
- list of step icons 24

- build store & forward database, build step process 31

C

- CD Configuration Director 14
- CD information 14
- change table configuration 39
- Change Table Configuration Director 3
- change table configurations
 - adding 15
 - revising/submitting change tables 39
 - setting up 15
- Change Table Director 15
- Change Table Revisions 40
- change tables, configuring 15
- \$CLIENT 45
- comments, submitting xii
- common elements xii
- compress, build step process 31
- configuring change tables 15
- contact information xii
- conventions for this guide 1
- conventions for this guide, fonts 1
- converting relative and absolute paths 46
- copy CD directory files, build step process 31
- copying a software master definition 28
- create CD file structure, build step process 29
- create INF, build step process 31
- creating a data dictionary in the pristine data source 9
- creating a software master 12
- creating the final software master 13
- cross-references xi

custom CD 37
 Customer Connection website viii

D

data cleanup, build step process 32
 data sources
 creating a data dictionary in the pristine
 data source 9
 verifying the Product Packaging data
 source 8
 data-cleanup build steps, executing 42
 data-cleanup procedures
 adding 42
 executing 42
 data-cleanup templates 43
 defining a software master 12
 deleting a software master 23
 \$DEP 45
 details of all build step processes 29
 distributed development 3
 documentation
 printed viii
 related viii
 updates viii

E

execute Step command 43
 executing a data-cleanup procedure 42
 executing data-cleanup build steps 42

F

fonts, conventions for this guide 1
 forms
 Batch Application Selection 16
 CD Configuration Director 14
 CD information 14
 Change Table Director 15
 Change Table Revisions 40
 Source Environment Selection 15
 Target Release Selection 15
 Work With Change Table
 Definitions 39

G

glossary 51

I

icons, for build steps 24
 \$IMAGE 45

M

manual build step, build step process 29
 master central objects, build step
 process 31
 MMA Partners viii

N

notes xi

O

ODBC data sources, adding 8

P

package build, build step process 29
 path tokens
 \$CLIENT 45
 \$DEP 45
 \$IMAGE 45
 \$TEMP 45
 PeopleBooks
 ordering viii
 PeopleCode, typographical conventions x
 PeopleSoft application fundamentals vii
 pre-build package, build step process 30
 pre-build pristine, build step process 30
 prerequisites vii
 printed documentation viii
 pristine data source, creating a data
 dictionary 9
 product packaging
 definitions 1
 process flow graphic 1
 product packaging tools 1
 proofing a software master definition 28

R

related documentation viii
 relative and absolute paths 45
 relative paths 45
 converting to absolute path 46
 using 46
 revising change tables 39

S

setting up a software master definition 12
 setting up change table configurations 15
 software master
 cleaning up data 41
 creating 12

- creating the final 13
- defining 12
- deleting 23
- updating PeopleSoft EnterpriseOne 19
- software master checklist, creating 5
- software master data cleanup 41
- software master definition 24
 - adding 12
 - copying 28
 - proofing 28
 - revising 24
 - setting up 12
 - validating 17
- software master templates 29
 - build step processes 29
 - custom CD 37
 - update CD template 32
- Software Mastering Director 3
- Source Environment Selection 15
- submitting change tables 39
- suggestions, submitting xii

T

- Target Release Selection 15
- \$TEMP 45
- terms 51
- typographical conventions x

U

- undefined, build step process 29
- update CD template 32
- using relative-path tokens 46
- using the software master to update
PeopleSoft EnterpriseOne 19

V

- validating a software master definition 17
- verifying the Product Packaging data
source 8
- virus check, build step process 32
- visual cues xi

W

- warnings xi
- Windows executable, build step
process 32
- Work With Change Table Definitions 39

