



EnterpriseOne Tools 8.94
PeopleBook: PeopleSoft
Analyzer Tool

November 2004

EnterpriseOne Tools 8.94 PeopleBook: PeopleSoft Analyzer Tool
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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.

Analyzer Tool Preface

This preface discusses the Analyzer Tool PeopleBook.

PeopleSoft Products

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

PeopleSoft Analyzer Tool

This PeopleBook covers Analyzer Tool, a member of the EnterpriseOne Tools suite. Use PeopleSoft EnterpriseOne Analyzer Tool to automate your testing of EnterpriseOne processes. Its chapters describe the tool in general and then defines its functionality and features.

CHAPTER 1

Getting Started with PeopleSoft Analyzer Tool

This chapter provides an overview of preparing to use Analyzer Tool.

PeopleSoft Analyzer Tools Overview

PeopleSoft EnterpriseOne Analyzer Tool is an automated testing tool that you use to gain detailed information about EnterpriseOne processes. The tool works with EnterpriseOne AutoPilot, which you use to write scripts that test EnterpriseOne applications. AutoPilot captures and stores detailed data on each script playback event, including PeopleSoft database (JDB) and CallObject APIs. You can import this data into Analyzer Tool, which displays the data in a variety of readable formats that make analysis of events easier. Analyzer Tool assists information technologists charged with keeping enterprise resource planning (ERP) systems running at or near top performance levels because the event data includes the following:

- The time required to run each event
- Input and output values for parameters in CallObject and JDB application programming interfaces (APIs)
- Identification of event categories, such as database calls, event rules, and business functions
- Names of tables opened and closed during playback
- Names of applications and forms launched
- Identification of user handles and request handles
- Placement of events in threads generated during script playback

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About These PeopleBooks*, with information about where to find the most current version of each.

Implementing PeopleSoft Analyzer Tool

To use Analyzer Tools, these tasks must be completed first:

- Data on EnterpriseOne processes must be captured and stored.
- AutoPilot must be installed.
- EnterpriseOne must be installed.

To use Analyzer Tool to work with your EnterpriseOne applications, these tasks must be completed first:

- You must have a valid EnterpriseOne user account.
- You must have AutoPilot installed.
- You must have Analyzer Tool installed.

CHAPTER 2

Capturing Data for Analyzer Tool

This chapter provides an overview of capturing data and discusses how to:

- Configure AutoPilot to capture test data.
- Use Event Capture to capture test data.

Understanding Data Capture

Before you can use Analyzer Tool, you must capture and store data on EnterpriseOne processes. You do this by configuring AutoPilot to capture script playback data and to store it as an event stream, which is a time-stamped record of test events. You then run an AutoPilot script to test EnterpriseOne events, including button clicks, entries to header controls and grid columns, form and row exits, and so on.

AutoPilot captures data during script playback through code that exists in both AutoPilot and EnterpriseOne. This code records information about each script playback event and writes the data to F97214, where it is stored. This table is a test results repository that can be shared by all members of your organization.

If you do not have the resources to write and to run AutoPilot scripts, you can use Event Capture, which captures and stores performance data when you run tasks in EnterpriseOne, without involving AutoPilot. Using Event Capture, you can import test results to Analyzer Tool, just as you can when you run AutoPilot scripts. You can activate Event Capture for a limited set of EnterpriseOne processes and then turn it off when these processes complete.

Whether you use AutoPilot or Event Capture, you import the event stream to Analyzer Tool to study and analyze the test data, with the goal of studying EnterpriseOne processes and improving EnterpriseOne performance.

Understanding the AutoPilot Playback Tab

Before you can use Analyzer Tool, you must be able to capture data about EnterpriseOne processes. You can set AutoPilot to capture and store the event stream during and after script playback.

To capture the event stream, configure playback by selecting Options from the Tools menu of the AutoPilot form. On the Playback tab, you will select options that enable you to set up script playback and data capture during script playback.

On the Playback tab, you select options to save and display results data after playback. Select the first option to ensure that AutoPilot stores the captured data in F97214, which is a results repository. Select the second option to display a form in AutoPilot to summarize the events that occurred during playback.

The options in the Events Stream Capture Level box specify the type of data that you want AutoPilot to capture. Call level refers to an API call's position in the sequence of calls. The more primary an API call's position, the lower the call level. For example, an EditLine business function that invokes a JDB Fetch API has a call level of 1 because it initiates the JDB call.

Using AutoPilot, you can capture either level 1 calls only or all levels of calls. When you import the results into Analyzer Tool, the event stream displays the API calls at the level you specified. The event stream capture level options are:

- None (AutoPilot does not capture script playback data).
- EnterpriseOne warning and error messages (AutoPilot captures EnterpriseOne messages, but does not capture data about EnterpriseOne processes).
- Level 1 API calls (AutoPilot captures data about all events except those API calls with a call level greater than 1).
- All API call levels (AutoPilot captures data about all events, including those API calls with a call level greater than 1).

With playback configured, you must write an AutoPilot script, if you have not already done so, and play it back.

See AutoPilot scripts, see the AutoPilot Guide.

If you configure playback to capture and display the results, AutoPilot displays the Test Results form after you have run a script to completion or have canceled playback. The Test Results form shows the event stream and other data about the test.

AutoPilot stores all the test results that you have generated. If you select Results from the Tools menu, you can view all the tests available for import to Analyzer Tool.

Understanding Event Capture

You can capture EnterpriseOne performance data without using AutoPilot by launching the Event Capture executable. Using Event Capture is advantageous if no one in your organization can create and run an AutoPilot script, or if time and manpower resources are scarce. If either is the case, you simply launch the executable and perform a set of tasks in EnterpriseOne. Code in EnterpriseOne captures all the data from the session and passes it on to Event Capture using a shared file in memory. Event Capture stores the data in the results repository, AutoPilot Playback Results Detail Table (F97214).

After you have generated test results using Event Capture, you can save them to a file and export them to the Analyzer Tool, just as you would if you used AutoPilot. The only difference is that the event stream generated by AutoPilot includes both AutoPilot and EnterpriseOne events. The event stream generated by Event Capture does not include AutoPilot events.

Event Capture can be particularly useful if you:

- Lack the time or resources to write AutoPilot scripts.
- Want to preserve data from a particular EnterpriseOne process that you suspect is causing a performance problem.

After you capture the data from an EnterpriseOne session and save the results, customer support, can use the Analyzer Tool to generate the event stream, analyze the events of the EnterpriseOne session, and attempt to identify and correct any problems that might exist, preventing the need for costly site visits.

Call Level Option

Like AutoPilot, you can use Event Capture to capture either level 1 calls only or all API call levels. When you import the results into Analyzer Tool, the event stream displays the API calls at the level you specified.

Important! The default setting is for the All API call levels option. However, you should begin all Event Capture sessions with the top level call only option. Capturing all API call levels will significantly increase the size of your saved results files and could make customer support analysis of the event stream a more difficult task. Use the All API call levels option only if customer support requests additional data to make a diagnosis.

Start Capture Button

Using Event Capture, you begin data capture by launching the executable file and clicking Start Capture. The Event Capture form appears.

After you click Start Capture, you can provide a script name for identification purposes. Clicking Start Capture means that you will collect results of your EnterpriseOne session in the results repository continuously until you click either Stop Capture or Exit.

Stop Capture Button

When you finish the EnterpriseOne session, click Stop Capture, which ends Event Capture collection of data. At this point, you can export the collected results to a file by saving the Event Capture script. In addition to the script name, saved results contain the following identifying information:

- Workstation
- Environment
- EnterpriseOne release
- Capture date
- Capture time
- Elapsed time

After you stop data capture, the data from the EnterpriseOne session resides in the results repository and is available to you when you launch Analyzer Tool to import data.

See Also

Chapter 2, “Capturing Data for Analyzer Tool,” Understanding the AutoPilot Playback Tab, page 3

EnterpriseOne Tools 8.94 PeopleBook: PeopleSoft Virtual AutoPilot, “Understanding Data Capture for PeopleSoft Virtual AutoPilot Scripts,” Understanding PeopleSoft AutoPilot

EnterpriseOne Tools 8.94 PeopleBook: PeopleSoft Virtual AutoPilot, “Understanding PeopleSoft Virtual AutoPilot Components”

Capturing Test Data

This section discusses how to:

- Configure AutoPilot to capture test data.
- Use event capture to capture test data.

Configuring AutoPilot to Capture Test Data

AutoPilot enables you to capture data when you play back a script that tests EnterpriseOne applications. To do so, you use settings on the Playback tab when you select Options from the Tools menu from the AutoPilot menu bar. On the Playback tab, select an option to capture the Virtual AutoPilot event stream. After script playback completes, or you cancel playback, AutoPilot saves the results to a repository, from which you can import them into Analyzer Tool.

Alternatively, you can capture data about an EnterpriseOne session by launching Event Capture, which assists you in writing an AutoPilot script.

You set up AutoPilot to capture test data either before, during, or after you write your AutoPilot script. With the setting intact, AutoPilot captures and stores the record of AutoPilot and EnterpriseOne events that occurred during playback.

Access AutoPilot.

To configure AutoPilot to capture test data:

1. On AutoPilot, select Options from the Tools menu.
2. On Options, click the Playback tab.
3. Select the following options:
 - Save Results Data after Playback
 - Display Results Data after Playback

Note. Turning on these options ensures that AutoPilot can capture and display event data. The type and amount of data, if any, that will be displayed is determined by choosing an Event Stream Capture Level option.

4. In the Events Stream Capture Level box, click the Level 1 API calls option.
5. Click OK.
6. On AutoPilot, select Play from Top from the Play menu.

After playback completes or you cancel playback, AutoPilot displays the Test Results form, which contains information about the script that you ran. The Test Results form is the chronological record of the events during script playback.

7. On Test Results, click the Summary tab, and note the number of the test located next to the Machine heading.

You use the number of the test to identify it later when you import a test into Analyzer Tool.

Using Event Capture to Capture Test Data

You can capture test results without creating an AutoPilot script by using Event Capture. After you start Event Capture, you perform any EnterpriseOne tasks that you want to test. Event Capture stores the results in the results repository. You can export the results to a file, and then you or customer support can import the data to Analyzer Tool.

Access Event Capture.

To use Event Capture to capture test data:

1. On Event Capture, select one of the following JDB, CallObject capture level options:

- Top level calls only
 - All levels
2. Assign a description for the data to be captured and stored in the Description of this capture field.
You do not have to assign a description. The system assigns a test number for you.
 3. Select the option Once capture is complete, copy to external file.
 4. Click Start Capture.
 5. In EnterpriseOne, perform any tasks that you want to test.
 6. When you have completed the EnterpriseOne tasks, click Stop Capture.

Note. To stop the process, click Exit.

CHAPTER 3

Importing Data for Analyzer Tool

This chapter provides an overview of importing data and discusses how to:

- Filter test results.
- Import, export, and delete test results.

Understanding Data Import

After you save event stream data from an AutoPilot script playback session, you can view the data in Analyzer Tool by importing it. The Result Sets form provides general information about each test that you ran. You can select one or more tests from this form and import the results data into Analyzer Tool.

From the Result Sets form, you can also export results to a file on your hard drive. Analyzer Tool stores the results as a binary file that you can email to an outside source, who can import those results to Analyzer Tool to troubleshoot the test. For example, this feature enables customer support to work on EnterpriseOne performance problems from a remote location.

Understanding Import Test Results

Analyzer Tool enables you to import the results of AutoPilot tests using the features that are available in the Result Sets form. You can restrict the number of tests that are available for view in the form by using Analyzer Tool's filter functionality. You can import one set of test results, or you can import more than one set to compare test results to one another. You also can delete one or more tests from the Result Sets form.

Note. Analyzer Tool is part of the EnterpriseOne installation and is located in the applicable EnterpriseOne directory: `\EnterpriseOne directory\System\Bin32\Analyzer.exe`.

Understanding the Result Sets Form

Using the Result Sets form, you can view general information about the results that you saved for each script. You can select one or more tests from the form and import the results to Analyzer Tool, export the results to a file on your hard drive, filter the results, or delete tests from the repository.

To access the Result Sets form, from the Results menu, select either Choose or Import from file.

Data Categories in the Result Sets Form

The number of each test that you ran to capture test results appears in the Result Sets form. Other categories of information provided include client name, the start time of the test, the elapsed time of the test, the environment in which you ran the test, the EnterpriseOne release against which you ran the test, the script path, and the status of the test: successful, failed, or canceled. On the Results Set form, a check mark next to the test number indicates that the test ran successfully. An X next to the test number indicates that the test failed or was canceled.

You can sort the contents of each category by clicking the category name. Analyzer Tool sorts alphabetically, in ascending, or in descending numeric order. For example, if you click the Elapsed category, Analyzer Tool displays the test with the shortest elapsed time first, followed by other tests in ascending order of elapsed time. The test with the longest elapsed time appears at the bottom of the category list. If you click the Script category, Analyzer Tool sorts the list alphabetically by the name you assigned the test. Use the Refresh button to restore the contents of a category to its original state.

Result Sets Form Filter Button

From the Result Sets form, you can filter the view using any of the categories in the form as selection criteria. To do so, click Filter on the right side of the form.

On the Filter form, select a column name as a selection criterion. From the two options, Exact Match and Expression / Contains, you can further refine the filter. When you select one of these options, you enter a value to the unpopulated Filter Value list. If you select Exact Match as a filter type, type an integer into the Filter Value list. If you select Expression / Contains as a filter type, type in a string. You can also type in expressions for greater than, less than, equal to, and so on. For example, to filter for tests with numbers greater than 1007, select Expression / Contains as a filter type, then type >1007 in the Filter Value list.

Analyzer Tool filters the entries in the Result Sets form so that only those tests with a number greater than 1007 appear. If you select the Invert option, Analyzer Tool reverses the criterion and filters in only those tests with a number less than 1007.

After you have set up the filter criteria to your satisfaction, click OK. To restore the Result Sets form to its original state, click Clear All on the Filter form.

Result Sets Form Select Button

From the Results menu, select Choose.

Use Analyzer Tool to import one or more sets of AutoPilot results. This feature can be particularly useful to compare the results of two separate scripts to test the same application against different releases or against different environments. You can import more than one test by holding down either the Control or the Shift key and clicking multiple lines on the Results Sets form. After you have made your selections, click Select. The Analyzer Tool display the detailed results of a particular test.

Result Sets Form Export to File Button

Use the Export to file button to export test results from the Result Sets form to a directory on your local drive. The default file extension is .owr (PeopleSoft Results Archive). Analyzer Tool stores the results as a binary file, which you can email to customer support if you need assistance to solve a performance problem. Customer support can import the binary file to Analyzer Tool and troubleshoot the problem.

It is recommended that you use the Export to file and Import from file options when saving or opening a test file.

Import from File Option

From the Results menu, select Import from file.

If you received an emailed containing a binary file with test results, you can import it to Analyzer Tool by clicking Import from file in the Result Sets form or by selecting Import from file from the Results menu. The .owr file displays any exported files. When you open a file, Analyzer Tool imports the results for analysis.

It is recommended that you use the Export to file and Import from file options when saving or opening a test file.

Result Sets Form Delete Button

You can also delete tests from the Result Sets form. You select a test by clicking the line that contains the test and the clicking Delete. Analyzer Tool deletes the test. To delete more than one test, hold down the Control or the Shift key, select the lines that contain the tests to delete, and click Delete. Remember that each test contains a large amount of data. Therefore, you should regularly purge tests from the results repository to avoid consuming a great deal of disk space.

Filtering Test Results

This section discusses how to:

- Select a column for filtering.
- Invert the filter value.
- Refresh the result sets form after filtering.

Selecting a Column for Filtering

Before you import the results of an AutoPilot test, you can simplify the view in the Result Sets form by filtering the list of test results. To do this, click the Filter button and use the Filter form to:

- Select a column for filtering.
- Invert the filter value.
- Refresh the AutoPilot Result form after filtering.

On the Filter form, the Select Column for Filter list contains the name of each column in the Result Sets form. To filter the entries in the Result Sets form, select a column from this list. Establish filtering criteria using the Filter Type options and Filter Value. When you apply these criteria, Analyzer Tool filters into the Result Sets form for those tests that match your criteria.

Access Analyzer Tool.

To select a column for filtering:

1. On Analyzer Tool, select Choose from the Results menu.
2. On Result Sets, click Filter.
3. On Filter, select the name of a Result Sets form column from the Select Column for Filter list.
4. Select one of the following filter types:
 - Exact Match
 - Expression / Contains
5. Enter a literal value or an expression in the unpopulated Filter Value list.

Note. If you select Exact Match, enter integers only. If you select Expression / Contains, enter a string. Choosing Expression / Contains also enables you to enter a conditional reference, such as greater than, less than, or equal to.

6. Click OK.

Inverting the Filter Value

After you filter entries in the Result Sets form, use the Invert option on the Filter form to invert your selection criteria and change the view in the form.

Access Analyzer Tool.

To invert the filter value:

1. On Analyzer Tool, select either Choose or Import from file from the Results menu.
2. On Result Sets, click Filter.
3. On Filter, select the Invert option.
4. Click OK.

Analyzer Tool inverts the selection criteria and reflects those changes on the Result Sets form.

Refreshing the Result Sets Form after Filtering

After you filter the entries in the Result Sets form, you can restore the form to its original state using the Filter form.

Access Analyzer Tool.

To refresh the Result Sets form after filtering:

1. On Analyzer Tool, select either Choose or Import from file from the Results menu.
2. On Result Sets, click Filter.
3. On Filter, click Clear All.
4. Click OK.

Analyzer Tool refreshes the Result Sets form.

Importing, Exporting, and Deleting Test Results

This section discusses how to:

- Importing test results to a file.
- Exporting test results to a file.
- Getting test results from an external source.
- Deleting test results.

Importing, Exporting, and Deleting Test Results

After you capture an event stream, you can open Analyzer Tool, select one or more tests that you ran and import the event stream data for analysis. You can export the results of a test to a file to send to an outside source such as customer support. Analyzer Tool saves the results as a binary file to a directory of your choice.

People within or outside of your organization can import results that you save as a binary file to the Analyzer Tool.

To avoid creating an unmanageable results repository, you should regularly delete test results that are out of date or no longer useful.

Importing Test Results to Analyzer Tool

Access the Analyzer Tool.

To import test results to Analyzer Tool:

1. On Analyzer Tool, select Choose from the Results menu.
The Result Sets form displays information about each test that you saved.
2. Select the test that you want to import.
3. Double-click the test or click Select.
Analyzer Tool imports the results of the test.
4. Click the title of the test that you imported.
The event stream appears in the detail area of the form.

Exporting Test Results to a File

Access the Analyzer Tool.

To export test results to a file:

1. On Analyzer Tool, click List Result Sets on the toolbar.
2. On the Result Sets form, select one or more tests.
3. Click Export to file.
4. Assign names to the tests and click Save.
Analyzer Tool saves the results as a binary file. To send the file to someone else, attach it to an email.

Getting Test Results from an External Source

If you have received the binary file as an attachment to an email, save the attachment to a directory of your choice.

Access the Analyzer Tool.

To get test results from an external source:

1. On Analyzer Tool, select Import from file from the Results menu.
2. Open the folder from the location in which you saved the binary file.

3. Select the file name and click Open.

Analyzer Tool imports the test results from the binary file.

Deleting Test Results

Access the Analyzer tool.

To delete test results:

1. On Analyzer Tool, click List Result Sets on the toolbar.
2. Click the test results that you want to delete.

CHAPTER 4

Understanding How to Analyze Data with Analyzer Tool

This chapter discusses:

- Analyzer Tool data.
- Interactive panes.
- Report pane.
- Tool analysis pane.
- Event pane.

Analyzer Tool Data

After you import the results of one or more tests, you work in the Analyzer Tool form. Use these panes to separate and analyze the test data:

Panes	Description
Report pane	Contains general details about each test that you import into Analyzer Tool.
Analysis pane	Enables you to select a variety of formats in which to present test data. You can also filter the list of events by applying limiting criteria, such as event type.
Event pane	Enables you to view individual or aggregated details of test events after you have selected the test level to view in the report pane, such as a particular application or form, and the limiting criteria to apply to the view in the analysis pane.

Together, the three panes enable you to analyze PeopleSoft EnterpriseOne operations from different perspectives. The tool enables you to move with precision to a low level of script playback detail or to aggregate detail. Using this information, you can evaluate the script playback, noting, for example, processing delays.

Interactive Panes

After you import one or more scripts from the Result Sets form, you can view the test results at various levels of detail. The Analyzer Tool form displays three panes. You work in each of these panes to define how to display the information about events that occurred during script playback.

The report pane contains information about the test that you imported into Analyzer Tool, including its name, any applications you tested, and so on.

The analysis pane contains tabs that enable you to establish the view of events from a variety of perspectives. For example, you can view the entire event stream that you captured during script playback, or you can isolated event types, such as JDB API calls.

The event pane displays details about the script playback. You determine the view that appears in the event pane by the choices you make in the analysis pane.

Report Pane

The report pane contains general details about each script that you import into Analyzer Tool:

- Name of the script.
- Time required for startup and shutdown.
- Name of the applications tested.
- Names of all forms in the applications.
- Names of all header controls and grid columns in the forms.

In addition, the report pane indicates which EnterpriseOne forms, header controls, and grid columns that AutoPilot accessed during script playback, as well as the time required to run the entire script and various subsets.

Analyzer Tool displays the contents of the report pane in a parent/child relationship format. The ultimate parent is Master Report, which includes all the scripts that you import into Analyzer Tool. You view the following information by expanding each node in the Master Report tree:

- Name of the script.
- Startup and shutdown time for script playback.
- Applications called and the total time the script spent running the application.
- The number of forms in the application that were accessed during script playback.
- The forms that were accessed during script playback.
- The number of form header controls and grid columns accessed during script playback.
- Names of all form header controls and grid columns and their data dictionary aliases and whether they were accessed during script playback.

Analyzer Tool displays the total time it took to run the entire script, startup and shutdown times, and application time. The total time figure does not include time intervals between events.

The table summarizes the information that is displayed in the report pane of the Analyzer Tool form:

Entry to PeopleSoft Column of the Report Pane	Entry to Statistics Column of the Report Pane
Master Report	N/A
AP Script Name	Total time to run script without time intervals between events
Start Up/Shut Down	Total time required for startup and shutdown
Application	Total time required to run the application and the number of forms that were accessed during playback
Form	Number of header controls and grid columns accessed during playback
Header Controls (controls accessed during playback)	N/A
Grid Columns (columns accessed during playback)	N/A

Note. The node that you select in the report pane, determines what you see in the event pane or the analysis pane. For example, if you click the application node in the report pane, script events that appear in the event pane are events that occurred during the playback of that application only.

Analysis Pane

Use the analysis pane to view some or all of the events that occurred during any stage of script playback. The analysis pane also enables you to select how you will view the events.

You work in the analysis pane in conjunction with the other two panes. In the report pane, you select a level of the test. For example, you might analyze the events from the level of the entire test. Using options in the analysis pane, you can apply a selection criterion to limit the number of events that you view in the event pane. For example, you might select to view only JDB API calls.

Usage Report Tab

Use the Usage Report tab to select:

- The type of script events that you want to view, by category.
- The criteria by which you group the events.

For example, you might decide to view only CallObject APIs. Based on that choice, Analyzer Tool displays only CallObject APIs. To group these CallObject APIs by message (that is, to see each CallObject API that is invoked by EnterpriseOne during playback), select Group by Message as the criterion by which Analyzer Tool groups the CallObject APIs.

Available options on the Usage Report tab include:

- View Category.
- Grouping.
- Subtotal Options.

View Category Option

The View Category options include:

- JDB Only.
- CallObject Only.
- Event Rule Only.
- Others.
- View All.

Use these options to select the type of playback event that you want to analyze.

Grouping Option

After you select a category of event, you can group those events. Grouping options include:

- Group by Message.
- Group by User Handle.
- Group by Request Handle.

Subtotal Options

You can view aggregate numbers of events within an event category and the total time required to run the events during script playback using subtotal options. The subtotal options include:

- Show Subtotal and Grand Total.
- Place Grand Total on Top.

Use the Subtotal Options feature with the View Category and Grouping options. For example, suppose you select the CallObject Only option in View Category and the Group by Message option in Grouping. If you select both subtotal options, Analyzer Tool displays the total number of CallObject APIs called during playback, the total number of times these APIs were called during playback, and the total amount of time required to run all of the calls at the top of the event pane.

Stream Tab

The Stream tab contains the complete record of all events that occurred during playback of the AutoPilot script and the elapsed time for each event.

The Stream tab also has a Filter button that lets you change the view of the event stream in the event pane. When you click Filter, the Filter form appears, from which you can sort events by:

- Start time.
- End time.
- Elapsed time.
- Thread ID.
- API call level.
- User handle.
- Request handle.
- Message ID.

- Message (such as OpenTable).

This form limits the number of tests that you view. For example, if you use the Filter form in the analysis pane, you might select request handles equaling 15 as a filter.

If you apply this filter, the event pane displays only the playback events that match the criterion of an hRequest parameter of 15.

Time Line Tab

The Time Line tab displays the execution of script playback events that are plotted against a time line. Time line mode options include:

- Plot by Message Type.
- Plot by Message Thread ID.
- Plot by User Handle.
- Plot by Request Handle.

When you select a time line mode, the event pane displays a time line indicates the time it took AutoPilot to run script events, based on the criterion you chose. Time is displayed in seconds along the x-axis of the time line. The values of the mode are displayed along the y-axis. For example, if you display the timing of events by user handle, the Y axis displays all user parameters used during script playback, along with the point in time that each occurred and its duration.

Coverage Tab

The Coverage tab enables you to see how extensively your script tested an application. When you click this tab, Analyzer Tool displays in the event pane nodes that represent any applications that AutoPilot accessed during script playback. You can click these nodes to see how many forms in an application and how many header controls and grid columns in a form AutoPilot accessed.

Event Pane

You use the Analyzer Tool event pane to view the details of AutoPilot playback events after you select on of these options:

- The level of playback that you want to view, from the report pane.
- The limiting criteria you want to apply to the view, from the analysis pane.

You can use these features when you work in the event pane:

- Sort mechanism.
- View API call parameters.
- Export playback event details to Microsoft Excel.

Sort Mechanism

The event pane views that appear when you click the Usage Report and Stream tabs in the analysis pane have a sort mechanism that manipulates the order of playback events. When you click a category in either one of these event pane views, Analyzer Tool sorts the contents of the column:

- If the contents are integers, Analyzer Tool sorts them in ascending or descending order.

- If the contents are strings, Analyzer Tool sorts them in alphabetical or reverse alphabetical order.

View API Call Parameters

With the event stream in the event pane, you can click a line that contains the details of a JDB or CallObject API call and view the parameters of that call in the analysis pane.

The analysis pane view contains the name and value of each parameter, as well as directional arrows that indicate whether the parameter value was used as input to or an output from an API call. An arrow to the left of the box next to the parameter name indicates an input value. An arrow to the right of the box indicates a value that was returned from an API call.

You can also click a line that contains details of an AutoPilot event and view details of that event in the analysis pane. For example, you can view the application and form you chose in the AutoPilot script and entries you made to header controls and grid columns.

Export Playback Event Details to Microsoft Excel

You can export the playback details in an event pane to a Microsoft Excel document. To do so, you must:

- View by clicking the Usage Report or the Stream tab in the analysis pane.
- Click inside the report pane.

The Export to Excel button in the toolbar is enabled.

CHAPTER 5

Understanding the Analyzer Tool Interface

This chapter provides an overview of Analyzer Tool interface and discusses how to:

- Select a report level.
- Select criteria for event analysis.
- Use the stream tab.
- View details of events.

Working with the Analyzer Tool Interface

The Analyzer Tool user interface consists of three panes, each of which enables you to view in various ways the details of your AutoPilot script's playback. You use the panes to analyze the script playback data contained in the event stream.

Use the report pane to select the level of detail to view for a test. For example, you might want to view all the events that occurred during script playback or you might want to view only the events that occurred during the playback of one application.

Use the analysis pane to select criteria that further limits the number of events that you view and the manner in which Analyzer Tool presents those events, such as in a table or a graph.

The event pane contains the details of the events, that are presented in the manner that you define.

Understanding Report Levels

This section provides an overview of the report pane and discusses how to select a report level.

Selecting a Report Level

You work in the report pane to select the level of detail in the event pane. You can also select more than one test and view the comprehensive totals in the event pane.

Access Analyzer Tool.

To select a report level in the report pane:

1. In the report pane of the Analyzer Tool form, select a report level by clicking it.
2. If you have imported two or more sets of test results, click the Master Report node.

In the event pane, Analyzer Tool displays the combined results of all the tests that you imported.

Note. The event pane displays the events that occurred at the report level that you select. You might want to click a tab in the analysis pane to alter the presentation of the view. For example, to see the events in a table format, click either the Usage Report tab or the Stream tab in the analysis pane.

Choosing Criteria for Event Analysis

This section provides an overview of criteria for event analysis and discusses how:

- View details of playback events using the usage report tab.
- Display playback event subtotals.

Understanding Criteria for Event Analysis

When you work in the analysis pane, you can select criteria that limit the type and number of script playback events that you view in the event pane, and you can select the graphical presentation of the events. To accomplish these goals, select options in the analysis pane to change the view in the event pane.

Working with the Usage Report Tab

On the Usage Report tab, you can view all the script playback events in the event pane, or you can select a criterion that limits the playback events that you view. After you select a criterion, you select an option to group the events that you view by message, user handle, or request handle. You can also use the analysis pane view under the Usage Report tab to display aggregate numbers of details that are related to script playback events. For example, you can display the total number of CallObject API calls that are made during script playback.

Viewing Details of Playback Events Using the Usage Report Tab

The Usage Report tab enables you to view details of playback events. You can view all the events at the test level that you chose in the report pane or select a criterion to limit the types of events that you view. You can select a criterion by which to group the events, such as by request handle.

Access Analyzer Tool.

To view details of playback events using the Usage Report tab:

1. On Analyzer Tool, click the Usage Report tab.
2. Select one of the following View Category options:
 - JDB Only.
 - CallObject Only.
 - Event Rule Only.
 - Others.
 - View All.

All the script playback events or a category of playback events, such as CallObject APIs, are displayed in the Event pane.

3. Select one of the following Grouping options:
 - Group by Message.

- Group by User Handle.
- Group by Request Handle.

Displaying Playback Event Subtotals

With the script playback events displayed in the event pane, you can view event subtotals, including the number of events by category and the total time that is required to complete the events in that particular category. You can also display the grand totals, either at the bottom or at the top of the event pane.

Access the Analyzer Tool.

To display playback event subtotals:

1. In the analysis pane on the Analyzer Tool form, click the Usage Report tab.
2. Click an option in the View Category subpane.
3. Click an option in the Grouping subpane.
4. Click one of the following options:
 - Show Subtotal and Grand Total
Displays subtotals for events, with the grand totals displayed at the bottom of the event pane.
 - Place Grand Total on Top
Displays subtotals for events, with the grand totals displayed at the top of the event pane.

Using the Stream Tab

This section discusses how to:

- Filter events in the event stream.
- Work with the time line tab.
- Work with the coverage tab.

When you click the Stream tab, the analysis pane appears with the event stream in the event pane. This is the complete record of script playback events. You can view this complete record or use the Filter button in the analysis pane to limit the types and number of events that you view in the event pane.

You view details of playback events using the Stream tab by selecting the Stream tab in the analysis pane.

Filtering Events in the Event Stream

To manipulate your view of the event stream in the event pane, you use the Filter button on the Stream tab. Using the Filter form, you can limit the number and kind of events that appear in the event pane.

Access the Analyzer Tool.

To filter events in the event stream:

1. In the analysis pane of Analyzer Tool, click the Stream tab.
2. Click Filter.

3. On Filter, select a column in the event stream from the Select Column for Filter list.
4. To refine your filter criterion, select one of the following options:
 - Exact Match
 - Expression / Contains
5. Enter a value in the Filter Value field.
6. Click OK.

Analyzer Tool filters the event stream for the value that you specified on the Filter form and displays the new view in the event pane.

Note. To invert the view in the event pane so that it filters out the value you enter on the Filter form, select the Invert option and click OK.

Working with the Time Line Tab

Use the Time Line tab to view the elapsed time for AutoPilot to run categories of events. Analyzer Tool plots categories of events along the y-axis of a time line and the time in seconds, on the x-axis. Using the Time Line tab, you can view the number and duration of different kinds of events in the event pane.

Access the Analyzer Tool.

To view details of events using the Time Line tab:

1. In the analysis pane of the Analyzer Tool form, click the Time Line tab.
2. Select a time line modes:
 - Plot by Message Type.
 - Plot by Message Thread ID.
 - Plot by User Handle.
 - Plot by Request Handle.

Analyzer Tool displays each event separately, with a bar. The bar enables you to see the starting point, ending point, and duration of the event.

Working with the Coverage Tab

Use the Coverage tab to view how extensively your AutoPilot script covered the code in an EnterpriseOne application or form. You select a test level in the report pane and then click the Coverage tab. The event pane displays statistics on the applications, forms, header controls, and grid columns that AutoPilot accessed during script playback. Click a test level, such as application, to view the coverage for that level of the test.

Access the Analyzer Tool.

To view code coverage using the Coverage tab:

1. In the report pane of the Analyzer Tool form, click the level of the AutoPilot test that you want to view.
2. In the analysis pane, click the Coverage tab.
3. In the event pane, click the level of the test that you want to view.

Viewing Details of Events

This section discusses how to:

- Sort events in a category.
- Enable the parameter view in the analysis pane.
- Export script playback event details.

Use the event pane to view script playback events. Analyzer Tool displays these events based on the criteria that you select in the report and analysis panes. You select actions in the event pane that alter your view of the script playback events, present a more detailed view of individual events, and offer you the opportunity to export the view to a Microsoft Excel spreadsheet.

Sorting Events in a Category

When you click the Usage Report tab or the Stream tab in the analysis pane, Analyzer Tool displays the script playback events in a table with eight and nine columns, respectively. You can sort these categories in the event pane by clicking the category name. When you do so, Analyzer Tool sorts in alphabetical or reverse alphabetical order those events that are described by a string. Analyzer Tool sorts those events described by integers from least to greatest or from greatest to least.

For example, when you click the Usage Report tab and select from the View Category and Grouping options, Analyzer Tool displays the events under eight categories in the event pane. In the Message column, the events appear in alphabetical order. When you click the column, Analyzer Tool arranges the messages in reverse alphabetical order. In the Count column, the events appear in order of those that occurred the least number of times to those that occurred the greatest number of times. When you click the column, those that occurred the greatest number of times appear first.

Access the Analyzer Tool.

To sort events in a category:

1. In the analysis pane of the Analyzer Tool form, click either the Usage Report tab or the Stream tab.
2. If you click the Usage Report tab, select a View Category and a Grouping option.

Note. If you click the Stream tab, the View Category and Grouping options do not appear and you can proceed to Step 3.

3. In the event pane, click a column name.

Enabling the Parameter View in the Analysis Pane

When you display the event stream in the event pane, you can click a JDB or CallObject API event to view the parameters of that call. Analyzer Tool displays the parameters and other information about the call in the analysis pane.

Access the Analyzer Tool.

To enable the parameter view in the analysis pane:

1. In the analysis pane of the Analyzer Tool form, click the Stream tab.
2. In the event pane, click a line containing a JDB or CallObject API call.

A view of the parameters of the call appears in the analysis pane. You can also view details of some AutoPilot events, such as application launches and entries to header controls and grid columns.

Exporting Script Playback Event Details to a Microsoft Excel Spreadsheet

You can export script playback event details from the event pane to a Microsoft Excel spreadsheet when you have created an event pane view using the Usage Report tab or Stream tab in the analysis pane. Using this feature enables you to arrange the playback event details as you desire.

Access the Analyzer Tool.

To export script playback event details to an Excel spreadsheet:

1. In the analysis pane of the Analyzer Tool form, click the Usage Report tab or the Stream tab.
2. If you click the Usage Report tab, select a View Category and a Grouping option.

Note. If you click the Stream tab, the View Category and Grouping options do not appear, and you can proceed to Step 3.

3. Click inside the event pane, either on a line containing an event or on a column heading.
The Microsoft Excel button on the Word toolbar is enabled.
4. Click the Export to Excel button on the toolbar.

Analyzer Tool exports the contents of the event pane table to a Microsoft Excel spreadsheet.

Glossary of PeopleSoft Terms

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

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

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

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

class	<p>In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.</p> <p>See also <i>course</i>.</p>
Class ChartField	<p>A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i>.</p>
clearance	<p>In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.</p>
clone	<p>In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.</p>
cohort	<p>In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.</p> <p>See also <i>population</i> and <i>division</i>.</p>
collection	<p>To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.</p>
collection rule	<p>In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.</p>
comm key	<p>See <i>communication key</i>.</p>
communication key	<p>In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.</p>
compensation object	<p>In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.</p>
compensation structure	<p>In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.</p>
condition	<p>In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.</p>
configuration parameter catalog	<p>Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.</p>
configuration plan	<p>In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.</p>

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

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

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

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

GL Interface process

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

group

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

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

incentive object

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

incentive rule

In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur

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

initiative

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

inquiry access

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

See also *update access*.

institution

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

item

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

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

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

item shuffle

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

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

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

national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.

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

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

rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

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

session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,

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

3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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