



EnterpriseOne Tools 8.94 PeopleBook: Object Management Workbench

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EnterpriseOne Tools 8.94 PeopleBook: Object Management Workbench
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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.

Object Management Workbench Preface

This preface discusses the Object Management Workbench (OMW) PeopleBook.

PeopleSoft Tools Object Management Workbench Overview

This PeopleBook refers to this PeopleSoft product line: PeopleSoft EnterpriseOne Tools.

PeopleSoft Object Management Workbench

This PeopleBook covers Object Management Workbench (OMW), a member of the EnterpriseOne Tools suite. OMW is the primary component of the change management system for EnterpriseOne development. Its chapters describe the tool in general and then defines its features and functionality.

CHAPTER 1

Getting Started with PeopleSoft Tools Object Management Workbench

This chapter provides an overview of preparing to use Object Management Workbench (OMW).

PeopleSoft Tools OMW Overview

Object Management Workbench (OMW) is the primary component of the change management system for EnterpriseOne development. A change management system is vital to a productive development environment because it helps organize a myriad of development activities and helps prevent problems, such as when a developer intermixes components from different releases or when multiple developers simultaneously change an object. OMW automates many of these change management activities.

OMW has the following three components:

- Graphical User Interface (GUI)
Unifies all development in an intuitive interface.
- Configuration System
Controls all development from a central location.
- Logging System
Tracks all program changes automatically.

Implementing OMW

To use OMW, these tasks must be completed first:

- You must have a valid EnterpriseOne user account
Depending on how security has been configured, you might need one or more roles assigned to you so that you can access OMW, the EnterpriseOne databases, and so forth.
- OMW must be configured with transfer activity rules and allowed actions that application development can occur.
- At a minimum, you must have a default project in OMW to which you have added in the role of Developer.

CHAPTER 2

Understanding Object Management Workbench

This chapter discusses:

- OMW projects.
- Default projects in OMW.
- User roles in OMW.
- Allowed actions.
- Tokens.
- The OMW interface.
- Object Librarian and non-Object Librarian objects.

OMW Projects

Projects are composed of objects and owners. All development of objects within EnterpriseOne must be performed within the context of a project. Usually, you must first create or select a project, add an object to it, and then you can work with that object. Typically, objects are included in a project because they have been modified or created by a developer to complete a specific task.

In addition to objects, users can be associated with different projects. In fact, before you can add an object to a project, you must have been added to the project as a user in a role that has permission to add objects. A user can be assigned to the same project more than once with different roles. Projects may also contain other projects.

Default Projects in OMW

The default project is your personal project that you use for development and research. It holds any miscellaneous development objects that you want to work with but that you have not associated with a specific project. EnterpriseOne creates a default project when you run OMW for the first time. Your EnterpriseOne logon is the name of your default project.

Use your default project to do the following:

- Research, develop, and prototype objects
- Review objects that you do not need to modify or check in

The default project is similar to other projects; however, the status of a default project does not change. Therefore, you cannot use a default project to transfer objects.

Some objects, such as versions, and reports can be created and edited outside of OMW. Nevertheless, any changes that you make to these objects must be tracked and managed. You use your default project to manage these objects. If you create or access such objects outside of OMW, these objects are added to your default project.

User Roles in OMW

Users must be assigned to a project before they can revise the project or the objects within that project. When you add a user to a project, you also identify the role of the user within the project. The user role defines the function of the user within the project organization and specifies the user's access to certain OMW functions, depending on the allowed actions associated with the role. User roles and their allowed actions are defined in the Object Management Configuration application.

Note. Do not confuse user roles in the OMW with the concept of user roles as applied to other components of EnterpriseOne, such as Solution Explorer. OMW roles function independently of all other role-based systems in EnterpriseOne.

Allowed Actions

Allowed actions are rules that define the actions that may be performed by a user who is assigned a specific user role. You set up these rules for each user role, object type, and project status by using the Object Management Workbench Configuration program.

Tokens

Some objects use tokens to minimize the possibility of one user overwriting another user's changes to an object. The token management system organizes application development by providing a single checkout environment. Tokens provide a change control solution in a system that does not support merging or multiple versions of object specifications.

Projects hold tokens for an object, and each object has only one token. You can check out an object only if your project holds the token for the object. In this way, an object can reside in several projects, but can be checked out and checked in only by qualified users of the project that holds the token. However, you can allow other projects to share an object's token, thereby allowing the object to be checked out and checked in by qualified users of one or more projects. Only one person can check out an object at a time.

Note. Only Object Librarian objects have tokens.

See [Chapter 5, "Working with Objects," Adding Objects to Projects, page 19](#).

See [Chapter 2, "Understanding Object Management Workbench," Object Librarian and Non-Object Librarian Objects, page 6](#).

You can perform the following actions while your project holds the token:

Action	Description
Allow Another Project to Inherit the Token	This action forces both projects to be advanced together as if they were one project and allows multiple fixes to be applied to an object.
Switch the Token to Another Project	The project that donates the token returns to the queue as the first project waiting for the token when the new project inherits the token. This action allows an emergency fix to be applied immediately. Token switching should be restricted to a specific user role to ensure security of the objects.
Release the Token	You can release the token and allow the next project in the queue to inherit the token. The token can be released manually or configured to be released when a project advances to a new status. The token can be released when the project's status first changes or as late as when the project is closed. You must configure token release according to object type. Some object types, such as business functions, can hold their tokens longer, while other object types can give up their tokens earlier. You must also, set up tokens for release at a predefined object transfer point.

Your organization's change control procedures determine how you configure the object-transfer activity rules to release tokens. If you do not define object-transfer activity rules to release tokens, developers risk overwriting the changes of other developers.

The OMW Interface

From left to right, the initial OMW form displays the following:

- The project window, which displays your projects and their related objects and users. To view your current projects, click Find.

The following information describes how the color of an Object Librarian Object button indicates its status:

- Gray Object Icon with Check Mark: Another project holds the token for this object.
- Colored Object Icon (not gray): The project that contains the object holds the token for this object.
- Colored Object Icon with Check Mark (not gray): The project that contains the object holds the token for the object, and the object is checked out.
- Gray Object Icon: This object is not checked out and no project currently holds the object for the token.

Non-Object Librarian Object buttons do not vary in appearance.

Objects to be deleted are marked in bold in this window.

- The center column, which contains action buttons that you use to perform actions on a selected object. Available buttons vary based on your roles in the current project and on the status of the project in which the selected object resides. When you first launch OMW, no buttons appear in the center column because you have not selected an object.

- The information window, which displays a Web site; project status and release information; object or user information; and search results. Initially, the window displays a Web site or HTML page. The contents change based on your tab and object selections. For example, when you select a project or an object in the project window, the information window displays information about the selected project or object. To return this window to its initial state, click News on the toolbar.

Object Librarian and Non-Object Librarian Objects

OMW provides control of PeopleSoft objects in a simple, integrated, graphical user interface for software development. In EnterpriseOne, an object is a reusable entity based on software specifications that are created by PeopleSoft tools.

In OMW, this definition is expanded to include non-Object Librarian objects that are data source-based rather than path code-based.

EnterpriseOne objects include the following Object Librarian objects:

- Batch applications and versions (UBE)
- Business functions (BSFN)
- Business views (BSVW)
- Data structures (DSTR)
- Interactive applications (APPL)
- Media objects (GT)
- Tables (TBLE)

PeopleSoft objects include the following non-Object Librarian objects:

- Data dictionary items
- User defined code items
- Workflow objects
- Menus

CHAPTER 3

Understanding Projects in OMW

This chapter discusses:

- Default projects.
- The lifecycle of a project.

Understanding Default Projects

This section discusses:

- Default projects.
- Roles in default projects.

Default Projects

When you run OMW for the first time, the system creates a default project and tags it with your user ID. The default project is your personal project that you can use for development and research.

You can use default projects to do the following:

- Develop objects that are later moved into a regular project.
- Store objects to be added to a project later.
- Automatically store objects worked on outside of OMW.

A default project is similar to a project except that the project status of a default project never changes. Therefore, you cannot use a default project to transfer objects.

Non-Object Librarian objects can be accessed outside of OMW. If you access objects such as versions, user defined codes, menus, or the RDA outside of OMW, these objects are added to the default project. Any changes that you make to these objects must be tracked and managed through the default project. Modifications to non-Object Librarian objects are always logged.

If you want to advance the status of an object, use OMW to move the object from the default project to a project.

Roles in the Default Project

Although your default project appears immediately, you have one role only (usually Originator), as configured by your system administrator. You might need to add yourself to your default project in another role, such as Developer.

See Also

Chapter 4, “Working with Projects,” Adding Users to Projects, page 13

Understanding the Lifecycle of a Project

This topic discusses a typical project lifecycle from inception to completion. It includes steps required by a SAR-based (software action request) system. If you are not using a SAR-based system, some of the following steps might not apply to you. Furthermore, depending on your business’s software development procedures, the steps that you follow and their order might vary from the following process.

1. Based on the task to be accomplished, create a new project.
2. Add users to the project.

When you add a user, you define the role of the user, based on the actions that you want that user to be able to perform within this project. You might need to add a user more than once if you want the user to be able to perform actions allowed by different roles. As the project progresses, you can continue to add (or remove) users as required.

When you create a project with SAR integration turned off, you are automatically added to that project in the role determined by your system administrator (usually, as the Originator). You might want to add yourself to the project in other roles as well.

When you create a project with SAR integration turned on, the person who entered the SAR is added to the project in the role of Originator.

3. Add objects to the project.

Qualified users might be adding objects to the project throughout much of its lifecycle.

If you create a new object, drag and drop the object from your default project to the project as appropriate.

4. Check objects out and in.

To be able to save your changes to an object, you must check the object out, apply your changes, and check the object in.

You can check out an object only if no other projects hold the token for that object. If the token is available, it passes to your project when you check the object out. If another project already holds the token for the object, you can join a token queue to be notified when the token becomes available.

After checking out an object and modifying it, you can save your changes without checking the object in.

When you check an object in, the system might not release the token from the project, depending on how OMW is configured. As long as your project holds the token, another qualified user in your project can check the object out, but users in other projects cannot. You can enable users in other projects to check an object out by removing the object from the project.

5. Advance the project.

As the project progresses through its lifecycle, you must change its status. You do this by advancing the project. When you advance a project, the allowed actions for some roles might change and some objects might be transferred to other locations. Status-based role changes and transfers are configured by your system administrator.

6. Complete the project.

Based on your processes, you might archive or delete the project when finished. In OMW, 01 (Complete) is a closed status.

CHAPTER 4

Working with Projects

This chapter provides an overview of projects and discusses how to:

- Filter and search for projects.
- Create new projects.
- Change project properties.
- Advance projects.
- Add existing projects to a project.
- Delete projects.

Understanding Projects

In Object Management Workbench (OMW), all development is performed within the context of a project.

By default, when you click Find on OMW, the project window displays all of the projects to which you are added in at least one role. The project list can become lengthy, and you might want to filter the list so that only certain projects appear. For example, if you have a Developer role on some projects, you might want to filter your list so that you view only those projects with a development status. You can filter by user, role, and status.

In addition to projects in which you have a role, you can also view any other projects in the system. You can search for projects based on a variety of criteria, including object. If you complete the filter fields in the project window before you perform a search, you can refine the search based on the information that you enter in the filter fields.

Note. Searches are case-sensitive. When you complete fields, verify that you entered your search criteria using the commonly accepted spelling and case. If you receive no search results, try different capitalization or spelling.

Filtering and Searching for Projects

This section discusses how to:

- Filter projects.
- Perform project searches.
- Search for projects by object.

Filtering Projects

To filter projects:

1. On Object Management Workbench, enter the role and complete the following fields in the project window:

User	This field is required. When you launch the OMW, this field displays your ID. You can also enter other user IDs in this field.
Status	The range that you enter is inclusive. To search for projects with a specific status, enter the status code in both fields.

2. Click Find.

Performing Project Searches

To perform a project search:

1. On Object Management Workbench, select Advanced Search from the Form menu.
2. If you entered a user ID on the previous form, the OMW Project Search and Select by Project User form appears, and you can limit the search by enter the user role and project status.

To search for projects with a specific status, enter the status code in both fields. The range that you enter in these fields is inclusive.

The OMW Project Search and Select form appears if you did not complete any of the filter fields in the project window. These fields are unavailable on the OMW Project Search and Select form.

3. Enter the desired criteria in the Query by Example (QBE) columns, and then click Find.
4. Choose one or more projects, and then click Select.

The projects that you chose appear in the project window.

Searching for Projects by Object

This search method places all of the selected projects in the project window.

To search for projects by object:

1. On Object Management Workbench, select Search by Object from the Form menu.
2. On OMW Project Search and Select by Object, enter the desired criteria in the Query by Example (QBE) columns, and then click Find.
3. Choose one or more projects, and then click Select.

Creating New Projects

You create new projects to use as containers for objects and users that are grouped for a specific purpose. For example, you can create separate projects for different system enhancements. Through logging, projects also enable you to track the evolution of objects within the project, as well as the project itself.

This section discusses how to:

- Create new projects.

- Add users to projects.
- Remove users from projects.

Creating New Projects

To create new projects:

1. On Object Management Workbench, click Add.
2. On Add PeopleSoft Object to the Project, click OMW Project, and then click OK.
3. On Adding a Project, select how you want to create the project, and then click OK.

The option to create a project using a SAR is valid when SAR integration is enabled. This form is unavailable if your system does not use the PeopleSoft SAR system.

4. On Project Revisions, click the Summary tab, and enter a project ID.

PeopleSoft recommends that you use the following format when you name your projects:

YYYzzzzz

YYY is a company-specific code.

zzzzz is a unique, five-digit number.

For example, ABC00001 might be the name of a project.

5. Complete the following fields:
 - Description
 - Type
 - Severity
 - Product System Code
 - Release
6. Click the Dates tab, and then enter the planned completion date.
7. (Optional) Click the Category Codes tab, and then enter category codes 1 through 10.
8. Click the Attachments tab, and then add optional text comments to document the new project.
9. Click OK.

Adding Users to Projects

To add users to projects:

1. On Object Management Workbench, click the project to which you want to add the users.
2. Set up a list of users to add to the destination project by performing a search using the Search tab in the information window.
3. On the search form, select the user to be added to the destination project.
4. Verify that the owner's node in the destination project in the project window is highlighted. If it is not highlighted, click it.
5. With the user to be added highlighted, click the Add Object or User to Project button in the center column.
6. On Add User to Project, enter the role and lead, and then click OK:

Note. To add a user in more than one user role, repeat the add user procedure and select a second user role for the same user. Different functions are enabled for different user roles, according to their allowed (user) actions. These actions are configured by the administrator for your project using the configuration program of the OMW.

Removing Users from Projects

Removing a user from a project does not delete the user from the system.

To remove users from projects:

1. On Object Management Workbench, select a user in the project window.
2. Click the Remove Object or User from Project button in the center column.

Changing Project Properties

This section provides an overview of project properties and discusses how to change project properties.

Understanding Project Properties

You can view and modify the following properties of any project that you select:

- Description
- Type
- Severity
- Product system code
- Release information
- Start date
- Planned completion date
- Category codes
- Text attachments

Changing Project Properties

To change project properties:

1. On Object Management Workbench, click a project, and then click Select.
You can also click the Design button in the center column.
2. On Project Revisions, click the Summary tab, and then revise the information in the following fields:
 - Description
 - Type
 - Severity
 - Product System Code

- Release
3. Click the Dates tab, and then revise the start date and the planned completion date.
 4. (Optional) Click the Category Codes tab, and then revise category codes 1 through 10.
 5. Click the Attachments tab, and then add optional text comments to document the project.
 6. Click OK.

Advancing Projects

This section provides an overview of project advancement, lists prerequisites, and discusses how to advance projects.

Understanding Project Advancement

After development is complete for all objects in a project, the status of the project must be advanced to send the project through the development cycle. Changing the status of a project might affect the allowed actions of certain roles.

OMW can be configured to enable users, based on their roles, to perform specific actions when a project is at a specific status. For example, a user who is assigned to a project in the role of developer might be able to perform the following actions before the project is advanced: check out, design, and check in. However, after the project is advanced to the next status, a developer might not be able to perform any actions at all.

Changing the status of a project can also initiate actions, such as transferring objects in the project and deleting from the system objects that have been marked for removal. You cannot advance a default project.

Prerequisites

Before advancing projects:

- Ensure that all of the objects in a project are checked in, including objects in projects that will inherit a token.
- In SAR-based systems, ensure that you complete all required SAR fields.

Advancing Projects

To advance projects:

1. On Object Management Workbench, click the project to be advanced.
2. Click the Advance Project button in the center column.
3. Click the field labeled >>>, and then enter the desired project status.

Your choices are limited, based on the current status of the project and on your company's specific procedures, which are defined in the Object Management Workbench Configuration application.

Note. Turn on the Validate Only option to validate the status change without actually advancing the status of the project. This option enables you to verify that the project is valid before attempting any object transfers. Any projects that are linked to it through token inheritance are validated at this time as well.

4. Check for dependencies, if applicable.

When you advance a project, you can use the Check Dependency feature to determine whether the project contains objects that can be rolled up when an ESU is created. If the system finds a rule violation, the project is not transferred.

5. Click OK.

If you did not select the Validate Only option, the system advances the project status and initiates any required object transfers and deletions. Otherwise, the system validates only the project status.

Use the OMW logging system to view any errors that occurred during the status change. If you cannot advance the project, verify the following:

- All of the objects in the project are checked in, including objects in projects that will inherit a token.
- If you are using a SAR system, you have completed all of the required fields in the SAR.

Adding Existing Projects to a Project

In addition to objects and users, projects can contain other projects. You can add a project to a project or, if the target project and the project to be added both appear in your project window, you can move the project to be added under the target project using drag-and-drop. The methods for adding and moving projects are identical to the methods for adding and moving objects.

See [Chapter 5, “Working with Objects,” Adding Objects to Projects, page 19](#).

See [Chapter 5, “Working with Objects,” Adding Objects to Projects, page 19](#).

Deleting Projects

This section provides an overview of project deletion and discusses how to delete projects.

Understanding Project Deletion

When you delete a project, the system removes all objects and owners from the project. The project is then completely deleted from the system.

If you delete a project that contains objects that are checked out, the system erases the check out for each object before deleting the project. If the project holds any tokens, the system releases them as well.

Deleting Projects

To delete projects:

1. On Object Management Workbench, click a project, and then click Delete.
The system confirms the deletion.
2. Click OK in the Confirm Delete query.

CHAPTER 5

Working with Objects

This chapter provides an overview of objects and discusses how to:

- Create objects.
- Search for objects.
- Add objects to projects.
- Move objects.
- Remove objects from projects.
- Delete objects.
- Download object specifications.
- Check objects in and out.
- Change objects.
- Maintain objects in multiple software releases.

Understanding Objects

OMW enables you to administer database objects in a tool that displays nodes, tables, business views, indexes, and programs hierarchically. Rather than have an administrator manage all of the objects and track what modifications went with which SAR/Project, you do it yourself. You can create and manage a variety of objects with OMW, including:

- Applications
- Business functions
- Data structures
- Tables
- Business views
- Data and menu items
- User defined codes (UDCs)
- Workflow processes

Creating Objects

To create objects:

1. From the Object Management Workbench, click Add.
2. On Add PeopleSoft Object to the Project, click the object type that you want to create, and then click OK.
The Add Object form appears. The contents of this form vary based on the type of object that you are creating.
3. On Add Object, complete the fields as appropriate for the type of object you are creating, and then click OK.

Depending on the object that you are creating, a design form, which provides the functions you need to design the object, might appear. For example, if you create an interactive application, the Interactive Application Design form appears. Click the Design Tools tab to access the buttons that launch Form Design Aid, Work with Vocabulary Overrides, Work with Interactive Versions, and so on.

Searching for Objects

This section provides an overview of object searches and discusses how to search for objects.

Understanding Object Searches

Conducting an efficient search is preliminary to adding objects to a project. You can search for objects by category and type, or you can perform an advanced search and find objects based on other criteria.

Note. Searches are case-sensitive. When you enter your search criteria, enter the commonly accepted spelling in standard capitals and lower case. If you receive no search results, try different capitalization or spelling.

Searching for Objects

To search for objects:

1. On Object Management Workbench, click the Search tab.
2. Complete the following fields, and then click the button next to the Search field:

Category	You can search a variety of categories. For example, to find a report, select Object Librarian as the category because reports are Object Librarian objects. To find a project, select OMW Project. To find a user, select Owners.
Search Type	Valid choices for this field vary based on the category that you select. If you set the search type to Object Name Version Name, you can use the delimiter to specify a search suffix. For example, if the category is Object Librarian and the search type is object name, entering R0008P XJDE* displays all XJDE versions of object R0008P (Date Patterns Report).
Search	Entries in this field must match the Search Type that you select.

3. To search for objects based on criteria other than category, search type, and name, click Advanced Search.

4. On Object Librarian Search and Select, enter the desired criteria in the Query by Example columns, and then click Find.
5. Choose one or more objects, and then click Choose.

The objects that you chose appear in the information window.

See Also

Chapter 5, “Working with Objects,” Adding Objects to Projects, page 19

Adding Objects to Projects

This section provides an overview of object addition and discusses how to:

- Add an object.
- Add multiple objects.

Understanding Object Addition

An object must exist within one of your projects before you can work with it. You can add an existing object to a project, or you can create a new object for a project. When you create a new object, the system places it in the current object that you have selected. If you did not select a project before creating the object, the system places it in your default project. Adding an object to a project neither checks out the object nor downloads the specifications of the object to your local environment.

Note. If you try to add an object to a project that already exists in that same project, the Release Search & Select form appears because the system enables you to modify the same object across multiple releases.

See Also

Chapter 4, “Working with Projects,” Adding Users to Projects, page 13

Chapter 5, “Working with Objects,” Checking Objects In and Out, page 23

Adding an Object

To add an object:

1. On Object Management Workbench, click the project to which the object will be added.
2. Find the object to add to the destination project by performing a search using the Search tab in the information window.
3. When the search completes, on the search form, select the object to be added to the destination project.
4. Verify that the destination project is highlighted in the project window. If it is not highlighted, click it.
5. With the object to be added highlighted, click the Add Object or User to Project button in the center column.

Adding Multiple Objects

To add multiple objects:

1. On Object Management Workbench, click the project to which the objects will be added.
2. Find the objects to add to the destination project by performing a search using the Search tab in the information window.
3. Verify that the destination project is highlighted in the project window. If it is not highlighted, click it.
4. From the Row menu, select Advanced, and then select Add All Objects.

The system adds all of the objects that fit the search criteria to the project that you selected in step 1.

Moving Objects

You can move objects from one project to another by dragging and dropping them. Both projects and the object must be visible in your project window. This task can be used to move users from one project to another or to move a project to another project.

This section discusses how to:

- Move an object.
- Move multiple objects.

Moving an Object

To move an object:

1. On Object Management Workbench, in the project window, click and hold the mouse button on the object that you want to move.
2. Drag the object over the target project and release the mouse button.

The system removes the object from the source project and adds it to the target project.

Moving Multiple Objects

To move multiple objects:

1. On Object Management Workbench, in the project window, click the project that contains the objects that you want to move.
2. From the Row menu, select Advanced, and then select Move Objects.
3. On Move Multiple Objects Search & Select, in the To Project field, enter the project to which you want to move the selected objects.
4. In the detail area, click the objects that you want to move.
5. Click Select.

The system moves the objects from the source project to the target project. This process might take several minutes, depending on the number of objects that you selected.

Removing Objects from Projects

This action removes the reference to the object from the project; it does not delete the object. This task also can be used to remove users from a project.

To remove objects from projects:

1. On Object Management Workbench, select an object in the project window.
2. Click the Remove Object or User from Project button in the center column.

Deleting Objects

This section provides an overview of object deletion and discusses how to delete objects.

Understanding Object Deletion

You can delete any object from the server that is at an open status. You can also mark an object for deletion from its transfer locations upon project advancement or from its current save location (the location where the system saves the object when you click the Save button in the center column of OMW).

You can also use this task to remove the specifications for Object Librarian object from your workstation.

When you select Delete Object from Server for a non-Object Librarian object, the system deletes the object from locations that are defined in the transfer activity rules when you click OK. If you select Mark Object to be Deleted from Transfer Locations, the system deletes the object from any other configured locations when the project advances.

For an Object Librarian object, you can delete the local and save specifications. If the Object Librarian object is checked in, you can delete the checked-in version of this object by choosing Delete Object from Server. If you select Mark Object to be Deleted from Transfer Locations, the Object Librarian object is deleted from its transfer locations, which are defined in the transfer activity rules when the Project Status is advanced.

Deleting Objects

To delete objects:

1. On Object Management Workbench, select an object in the project window.
2. Click Delete.

A Delete form appears. Your available options vary depending on the object type and whether the object has been checked in.

3. Choose one or more of the following options, and then click OK:

- Delete Object from Server

Click View Locations for a list of locations from which the object is deleted when you select this option. This action occurs as soon as you click OK.

- Delete Object Locally

This action occurs as soon as you click OK.

- Delete Object from the SAVE location

This action occurs as soon as you click OK.

- Mark Object To Be Deleted From Transfer Locations

Objects marked for deletion from transfer locations appear in bold letters in the project window. They are deleted from the transfer locations when the project status is advanced.

- Remove Object from ALL locations

This option selects all of the above options.

Downloading Object Specifications

This section provides an overview of specification downloads and discusses how to use the advanced get feature.

Understanding Specification Downloads

To download checked-in object specifications from the server that is defined for the current status, select the object and click the Get button in the center column. Use this function when someone else has been working on the object and you want to see the changes, or when you have made changes to the object but want to abandon them in favor of another version of the object.

The Get button enables you to get the specifications for objects that reside in your path code only. However, you can download the specifications of an object that resides in other areas of the system. For example, you might want to get the specifications for an object as it existed in a previous software release. Use the advanced get feature to specify the location of the object that you want to download.

Note. If you want to review the object and not save any changes, use the Get button to copy the latest specifications to your local workstation instead of checking out the object and then erasing the checkout.

Using the Advanced Get Feature

To use the advanced get feature:

1. On Object Management Workbench, select an object in the project window.
2. From the Row menu, select Advanced, and then select Advanced Get.
You are prompted to decide whether you want to overwrite local specifications.
3. Click one of the following options:
 - Yes
If you select Yes, go to step 5.
 - No
If you select No, continue with step 4.
4. On Path Code Search & Select, enter the path code, and then click Find.
5. Choose the location of the object that you want to get, and then click Select.

Checking Objects In and Out

This section provides an overview of object check in and check out and discusses how to:

- Check out objects.
- Check in objects.
- Erase checkouts.

Understanding Object check in and check out

You can check out an Object Librarian object that resides in your projects provided that the token for the object is either available or held by the project in which the object currently resides. Only one user at a time can check out an object. Checkout fails if the object is already checked out or if the token is unavailable. If the token is unavailable, you can join the token queue for the desired object. If you join the token queue, you will be notified when the token is available and your project will receive the token.

Check in an object when you want to upload its specifications to the server and make it publicly available. When you check in an object, the system records the project in which the object resides and ensures that only changes made under the current project are transferred when the project is advanced to a status that triggers a transfer. If you move an object from one project to another using the drag-and-drop method, the system tracks the change and records the new project for the object. However, consider the following scenario:

1. You add an object to a project and check it out.
2. You change the object and check it in.
3. You use the right-facing arrow in the center column to remove the object from the project.
4. You later add the object to a different project.

In this scenario, the system cannot track the object because it passes out of a project completely. Therefore, when you advance the second project, if the system needs to transfer the object as part of the advance, the transfer will fail because the object's last known check in project location and its current project location do not match.

When you drag-and-drop an object, the system updates its tables in such a way that the transfer can occur. This is not the case when you remove an object from a project and then add it to a different project later.

If an object is checked out, you can erase the checkout. When you erase a checkout, local changes are not uploaded to the server. Erasing the checkout for an object does not release its token, but it does enable other developers who are assigned to the same project to check out the object.

Checking Out Objects

To check out objects:

1. On Object Management Workbench, select an object in the project window.
2. Click the Checkout button in the center column.

OMW indicates that an object is checked out by superimposing a check mark over the object's button. Additionally, data about the object that appears in the information window is updated to reflect its checked out status.

Note. If the object is unavailable, the system asks if you want to be added to the token queue for the object. If you select to join the queue, the system alerts you when the token is released and assigns the token to your project. To determine which project holds the token for an object, select the object in the project window and click the News/Status tab in the information window. Additionally, if you have joined a token queue, your position in the queue appears here.

Checking In Objects

To check in objects:

1. On Object Management Workbench, select a checked-out object in the project window.
2. Click the check in button in the center column.

OMW indicates that an object is checked in by removing the check mark that was superimposed over the object's button when it was checked out.

Erasing Checkouts

To erase checkouts:

1. On Object Management Workbench, select a checked-out object in the project window.
2. Click the Erase Checkout button in the center column.

OMW indicates that an object is no longer checked out by removing the check mark that was superimposed over the object's button when it was checked out.

Changing Objects

This section provides an overview of object changes and discusses how to change objects.

Understanding Object Changes

When you create an object using OMW, OMW enables you to define the properties of the object. OMW also provides access to design tools and system actions for the object. Similarly, after the object is created, you can use OMW to modify the object and its specifications.

Your system administrator can also specify a separate save location that is different from your local environment and from the location of the object on the server. Save objects to this location by selecting the object and clicking the Save button in the center column. Retrieve an object from its save location by selecting the object and clicking the Restore button in the center column. Note that the save location for the object must be different from its system location.

You must check out the object before you modify it to be able to check the object back in and upload the changes.

As users modify objects, the changes exist only in their local environments until they either save the object to its save location or check in the object to its system location.

Changing Objects

To change objects:

1. On Object Management Workbench, select an object in the project window.
2. Click the Design button in the center column.

An appropriate design form for the object appears. The current properties of the object appear on the form.

3. Make the necessary changes to the object, and then click OK.

Maintaining Objects in Multiple Software Release

This section provides an overview of objects in multiple software releases, lists a prerequisite, and discusses how to:

- Add same-named objects to a project.
- Change the release level of an object on your project.
- Update an object to match another object.
- Update different objects in different releases.

Understanding Objects in Multiple Software Releases

Same-named objects in different software releases can be modified in OMW in the same project. After adding the objects to the project, you can maintain them independently or you can update one to match the other. When working on objects from separate releases, OMW handles save and check in file paths for you, based on the Object Management Configuration. You perform the necessary modifications and use the OMW functions as you would normally.

Important! Changing and maintaining objects in multiple releases can cause problems due to EnterpriseOne object interdependencies. Changing an object in one version and then updating the object in another version to match might cause dependent objects to malfunction.

Prerequisite

Determine the paths of the objects that you want to modify.

Adding Same-Named Objects to a Project

To add same-named objects to a project:

1. On Object Management Workbench, add the first object to the project.

Note. The object is added to the project at the current release level of your EnterpriseOne.

2. Add the same object to the project again.
3. On the Release Search and Select form, click Find.

All available releases for which the object can be added to the project appear.

4. Click the release you want, and then click Select.

The object is added to the project for the selected release level.

Changing the Release Level of an Object on Your Project

To change the release level of an object on your project:

1. On Object Management Workbench, select Advanced from the Row menu, and then select Change Release.
2. On the Release Search and Select form, click Find.

All available releases for which the object can be added to the project appear.

3. Click the release that you want, and then click Select.

The object is added to the project for the selected release level.

Updating an Object to Match Another Object

To update an object to match another object:

1. Check out the object A from release A.
2. Modify the object.
3. Check in the modified object A.
4. Check out the object B from release B.
5. Choose object B, select Advanced from the Row menu, and then select Advanced Get.
6. Click Yes to override local specifications.
7. On Path Code Search & Select, find and select the path code in which the release A version of the object was checked in, and then click Select.

In your project, the release B version of the object is modified to match the release A version of the object.

8. Check in object B.

Updating Different Objects in Different Releases

To update different objects in different releases:

1. Check out the object from release A.
2. Modify the object.
3. Check in the modified object.
4. Check out the object from release B.
5. Modify the object.
6. Check in the modified object.

CHAPTER 6

Working with Tokens

This chapter provides an overview of tokens and discusses how to:

- View the token queue.
- Inherit tokens.
- Switch tokens.
- Release tokens manually.

Understanding Tokens

In Object Management Workbench (OMW), Object Librarian objects use tokens to minimize the possibility of one user overwriting another user's changes. Each object has a single token, and it is associated with a project when the object is checked out. Checking in the object does not release the token; instead, the token is released when the status of the project changes to a level determined by your system administrator. At that time, another developer can check out the object and receive the token.

The following three actions are allowed while your project holds the token:

- Allow another project to inherit the token. This action forces both projects to be advanced together as if they were one project and allows multiple corrections to a project to be applied to a single object. No matter how many projects have inherited the token, however, only one user at a time can check out the object. For a project to successfully inherit a token, the target project must be at the same status as the source project.
- Switch the token to another project. After the token is switched, the project that loses the token will be placed in the token queue as the first project that is waiting for the token. When you configure OMW, token switching should be restricted to a specific user role so that you can maintain object security.
- Release the token. A project owner can give up the token and allow the next project in the queue to receive it.

OMW might have been configured to release tokens for different object types at different project status levels. Therefore, all object types might not give up their tokens during the same change in project status.

Viewing the Token Queue

This section provides an overview of the token queue and discusses how to view the token queue.

Understanding the Token Queue

OMW attempts to acquire a token for an object when you check out an object. If the token is unavailable, the information window displays information about the token, such as which project currently holds it, the user who checked it out, and when the user checked it out. You can join the token queue so that you are notified when the token is released and your project is assigned the token. Projects in the token queue are assigned the token in the order in which the users requested the token. After joining the token queue, you can select to inherit the token.

When a project has a token, the token stays with that project until the project advances to a status that is configured in the activity rules for release of the token or until it is switched or released manually. When the token is released, the next project in the token queue is notified and assigned the token. Each Object Librarian object has one token per release.

If you join a token queue and then decide later that you do not need the token, remove the object from your project to relinquish your position in the queue.

Viewing the Token Queue

To view the token queue:

1. On Object Management Workbench, click an object in the project window.
2. From the Row menu, select Advanced, and then select Token Queue.

The View Object's Token Queue form appears. The form shows which project currently holds the token and which projects, in order, are in the queue.

See Also

Chapter 6, "Working with Tokens," Inheriting Tokens, page 29

Inheriting Tokens

This section provides an overview of token inheritance and discusses how to inherit tokens.

Understanding Token Inheritance

Token inheritance can be useful when developers have the same object in multiple projects for which they would like to implement changes simultaneously, without having to wait for other projects that are holding the token to progress through the project life cycle.

To inherit tokens, both the project holding the token and the inheriting project must be at the same project status. After a token is inherited, these projects will be linked and will automatically advance in project status together. Therefore, if the project status of one project is advanced, the project status of its linked project also advances. If one or more projects are linked through token inheritance, ensure that all development in the linked projects is complete before you advance the projects. The user who is attempting to advance the project must be assigned a role that permits this action in all of the linked projects, or the advance attempt will fail.

All project advancement requirements must be met for all projects that are linked through token inheritance; if one project fails to advance, OMW does not advance any of the other linked projects. If an advancement failure occurs, review the logs for all of the linked projects to determine where the errors occurred.

Inheriting Tokens

To inherit tokens:

1. Attempt to check out an object for which another project holds the token.
The system asks you whether you wish to enter the token queue for the object or inherit the token.
2. Choose to inherit the token, and then click OK.

Note. If you have inherited the token but cannot check out the object, the object is already checked out by another user. You cannot check out the object until the other user checks it in or until checkout is erased. This action prevents you from overwriting changes when you inherit the token.

Switching Tokens

This section provides an overview of token switching, lists a prerequisite, and discusses how to switch tokens.

Understanding Token Switching

A project owner whose role allows switching tokens might take the token from the project that currently holds it and assign it to another project. Switching tokens might be necessary when you need to make an emergency change. If a change in another project needs to be implemented to an object in your project, you can switch the token to the other project to allow the change.

Note. After the token is returned, the user from whom the token was taken can save the object, check the object out, and then restore the object to return the object to its previous state before switching. However, the user must manually implement any changes made during the switch.

To switch a token, you must be an owner in both the holding and the requesting projects. Your role in both projects must be one that enables you to switch tokens at the current status of the project and for the object type.

Prerequisite

The token requester should attempt to check out the object and then join the token queue.

Switching Tokens

To switch a token:

1. On Object Management Workbench, select the object that has the token that you want to switch.
2. Click the Switch Token button on the central column.
3. On Project Token Queue Search and Select, click Find.
A list of projects in the token queue appears.
4. Choose the project to which you want to give the token, and then click Select.
The current token owner should save the object before you switch the token.

Releasing Tokens Manually

This section provides an overview of token release and discusses how to release tokens manually.

Understanding Token Release

You can release a token manually if you decide you do not need to modify an object. Additionally, you can release the token if you want to allow the next person in the token queue to check out the object for development. If you have made changes to an object and checked it in, another developer in another project must refrain from checking in the object until after your project has been promoted to a status where the system transfers the object to the next path code, or your changes will not be transferred.

See Also

Chapter 6, “Working with Tokens,” Understanding the Token Queue, page 28

Chapter 4, “Working with Projects,” Advancing Projects, page 15

Releasing Tokens Manually

To release tokens manually:

1. On Object Management Workbench, either erase the check out or check in the object that has the token that you want to release, if appropriate.
2. Choose the object, and then click the Release Token button in the center column.

CHAPTER 7

Working with Users

This chapter provides an overview of users and discusses how to:

- Search for users.
- Add users to projects.

Understanding Users

To be able to perform OMW tasks, one must first exist as a user in the related EnterpriseOne system. Then, when you add a user to a project, you assign that user at least one OMW role. You can control what actions each user can perform by assigning at least one role to that user. The user role defines the user's function within the project organization. Roles in the OMW system are separate from roles in EnterpriseOne software. When you define user roles, you specify a user defined code value or job title for roles that can be played on a project. You can either assign predefined user roles or create your own user roles.

You can also remove a user from a project by removing all of the user's roles for that project.

Searching for Users

This section provides an overview of user searches and discusses how to:

- Search for users by name or ID.
- Search for users by class or group.

Understanding User Searches

Conduct a search before you add users to a project. You can search for user names or IDs, or you can perform an advanced search and find users based on their class or group.

Note. Searches are case-sensitive. When entering your search criteria, enter the commonly accepted spelling in standard capitals and lower case. If you receive no search results, try different capitalization or spelling.

Searching for Users by Name or ID

To search for users by name or ID:

1. On Object Management Workbench, click the Search tab.
2. Complete the following fields:

- Category

Enter Owners.

- Search Type
- Search

Entries in this optional field must match the search type that you selected.

You can use | to specify a search suffix. For example, if the category is Owners and the search type is Address Book#|Search Type, entering *|E displays all entries in the Address Book with a search type of E for employee.

3. Click the Search button next to the Search field.

Searching for Users by Class or Group

To search for users by class or group:

1. On Object Management Workbench, click the Search tab.
2. Complete the following fields:
 - Category
Enter Owners.
 - Search Type
3. Click Advanced Search.
4. On PeopleSoft User ID Search and Select, complete one or more of the Query by Example columns and click Find.
5. Choose the users that you want, and then click Select.

Adding Users to Projects

This section provides an overview of users in projects and discusses how to:

- Add users to projects.
- Remove users from projects.
- Change user properties.

Understanding Users in Projects

To affect a project and the objects within that project, a user must be added to the project. When added to the project, a user is assigned a specific role. This role dictates the kind of actions that the user can perform. A user can be added to a project more than once with different roles. Additionally, some roles can be associated with several users. For instance, a project might include several developers.

Adding Users to Projects

To add users to projects:

1. On Object Management Workbench, click the project to which you want to add the users.
2. Set up a list of users to add to the destination project by performing a search using the Search tab in the information window.
3. On the search form, select the user to be added to the destination project.
4. Verify that the owner's node in the destination project in the project window is highlighted. If it is not highlighted, click it.
5. With the user to be added highlighted, click the Add Object or User to Project button in the center column.
6. On Add User to Project, enter the role and lead, and then click OK:

Note. To add a user in more than one user role, repeat the add user procedure and select a second user role for the same user. Different functions are enabled for different user roles, according to their allowed (user) actions. These actions are configured by the administrator for your project using the configuration program of the OMW.

Removing Users from Projects

Removing a user from a project does not delete the user from the system.

To remove users from projects:

1. On Object Management Workbench, select a user in the project window.
2. Click the Remove Object or User from Project button in the center column.

Changing User Properties

To change user properties:

1. On Object Management Workbench, select a user (owner) in the project window, and then click Select.
2. On Project User Details, complete the following fields, and then click OK:
 - User Role
 - Project Lead
 - Estimated Hours

CHAPTER 8

Working with Attachments

This chapter provides an overview of attachments and discusses how to view attachments.

Understanding Attachments

Object Management Workbench (OMW) enables you to add text, graphic, OLE, and file attachments to projects and to Object Librarian objects within projects. These attachments are available only through OMW; they neither affect the way in which the object functions nor are they available when a user employs the object. You use this feature to document the creation, purpose, and intended use of objects in the system.

Viewing Attachments

This section discusses how to:

- View attachments in the Design view.
- View attachments in Object Management Workbench.

Viewing Attachments in the Design View

To view attachments in the Design view:

1. On Object Management Workbench, create an object or project, or select an existing object or project, and click the Design button in the center column.
2. On the design form, click the Attachments tab.

Viewing Attachments in Object Management Workbench

To view attachments in Object Management Workbench:

1. On Object Management Workbench, select a project.
2. Click the News/Status tab.
3. From the Row menu, select Attachments.

If attachments exist, they appear in the information window.

CHAPTER 9

Configuring Object Management Workbench

This chapter provides an overview of Object Management Workbench configuration and discusses how to select a configuration option.

Understanding Object Management Workbench Configuration

This section discusses:

- Object Management Workbench configuration options.
- The configuration process flow.

Object Management Workbench Configuration Options

The Object Management Workbench (OMW) automates many of the object management tasks users performed manually in previous releases of the software. Much of this automation requires careful configuration by the system administrator through the Object Management Workbench Configuration program.

Use the Object Management Workbench Configuration program to configure the following optional features:

Option	Description
Constants	Enables you to set general constants pertaining to OMW projects.
SAR System Integration	Enables you to disable SAR system integration with OMW and, thus, EnterpriseOne development tools.
Logging System	Enables you to specify the project and object events to be logged. In the event that logging fails, you can also disable development or allow development but disable transfers.
Object Action Notification	Enables you to enable and disable Object Action Notification, which sends a notification message when an action such as checkin or checkout is performed on an object.
Notification Setup	Enables developers to be notified, using subscription, when actions are performed on an object.
Activity Rules	Enables you to add and modify project statuses and object transfer activity rules.
User Roles	Enables you to maintain user roles.

Option	Description
Allowed Actions	Enables you to assign to a user role the actions allowed for each object type during a specific project status.
Save Locations	Enables you to add, modify, and delete the locations where you save objects.

The Configuration Process Flow

The list below provides a recommended process flow for using all of the Object Management Workbench configuration tools. The list contains each configuration function in the process flow, along with the topic in which you can find more information about each function.

Note. The following items in the process flow require advance preparation: assigning user roles, applying allowed actions to users, and setting up project status rules and object transfer rules.

Before configuring these functions, make sure you understand user roles, allowed actions, project status rules, and object transfer rules.

The recommended process flow is as follows:

Configuration Function	Procedure Location
Assigning User Roles	See Chapter 10, “Configuring User Roles and Allowed Actions,” page 43.
Applying Allowed Actions to Users	See Chapter 10, “Configuring User Roles and Allowed Actions,” page 43.
Disabling SAR Integration with Object Management Workbench	See Chapter 11, “Configuring OMW Functions,” page 49.
Setting Up Project Constants	See Chapter 11, “Configuring OMW Functions,” page 49.
Setting Up Project Status and Object Transfer Rules	See Chapter 12, “Configuring Activity Rules,” page 53.
Adding, Modifying, and Deleting Object Save Locations	See Chapter 13, “Configuring Object Save Locations,” page 59.
Controlling Development in the Event of Logging Failure	See Chapter 11, “Configuring OMW Functions,” page 49.
Controlling Logging Detail	See Chapter 11, “Configuring OMW Functions,” page 49.
Enabling or Disabling Object Action Notification	See Chapter 14, “Configuring Notification Subscriptions,” page 61.
Adding, Modifying, and Deleting Notification Subscriptions	See Chapter 14, “Configuring Notification Subscriptions,” page 61.
Viewing Major and Detail Logs	See Chapter 15, “Working with Logs,” page 65.

Activity Rules

The following two types of activity rules exist:

- Project status activity rules
- Object transfer activity rules

Project status activity rules define the possible paths for an Object Management Workbench project. For a given project status, these rules define the possible next project statuses to which the project can be advanced.

For each project status activity rule, one or more object transfer activity rules exist. Each object transfer activity rule defines a FROM and TO location, where objects of this type are moved from and to for a specific software release.

For example, one object transfer activity rule can specify that all APPL objects be transferred from the DV810 location to the PY810 location during a specified project status change.

Allowed Actions

The Allowed Actions form enables you to assign allowed actions to user roles for each object type during a specific project status. You must create the user role before configuring any allowed user actions.

Using allowed actions, administrators can restrict the actions that users with a specific role can perform.

Project and Object Logging

Object Management Workbench logging tracks information about projects and objects. A major log is created whenever:

- A project is created, copied, or deleted.
- The project status is changed.
- A new or existing object is added to or removed from a project.
- An object is created, copied, or deleted.
- An object is checked in, checked out, saved, restored, transferred, or retrieved.

For every significant step or event within these actions, the system creates a detail log and attaches it to the major log record.

Project Constants

The Object Management Constants form enables an administrator to set the following general constants pertaining to Object Management Workbench projects:

Type of Constant	Description
Project Status for Users' Personal Default Projects	The default status assigned to a default project within the Object Management Workbench. This project constant can be any one of the standard project status codes.

Type of Constant	Description
Project Status for All New Projects	The status assigned to a project when it is first created. This project constant can be any one of the standard project status codes or you can create a status and code for this purpose.
User Role to be Assigned to the Project's Originator	When a project is created, the originator is added as a user on the project. This project constant defines the user role assigned to the originator.

Object Save Locations

The Object Save Locations form indicates the save location for Object Librarian (OL) objects. Defining the save location will enable users to transfer objects that are saved into the path code specified. Currently, only the save locations for Object Librarian objects may be defined.

Object Action Notifications

The Object Action Notifications form enables you to activate or deactivate object action notification. The Object Action Notification System sends you an email each time an event, such as check in or checkout, occurs to one of your objects. Object action notification is enabled by default.

Notification Subscriptions

The notification system sends email messages to users about changes to objects, such as object check in and checkout, in the system. The Notification Subscriptions form enables you to add, delete, and modify notification subscriptions, as well as to sort notification subscription records by criteria that you select.

Application and User Role Security

You should secure the following applications using application security:

- P98230 - OMW Configuration System
- R98210B - Object Management Log Purge
- P98231 - OMW Transfer Activity Rules Director

User Role Security

You can prevent users from adding a user to a project by using row-level security for the F98221.puomwur field. This field contains the user defined code of the user role for each user in a specific project.

However, all users must be able to add the following user roles when setting up a new project:

- Originator
- Supervisor
- Manager
- Developer
- QA
- Product Support

The administrator role should be secured from all but a few users. Because manager and supervisor roles cannot be secured, consider creating a product manager role or similar role that can be secured. This new user role can be granted security attributes, such as being allowed to switch a token from one project to another.

Administrative Update Security

You should secure all actions, including project status change, for project statuses 40 (Production Development), 41 (Transfer Production to Prototype), and 42 (Transfer Prototype to Development). These statuses enable administrators to apply fixes to objects in the Production path code and then to promote the objects back to development. The ability to do so should be limited to administrators only.

Selecting a Configuration Option

All configuration options are set up through the OMW Configuration System application (P98230). You select the option that you want to configure by clicking the button that corresponds to the desired option.

Select Cross Application Development Tools (GH902), Object Management Configuration (P98230) to access the OMW Configuration System application.

To select a configuration option:

1. If necessary, click the General tab to display function options.
2. Click one of the following buttons to configure the corresponding function:
 - Constants
 - SAR System Integration
 - Logging System
 - Object Action Notification
 - Notification Setup
 - Activity Rules
 - User Roles
 - Allowed Actions
 - Save Locations

Configuration Settings Indicators

Some of the function buttons on the Object Management Setup Form have setting indicators next to them. Settings indicators describe the current setting for the SAR System Integration, Logging System, and Object Action Notification options. The purpose of each setting indicator is as follows:

Indicator	Description
SAR System Integration Indicator	Indicates whether the SAR (Software Action Request) system is integrated with the Object Management Workbench. SAR integration is enabled or disabled.

Indicator	Description
Logging System Indicator	Indicates whether full or reduced logging of project or object events is selected.
Object Action Notification Indicator	Indicates whether the object notification system is enabled or disabled.

CHAPTER 10

Configuring User Roles and Allowed Actions

This chapter provides an overview of user roles and allowed actions and discusses how to set up:

- User roles.
- Allowed user actions.

Understanding User Roles and Allowed Actions

Configuring user roles and allowed actions is one of the most important Object Management Workbench (OMW) configuration tasks. OMW's automation relies on an administrator who carefully configures these areas.

The following sections show the allowed user actions that PeopleSoft recommends for each user role and the responsibility of the person in that user role, organized by the project status at which these actions should be authorized.

Note. You might want to allow the Manager and Supervisor roles to perform the same actions as the Developer role, in case the Developer cannot perform assigned duties or needs to have work verified.

New Project Pending Review (11)

This table shows user roles and allowed actions for projects with a status of 11 (new projects pending review):

User Role	Recommended Allowed Action	Explanation
Originator	Status Change	Originator might need to advance the status to 91 - canceled. Entered in Error
Manager, Supervisor	Update Project	Change values for the project
Manager, Supervisor	Update Users	Change values for the user
Manager, Supervisor	Status Change	Advance project to the next status

Programming (21)

This table shows user roles and allowed actions for projects with a status of 21 (programming):

User Role	Recommended Allowed Action	Explanation
Developer	Add Objects	Add objects to project in order to fix or enhance
Developer	Remove Objects	Remove objects that were incorrectly added
Developer	Check Out	Check out objects from the server
Developer	Check In	Check in objects to the server
Developer	Get	Get objects from the server
Developer	Status Change	Advance project to the next status

Rework-Same Issue (25)

This table shows user roles and allowed actions for projects with a status of 25 (rework-same issue):

User Role	Recommended Allowed Action	Explanation
Developer	Status Change	Change project to 21 - Programming status

QA Test/Review (26)

This table shows user roles and allowed actions for projects with a status of 26 (QA test/review):

User Role	Recommended Allowed Action	Explanation
Quality Analyst	Get	Get objects from the server
Quality Analyst	Status Change	Advance project to next status

QA Test/Review Complete (28)

This table shows user roles and allowed actions for projects with a status of 28 (QA test/review complete):

User Role	Recommended Allowed Action	Explanation
Manager, Supervisor	Update Project	Change values for the project
Manager, Supervisor	Status Change	Advance project to the next status

In Production (38)

This table shows user roles and allowed actions for projects with a status of 38 (in production):

User Role	Recommended Allowed Action	Explanation
Manager, Supervisor	Status Change	Advance project to the next status

Complete (01)

This table shows user roles and allowed actions for projects with a status of 01 (complete):

User Role	Recommended Allowed Action	Explanation
Developer	Remove Objects	Remove objects from projects at status 91 that might have been added but not removed

Default Allowed Actions That Cannot Be Changed

The following default allowed actions cannot be changed. This information is provided for reference only:

Value	Description
02	Check In
03	Check Out
04	Delete
05	Add
06	Copy
08	Save
09	Restore
10	Design
11	Get
12	Remove Object from Project
13	Update a Project
16	Add Object to a Project
21	Switch Token
23	Force Release from Token Queue
30	Erase Check Out

Default Object Types

The following default object types are provided for reference only:

Value	Description
01	Object Librarian objects
02	Data items
03	Versions
04	UDCs
05	Menus
06	Documentation record (SAR object)
11	Transfer record (SAR object)
12	History record (SAR object)

Setting Up User Roles

This section discusses how to:

- Modify user roles.
- Delete user roles.

Modifying User Roles

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To modify a user role:

1. On Object Management Setup, click User Roles.
2. Choose the user role you want to modify.
3. Double-click the first field that you want to change, and modify it.
4. Repeat step 3 to make all required modifications.
5. Click Find and verify that the modifications you made appear in the list.
6. Click OK.

Deleting User Roles

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To delete a user role:

1. On Object Management Setup, click the User Roles button.
2. Click the cell to the left of the User Role that you want to delete.
3. Click Delete.
4. In the Confirm Delete query, click OK.
5. Repeat steps 2 through 4 to delete all desired user roles.
6. Click Find to verify that the user roles were deleted.
7. Click OK.

Setting Up Allowed User Actions

This section provides an overview of user-defined codes for allowed user actions and discusses how to set up allowed user actions.

Understanding User-Defined Codes for Allowed User Actions

The Allowed Actions Form lets you assign allowed actions to user roles for each object type during a specific project status. The following user defined codes (UDCs) define allowed Object Management Workbench actions involving objects:

- 02 - Check in
- 03 - Check out
- 04 - Delete
- 05 - Add
- 06 - Copy
- 07 - Install
- 08 - Save
- 09 - Restore
- 10 - Design
- 11 - Get
- 12 - Remove object from project
- 13 - Update the project
- 16 - Add an object to the project
- 21 - Switch tokens
- 23 - Release from token queue
- 30 - Erase check out
- 38 - Status change

For example, if you want the developer to be allowed to check in all object types when the project is at project status 21, you would enter the following values in the Allowed Actions Form:

Field	Value
User Role	02 - Developer
Object Type	*ALL
Allowed Action	02 - Check in
Project Status	20 - Programming

Note. Before setting up allowed actions, you must add the user role to the User Roles UDC by using the User Defined Code form.

Setting Up Allowed User Actions

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To set up allowed user actions:

1. On Object Management Setup, click the Allowed Actions button.
2. Click Find to display previously defined user actions.
3. To create a blank row in which to add a definition, sort on the allowed user action to be worked on.
4. Complete one or more of the query by example (QBE) columns and click Find.
5. Scroll to a blank row at the bottom of the sorted list.
6. Complete the following fields in the blank row:
 - OMW User Role
 - Object Type
 - Project Status
 - Action

Note. You can enter *ALL in any field except User Role. Typing *ALL in a field indicates that the user role chosen can work with all object types, project statuses, or actions.

After you complete a row, a new blank row appears.

7. Repeat this procedure until all allowed user actions are set up.
8. Click OK.

CHAPTER 11

Configuring OMW Functions

This chapter provides an overview of OMW functions and discusses how to:

- Disable SAR integration.
- Set up project constants.

Understanding OMW Functions

To configure OMW functions, you can disable the Software Action Request (SAR) system. This action is necessary if your company does not use SARs. You can also control logging detail and disable or limit development when logging fails. Finally, you can set up project constants to track the course of project development.

Disabling SAR Integration

This chapter provides an overview of SAR integration and discusses how to:

- Disable SAR system integration.
- Control logging detail.
- Control development in the event of a logging failure.

Understanding SAR Integration

Most companies do not have the SAR (Software Action Request) system. You can verify that SAR integration is disabled by checking the settings indicator to the right of the SAR System Integration button on the Object Management Setup Form.

If you do not have the SAR system installed and the SAR System Integration settings indicator shows that SAR integration is enabled, you must disable SAR integration.

Disabling SAR System Integration

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To disable SAR system integration:

1. On Object Management Setup, click the SAR System Integration button.

2. Make sure the Integrate SAR System option is blank.
3. Verify that all other fields are deselected.
4. Click OK.

Controlling Logging Detail

The Object Management Logging System form enable you to specify which project and object events you wish to have logged.

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To control logging detail:

1. On Object Management Setup, click the Logging System button.
2. Select the Reduce Logging Detail check box.
3. Double-click the Log Actions and Detail Log Items folders.
4. Double-click items for which you do not want to log details.
A red X appears next to the deselected items.
5. Repeat step 3 to deselect all unwanted log detail items.
6. Click OK.

Controlling Development in the Event of a Logging Failure

The Object Management Logging System form also enables you to disable development or to allow development but disable transfers if logging fails.

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To control development in the event of a logging failure:

1. On Object Management Setup, click the Logging System button.
2. To disable development if logging fails, select the "Do not allow any development" option.
3. To permit development but disable object transfers in the event of a logging failure, select the Allow development but do not allow any transfers option.

Note. The "Allow development but do not allow any transfers" option is the default value.

4. Click OK.

Setting Up Project Constants

The Object Management Constants form enables you to set general constants pertaining to OMW Projects. These project constants are:

- Project status for users' personal default projects

- Project status for all new projects
- User role to be assigned to the project originator

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To set up project constants:

1. On Object Management Setup, click the Constants button.
2. To enter a project status for a user's personal default project, click the visual assist for the following field: Enter the Project Status for user's personal default project.
3. Double-click a project status.
4. To enter the initial project status for all new projects, click the visual assist of the following field: Enter the initial Project Status for all new projects.
5. Double-click a project status.
6. To enter the User Role to use when assigning the originator to a project, click the visual assist for the following field: Enter the User Role to use when assigning the originator to a project.
7. Double-click a project status.

Note. You can click the Attachments buttons next to the three fields to view their respective attachments.

CHAPTER 12

Configuring Activity Rules

This chapter provides overviews of activity rules and the project promotion lifecycle and discusses how to set up:

- Project status activity rules.
- Object transfer activity rules.

Understanding Activity Rules

The Activity Rules button on the Object Management Setup form enables you to set up both project status activity rules and object transfer activity rules. Project status activity rules define the activities that occur during a project development cycle. Object transfer activity rules work in conjunction with project status activity rules to define the From and To locations for moved objects.

Understanding the Project Promotion Lifecycle

The normal project promotion life cycle is as follows:

11 > 21 > 26 > 28 > 38 > 01

Where

11 = New project pending review

21 = Programming

26 = QA test/review

28 = QA test/review complete

38 = In production

01 = Complete

During a normal project promotion cycle, developers check objects out of and in to the Development path code; promote them to the prototype path code; and then promote them to the Production path code before declaring them complete.

Administrators can follow a different promotion cycle, as follows:

11 > 40 > 41 > 42 > 01

Where

- 11 = New project pending review
- 40 = Production development
- 41 = Transfer from Production to Prototype
- 42 = Transfer from Prototype to Development
- 01 = Complete

During this promotion cycle, administrators check objects out of and in to the Production path code to apply fixes, and then demote the objects to the Prototype path code and the Development path code. Developers should not use this promotion cycle. PeopleSoft recommends that you apply status activity rules that limit this promotion cycle to a specific group: those with the User ID for administrators.

Setting Up Project Status Activity Rules

This section provides an overview of project statuses and discusses how to set up project status activity rules.

Understanding Project Statuses

You can set up statuses for a project as development progresses from one phase to the next. For example, the project might move from a programming phase to a manager review phase. For each of these transitions you will define the following:

- Whether this project status rule is active
- The System Role to which this project status transition applies
- The related "To" project status
- The related "From" and "To" SAR* statuses

Complete the From and To SAR status only if you have SAR integration turned on.

Setting Up Project Status Activity Rules

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To set up project status activity rules:

1. On Object Management Setup, click the Activity Rules button.
2. Click Find.

All available From project statuses appear.

3. Click the From Project Status for which you want to set up one or more To project statuses.
4. Click Select.

Project Status Activity Rules lists all valid To project statuses for the From project status you chose.

The current project status appears in the From Project Status field.

5. Scroll to the blank row at the bottom of the list and complete the following fields:

- Active

This field can be used to allow only specific users or only users who are members of a specified group to perform a status change. To make the rule available to everyone, enter *PUBLIC in this field.

- User/Role

- To Project Status

- From SAR Status

Complete for projects with SARs and only if you have SAR integration turned on. If SAR integration is disabled, these columns are disabled.

- To SAR Status

Complete for projects with SARs and only if you have SAR integration turned on. If SAR integration is disabled, this column is disabled.

A blank row appears below the row you completed.

6. Repeat step 5 to set up or modify other To project status entries for this particular From Project Status.
7. Click OK when you are done.
8. Choose the next From Project Status and repeat steps 5 through 7 to set up project activity rules for each remaining From Project Status.
9. When all project activity rules are complete, click OK to return to the Work with Object Management Activity Rules Form.
10. Click Close.

Setting Up Object Transfer Activity Rules

This section provides an overview of object transfer activity rules and discusses how to set up object transfer activity rules.

Understanding Object Transfer Activity Rules

You must configure object transfer activity rules for each object type used in a project that you want to perform an action on.

For each object type you want to perform an action on, you must define the following information:

- Project statuses at which users can check in, check out, and get objects ("getting" an object means copying its specifications to your work area without checking it out)
- At which status change you would like objects to be transferred
- Project statuses at which object tokens are released

The following object location tasks must be performed when setting up object transfer activity rules:

- Define FROM and TO transfer locations for each object type at each project status transition—for example, when project status 21 (development) changes to project status 26 (prototype). In this example, objects are transferred from DV810 to PY810.
- Define checkout and get locations for Object Librarian object types.

- Define checkin locations for Object Librarian objects.

Note. Transfer activity rules can occur in any order. For example, you might have one status change that will require more than one object transfer. If you expect an object to transfer from DV810 to PY810 and then to PD810, you will want to set up rules to transfer the object from DV810 to PY810 and from DV810 to PD810 because the object could be retrieved in any order.

Setting Up Object Transfer Activity Rules

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To set up object transfer activity rules:

1. On Object Management Setup, click the Activity Rules button.
2. Click Find to display all available project statuses.
3. Double-click the From Project Status folder for which you want to set up object transfer activity rules.
4. Click one of the related To project statuses.

This field defines the To Project Status, which completes the From and To Project Status transition for which you want to configure object transfer activity rules. For each From and To Project Status transition, you can create multiple object transfer activity rules for different object types.

5. Click Select.
6. Scroll to the blank row at the bottom of the list. Complete the following fields for the object type desired:

- Active
- User/Role

This field can be used to allow the activity rule to apply only specific users or only users who are members of a specified group. To make the rule available to everyone, enter *PUBLIC in this field.

- Object Type

Note. *ALL may not be used when defining transfer activity rules.

- From Location
- To Location

Note. Object Librarian objects use path codes for the From Location and To Location values, whereas non-Object Librarian objects use data source values. For Versions, if a path code is entered, the F983051 record and the specs for the version are transferred (for batch versions), and if a data source is entered, just the F983051 record is transferred between the defined locations.

- Object Release

This field contains the release level of EnterpriseOne that you are currently working on. The From Release value should be the same as the To Release value.

- To Release

Currently not used. This field is populated with the From Release value.

- Release Token

- Allowed Action

A blank row appears when you have finished. When you set up transfer activity rules for Workflow objects, an additional form appears. Use the form to provide From and To Data Source values for the Task Specifications table (F98811) records.

7. Repeat this procedure to set up or modify other object types for this project status transition.
8. Click OK to return to the Object Management Activity Rules form.
9. Choose the next From and To project status transition, and repeat this procedure to set up its object transfer activity rules.
10. Repeat step 9 until all object transfer activity rules are complete.
11. Click OK to return to the Object Management Activity Rules form.
12. Click Close.

Note. When you set up transfer activity rules for APPL objects, you must also define rules for User Override Object types so that OMW can transfer any *PUBLIC user overrides for the APPL objects. If you do not do so, APPL objects will not transfer successfully.

CHAPTER 13

Configuring Object Save Locations

Using Object Management Workbench (OMW), you can create a save location, which is a path code developers use to save their objects. With the save location created, you add the path code to the system, allowing saved objects to be transferred, and you can modify or delete save locations.

This chapter discusses how to create a save location.

Creating a Save Location

This section provides an overview of path codes and discusses how to:

- Add an object save location.
- Modify an object save location.
- Delete an object save location.

Understanding Path Codes

During the installation process, an additional path code might not have been created to use as your OMW save location. To use this feature, you must create a path code where developers can save their objects while they are in development. When users perform a Save, their objects are checked into the path code defined as the save location; when they perform a Restore, objects are retrieved from this location.

Adding an Object Save Location

The Object Save Locations form indicates the save-off location for Object Librarian (OL) objects. Defining the save location will transfer objects that are saved into the path code specified. Currently, only the save locations for Object Librarian objects may be defined.

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To add an object save location:

1. On Object Management Setup, click the Save Locations button.
The Location column contains the names of path code where your version of EnterpriseOne is installed.
2. To add a new save location, click a blank field in the Location column.
3. Click the visual assist button.
4. Locate and double-click the current location of the object.

The Object Save Locations form reappears with your object's current location in the Location column.

5. In the same row, scroll to and double-click the Save Location field located to the right of the Location field clicked previously.
6. Click the visual assist button.
7. Scroll to and double-click the new save location of the object.
The Object Path Save Locations form reappears with your object's new save location in the Save Location column.
8. Click OK.

Modifying an Object Save Location

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To modify an object save location:

1. On Object Management Setup, click the Save Locations button.
2. Click the Save Location field.
3. Click the visual assist button.
4. Scroll and double-click the new save location for the object.

The Object Save Locations form reappears with the modified object save location in the Save Location column.

5. Click OK.

Deleting an Object Save Location

Select Object Management (GH9081), select Object Management Configuration (P98230) to access the Object Management Setup form.

Note. If an Object Librarian object is deleted, you should also delete the object's save location in order to delete the save location completely from the system.

To delete an object save location:

1. On Object Management Setup, click the Save Locations button.
2. On Object Save Locations, select the record to be deleted.
3. Click Delete.
4. Click OK in the Confirm Delete box.
5. Click OK.

CHAPTER 14

Configuring Notification Subscriptions

This chapter provides an overview of object action notifications and discusses how to configure notification subscriptions.

Understanding Object Action Notifications

Notification subscriptions allow you to alert users using email about changes to objects in the system, such as object checkins and checkouts. After you enable object notification, you can add, modify, delete, or sort notification subscriptions. The Object Action Notification System is initially enabled by default.

Configuring Notification Subscriptions

This section discusses how to:

- Enable or disable object action notifications.
- Add notification subscriptions.
- Modify notification subscriptions.
- Delete notification subscriptions.
- Sort notification subscriptions.

Enabling or Disabling Object Action Notifications

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To enable or disable object action notifications:

1. On Object Management Setup, click the Object Action Notification button.
2. To enable object action notification, select the Activate Object Action Notification option.
3. To disable object action notification, clear the Activate Object Action Notification option.
4. Click OK.

Note. Notification that users are added to or removed from projects always occurs, even when object action notification is disabled. In this situation, an email message is sent to the user.

Adding Notification Subscriptions

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To add a notification subscription:

1. From the Object Management Setup form, click the Notification Setup button.
2. Click Find to display the current notification subscriptions.
3. Scroll to a blank row and complete the following mandatory fields:
 - OMW User Role
 - Action
4. Complete the following optional fields:
 - Object Type
 - Object Name
 - Reporting System Code
 - Path Code

A new row appears when you are done.

5. Repeat steps 3 and 4 until all notification subscriptions are added.
6. Click OK.

Note. Notification Subscriptions can be created for an action performed on all objects of the specified system code, all objects of a specified type, all objects of a combination of the specified system code and type, and a specific object name and type.

Modifying Notification Subscriptions

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To modify a notification subscription:

1. On Object Management Setup, click the Notification Setup button.
2. On Notification Subscriptions, click Find to display the current notification subscriptions.
3. Choose the fields to be modified and make your changes.
4. Click OK.

Deleting Notification Subscriptions

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To delete a notification subscription:

1. On Object Management Setup, click the Notification Setup button.
2. On Notification Subscriptions, select the record to be deleted.
3. Click the Delete button.

4. Click OK in the Confirm Delete query.
5. Click OK.

Sorting Notification Subscriptions

Select Object Management (GH9081), Object Management Configuration (P98230) to access the Object Management Setup form.

To sort notification subscriptions:

1. On Object Management Setup, click the Notification Setup button.
2. Above the rule headers, click the Query by Example column to be filtered.

If a visual assist appears, click it and double-click your filter criteria. In other Query by Example columns, enter your filter criteria.

3. Click Find.

The filtered notification subscriptions appear.

4. Click OK.

CHAPTER 15

Working with Logs

This chapter provides an overview of object management logging and discusses how to use logs.

Understanding Object Management Logging

Object Management Workbench (OMW) contains an object management logging application. Project and object logs provide an excellent way to review the development history of projects or objects. Furthermore, you can view log details for any log record currently appearing on your monitor. From the Work With Log Detail form, you can bring up the actual log entry in the View Full Log Text window.

This application also allows you to rearrange log fields to customize software development reporting. You can view all logs, view sorted logs, or show only the last logging action for an object or project. The following two tasks must be performed together to produce customized project and object development reports:

- Reorder log record fields
- Print logs

Using Logs

This section discusses how to:

- View project or object logs.
- Locate object logs.
- Locate project logs.
- View detail logs.
- Reorder log record fields.
- Print logs.

Viewing Project or Object Logs

Select Cross Application Development Tools (GH902), Object Management Logging (P98210) to access the Work with Object Management Log form.

To view project or object logs:

1. On Work With Object Management Log, perform one of the following actions:
 - Click Find to view logs for all projects and their objects in OMW.

- Enter sorting criteria in the Query by Example cells to filter search results, and then click Find.
 - Select the Show Only Last Action option to show only the last logging action for a given project or object.
2. Click Close.

Locating Object Logs

Select Cross Application Development Tools (GH902), Object Management Logging (P98210) to access the Work with Object Management Log form.

To locate object logs:

1. On Work With Object Management Log, click Form and then click Object Logs.
2. On Work With Object Logs, you can do the following:
 - Click Find to show all OMW object logs.
 - Enter data in the Query by Example cells to narrow your search and click Find.
 - Turn on the Show Only Last Action option to show only the last logging action.
 - Click the Check for Attachments button to check for object attachments.
3. Click Close.

Locating Project Logs

Select Cross Application Development Tools (GH902), Object Management Logging (P98210) to access the Work with Object Management Log form.

To locate project logs:

1. On Work With Object Management Log, click Form and then click Project Logs.
2. On Work With Project Logs, you can perform the following functions:
 - Click Find to show all OMW project logs.
 - Enter data in the Query by Example cells to narrow your search, and then click Find.
 - Select the Show Only Last Action option to show only the last logged action for the selected project.
 - Click the Check for Attachments button to check for attachments.
3. Click Close.

Viewing Detail Logs

To view detail logs:

1. Double-click any log record you want to research. Or, click the desired log record row to highlight it, and then click Select.
2. Click Find.

The detail log record for the selected log appears. All sequence details for the selected Log record appear in ascending numerical order.

3. To view the full text of the Description field, click it and then click Select.

The View Full Log Text window appears, showing the actual log entry.

4. You can move between detail logs by clicking the Previous and Next buttons.
5. Click Close.

Reordering Log Record Fields

Select Cross Application Development Tools (GH902), Object Management Logging (P98210) to access the Work with Object Management Log form.

To reorder log record fields:

1. On Work With Object Management Log, click Sequence.
2. Click the first column you want to sort in the Columns Available window.
3. Click the right-pointing arrow to move it to the Columns Sorted window on the right.
4. Repeat steps 3 and 4 as required until all the columns you want to view are in the correct sort order.

If you make an error, you can move columns back to the Columns Available window for resorting. Select the column to be resorted and the left-pointing arrow.

5. Click OK in the Select Grid Row Sort Order form to reorder the log columns.

Printing Logs

Select Cross Application Development Tools (GH902), Object Management Logging (P98210) to access the Work with Object Management Log form.

To print logs:

1. On Work with Object Management Log, click File and then Print Screen.
2. Modify print settings as required.
3. Click OK in the Print form.

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

default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft 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.

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	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i> .
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 SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft 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.

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