



EnterpriseOne Tools 8.94 PeopleBook: Configurable Network Computing Implementation

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About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

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

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

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

PeopleSoft Application Fundamentals

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Additional Resources

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

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

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements Used in PeopleBooks

Address Book Number

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

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

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

Document Number

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

Document Type

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

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

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

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

Fiscal Period and Fiscal Year

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

G/L Date (general ledger date)

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

PeopleSoft EnterpriseOne Preface

This guide describes the architecture and tasks required to set up an EnterpriseOne network distributed across one or more computers.

Configurable Network Computing Implementation

The Configurable Network Computing Implementation guide describes how to perform these types of tasks after you initially install PeopleSoft EnterpriseOne:

- Set up path codes
- Configure a PeopleSoft EnterpriseOne network using the Object Configuration Manager
- Set up environments
- Set up data sources
- Set up different modes of client-server processing

CHAPTER 1

Getting Started

The Configurable Network Computing (CNC) Implementation Guide focuses primarily on how to set up your enterprise after you have loaded PeopleSoft EnterpriseOne. Although it is aimed primarily at CNC specialists, those with other job functions might find the information useful or essential to their positions.

The assumption throughout these guides is that the initial PeopleSoft EnterpriseOne installation is complete and that the standard data sources, path codes, and environments are defined. These guides tell you how to make changes or additions to the configuration setup after the initial installation.

Configuration Planning and Setup Suite

The Configuration Planning and Setup suite consists of these guides:

- Configurable Network Computing Implementation Guide
Written primarily for CNC specialists.
- System Administration Guide
Written primarily for PeopleSoft EnterpriseOne system administrators.
- Package Management Guide
Written primarily for PeopleSoft EnterpriseOne system administrators and others who manage custom modifications to the environments.
- Server and Workstation Administration Guide
Written primarily for network administrators.

Implementation Roles

This section discusses the various roles in implementing a Configurable Network:

- Roles.
- Technology roles.
- Development roles.
- Functional roles.
- System integration roles.

The PeopleSoft EnterpriseOne implementation methodology defines specific roles that are involved in the design, installation, and configuration of an ERP solution. These roles are generally divided into four implementation teams:

- Technology - installation and upgrades, system administration, security, change management
- Development - data conversions, interfaces, custom modifications
- Functional - business process, application configuration, integration and testing, end-user training
- Systems Integration - data center design, hardware support, network infrastructure, third-party software

Each of these implementation teams is staffed by both consultant and customer roles. As an implementation progresses to completion, the consultant roles diminish, while the customer roles remain and often increase in level of responsibility. It is critical, therefore, that the customer ensures that each role to be assumed by its personnel is adequately trained.

Technology Roles

Typically, the technology project team is led by a single consulting role, the technology specialist, and two customer roles, the system administrator and the change management administrator. The technology specialist and system administrator are involved with installing PeopleSoft EnterpriseOne and setting up environments, users, security, distributed processing, data replication, and other system administration and operations support topics. The technology specialist and change management administrator are responsible for setting up version control, applying software updates and service packs, reviewing and promoting code and data across change management environments, and deploying code and data changes to the servers and workstations involved in the ERP solution.

Development Roles

The development project team is typically led by a custom solution consultant and staffed by one or more application developers. The custom solution consultant resolves business issues by developing applications. Primary responsibilities include developing a data migration strategy, designing interfaces to legacy and third-party systems, and designing custom modifications with upgrades in mind. The application developers migrate legacy data, code and test interfaces, code and test custom modifications, and integrate all code changes into the ERP solution.

While the change management administrator performs the version control functions that control the acceptance, promotion, and deployment of software changes, the custom solution consultant must help develop the internal procedures for realizing an application development life cycle within your business. In addition, development team members must be aware of change management tools and procedures, as well as how the technology components affect the design and operation of interfaces and custom modifications.

Functional Roles

The functional project team is led by a consulting project manager and a customer project manager, and staffed by application specialists and customer process owners. These project members are responsible for the design, configuration, and deployment of PeopleSoft EnterpriseOne applications, as well as the modeling of all business processes that will be realized through the application set. After PeopleSoft EnterpriseOne is installed, configured, and rolled out, the application specialists continue in their role as product experts. Although application specialists do not implement technology-level solutions, they must understand how the software handles distributed processing, data replication, environments, and so on, because these application issues influence technology design and configuration. In addition, application specialists and process owners must become expert at troubleshooting potential problems and identifying the difference between a technology issue and an application issue.

Systems Integration Roles

The systems integration project team is responsible for many tasks that are outside the scope of PeopleSoft services. Third-party consultants provide some of these services and supplement PeopleSoft staff as CNC consultants, network architects, custom modification consultants, and so on. In addition, customers provide hardware and network infrastructure support.

Implementing the PeopleSoft EnterpriseOne system includes many tasks that are outside the scope of PeopleSoft software and services. Systems integration (that is, third-party) consultants provide these services to help you align your infrastructure to optimally support PeopleSoft EnterpriseOne applications and runtime services, as well as expand the overall business solution with complementary third-party products. These consultants are able to assist with such services as data center design, IT process improvement, and network infrastructure. They are also able to assist with the installation, configuration, and integration of third-party hardware and software products that enhance and extend the PeopleSoft software solution. These project members should be aware of the architecture and technical behavior of PeopleSoft software and of how the various technology components interact with operating systems, database management systems, third-party middleware, and the network.

CHAPTER 2

Path Code Setup

This chapter provides an overview of path codes and path code usage and discusses how to work with path codes.

Understanding Path Codes

Path codes keep track of sets of objects and their locations in PeopleSoft EnterpriseOne. For every set of objects in your configuration, PeopleSoft EnterpriseOne requires a path code definition in the Object Path Master File table (F00942).

A path code is a pointer to a set of objects. For each set of objects in your configuration, you must define a path code in the Object Path Master File table (F00942). For example, a separate path code definition is recommended for each of these sets of objects:

- PeopleSoft pristine objects
- Production objects
- Development objects
- Prototype or Conference Room Pilot (CRP) objects

The Path Code Master program (P980042) uses the Object Path Master File table (F00942).

Understanding Path Code Usage

The next sections provide an overview of path codes at installation, path codes at runtime, and path codes at development.

Understanding Path Codes at Installation

You must define a path code in the Object Path Master File table (F00942) for each set of central objects. A set of PeopleSoft EnterpriseOne objects consists of a central-objects data source and a directory of objects, which includes business function source and include files, object files, and dynamic link libraries (DLLs). A path code definition contains the data source name of the central-object specifications and the directory path to the objects.

When you build a package for the workstation, you must specify a path code. The software uses this path code to determine which set of central objects to use as the source for the package and the directory to use as the destination for the package.

If the software opens an application that does not reside on the workstation and Just-In-Time Installation (JITI) is set for the workstation, the deployment data source will install the needed objects to the workstation at runtime.

Understanding Path Codes at Runtime

PeopleSoft EnterpriseOne uses path codes at runtime in these ways:

- To validate available environments

When you log on to PeopleSoft EnterpriseOne, the system checks the path codes that you have defined in your environments against the path code directories that are physically installed on the workstation. If that workstation does not have a path code that you defined in one of your environments, that environment is not displayed when you log on.

- To determine the directory location of a requested object

Understanding Path Codes at Development

When you check out an object for development, you use the Object Librarian to specify a path code. The software uses the path code to determine where the central objects are stored and checks out the object from those locations (both database and file server).

When you check in an object, you use the Object Librarian to specify a path code. The software uses the path code to determine the location of the central objects in which to place the objects.

Working with Path Codes

You might want to create path codes to supplement the one you created during installation. The tasks in this chapter describe how to add a path code and create a path code definition. When you add a new path code, you also must modify some Object Librarian tables.

See Also

Chapter 5, “Using Environment Director,” page 53

Prerequisite

Before you complete the tasks in this section:

- Observe these naming conventions when adding a new path code:
- Limit to 10 characters
- Use only uppercase

Forms Used to Add a New Path Code

Form Name	Form ID	Navigation	Usage
Path Code Master	W980042A	From the Environments menu, select Path Code Master (P980042)	Create a new path code

Adding a New Path Code

During installation, you created one path code (PD811). You can use the information from this path code to create another one, such as DV811. When adding a new path code, always do so by copying existing objects, such as from your production path code. You can copy from any existing path code. You cannot add a new path code with an incomplete set of objects.

To add a new path code:

1. Create a new directory on your deployment server for your new path code. For example, create a directory called DV811.

Note. For this task, DV811 is the new path code.

Each central-object data source should have an associated directory path on the deployment server. The PD811 directory on your deployment server contains all of the objects (including business function source and include files, object files, and DLLs) and standard packages. Use this directory as a template for creating new central-object directories.

2. Copy the subdirectories of the PD811 path code into the new directory (DV811) that you created.
3. Create a new Oracle or SQL database (or increase the size of your existing Oracle or SQL databases) to hold a set of central-object specifications for the new path code.
4. Create a new table owner for the new set of central-object specifications (DV811).
5. Modify the Object Librarian - Status Detail (F9861) and Versions List (F983051) tables for the new DV811 path code.
6. Copy your production path code (PD811) set of central-object specifications to that database.
7. Verify that the installation process created a new data source for the newly copied central-objects database (Central Objects - DV811).

If the process did not create this data source, you must create it.

8. Using the Path Code Master program (P980042), modify the DV811 path code definition. Verify that the Deployment Data Source field specifies your new data source for the newly copied central-objects data source (DV811). Verify that the Location and Server Share Path fields specify the location of your new DV811 path code.
9. Verify that the package definitions (DV811_A and DV811_B) that were provided with the installation exist.
10. Copy existing packages from your PD811 path code to your new DV811 path code. Modify your new path code package INF files by changing the path code directories to that of your new path code.
11. Verify that the installation process created the DV811 environment.

If the installation process did not create the environment, create it by copying an existing environment. Make sure you change the path code to the new path code.

Note. Remember to add new environments to a user profile so that the environment is available for selection when the user logs on.

12. Modify your Object Configuration Manager mappings for the new environment.

For tables mapped to the previous central-objects data source, add records that point the tables to the newly created central-objects data source. Map the Versions List table (F983051) and Processing Option Text table (F98306) to point to the Central Objects - DV811 data source. The default data source should be Business Data - Test.

Note. OCM does not determine the location of the F987* series tables. The deployment data source determines the location of these tables, including the Central Objects specifications tables.

See Also

[Chapter 2, “Path Code Setup,” Modifying Tables for the New Path Code, page 8](#)

[Chapter 6, “Data Sources,” Working with Data Sources, page 69](#)

[Chapter 4, “Environment Setup,” Adding an Environment, page 47](#)

[Chapter 3, “Object Configuration Manager,” Working with the Object Configuration Manager, page 15](#)

Copy Path Code Objects in the “ ” *EnterpriseOne PeopleTools 8.11 Installation Guide*

EnterpriseOne Tools 8.94 PeopleBook: Package Management, “Understanding the Package Build Process,” The Creation and Deployment Process

EnterpriseOne Tools 8.94 PeopleBook: Package Management, “Building Packages”

Creating a Path Code Definition

The Object Path Master File table (F00942) contains all path code definitions for your configuration. This table resides in your system data source.

To create a path code definition:

1. On Work With Path Codes, click Add.
2. On Path Code Revisions, complete these fields and click OK:
 - Path Code
 - Description
 - Location
 - Release
 - Deployment Data Source
 - UNC Flag

Modifying Tables for the New Path Code

You must modify the Object Librarian - Status Detail (F9861) and the Versions List (F983051) tables to reflect the new path code. This modification enables developers to perform the check-in/check-out process with valid Central Objects information.

To modify the Object Librarian - Status Detail table (F9861):

1. Log on as follows depending on which platform you are using:
 - For Oracle, sign in to the SQL Plus utility.
 - For Query Analyzer, sign in to SQL Server as user PSFT.
 - For DB2/400, invoke SQL by typing STRSQL.
 - For DB2/UDB on the Windows platform, start the command window with "Start | Programs | IBM DB2 | Command Window" and connect to PSFT811.
 - For DB2/UDB on the UNIX platform, sign in as the instance owner and connect to PSFT811.

2. Save a backup copy of master table F9861 as follows:

- When using an Oracle database, enter this command:

```
CREATE TABLE F9861SAV AS SELECT * FROM OL811.F9861
```

- When using the Query Analyzer tool, enter this command:

```
SELECT * INTO F9861SAV FROM OL811.F9861
```

- When using a DB2/UDB database, enter these commands:

```
DB2 "CREATE TABLE OL811.F9861SAV LIKE OL811.F9861"
```

```
DB2 "INSERT INTO OL811.F9861SAV SELECT * FROM OL811.F9861"
```

3. When using DB2/400, perform these steps:

- Press F13.
- Select option 1.
- Change SELECT output to 3.
- Press Enter.
- Change output file to OL811/F9861SAV.
- Press Enter.
- Press Enter.
- Select * FROM OL811/F9861.
- Press Enter.
- Press F13.
- Select option 1.
- Change SELECT output to 1.
- Press Enter.
- Press Enter.

4. Get a record count of master table F9861 as follows:

- When using Oracle and Query Analyzer enter this command:

```
SELECT COUNT(*) FROM OL811.F9861
```

- When using DB2/400, enter this command:

```
SELECT COUNT(*) FROM OL811/F9861
```

- When using DB2/UDB, perform this command:

```
DB2 "SELECT COUNT (*) FROM OL811.F9861"
```

5. Create a temporary table that contains a subset of the master F9861 records as follows:

- When using Oracle, enter these commands:

```
CREATE TABLE TEMPF9861 AS SELECT * FROM OL811.F9861 WHERE SIMKEY =
'DEPLOYMENTSERVERNAME' AND SIPATHCD = 'PD811';
COMMIT
SELECT COUNT(*) FROM TEMPF9861
```

- When using Query Analyzer enter this command:

```
SELECT * INTO TEMPF9861 FROM OL811.F9861 WHERE SIMKEY =
'DEPLOYMENTSERVERNAME' AND SIPATHCD = 'PD811'
```

- When using DB2/UDB, enter these commands:

```
DB2 "CREATE TABLE OL811.TEMPF9861 LIKE OL811.F9861"
DB2 "INSERT INTO OL811.TEMPF9861 SELECT * FROM OL811.F9861 WHERE
SIMKEY = 'DEPLOYMT' AND SIPATHCD = 'PD811' "
```

6. When using DB2/400, perform these steps:

- Press F13.
- Select option 1.
- Change SELECT output to 3.
- Press Enter.
- Change output file to OL811/TEMPF9861.
- Press Enter.
- Press Enter.
- SELECT * FROM OL811/F9861 WHERE SIMKEY = 'DEPLOYMENTSERVERNAME' AND SIPATHCD = 'PD811'
- Press Enter.

7. Update the temporary F9861 records with the new path code as follows:

- When using an Oracle database enter these commands:

```
UPDATE TEMPF9861
SET SIPATHCD = 'DV811'
COMMIT
```

- When using Query Analyzer, use the statement:

```
UPDATE TEMPF9861
SET SIPATHCD = 'DV811'
```

- When using DB2/400, enter these commands:

```
UPDATE OL811/TEMPF9861
SET SIPATHCD = 'DV811'
```

Press Enter.

- When using DB2/UDB use this command:

```
DB2 "UPDATE OL811.TEMP9861 SET SIPATHCD = 'DV811' "
```

8. Add the temporary F9861 records to the master F9861 records as follows:

- When using an Oracle database enter these commands:

```
INSERT INTO OL811.F9861 AS SELECT * FROM TEMPF9861;
COMMIT
```

- When using Query Analyzer enter this command:

```
INSERT INTO OL811.F9861 SELECT * FROM TEMPF9861
```

- When using DB2/400 perform this command:

```
INSERT INTO OL811/F9861;
SELECT * FROM OL811/TEMPF9861
```

- When using DB2/UDB, perform this command:

```
DB2 "INSERT INTO OL811.F9861 SELECT * FROM OL811.TEMP9861"
```

9. Verify that the new number of combined total records in master F9861 is correct as follows:

- When using Oracle and Query Analyzer, enter these commands:

```
SELECT COUNT(*) FROM OL811.F9861;
```

- When using DB2/UDB perform this command:

```
DB2 "SELECT COUNT (*) FROM OL811.F9861"
```

10. When using DB2/400, perform these steps:

- Press F13.
- Take option 1.
- Change SELECT output to 1.
- Press Enter.
- Press Enter.
- Enter this command:

```
SELECT COUNT(*) FROM OL811/F9861
```

11. Drop the temporary F9861 table as follows:

- When using Oracle and Query Analyzer, enter this command:

```
DROP TABLE TEMPF9861;
```

- When using DB2/400, enter this command:

```
DROP TABLE OL811/TEMPF9861
```

- When using DB2/UDB, enter these commands:

```
DB2 "DROP TABLE OL811.TEMPF9861"
```

12. Drop the backup F9861SAV table as follows:

- When using Oracle and Query Analyzer, enter this command:

```
DROP TABLE F9861SAV;
```

- When using DB2/400, enter this command:

```
DROP TABLE OL811/F9861SAV
```

- When using DB2/UDB, enter this command:

```
DB2 "DROP TABLE OL811.F9861SAV"
```

Modifying the Versions List Table

The Versions List table can be modified by performing these steps:

To modify the Versions List table (F983051):

1. Verify that you are logged on to SQL Plus Utility for Oracle or ISQL/w for SQL Server as user PSFT.
2. Run the following SQL command to create a backup of the OBJB9.F9861 table:

- For Oracle:

```
UPDATE DV811.F983051 SET VRMKEY='DEPLOYMENTSERVERNAME', VRENV='DV811';
COMMIT;
```

- For ISQL/w:

```
UPDATE DV811.F983051
SET VRMKEY='DEPLOYMENTSERVERNAME', VRENV='DV811'
```


CHAPTER 3

Object Configuration Manager

This chapter provides an overview of a distributed architecture and Object Configuration Manager and discusses how to:

- Work with the Object Configuration Manager.
- Update the Oracle Parameters Table.
- Run Object Configuration Manager reports.
- Partition application logic on servers.
- Troubleshoot basic function processing problems.

Understanding a Distributed Architecture

The software enables you to distribute data and logic in a manner that optimizes both the power of the workstation and the data integrity of the server. This optimization provides you with:

- Flexibility in determining your own partitioning schemes. As requirements change, you can repartition the system quickly and easily to meet new needs.
- Independence in using the data and logic objects that you need. For example, if you are a salesperson on the road, you can download only the data and logic you need to quote prices and availability. Later, you can connect to the server and place the orders in a batch process.
- Growth for your enterprise systems. the system can be as large as you need because the software enables you to move objects around the system in practically endless combinations.

To keep track of where data resides and where logic processing occurs, the software uses a tool called the Object Configuration Manager. This tool enables users to specify data and logic processing locations.

Understanding the Object Configuration Manager

The Object Configuration Manager program (P986110) configures distributed processing and data dynamically without any programming. Depending on the environment and the user, the Object Configuration Manager points to the correct location for:

- Data
- Batch processes
- Business functions

The Object Configuration Manager stores information in tables that tell the software where data resides and where processing occurs. At runtime, the software looks to the Object Configuration Manager to determine these data and processing locations.

In PeopleSoft EnterpriseOne, business data objects (tables) map to database data sources. Batch processes and business functions map to machine data sources.

You always need at least two Object Configuration Manager tables:

- One table for all workstations. Store this table in a centralized system data source. Normally, a central data server stores the system data source. If the central server is unavailable, PeopleSoft EnterpriseOne looks to the workstation's jde.ini file for a secondary location.
- One table for each logic server. Servers process differently than workstations; for example, the server map data source for each logic server stores separate Object Configuration Manager tables for server processing.

Example: Application Request for Logic

Here is an example of how the Object Configuration Manager works with a general logic request:

Step 1: The request process for application logic is similar to data requests. The Object Configuration Manager controls where all business functions and batch processes are processed.

For example, when you add a purchase order, any event that calls a business function looks to the Object Configuration Manager to determine where to process that business function. After you click OK to complete a purchase order, the software calls a master business function to validate all information and record the transaction. The software can process these business functions locally or on the server.

The primary, unique index to the Object Configuration Manager includes:

- Environment, such as PD811 or DV811
- User, which is either a specific User ID / Role or *PUBLIC
- Object name, such as F0101, B401002, or R09801
- Database path

The following describes the search hierarchy that the Object Configuration Manager uses to locate the correct data source for a logic request. For this example:

- The environment is PD811 (production)
- The status is AV (active)
- The object type can be either a batch process (UBE) or business function (BSFN)

Search Sequence	Object Name	User or Role	Search Criteria
1	B0900049	SI5745669 (user ID)	Is there a record for the named environment, status active, type (UBE or BSFN) for the named object, and the specific user?
2	B0900049	OWTOOL (role)	Is there a record for the named environment, status active, type (UBE or BSFN) for the named object, and the specific role?

Search Sequence	Object Name	User or Role	Search Criteria
3	B0900049	*PUBLIC	Is there a record for the named environment, status active, type (UBE or BSFN) for the named object, and *PUBLIC?
4	DEFAULT	SI5745669 (user ID)	Is there a record for the named environment, status active, type (UBE or BSFN) with no named object (default), and the specific user?
5	DEFAULT	OWTOOL (role)	Is there a record for the named environment, status active, type (UBE or BSFN) with no named object (default), and the specific role?
6	DEFAULT	*PUBLIC	Is there a record for the named environment, status active, type (UBE or BSFN) with no named object (default), and *PUBLIC?
7			If there is no record for this object type, then the software processes the process on the workstation.

Step 2: After the data source is determined, the software passes the definition of that data source to JDENet.

Step 3: JDENet sends a message to the server to begin processing logic. When JDENet on the server receives the message, a PeopleSoft EnterpriseOne process on the server responds to the message by processing the requested logic object.

Working with the Object Configuration Manager

The Object Configuration Manager provides the flexibility to map data, batch applications, and business functions to a data source, which enables you to coordinate your distributed processing. For example, you would map table objects to database data sources and logic objects to machine data sources.

You must have at least two sets of the Object Configuration Master (F986101) and Data Source Master (F98611) tables:

One for All Workstations	The Object Configuration Master and Data Source Master tables that the software uses for workstation processing are stored in the centralized system data source normally kept on an enterprise server. If the system data source is not available, the software looks to the workstation's jde.ini file for a secondary location.
One per Logic Server	The Object Configuration Master and Data Source Master tables that the logic server uses are stored on that server in the server map data source. Each logic server type requires its own server map data source.

In PeopleSoft EnterpriseOne, business objects are used to configure distributed processing and distributed data at runtime. The Object Configuration Master table defines this configuration. You can work with the server object map to modify the entries in this table.

Workstation mappings are stored in a centralized system data source. The F986101 table used by the enterprise server is stored on that server in the server map data source. Each enterprise server requires a separate server map data source.

Compared to a workstation, an enterprise server processing a logic object has a different perspective of where data should be retrieved. For a workstation that is requesting user defined codes, its F986101 table (in the system data source) points to the local database.

When an enterprise server requests user defined codes, it makes no sense for the enterprise server to look to a workstation for this information; therefore, the enterprise server should have unique mappings for user defined codes. These mappings are set up in the Object Configuration Master table (F986101) in the server map data source.

If you have changed table F986101 for the workstation, you should check it in the server maps to see if they should also be changed. For example, if you have new environments with unique mappings for the workstation, you should check to see if changes are required in the corresponding mappings for the enterprise server.

The Object Configuration Manager also provides batch processes to help with the administration of your object mappings. These processes perform such tasks as comparing, updating, copying, and deleting Object Configuration Manager records.

The Object Configuration Manager program (P986110) updates the Object Configuration Master table (F986101).

You map objects by environment. You select an environment that you have already created and map that environment's objects to the data sources you want those objects to use. You can set default mappings for all instances of an object type to one data source, and you can map individual objects to data sources.

Mapping Object Types: Default Maps	To create a default map for an object type, create a mapping whose object name is the literal value: DEFAULT. Then enter an object type (such as TBLE) and a data source. By creating a default map for the object type TBLE, any table objects not mapped individually point to the default data source.
Mapping Individual Objects	<p>You can map individual objects within an environment. For example, you can map a specific table, such as the Security Workbench Table (F00950), to a data source other than the default, such as to the system data source.</p> <p>If you do not explicitly map an object by name in the Object Configuration Manager, the software uses the default map for that object's type.</p>

Important! Each environment must have a default map for TBLE (table) objects for the *PUBLIC user profile because there is no inherent default location for table objects. If table objects do not have a default map and are not explicitly mapped by name, the software produces a Select/Failed error message.

Forms Used to Map Objects

Form Name	Form ID	Navigation	Usage
Object Configuration Manager	W986110D	From the System Administration Tools menu, select Object Configuration Manager (P986110)	Determine the location on which data is located and logic is run.

Processing Options for Object Configuration Manager (P986110)

The Object Configuration Manager program has one processing option that controls error handling.

Process Tab

Although processing options are set up during PeopleSoft EnterpriseOne implementation, you can change processing options each time you run a program.

1. **Non-existent table error** Use this processing option to specify whether an error or a warning should be issued when a table does not exist in the data source to which it is mapped. Values are:
 / = Issue an error
 blank = Issue a warning

Mapping Objects

Batch applications and business functions automatically run locally if there is no default map for that object type.

To map objects:

1. Access Object Configuration Manager.
2. On Machine Search and Select, select the data source that stores the Object Configuration Manager table with which you want to work, and click Select.
 The Machine Search and Select form displays data sources that have the OCM Data Source field checked on the data Source Revisions form. The machine name next to the data source in the grid refers to the machine where the data source resides. Workstations use the system data source for their mappings. Each enterprise server has its own server map data source.
3. On Work With Object Mappings, click Add to locate data sources for which to revise object mappings and to access a form to which you can add new object mappings for data sources.
4. On Object Mapping Revisions, complete these fields to specify the data source to which the objects map:

Environment Name	For install applications, the environment name is also called the Plan Name and is used to uniquely identify an upgrade environment for install/reinstall. For environment or version applications, this is the path code that identifies the location of the application or version specification data.
-------------------------	---

Object Name	<p>Enter the name that identifies a system object. PeopleSoft EnterpriseOne architecture is object-based. Discrete software objects are the building blocks for all applications, and developers can reuse the objects in multiple applications. The Object Librarian tracks each object. Examples of system objects include:</p> <p>Batch Applications (such as reports)</p> <p>Interactive Applications</p> <p>Business Views</p> <p>Business Functions</p> <p>Business Functions Data Structures</p> <p>Event Rules</p> <p>Media Object Data Structures</p> <p>--- FORM SPECIFIC ---</p>
Primary Data Source	<p>On this form, this is the object that you want to map. To create a default map for all of an object type, enter the literal value DEFAULT into this field, then enter an object type into the Object Type field.</p>
User	<p>The primary data source that you select must be valid for the type of object that you map. For example, you can only map objects of type TBLE and GT to a database data source, and you can only map objects of type BSFN to a logic data source.</p> <p>Enter a profile that you use to classify users into groups for system security purposes. You use group profiles to give the members of a group access to specific programs.</p> <p>Some rules for creating a profile for a user class or group are as follows:</p> <p>The name of the user class or group must begin with an asterisk (*) so that it does not conflict with any system profiles.</p> <p>The User Class/Group field must be blank when you enter a new group profile.</p> <p>--- FORM SPECIFIC ---</p> <p>On this form, you can enter an individual user, a group name, or the literal value *PUBLIC.</p>
Data Source Mode	<p>Indicates whether the primary or secondary data source should be used.</p> <p>Only use the secondary data source for business function (BSFN) data sources.</p>
Allow QBE	<p>Use this flag to SELECT or CLEAR row-level record locking for the data source.</p> <p>You should have this flag turned ON to help prevent database integrity issues.</p> <p>JDEBASE middleware uses this flag to determine whether or not to use row-level record locking.</p>

5. Click OK to save the object mapping.

You can continue to map objects, clicking OK after each mapping. Be sure to click OK to save the latest mapping, and then click Cancel to return to the Work With Object Mappings form.

Note. On the Work With Object Mappings form, NA (inactive) in the Object Status field is verification that the Object Configuration Manager created the map with an inactive status.

6. To activate the map, on the Work With Object Mappings form, select the map and, from the Row menu, select Change Status. AV (active) appears in the Object Status field.

See Also

Chapter 3, “Object Configuration Manager,” Processing Options for Object Configuration Manager (P986110), page 17

Changing the Mappings for an OMW Table

To change the mapping for an Object Librarian table:

1. From the System Administration Tools menu (GH9011), select Object Configuration Manager.
2. On Machine Search and Select, select the machine and data source for the Object Configuration Manager table that you want to work with, and click Select.

The data source resides on the machine. Workstations use the system data source for their mappings. Each enterprise server has its own server map data source.

3. On Work With Object Mappings, select Revise OL DS from the Form menu to add and revise object mappings to data sources.

Note. When you map any of the Object Librarian tables, the software validates the entries to ensure that all environments based on the same path code have their Object Librarian tables mapped to the same data source. The software alerts you with an error message if you map the Object Librarian tables to different data sources.

4. On Revise OL Data Source, complete these fields to define the new mapping for the Object Librarian tables:

Path Code Enter the path code, which is a pointer to a set of objects, and is used to keep track of sets of objects and their locations.

OL Data Source Enter the name that identifies the data source.

5. Click OK to save the revision to the data source mapping.

When you click OK, the software updates the Object Librarian data source mapping for each environment that contains the path code that you entered in the Path Code field.

Updating the Oracle Parameters Table

You must update the Oracle parameters table if you use Oracle and do not follow the recommended naming conventions, or if you add new Oracle data sources.

Forms Used to Update the Oracle Parameters Table

Form Name	Form ID	Navigation	Usage
Oracle Parameters	W9861151A	From the Work With Object Mappings form, select Oracle Params from the Row menu.	Update the Oracle parameters table.

Updating the Oracle Parameters Table

To update the Oracle parameters table:

1. Access Object Configuration Manager.
2. On the Machine Search and Select form, select the machine and data source for the Object Configuration Manager table that you want to work with and click Select.
The data source resides on the machine. Workstations use the system data source for their mappings. Each enterprise server has its own server map data source.
3. On the Work With Object Mappings form, click Find to display object mappings.
4. Select an object and then, from the Row menu, select Oracle Params.
5. On the Work with Oracle Database Object Sizing form, click Find to locate information with which to work.

You can modify the fields on this form to search by release level, data source, and object name. If you are adding new parameters, you do not need to click Find.

You also can access this application from the Data Sources program (P986115).

6. On the Work with Oracle Database Object Sizing form, perform one of these actions:
 - Select a record and click Select.
 - Click Add.

The Oracle Database Object Sizing form appears. On this form, you can revise and add table and index information for a data source or table.

Alternatively, you can display the Revise Table and Data Source Sizing form by choosing Default Database from the Work With Data Sources form's Row menu. When you do so, the *DEFAULT* value is automatically entered at the Object Name field so that default values are used for the form. If you change the object name from *DEFAULT*, the fields that were formerly filled with default values on the form appear.

7. If you are adding new parameters, complete these fields:

Data Source

Enter the name that identifies the data source.

Object Name

To define parameters for all objects in a data source, type *DEFAULT* in this field.

Enter the name that identifies a system object. PeopleSoft EnterpriseOne architecture is object-based. Discrete software objects are the building blocks for all applications, and developers can reuse the objects in multiple applications. The Object Librarian tracks each object. Examples of system objects include:

Batch Applications (such as reports)

Interactive Applications

Business Views

Business Functions

Business Functions Data Structures

Event Rules

Media Object Data Structures

Release

Enter the release number as defined in the Release Master.

8. Depending on whether you select a data source for the DEFAULT map or for a specific object, different fields appear on the Oracle Database Object Sizing form. For the DEFAULT map, you can define only the name of the Oracle space where tables or indexes reside. However, for a specific object you can define parameters such as the amount of space to use for an Oracle table.

For the DEFAULT map, complete these fields:

Table Space Name	Enter the name of an Oracle region of space created to store tables.
Index Space Name	Enter the name of an Oracle region of space created to store indexes.
Index Initial Storage	Enter the amount of Oracle space, in bytes, required to store an index in one initial segment of space, or extent.
Index Next Storage	Enter the amount of Oracle space, in bytes, that will be allocated to an index once the previously used segment of space has been filled.
Index Percent Increase Storage	Enter the Oracle parameter that indicates the number of percentage points that the next extent of Oracle space will grow over the last extent of space that was allocated to an index.
Index Minimum Extent	Enter the Oracle parameter indicating the minimum number of space segments, or extents, that Oracle will allocate to an index.
Index Maximum Extent	Enter the Oracle parameter indicating the maximum number of space segments, or extents, that Oracle can allocate to an index. These values are valid for both the table information and the index information.

9. To enter override information, select Overrides from the Form menu.

This option is also available from the Work With Table and Data Source Sizing form's Row menu.

10. On the Revise Table and Data Source Overrides form, complete or modify these fields:

Copy Data (Y/N)	Use to indicate if a file and its data are copied into production. A value of N moves the file without data during a file copy. When creating a production data library from JDFDATA, this field designates whether the data is included in the copy.
Create Tables(1/0)	Use to denote whether tables are automatically created for this data source. See UDC H96/CR.

11. Click OK to return to the previous form. If necessary, click OK on all subsequent forms until you return to the System Administration Tools menu.

Mapping Generic Text

The Generic Text Language Status table (F001651) has more mapping flexibility than other objects because the data stored in this table has different uses. The generic text categories are as follows:

- Common data that all environments use.

For example, data dictionary glossaries and business function notes are the same across all environments.

- Production data specific to an environment.

For example, inventory item notes and address book supplemental data can be different for a corporation running PeopleSoft EnterpriseOne over multiple environments, such as production, test, and demo data.

To map generic text:

1. Access Object Configuration Manager.
2. In the Object Configuration Manager, use the GT object type to map specific generic text objects.

The following is an example of what the Object Configuration Master table (F986101) looks like after installing PeopleSoft EnterpriseOne if your business follows the typical configuration. This example includes only the PD811 (production) and TS811 (test) environments.

Environment	Object Name	Description	Data Source	Object Type
PD811	F00165	Generic Text Table	Business Data - Prod	TBLE
PD811	GT92002	Data Dictionary Glossary	Data Dictionary	GT
PD811	GT9860A	Object Librarian	Object Librarian	GT
PD811	GT9862A	Business Function Notes	Object Librarian	GT
PD811	GT98DSA	Data Structure Notes-Structure	Object Librarian	GT
PD811	GT98DSB	Data Structure Notes-Structure and Item	Object Librarian	GT
PD811	GT98TMPL	Media Objects Templates	Object Librarian	GT
TS811	F00165	Generic Text Table	Business Data - Test	TBLE
TS811	GT92002	Data Dictionary Glossary	Data Dictionary	GT
TS811	GT9860A	Object Librarian	Object Librarian	GT
TS811	GT9862A	Business Function Notes	Object Librarian	GT
TS811	GT98DSA	Data Structure Notes-Structure	Object Librarian	GT

Environment	Object Name	Description	Data Source	Object Type
TS811	GT98DSB	Data Structure Notes-Structure and Item	Object Librarian	GT
TS811	GT98TMPL	Media Objects Templates	Object Librarian	GT

Running Object Configuration Manager Reports

The Object Configuration Manager provides batch processes that produce reports that help you track your mappings.

Some Object Configuration Manager reports are called when you select that report from the PeopleSoft EnterpriseOne menu. Other Object Configuration Manager reports are called from a report driver job. Although the result is the same, you set processing options and data selection differently for a batch process called from a report driver.

When a report is called by a driver, processing options are set from the report for all reports that are launched from the driver. For example, the R988611A driver calls the Mapping Comparisons, Global Update, OCM Delete, and OCM Copy reports.

Any data selection for a report must be entered for the specific report, not from the driver. When you finish entering processing options and data selection, if any, you can run the report from the driver.

Using the Report Driver for Object Configuration Manager Reports

The following task describes how to use a report driver to set processing options for a data source report. These Object Configuration Manager reports are called by a report driver:

- Object Configuration Mapping Comparison
- Object Configuration Global Update
- Object Configuration Delete
- Object Configuration Copy
- Job Master Deletion By Days Old

All of the reports except Job Master Deletion By Days Old are called from the R98611A report driver. Job Master Deletion By Days Old is called from the R9861101 report driver. Except as noted, the process for setting processing options for these reports is identical, regardless of which report you select.

To set processing options for Object Configuration Manager reports:

1. From the Advanced Operations menu (GH9012), select one of the Object Configuration Manager (P986110) reports called by a report driver.
2. On Work With Batch Versions - Available Versions, select a version and then select Processing Options from the Row menu.

3. If you chose the Job Master Deletion by Days Old report, on the Processing Options form, click the tab for the applicable report.
4. Click OK to save and exit to the Work with Batch Versions - Available Versions form.

Setting Processing Options for Object Configuration Batch Applications (R98611A)

These batch applications have processing options that are entered from the R98611A report driver using the same processing option form:

- Object Configuration Mapping Comparison (R986101)
- Object Configuration Global Update (R986110)
- Object Configuration Delete (R986120)
- Object Configuration Copy (R986121)

The processing options for OCM batch applications enable you specify the data source used when comparing, updating, deleting, or copying data. These processing options enable you set other parameters used by the specific batch application.

Only the processing options for the report you are currently running are used. Processing option fields for other reports are ignored until you run that report.

Driver Tab

Use these processing options to specify which report and version to run.

- | | |
|--|---|
| 1. Object Configuration Manager Report Name | Use this processing option to specify the name of the report that you want to run. Values are:
R986101 - OCM Mapping Comparison
R986110 - OCM Global Update
R986120 - Object Configuration Delete
R986121 - Object Configuration Copy |
| 2. Version | Use this processing option to specify the version of the report that you want to run. |

You must enter report processing options before running the report.

If data selection is necessary, it must be done on the version of the report that you specified on the Driver tab.

R986101 Tab

Use these processing options to specify parameters when running the R986101 report.

- | | |
|---|---|
| 1. Data Source One and 2. Comparison Data Source Two | Use this processing option to specify the names of the data sources that you want to compare. If necessary, you can use the Visual Assist feature to locate valid data sources. Click the Visual Assist button to display the Data Source Search and Select form. |
| 3. Comparison Method | Use this processing option to specify the comparison method used. Values are: |

/ Compare one direction only. Print only the records found in the first data source, but not in the second data source.

Blank: Compare both directions. Print records found in the first data source but not in the second data source, and also the records in the second data source that don't exist in the first data source.

4. Exceptions

Use this processing option to specify whether to print only the report exceptions, or every record from the data selection, noting the differences between the data sources. Values are:

/ Print exceptions only

Blank: Print all records

R986110 Tab

Use these processing options to specify parameters when running the R986110 report.

1. Process Mode

Use this processing option to specify the mode in which the report processes data. Valid options are:

/ Proof Mode. This mode produces a report that enables you to view the records you want to delete, but no records are deleted.

Blank: Final Mode. This mode produces a report of records you want to delete, and then deletes the records.

2. Data Source name

Use this processing option to specify the name of the data source for the Object Manager Configuration table. Any updates that occur as a result of running this report will be made to the Object Manager Configuration table found in the specified data source.

3. Process Control

Use this processing option to specify whether to create new OCM records or change existing ones. Values are:

/ Create new OCM records from existing ones. The records created will look similar to those selected, except that the new OCM values entered in the processing options will be substituted where appropriate.

Blank: Change selected records with new OCM values. Use data selection to specify which records will be changed with the new OCM values entered into the processing options.

4. Enter the new OCM values:

Use this processing option to enter new OCM values. If you are creating new OCM records from existing ones, any values you enter for this processing option will replace the existing ones. Values are:

Environment Name

Object Name

Primary Data Source

User

Object Type

Data Source Mode

Secondary Data Source

Allow QBE

R986120 Tab

Use these processing options to specify parameters when running the R986120 report.

- 1. Process Mode**

Use this processing option to specify the mode in which the report processes data. Valid options are:

/ Proof Mode. This mode produces a report that enables you to view the records you want to delete, but no records are deleted.

Blank: Final Mode. This mode produces a report of records you want to delete, and then deletes the records.
- 2. Enter Data Source name**

Use this processing option to specify the name of the data source for the Object Manager Configuration table. Any updates that occur as a result of running this report will be made to the Object Manager Configuration table found in the specified data source.
- 3. Object Copy**

Use this processing option to specify whether to run the Object Configuration Copy report (R986121) along with the Object Configuration Delete report. Values are:

/ Run the Object Copy (R986121). Creates a copy before deleting records. When you run the Object Copy, remember to enter the processing options under the R986121 tab, and to set up any data selection. Data Selection should be defined on the same version of R986121 that you specified for R986121 (Object Configuration Delete).

Blank: Do not run Object Copy. Deletes the records without first creating a copy.

R986121 Tab

Use these processing options to specify parameters when running the R986121 report.

- 1. Process Mode**

Use this processing option to specify the mode in which the report processes data. Valid options are:

/ Proof Mode. This mode produces a report that enables you to view the records you want to delete, but no records are deleted.

Blank: Final Mode. This mode produces a report of records you want to delete, and then deletes the records.
- 2. From Data Source**

Use this processing option to specify the name of the data source with the Object Configuration Manager table from which you want to copy records.
- 3. Target Data Source**

Use this processing option to specify the name of the data source with the Object Configuration Manager table to which you want to copy.

Using the Object Configuration Mapping Comparison Report

Run the Object Configuration Comparison report to compare Object Configuration Master tables (F986101) from two different data sources and display the differences between them. For example, you might compare the F986101 table in the system data source to the F986101 table for a given server map data source.

Prerequisite

Set processing options for the report from the report driver, not from the actual report.

Setting Data Selection for the Mapping Comparison Report

The data selection for the mapping comparison report

To set up data selection for the Mapping Comparison report:

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, enter *R986101* in the Batch Application field, and then click Find.
3. Double-click the version you specified on the Driver processing option tab.
4. On Version Prompting, select the Data Selection option and click Submit.
5. On the Data Selection form, select the appropriate columns to specify the exact records you want to compare.
6. Click OK.

Running the Object Configuration Mapping Comparison Report

To run the Object Configuration Mapping Comparison report:

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, select the version that corresponds to the report that you want to run.
3. Click Select.
4. On Version Prompting, click Submit to run the report.

Running the Object Configuration Global Update Report

This process performs global updates and global copies of object mappings in the same Object Configuration Master table (F986101). You can use this batch application rather than the interactive application (P986110). This application is useful in updating and copying multiple records.

Prerequisite

Set processing options for the report from the report driver, not from the actual report.

Setting Data Selection for the Global Update Report

The data selection for the global update report is set by:

To set up data selection for the Global Update report:

1. Access Batch Versions.

2. On Work With Batch Versions - Available Versions, enter *R986110* in the Batch Application field, and then click Find.
3. Double-click the version you specified on the Driver processing option tab.
4. On Version Prompting, select the Data Selection option and then click Submit.
5. On the Data Selection form, select from appropriate columns to specify the exact records you want to update or copy.
6. Click OK.

Running the Object Configuration Global Update Report

Run the object configuration global update report by:

To run the Object Configuration Global Update report:

1. From the Advanced Operations menu (GH9012), select OCM Category Update/Delete.
2. On the Work With Batch Versions - Available Versions form, click Find and then select the version that corresponds to the report that you want to run.
3. Click Select.
4. On Version Prompting, click Submit to run the report.
5. On Processing Options, verify the processing options and click OK.

You might receive these messages when you run this report:

- Duplicate Key - Update/Copy not done
You cannot update a record or create a new record using the key of an existing record.
- Active DEFAULT *Public records cannot be updated
You cannot update the DEFAULT records of the *PUBLIC role.

Running the Object Configuration Delete Report

This batch process deletes specific Object Configuration Manager records from one data source.

Prerequisite

Set processing options for the report from the report driver, not from the actual report.

Setting Data Selection for the Object Configuration Delete Report

To set up data selection for the Object Configuration Delete report:

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, enter *R986120* in the Batch Application field, and then click Find.
3. Double-click the version you specified on the Driver processing option tab.
4. On Version Prompting, select the Data Selection option and then click Submit.

5. On the Data Selection form, select the appropriate columns to specify the exact records you want to delete.
6. Click OK.

Running the Object Configuration Delete Report

To run the Object Configuration Delete report:

1. From the Advanced Operations menu (GH9012), select OCM Category Update/Delete.
2. On the Work With Batch Versions - Available Versions form, click Find and then select the version that corresponds to the report that you want to run.
3. Click Select.
4. On Version Prompting, click Submit to run the report.

Running the Object Configuration Copy Report

This process copies Object Configuration Manager records from one data source to another and automatically deletes any duplicate records. For example, if you create a new environment by copying an existing one, Object Configuration Manager records are created for the new environment in the system data source.

You use the Object Configuration Copy batch process to copy those records to the appropriate server map data source. After copying the records, use the Object Configuration Global Update program (R986110) to change, at the minimum, any mappings for LOCAL to the appropriate server location.

Prerequisite

Enter processing options for the report from the report driver, not from the actual report.

Running the Verify OCM Report

The Verify OCM report (R9861130) is a useful troubleshooting tool that can help you verify that:

- All Data Source Master definitions have Object Configuration Manager mappings
- Object Configuration Manager mappings are consistent for a given user, have data source definitions, and are not duplicated
- Appropriate specification files exist on a specific server
- Business function DLLs exist on a specific server

Run this report to verify the previous items for a workstation or a server. The machine on which you run this report determines which set of Object Configuration Manager and Data Source Master tables will be verified. Consequently, you should run this report on your local machine and on each server that runs PeopleSoft EnterpriseOne. You can also run this report on the deployment server.

To run the Verify OCM report:

1. From the Advanced Operations menu (GH9012), select Verify OCM.
2. On Work With Batch Versions - Available Versions, select a version and then click Select.
3. On the Version Prompting form, click Data Selection and then click Submit.

4. On the Processing Options form, complete the fields.

Processing options are divided into categories so that you can select the type of validation that you want. The first two options pertain to extraneous data source validation, and the remaining options pertain to object configuration mapping validations.

Leave an option blank if you do not want the software to run that validation.

The fields on the Processing Options form enable you to:

- Verify data source master definitions. Enter 1 to enable the software to verify that all of the Data Source Master (F98611) definitions have Object Configuration Manager mappings.
- Enter the name of the environment that you want to verify. You also can enter *ALL to verify all of the environments. This environment will be used for all of the following verifications.
- Enter the user ID of the individual or role (including *PUBLIC) for which you want to verify the object mappings. You also can enter *ALL or leave this field blank to verify all of the users. If you enter a user ID, the report also prints the *PUBLIC records.
- Specify whether to verify active or inactive mappings. Enter 1 to verify that all of the active Object Configuration Manager mappings for the user and environment that you entered have data source definitions in the Data Source Master table (F98611). Enter 2 to verify both active and inactive mappings.
- Check for duplicate records. Enter 1 to verify that no duplicate Object Configuration Manager mappings exist for the user and environment that you entered. This option verifies only duplication for active mappings.
- Check for consolidated DLL names. Enter 1 to verify that a consolidated DLL name exists for each business function on a specific server, and that the DLL name is valid.
- Verify specification files. Enter 1 to verify that all specification files required to run the software exist for the path code. This option applies only when running against a server.

Processing Options for Verify OCM (R9861130)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Data Source Tab

Use these processing options to specify whether to perform data source validation for data source master definitions, and to specify an environment.

- | | |
|--------------------------------|--|
| 1. Data Source Mappings | Use this processing option to specify whether to perform data source validation for data source master definitions. Values are:

Blank: Do not verify data source definitions.
1 Verify that each data source has at least one OCM mapping defined. |
|--------------------------------|--|

- 2. Environment Validation** Use this processing option to specify the environments for which you want to run the validations. Values are:
- *All Run the validations for all environments.
 - Specific environment name: Validate only that environment.

Parent DLL Tab

Use this processing option to specify whether each business function has a parent DLL assigned.

- 1. Business Function Parent DLL** Use this processing option to specify whether each business function has a parent DLL assigned. Values are:
- Blank: No verification is done.
 - / Verify that each business function has a parent DLL assigned. Also, verify that the DLL name is valid.

Specifications Tab

Use this processing option to verify that all required specifications exist for the pathcode.

- 1. Validate Server Specifications** Use this processing option to verify that all specifications required to run PeopleSoft EnterpriseOne exist for the pathcode. This processing option applies only when running against a server. Values are:
- Blank: Do not verify specifications
 - /: Verify whether the required specifications exist

OCM Tab

Use these processing options to specify OCM parameters.

- 1. User ID to Validate** Use this processing option to specify the user ID for which the OCM validations should be run. Values are:
- Blank: Run the validations for all users.
 - *ALL Run the validations for all users.
 - *PUBLIC Run the validations for only *PUBLIC.
 - A specific User ID. (Performs validations for only that user.)
- 2. OCM Mappings** Use this processing option to indicate whether to validate OCM mappings. Values are:
- Blank: Do not validate OCM mappings.
 - / Validate all active OCM mappings.
 - 2 Validate both the active and inactive OCM mappings.
- 3. Duplicate OCM Mappings** Use this processing option to specify whether OCM records should be checked for duplicates. Values are:
- Blank: Do not check for duplicates.
 - / Verify that the active OCM mapping records have no duplicates.

Performing the Object Configuration System Table Update

This program (R986101A) adds active Object Configuration Manager (OCM) records for a specified table, user ID, and data source for all environments listed in the Environment Detail table (F00941). You can use data selection to filter the environments to which this process adds OCM records.

Running the Object Configuration System Table Update

To run Object Configuration System Table Update:

1. From the Advanced Operations menu (GH9012), select Object Configuration System Table Update.
2. On Work With Batch Versions - Available Versions, click Find and then select XJDE0001 and click Select.
3. On the Versions Prompting form, click Data Selection and then click Submit.
4. On Data Selection, determine which records to update and then click OK.
5. On the Processing Options form, enter this information:
 - The table name for which to create mappings
 - The data source to which the table should be mapped
 - The user ID for whom to map the records

The value *PUBLIC maps the records for all users. You also can map by role.

 - Proof or final mode

If left blank, the application runs in proof mode. Run this process in proof mode first to test whether the current values create a successful result. Enter 1 for final mode.
6. Click OK.

Processing Options for Create System Table Mappings (R986101A)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process Tab

These processing options enable you to specify the table name, data source, and user ID to use in creating an OCM mapping. You can also specify whether to run the report in proof or final mode.

- | | |
|---------------------------------------|---|
| 1. Enter a specific Table Name | Use this processing option to define which mailbox a message is sent to.
Values are:

Blank: The field will be not visible when creating a new message |
|---------------------------------------|---|

- / The field will be visible when creating a new message*
- 2. Enter a specific Data Source** Use this processing option to specify the data source you want to map to each environment. The data source, along with the values you specify for the Table Name and User ID processing options, is used to create a whole OCM Mapping.
 - 3. Enter a specific User ID** Use this processing option to identify the user ID that is mapped to each environment. The user ID, along with the values you specify for the Table Name and Data Source processing options, is used to create an OCM mapping.
 - 4. Proof / Final Mode** Use this processing option to indicate whether records are changed or not changed when the batch application is run. Values are:
Blank: Proof mode
/ Final mode

Creating OCM Records for Business Functions

This batch process (R986140) reads the Object Librarian tables for server business functions, and then creates Object Configuration Manager records for those business functions in the target data source that you specify in processing options. Processing options also enable you to specify the source data source and environment to use when creating these Object Configuration Manager records.

Running the Create Server Business Function OCM Records Report

To run Create Server Business Function for OCM Records:

1. From the Advanced Operations menu (GH9012), select Create OCM Records for Business Functions.
2. On the Work With Batch Versions - Available Versions form, select XJDE0001 and then click Select.
3. On the Versions Prompting form, click Data Selection and then click Submit.
4. On Data Selection, specify which records to create and then click OK.
5. On the Processing Options form, enter this information:
 - Specify proof or final mode.
When you enter 1, the report runs in Final mode, which means that the report will be printed and reports will be updated. When you enter 0 or leave this field blank, the report runs in Proof mode, which means that the report will be printed but not updated.
 - The machine data source that corresponds to the server you wish to run the business function on.
 - The environment you wish to use realtime events on.
 - The system data source that the client-to-server machines use.

Running the Job Master Deletion by Days Old Report

This batch application lets you produce a report listing obsolete print jobs submitted to servers. You have the option of generating the report only, or generating the report and then deleting obsolete records from the Job Control Status Master table (F986110).

This batch application is launched by a report driver. Enter any data selection from the batch application, but enter processing options from the report driver (R9861101), not from the actual application (R9861102).

Setting up Data Selection for Job Master Deletion

To set up data selection for Job Master Deletion:

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, enter *R9861102* in the Batch Application field and then click Find.
3. Double-click one of these versions:
 - XJDE0001 = Jobs With All Status
 - XJDE0002 = Jobs With Done Status
 - XJDE0003 = Jobs With Error Status
 - XJDE0004 = Jobs With Wait Status
4. On Version Prompting, select the Data Selection option and click Submit.
5. On the Data Selection form, select the appropriate columns to specify the exact records you want to compare.
6. Click OK.

Running the Job Master Deletion by Days Old Report

The job master deletion by days old report can be run by:

To run Job Master Deletion by Days Old:

1. From the Advanced Operations menu (GH9012), select Job Master Deletion by Days Old.
2. On Work With Batch Versions - Available Versions, click Find and then select the version that corresponds to the report that you want to run.
3. Click Select.
4. On Version Prompting, click Submit.
5. On the Processing Options form, enter this information and then click OK:
 - Data Source (Defaults Tab)
 - Days Old (Defaults Tab)
 - Control Mode (Defaults Tab)
 - Job Control Status UBE (Versions Tab)

Running the OCM Category Update/Delete Report

This batch application (R986101B) lets you add or delete member objects of a specified category from the Object Configuration Master table (F986101). You can add or delete OCM mappings for all members in the same category rather than adding or deleting them individually. The processing options for this batch application enable you to specify whether to add or delete mappings, as well as the appropriate path code, environment, and data source to use.

To run OCM Category Update/Delete:

1. From the Advanced Operations menu (GH9012), select OCM Add/Update/Delete.
2. On Work With Batch Versions - Available Versions, select *XJDE0001* and then click Select.
3. On Version Prompting, click Data Selection and then click Submit.
4. On Data Selection, specify which records to add or delete, and then click OK.
5. On the Processing Options form, click the OCM Modes tab and enter this information:

Proof or Final Mode	Enter 1 to run the report in Proof mode. The report will print and the Object Configuration Manager table will not be updated. Enter 2 to run the program in Final mode. The report will print and the Object Configuration Manager table will be updated.
----------------------------	--

Add or Delete Mode	Enter 1 to add OCM mappings for objects in the category or 2 to delete mappings.
---------------------------	--

Override Mapping	Enter 1 to delete OCM mappings for objects that already have mappings for the environment and user. Enter 2 or leave this field blank to deactivate but not delete mappings for conflicting OCM records.
-------------------------	--

6. Click the OCM Settings tab and enter this information:

Path Code to use when adding or deleting OCM mappings	When you enter a path code, mappings are added or deleted for all environments with the path code you enter. You do not need to enter a path code if you entered an environment name in the Environments processing option. If this field is blank, OCM mappings will be added or deleted regardless of the path code.
--	--

Environment to use when adding or deleting OCM mappings	If this field is blank, OCM mappings are added or deleted regardless of the environment. If you entered a path code in the Path Code processing option, that path code is used. If both the Environments and Path Code processing option fields are blank, OCM mappings will be added or deleted for all environments in the Environment Detail table (F00941).
--	---

User Class/Role	If you are deleting OCM mappings and this field is blank, all OCM records will be deleted regardless of the user class or role. If you are adding OCM mappings, you must enter a value in this field.
------------------------	---

Data Source	If you are deleting OCM mappings and this field is blank, all OCM records will be deleted regardless of the data source. If you are adding OCM mappings, you must enter a value in this field.
--------------------	--

Partitioning Application Logic on Servers

The logic for PeopleSoft EnterpriseOne applications can be partitioned to run remotely by mapping individual or specified groups of business function components to run on an application server or enterprise server instead of on a workstation.

It has been found that redeploying certain business function components (including master business functions and business functions) can significantly increase the performance of a distributed PeopleSoft EnterpriseOne workstation while simultaneously decreasing network traffic. This redeployment involves remapping objects using the PeopleSoft EnterpriseOne standard Object Configuration Manager methodology.

Examples of such configurations are illustrated by the Windows light client/heavy server and the Java light client/heavy server models. Both models have applications specifications on the client and business function components on the server. The main difference is that the Windows model uses JDENet communication middleware, while the Java model uses JDENet/CORBA middleware.

While the software design enables you to partition all business function components, the biggest benefit is derived from partitioning Master Business Functions (MBFs).

PeopleSoft EnterpriseOne transaction-oriented applications are built around the concept of MBFs, which are typically responsible for transaction edits and for committing transactions to the database. Most of the I/O services for transaction-oriented applications are performed by MBFs. By localizing the majority of business logic for transactions in MBFs and partitioning the MBFs to run on application servers, network traffic can be minimized, thus dramatically improving the performance of the application in distributed and WAN environments.

In a two-tier setup where MBFs are processed on the client, a lot of interaction occurs across the WAN between client and server. In a three-tier setup consisting of a client, a data server, and an application or enterprise server, transaction processing can occur across a LAN between the two servers. Interaction across the WAN between the client and server is thus reduced to entering input on the client and sending back results from the server. This three-tier configuration can result in a significant reduction in traffic across the WAN.

The following contrasts typical network traffic for a two-tier setup where MBFs are processed on the client versus network traffic segmentation for a three-tier setup where MBFs are processed on the server.

Two-Tier: Typical Network Traffic

In a two-tier configuration, the GUI, event rules, and MBFs are typically handled by the client, and data is stored on the server. Typically, the following processing occurs across the WAN between client and server:

- Fetch Record (client to server)
- Return Record (server to client)
- Validate Data Format (client to server)
- Format OK (server to client)
- Send Record Detail (client to server)
- Detail OK (server to client)
- End Transaction (client to server)

Three-Tier: Network Traffic Segmentation

In a three-tier configuration, the GUI and event rules are handled by the client, but an application server or enterprise server handles MBF processing. The database server stores data. This processing occurs across the WAN between client and application or enterprise server:

- Input Processing Request or Data (client to server)
- Return Processing Results (server to client)

This processing occurs locally across the LAN between the application or enterprise server and the database server:

- Fetch Record
- Return Record
- Validate Data Format
- Format OK
- Send Record Detail
- Detail OK
- End Transaction

How a Master Business Function Operates

This series of events demonstrates how a typical application uses a Master Business Function (MBF). This example uses the Sales Order Entry application.

- End of Sales Order Line

The first event occurs when the end of a sales order line is reached, causing the PeopleSoft EnterpriseOne client application to call the `jdeCallObject` API. This command sends a message to the MBF. Included with the message is data (in the form of a data structure) for the line. The application sends the message asynchronously with its associated data; that is, once the message is sent, the client application proceeds to the next line.

- MBF Receives Line Message

This event occurs when the MBF receives the JDENet message that includes the data for the line. The line data is cached in the server's shared memory.

- MBF Extends and Edits the Line

This event occurs when the MBF extends and edits the sales order line. The data necessary to extend and edit the line is typically accessed locally on a LAN. The data is requested by a database-dependent SQL call and is transported by the applicable Open Database Connectivity (ODBC) or Oracle Call Level Interface (OCI) mechanisms.

- MBF Sends a Return Message to the Client Application

This event, the fourth event, occurs after the MBF extends and edits the sales order line and returns the extended line, as well as any error codes, to the client. The return message is sent using JDENet. Events 1 through 4 are then repeated asynchronously for all of the lines associated with the sales order.

- End of Sales Order (OK Button)

This event indicates that the user has completed all sales order lines. The user triggers this event by clicking OK after all edited lines have been returned to the client. When the user clicks OK, an end of transaction message is sent to the MBF. The client is immediately released to enter the next transaction.

- MBF Processes the Full Transaction

The full transaction is processed when the MBF asynchronously reads the shared memory cache (where all transaction lines are stored) and begins the process of committing the transaction to the database.

- Transaction Commitment to the Database and MBF Cleanup

The MBF commits the entire transaction to the database, typically locally through ODBC and OCI, and cleans up the shared memory cache for the completed transaction.

Mapping the MBF to run on the server causes the bulk of the database and logic interaction to occur within a single server machine (enterprise server) or between LAN-attached machines (application server and data server). Thus the transaction has been processed with a minimum of network traffic. This type of application transaction is ideally suited for performance gains in distributed and WAN environments.

See Also

Chapter 5, “Using Environment Director,” page 53

Server Behavior with Partitioned Application Logic

Compared to a typical heavy-client scenario, partitioning application logic by configuring business function components (such as Master Business Functions and other business functions) to run on the server requires the server to run more processes and to manage additional user sessions. To control the server’s behavior under this increased workload, important `jde.ini` parameters must be set.

Example: Processing Rule 1 - JDENet on Client

On the client, the JDENet functions reside in a dynamic-link library (DLL) called `jdenet.dll`. These functions are called by the PeopleSoft EnterpriseOne Explorer program (`Oexplore.exe`). That is, they are not run as a separate process or service; they are run from within the `Oexplore.exe` process.

When clients first initiate a communication session with an PeopleSoft EnterpriseOne server (as defined by the Object Configuration Manager), they are assigned to communicate with a specific JDENet process on that server. This assignment persists for the entire session. That is, the same logical connection is maintained for as long as the user is logged on.

Example: Processing Rule 2 - JDENet on the Server

You can configure multiple JDENet processes to run on a server. Parameters in the server’s `jde.ini` file specify how many JDENet processes can be started on the server, as well as the total number of network connections that can occur to and from that server.

If you specify multiple JDENet processes, the software starts the processes as required on a one-for-one basis with incoming session requests until the maximum number of JDENet processes is started. Then, the software sequentially assigns subsequent sessions to JDENet processes. Within each JDENet process, messages are queued and processed one at a time. For example:

```
Session 1: JDENET_1
Session 2: JDENET_2
Session 3: JDENET_3
Session 4: JDENET_1
Session 5: JDENET_2
Session 6: JDENET_3
```

The preceding example is based on the characteristics listed in this table:

Characteristic	Value	jde.ini Parameter
Number of JDENet processes	3	[JDENet] maxNetProcesses=3
Number of connections per server	nnn	This is a site-specific variable number. Typically, the setting should be a value large enough to accommodate the practical maximum for the installation. For example: [JDENet] maxNetConnections=800
Number of incoming sessions	6	N/A

Example: Processing Rule 3 - Kernels on the Server

To handle different functions, the PeopleSoft EnterpriseOne architecture enables for different types of kernel processes to run on the server. The kernel type that processes distributed objects through the jdeCallObject API is a Type 2 kernel. A parameter in the server's jde.ini file specifies how many individual kernels of a specific kernel type can be started.

The total number of active sessions that might connect to a kernel cannot be directly controlled. That is, the software dynamically allocates sessions to applicable kernel types on an as-available basis. However, you can indirectly control the number of users per kernel by specifying a sufficient number of kernels in the desired relationship based on the number of connections (client-to-server and server-to-server). For example, you can specify enough kernels to have one user for each kernel, or two users for each kernel, and so on.

In determining the number of required kernels, remember that each kernel process consumes server memory resources. The exact amount of memory consumed is not as important a consideration as the performance aspect. Consider how many users (or MBFs) can use a single kernel simultaneously before performance begins to degrade significantly.

Kernel processes are started in a manner similar to the JDENet network communication sessions. For each kernel type, the software starts a new kernel for each new session until the maximum number of kernels allowed is started. After the maximum is reached, the software assigns sessions sequentially to a specific kernel process.

Each Type 2 kernel queues and processes a single jdeCallObject API request at a time. If multiple sessions are assigned to a single kernel, when the jdeCallObject routine completes it takes the next request off the queue for that kernel type.

Care must be taken when configuring the jde.ini file for the server. Using this kernel-balancing methodology, there is no way to distribute the jobs being executed based on the nature of those jobs. As illustrated in the following example, this can result in Kernel_2 being loaded with heavy Sales Order Entry Processing while the other kernel, Kernel_1, is idling with less process-intense functions. This insight into load balancing may be used to your advantage when considering hardware tiers. For example:

```

Session 1: JDENET_1, Kernel_1
Session 2: JDENET_2, Kernel_2
Session 3: JDENET_3, Kernel_1
Session 4: JDENET_1, Kernel_2
Session 5: JDENET_2, Kernel_1
Session 6: JDENET_3, Kernel_2

```

The preceding example is based on the characteristics listed in this table:

Characteristic	Value	Jde.ini Parameter
Number of JDENet processes	3	[JDENet] maxNetProcesses=3
Number of incoming sessions	6	N/A
Number of Type 2 kernels	2	[JDENet_KERNEL_DEF2] maxNumberOfProcesses=2
Number of sessions requesting Type 2 kernel	6	N/A

When Not to Distribute Logic

Do not distribute logic in these scenarios:

- When a business function mapped to the server creates cache that is required by another business function invoked from the calling application, those business functions must also be mapped to the same logic server as the business function creating the cache.
- When client-only business functions contain GUI or Windows functions that are only valid on a Windows NT workstation, master business functions distributed to a logic server might not call a business function that can only execute on a client.

Note. When a master business function is mapped to a logic server, the server looks to its own server map data source to determine OCM tables for processing. For example, if a master business function is mapped to a logic server, then any logic called by that master business function will be called based on the server map data source in the OCM.

Issues with Distributed Logic

These issues exist concerning distributed logic:

- Batch control functionality might cause problems with distributed logic. When closing a transaction application, the batch control business function presents an additional form for review. No problem exists if the application calls the batch control business function directly. However, the call will fail if the mapped master business function calls the batch control business function because GUI presentations cannot be performed from the server. For example, the Purchasing and Inventory applications cannot use batch control if logic is mapped to the server.
- When implementing localization and custom logic, you must avoid mapping logic that contains GUI or windows functionality.

Troubleshooting Business Function Processing Problems

The PeopleSoft EnterpriseOne configurable network computing solution enables developers and administrators to map business functions to one or more application servers for logic processing. When a problem occurs on the server, the software attempts to reconnect to the application server so that the business function can run. If the software can reconnect to the server and run the business function, work proceeds uninterrupted.

However, these circumstances can complicate business function processing:

- The client workstation cannot reconnect to the application server because a server process has died.
- Business function processing creates cache, or state information, on the application server whose process has died.
- The business function causes one or more processes to die on the server.
- The client workstation cannot reconnect to the application server because the server machine has gone down and the server machine is part of a server cluster.

When the client workstation cannot communicate with the server, the software redirects business function processing to a secondary server. A list in the CallObject code designates the name of the original server and the name of the secondary server to which future calls should be rerouted.

Note. The default configuration is that no secondary server is defined during the PeopleSoft EnterpriseOne installation process. Defining a server will require changes to the OCM mappings. If you do not define a secondary server and failover occurs, the software remaps business function processing from the failed server to the client workstation.

When business function processing creates cache on the application server where a process has died, the client workstation reconnects to the application server, but the user must exit the application and restart it.

When a business function causes one or more processes to die on the server, the client workstation reconnects to the server. Because the business function is causing the jdenet_k process to die, PeopleSoft EnterpriseOne fails the business function call.

When the client workstation cannot communicate with a server in a server cluster, the software recognizes that the server is part of a cluster and continues to try to reconnect. The transfer of control from one server in a cluster to another server in a cluster can take several minutes.

The PeopleSoft EnterpriseOne configurable network computing solution provides a methodology that handles business function failure and enables you to continue working, even when a server has failed or a kernel process has died, ending the processing of logic on an application server. In addition, the software writes a message to the jde.log whenever a failover occurs, enabling you to troubleshoot the problem.

Failure to Connect to the Server

The mechanism by which a business function fails to connect to a server depends on how the server is configured in the network. Failures for these two types of configurations are discussed in this section:

- Failure to connect to a server in a non-clustered server configuration
- Failure to connect to a server in a clustered configuration

Failure to Connect to the Server in a Non-Clustered Server Configuration

In a non-clustered server configuration, the software redirects business function processing if it cannot connect to the primary server. These steps describe what occurs during the initial stages of an attempt to call a business function to run on an application server:

1. The user calls a business function on a server.
2. The software checks to see if the server has been failed over from the primary server to a secondary server or to the client workstation.
3. If processing has been directed to another server, the software remaps the business function and sends the CallObject message to the secondary server or to the client workstation to run the business function.

4. If the server has not been failed over, the software sends the CallObject message to the original server to run the business function.

In the second phase of business function processing, the software attempts to run the logic on the application server or client workstation. These steps describe what occurs during the second stage of processing:

1. If the business function runs without error, either on the original server or the failover alternative, the request has been processed.
2. If the client workstation request is not successfully processed by the server, the software increments a reconnect counter and attempts one reconnection.
3. If the value on the reconnect counter is greater than 1, the business function fails. If the value on the reconnect counter is not greater than 1, the software reconnects to the server and attempts to run the business function.
4. If the client is unable to reconnect to the server, the request is redirected to a secondary server if one is defined, or to the client workstation if one is not defined.

If cache has been created on the server, the user must exit the application and restart it.

Failure to Connect to a Server in a Clustered Configuration

If a business function fails because of a server failure in a clustered configuration, rather than failing over to a secondary server or the client workstation, the client will wait until a new machine in the cluster is available then resubmit the business function request. While trying to reconnect, the software displays a transient window: This window refreshes once a minute and continues to display until the client is able to successfully reconnect to the clustered server.

If the business function cache was created on the first server before it went down, the software will not submit the business function request to the server cluster. In this case, you must exit the application and then resubmit the business function.

Failure to Load the Business Function

When a client workstation requests to run a business function on a server, the server must successfully load the business function before it can run. This process can fail for these two reasons:

- Server cannot load the library where the business function resides.
- Server cannot get the address of the business function.

Server Cannot Load the Library Where the Business Function Resides

When the server cannot load the business function library, the software displays this message on the client workstation and writes the text of the message to the jde.log file on that machine:

```
The Business Function Library xxxx could not be loaded on
server yyyy. Because of the unknown cache-state on the server, you must
exit this application all the way to the menu. Please notify your
PeopleSoft System Administrator to have the problem corrected before
attempting to run the Business Function zzzz again.
```

Probable reasons that the library failed to load are that:

- The business function library failed to build during the package build process.
- The library was inadvertently deleted or renamed.
- A problem exists with permissions.

If the library fails to load, close the application until you get to the menu, and contact your system administrator. Ensure that the problem is corrected before you attempt to re-run the business function.

Server Cannot Get the Address of the Business Function

When the server cannot get the address of the business function within the library, the software displays this message on the client workstation and writes the text of the message to the jde.log file on that machine:

```
The Business Function xxxx was not found in the Business Function
Library yyyy on server zzzz. Because of the unknown cache-state on the
server, you must exit this application all the way to the menu. Please
notify your PeopleSoft System Administrator to have the problem corrected
before attempting to run this Business Function again.
```

Probable reasons that the server cannot get the address of the business function are that:

- The package build process failed to create the module that contains the business function; therefore, the module was not included in the business function library.
- The client has a newer package than the server, and the business function exists on the client but not on the server.

If this error occurs, close the application until you get to the menu and contact your system administrator. Ensure that the problem is corrected before you attempt to re-run the business function.

Failure While the Business Function is Running

The business function itself can cause one or more processes to die on the server. In this case, the software displays a dialog box indicating that the business function is causing problems.

You might have to change OCM mappings or fix a bug in the business function if this dialog box appears.

Resetting the Server Cache

If the business function does not run the first time, the software checks to see if cache was created on the server during the first failed attempt. If no cache is created and the reconnection attempt to the primary server fails, the software attempts to run the business function on the secondary server or the client workstation.

If cache is created on the server, the software instructs the user to close the application and start over. This message is also written to the client jde.log file.

The creation of cache on the server is vital to the processing of business functions. The software creates cache when one business function runs so that one or more subsequent functions can use the data in the cache. For example, one business function might create and initialize the cache, a second might add data to it, and a third might access the data and insert it into a database.

If a process on the server dies after the first business function creates the cache and the client workstation is unable to communicate with the process on the server that contains the cache, the subsequent business functions are not able to access the original cache. Therefore, in this scenario, the software forces you to close the application and start over.

Note. UBEs and table conversions continue to process business functions after a failure, even if they create cache on the server.

CHAPTER 4

Environment Setup

This chapter provides an overview of environments and environment definitions and discusses how to work with environments.

Understanding Environments

PeopleSoft EnterpriseOne environments, which you define, are collections of pointers indicating the location of data and objects. An environment definition contains a path code and a set of Object Configuration Manager mappings.

An environment consists of Object Configuration Manager mappings and a path code. The Object Configuration Manager mappings for an environment answer these questions:

- Where are my logic objects processed?
- Where do my data objects reside?

The path code associated with an environment answers the question in what directory are the objects located?

PeopleSoft EnterpriseOne has these types of environments:

- Distributed data and distributed logic environments

Distributed data and logic environments determine where data resides and where application processing occurs.

- Mode of processing environments

Mode of processing environments support the three types of transactions: store and forward, direct connect, and batch of one.

- Group of object environments

Group of object environments control which set of objects is used, such as production, development, or pristine.

Understanding PeopleSoft EnterpriseOne Environment Definitions

Environment definitions are stored in these five tables:

- Library List Control (F0093)
- Library List Master File (F0094)

- Environment Detail (F00941)
- Object Configuration Master (F986101)
- Object Path Master File (F00942)

Library List Control Table (F0093)

The Library List Control table (F0093) contains valid environments for each user. You must assign to each user at least one valid environment for logging on to PeopleSoft EnterpriseOne. The environments you assign to each user in the Library List Control table are validated at startup against the PeopleSoft EnterpriseOne directories on the workstation. Only those environments for which a user is authorized and that are installed on the machine they log on to are listed as available environments.

The Environment Revisions form of the User Profile application enables you to specify which users are authorized for specific environments.

Library List Master File Table (F0094)

The Library List Master File table (F0094) contains the name of the environment and the description.

Environment Detail Table (F00941)

This table contains the environment name and the associated path code from the Object Path Master File table (F00942).

Every environment must have an associated path code, but environments can share the same path code. For example, two environments can use production objects and have different data location mappings, such as in the case of a group of users processing against data on a corporate server and a group of users processing against data on a departmental server.

Object Configuration Master Table (F986101)

The Object Configuration Master table (F986101) has data and logic object mappings for every environment. Every environment must have entries in the Object Configuration Master table, even if the mappings for the environments are identical. Two environments might have different path codes but have the same mappings for data and logic. For example, developers and testers could have different sets of objects, but their data is in the same database and their logic processes locally.

The Object Path Master File Table (F00942)

This table stores the location of the path code's central objects, the release associated with this path code, and other details.

Working with an Environment

You can create a new environment either by adding a new environment or by copying an existing environment. The custom environments functionality in Installation Planner and Environment Director applications simplify this process.

Because the Object Configuration Manager (OCM) mappings are an important element of the environment, determining these mappings is the first step in deciding whether to create a new environment or copy an existing environment.

When you copy an environment, the OCM mappings for that environment are copied along with the environment. It is sensible to create a new environment by copying an existing environment when the OCM mappings for the environment you want to create closely match the mappings of an existing environment. For example, if a development environment and a test environment contain similar mappings, it might be easier to copy an environment and change the mappings that are different.

You should add a new environment rather than copying an existing environment when you do not want to use another environment's object mappings. For example, if you are setting up store-and-forward processing, consider adding a new environment because the OCM mappings for the store-and-forward users are different from the OCM mappings for the direct connect users.

Note. Remember that when you add an environment without copying an existing one, you must create the OCM mappings manually. For this reason, it is typically easier to create a new environment by copying an existing one and adjusting the OCM mappings instead of creating all of them manually.

Forms Used to Work With an Environment

Form Name	Form ID	Navigation	Usage
Work With Environments	W0094E	From the Environment menu, select Environment Master (P0094)	Add or copy new environments.

Adding an Environment

Add a new environment rather than copying an existing environment when you do not want to use the OCM mappings of another environment.

To add an environment:

1. On Work With Environments, click Add.

If the Display Only PeopleSoft Environments option is checked, this form displays only those environments that have an entry in the Environment Detail table (F00941).

2. On the Environment Revisions form, complete these fields, and then click OK:

- Environment Name
- Description
- Path Code
- Release
- Just In Time Installation
- Developer (Y/N)

A new environment will be added to the Library List Master File table (F0094). For that new environment, a record is created in the Environmental Detail table (F00941).

3. Click these options:

- WAN Configured Environment

- Detached Mode

If the path code you entered on the Environment Revisions form does not exist on any other record in the Library Master File table (F0094), the system displays the Data Source Selection form.

4. On Data Source Selection, complete the OL Data Source field.

The system uses the data source that you enter on this form to create Object Librarian OCM mappings for the new environment. The system writes the required records to the Object Configuration Master table (F986101).

If the path code that you enter on the Environment Revisions form already exists in another environment record, the system determines the data source that is associated with that environment's Object Librarian OCM record. The system uses this value to create a new record in the Object Configuration Master table (F986101).

See Also

Chapter 3, "Object Configuration Manager," Working with the Object Configuration Manager, page 15

Chapter 5, "Using Environment Director," page 53

Copying an Environment

When you create a new environment by copying an existing environment, the software also copies the Object Configuration Manager mappings associated with the existing environment. You can set up a processing option if you want to specify additional Object Configuration Manager mappings to copy at the time that you copy the environment.

You can copy environments from your own existing environments, or you can use the Installation Planner, which provides sample production environments you can use as templates. These templates contain suggested mappings for all PeopleSoft EnterpriseOne tables.

To copy an environment:

1. On Work With Environments, select an environment, and then click Find.

If the Display Only PeopleSoft Environments option is checked, this form displays only those environments that have an entry in the Environment Detail table (F00941).

2. Select the row in the detail area, and select Copy Environment from the Row menu.

3. On the Copy Environment form, type an environment name in the New Environment field.

To copy only the *PUBLIC Object Configuration Manager mappings of an environment, ensure that the Copy *PUBLIC Records Only option is turned on. Leave this option turned off to copy mappings for the environment, for individual objects, and for *PUBLIC.

4. Click OK.

A new environment will be added to the Library List Master File table (F0094). For that new environment, a record in the Environment Detail table (F00941) is created, as well as a set of mappings in the Object Configuration Master table (F986101) in the system data source. Depending on the processing options, there might also be a set of mappings in server map data sources.

5. To change the path code for the newly created environment, select the environment from the Work With Environments form and change the path code.

6. Modify other Object Configuration Manager mappings, if needed.

Copying a New Environment to a New Path Code

Copying a new environment to a new path code requires that you know how to use the copy feature to create a new test environment with demo data loading in a new path code.

To copy a new environment to a new path code :

1. On Work With Environments, click Find.
Make sure the option for *Public Records Only is set in the manner you want.
2. Select the environment that most closely matches the one you want, and select Copy Environment from the Row menu.
3. On Copy Environment, type a name in the New Environment field and select (or clear) the Copy *Public Records Only option.
4. Click Close to go back to the Work With Environments form.
5. On Work With Environments, click Find.
6. Select the new environment and change the path code to the new one you created at the beginning of this task.
7. Click OK when you are finished.
8. Verify that the path code was changed by closing to the Environments menu (GH9053) and choosing Environment Master again.

Creating Test Batch Files

Test batch files can be created by performing these steps.

To create test batch files:

1. Remark out all lines in the LOADALL and JDESET files and format a test set in the same format as the prod set.
2. Copy the LOADPROD to a LOADTEST.BAT file, and change the appropriate parameters to the ones you created in the JDESET.BAT file.
3. Run the LOADALL.BAT batch application.
4. Add the data sources you need in the current plan's planner environment.

For logical data sources, you will probably want Business Data Test, Central Objects Test, PeopleSoft EnterpriseOne Local Test, and Control Tables Test.

Make sure the deployment server source matches the Central Objects Data source and the LOADALL specifications that you entered.

Updating the iSeries

If using an iSeries, the server map tables need to be updated with the new environment.

To update the iSeries server map with the new environment:

From the System Installation Tools menu (GH961), select Custom Installation Plan.

1. On the Work with Installation Plans form, select your plan and expand.
2. Select the host and click Select.

3. Select Environment from the Form menu, and then add the new environment to the detail area. Save the environment you added.
4. When you are at the Host Planner form, select Revise Host from the Row menu.
5. Select Generate Svr. Map from the Form menu.

Adding a New Path Code on the iSeries

To add the new path code on the iSeries:

1. Modify the LIBRARY file in /E811/hosts/as400/*machinename* so that it contains E811SYS as the first entry.
2. Add the name of each path code, such as PD811, PY811, and so on.
3. Use the ENDNET and CLRIPC commands on the iSeries to end PeopleSoft EnterpriseOne services.
4. Log on to the iSeries as QSECOFR.
5. Use the CLRLIB JDEOW command to clear the JDEOW library on the iSeries.
6. Use the CHGCURLIB JDEOW to change the current library on the iSeries to JDEOW.
7. Use the FTP *deploymentservername* command to transfer files from the deployment server.
8. Sign on as PSFT and enter these commands:
 - `cd x:\PeopleSoft\E811\hosts\as400 \enterpriseservername`
 - `get ftpinput (replace)`
 - `cd..`
 - `bin`
 - `get jdesavl (replace)`
 - `quit`
9. Enter these commands on the iSeries:
 - `RSTOBJ OBJ(J98OW10 J98OW20) SAVLIB (JDEOW) DEV(*SAVF)`
`SAVF(JDEOW/JDESAV1) MBROPT(*ALL) ALWOBJDIF(*ALL) FRCOBJCVN(*YES *ALL)`
`RSTLIB (JDEOW)`
 - `SBMJOB CMD(CALL PGM(J98OW10) PARM('deploymentservername' 'JDEOW'))`
10. Start the PeopleSoft EnterpriseOne services with the STRNET command.
11. Run PORTTEST over each environment to verify that each one is working.

Setting Processing Options for Environment Master (P0094)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Process Tab

These processing options give you greater flexibility when copying or deleting by enabling you to specify whether users have the ability to copy or delete OCM mappings for this environment in other data sources.

Regardless of what you enter for these processing options, the software automatically copies or deletes OCM mappings for the environment you are using. The processing option values you enter determine whether you can copy or delete mappings in other data sources.

1. Delete OCM Mappings

Use this processing option to indicate whether users can delete Object Configuration Manager mappings for this environment from other data sources. Values are:

Blank: Users cannot delete OCM mappings.

/ Users can delete OCM mappings.

2. Copy OCM Mappings

Use this processing option to indicate whether users can copy Object Configuration Manager records for this environment into other server map data sources. Values are:

Blank: Users can copy OCM mappings.

/ Users cannot copy OCM mappings.

Deleting an Environment

When you delete an environment, the environment definition is removed and the Object Configuration Manager records associated with the environment are deleted. You can set a processing option if you want to specify additional Object Configuration Manager mappings to delete when you delete the environment.

To delete an environment:

1. Access the Environment Master form.
2. On the Work With Environments form, select an environment.
3. Select Delete.

CHAPTER 5

Using Environment Director

This chapter describes the environment director and discusses how to:

- Use the Environment Director program.
- Use the Environment Director Express program.
- Run the Environment Director program from different environments.
- Creating New OCM Mappings

Understanding Environment Director

Environment Director brings all the steps necessary to create an environment together in one place. It enables the user to create a new environment or copy an existing environment, share or copy an existing path code, set up data sources, create client and server map OCM mappings, and copy data from an existing environment.

While Environment Director is a useful tool for creating custom environments, we recommend using Installation Planner (P9840) and Installation Workbench (P9841) to create custom environments. Environment Director and Installation Planner and Workbench share common functionality for configuring custom environments.

Using the Environment Director Program

The Environment Director program (P989400) is designed to simplify the process of creating system environments. It is recommended that you use director mode rather than express mode to enable for greater control of new environment settings.

Forms Used During Environment Director

Form Name	Form ID	Navigation	Usage
Environment Director	W0094E	From System Installation Tools, select Advanced Operations, then select Environment Master	Create a new environment

Environment Director

Use this method to create a new environment whose settings will not be copied from an existing environment:

To create a new environment:

1. On the Environment Director form, select New Environment and click Next.
2. On the Environment form, select Director and click Next.
3. On the Environment Properties form, complete these fields:

Environment Name	Enter the environment, which encompasses both a path code (objects) and a data source (data). When put together, users have a valid workplace.
Description	Enter a user defined name or remark.
Abbreviation	Will be used when creating business data and control tables data sources. The default is the first two letters of the environment name.
Release	Enter the release number as defined in the Release Master. The default is the current release.
Just In Time Installation	Use this field to select or clear just-in-time installation for anyone signed onto this environment. Consider turning just-in-time installation off before you transfer modified applications into the production path code. Once you have fully tested the application and are ready for production users to receive the changes, you can turn just-in-time installation back on.
JAS/WTS Environment	Select JAS/WTS Environment if this is a Java or Windows Terminal Server environment. Choosing this option will affect how the system creates business function mappings for the environment and which environments are displayed at logon.

4. Click Next.
5. On the Path Code form, select either to share an existing path code with another environment, or to copy an existing path code for use with the new environment. Enter the path code name to be shared or copied and click Next.

The path code's release level must match the new environment's release level. If you select Copy an Existing Path Code, the Path Code Properties form appears. Otherwise the Machines form appears.

6. On the Path Code Properties form, complete these fields:

Path Code	Enter the path code, which is a pointer to a set of system objects, and is used to keep track of sets of objects and their locations.
Description	Enter a user defined name or remark.
Release	Enter the release number as defined in the Release Master. It must match the environment's release.
Cumulative Description	Use to further identify the release level of the path code; it is only used by OMW for SAR integration.
Location	Enter the location or machine key indicates the name of the machine on the network (server or workstation).
Server Share Path	Use this field indicate the shared directory for this path code. The objects that are stored on a file server will be found in this path.
UNC Flag	Determines how to create the server path. Valid options are: Checked

Creates the path using relative paths. Enter a double slash (\\), rather than the specific followed by a single slash (\).

Unchecked

Creates the path using the actual drive letter.

Deployment Data Source

This field indicates the location (data source) of the Central Object Specifications data source that corresponds to the path code. For example, if the environment has a PDxxxx path code, where xxxx is the current system release level, a valid data source for that path code would be Central Objects - PDxxxx, where xxxx is the current release level.

Status Code

This code determines the status of the software in the development cycle.

Merge Option

The merge option denotes whether a customer's object will be merged in with the PeopleSoft object. The merge option can be set at the path code level so that all objects checked into that path will carry the same merge option as the path code.

7. Click Next.
8. On the Machines form, select the enterprise servers where the new environment will run. To select machines, highlight the machine in the left tree view and click the right arrow. The machine moves to the right tree view.
9. To filter the list of machines in the left tree view, enter a machine key or port number and click Find. (If the new environment is being copied from an existing environment, the machines in the existing environment can be automatically selected for the new environment by clicking the link.)
10. To continue, click Next.

The Data Source Revisions form prompts for each data source for the new environment as defined in Data Source Templates By Environment (GH9012, P98503, F98511). Shared data sources do not display.

11. On the Data Source Revisions form, click OK. The screen reappears for each environment data source. After all data sources have been defined, the Data Load form appears.
12. On the Data Load form, select which of these data loads the system should perform:

Load Business Data (R98403 XJDE0021)	When selected, a form prompts for the source environment.
Load Control Tables (R98403 XJDE0022)	When selected, a form prompts for the source environment.

Central Objects And Versions (R98403 XJDE0019)	This UBE copies central objects and versions from the source environment to the target environment.
Deployment Server Directory (R9800942 XJDE0001)	<p>This UBE performs these actions:</p> <p>Copies either the path code on the local file system or the path code on the deployment server. If run from the deployment server, these are the same.</p> <p>Copies package inf files on the deployment server.</p> <p>Copies the Software Package Detail (F9631), Software Package Build Header (F96021), and Software Package Build Header - History (F96215) tables.</p> <p>Checks out records (R989861 XJDE0001)</p> <p>ESU History (R9672 XJDE0001)</p>

13. Click Next.
14. On the Environment Director Revisions form, select a node and click Select to review the node's properties.
15. Click OCM to create the environment and review the OCM.
16. Click Back to review the choices in the environment director or click Cancel to exit the environment director (all changes will be lost if you Cancel).
17. Click End to finish the creation of the environment.

Actions Performed by Environment Director

These actions will be performed:

- Create OCM if it does not already exist
- Write F98403 record for the new environment, which enables Installation Planner to display the environment
- Load Business Data
- Load Control Tables
- Load Central Objects and Versions
- Copy Path Code Directory and Packages
- Copy Check Out Records
- Copy ESU History
- Configure Enterprise Servers
- Create server map OCM
- Create server map F98611 records
- Write F9651 records for enterprise servers
- Configure logic server data sources for BSFN and UBE mappings, RTE, and XAPI

Using the Environment Director Express Program

The Environment Director program (P989400) is designed to simplify the process of creating system environments. It is recommended that you use director mode rather than express mode to allow for greater control of new environment settings.

Forms Used During Environment Express

Form Name	Form ID	Navigation	Usage
Environment Director	W989400A	From the System Installation Tools, select Advanced Operations, then select Environment Director	Create a new environment

Creating a New Environment Using the Express Option

Use this method to create a new environment whose settings will not be copied from an existing environment. It is recommended that you use director mode rather than express mode to allow for greater control of new environment settings.

To create a new environment using the Express option:

1. Access the Environment Director form.
2. Select New Environment and click Next.
3. On the Environment form, select Express and complete these fields:

Environment Name	Enter a valid environment that encompasses both a path code (objects) and a data source (data).
Description	Enter a user defined name or remark.
Path Code Name	Enter the name of an existing path code.
4. Click the link under Enterprise Servers.
5. On the Machines form, select the enterprise servers where the new environment will run. To select machines, select the machine in the left tree view and click the right arrow. The machine moves to the right tree view.
6. To filter the list of machines in the left tree view, enter a machine key or port number and click Find. (If the new environment is being copied from an existing environment, the machines in the existing environment can be automatically selected for the new environment by clicking the link.)
7. To continue, click OK.
You are returned to the Environment form.
8. Click Next to generate defaults for the environment.
9. On the Environment Director Revisions form, select a node and click Select to review the node's properties.
10. Click OCM to create the environment and review the OCM, or click Cancel to exit the environment director (all changes will be lost if you cancel).
11. Click End to finish the creation of the environment.

Actions Performed by Express Environment Director

These actions will be performed:

- Create OCM if it does not already exist
- Write F98403 record for the new environment, which enables Installation Planner to display the environment
- Load Business Data
- Load Control Tables
- Configure Enterprise Servers
- Create server map OCM
- Create server map F98611 records
- Write F9651 records for enterprise servers
- Configure BSFN and UBE mappings

Running the Environment Director Program from Different Environments

It is recommended that you create custom environments from the PSFTPLAN environment using Installation Planner. Doing so creates the environment in the planner databases and deploys it to the system data source. The environment must exist in the planner databases in order to apply software updates to the environment.

Installation Planner's Select Environment form includes Add and Copy buttons enabling you to add custom environments to a plan. These buttons use a few forms of the Environment Director to define the environment, and Installation Planner and Workbench configure the remainder of the environment (data sources, data load, and so forth).

You cannot run Environment Director from the deployment environment. The deployment environment exists only on the deployment server. It uses the bootstrap tables (F98611 and F986101) from the System Planner; the remainder of the system tables are in the system data source. This split will cause inconsistencies between the planner and system definitions.

If you run Environment Director as a standalone, you should run it from a Windows client. The environment will be created in the system data source and needs to be copied to the planner environment before software updates can be applied to the environment. The Copy System to Planner program (R9698611) automates the process of copying the environment definition from system to planner.

Shared vs. Environment Data Source

The Environment Director does not prompt for shared data sources. These data sources are shared by all environments and have already been configured and do not need to be reconfigured. By default, these are the System, Object Librarian, and Data Dictionary data sources. Only the environment data sources will be configured. By default, these are the Business Data, Control Tables, Central Objects, and Versions data sources.

Database Configuration and Permissions

New databases, table spaces, and libraries must be created before the Environment Director can load data into the new environment.

Typically, System, Object Librarian, and Data Dictionary data sources are shared with existing environments and do not need new databases. Business Data and Control Tables data sources, as well as any custom data sources, need new databases if these data sources are not being shared with another environment. Central Objects and Versions need new databases if the new environment will be using a new path code.

See Also

Installing the System Databases in the *EnterpriseOne PeopleTools 8.11 Installation/Upgrade Guide*

Data Source Configuration

Following is a description of various data classes and source templates by environment.

Data Class

The data class is at the center of automatic OCM generation. It categorizes the type of data stored in data sources and tables. For example, Business Data is data class and System is data class 'S'. If you want to split business data into multiple data sources, you need to create a new data class, modify the data source template (so Environment Director or Planner will prompt for a data source) and assign tables and GT objects to that data class. OCM will be created based on the information provided previously.

Create A New Data Class

Create a new data class by adding a value to the H96/DU UDC for data sources and H96/CL UDC for table and GT objects.

Data Source Templates By Environment

A data source template defines the set of data sources that will be used by new environments, and the default values for the data source's properties. They are stored in the Data Sources by Environment table (F98511).

F98511 also stores the set of data sources for an environment after they have been generated from the template.

Installation Planner and Environment Director both use this table when prompting for data sources and when creating OCM. When prompting for a data source, it will first check the Data Source Master table (F98611) to see whether it has already been defined. If so, it will ignore the default settings in F98511 and prompt based on the existing data source definition.

The information in this table can be edited using the Data Source Templates By Environment program (P98503). By understanding this application, you can implement custom environment naming standards and ease the creation of environments.

When creating a new environment, template records are copied to create data sources for the environment and tokens in the properties are replaced with values for the environment. Records with an environment value of *SHARED are used as a template for shared data sources. This is used once to set up the shared data sources, whereas new records with environment DEFAULT are created. Environment Director does not prompt for shared data sources, and these must be set up from Installation Planner. The default set of shared data sources is system, object librarian, and data dictionary.

Records with an environment *ENV are used for new environment data sources. Whenever a new environment is created, the *ENV records are copied. The environment name replaces *ENV and tokens are replaced in order to receive the actual data source name and default properties. The default set of environment data sources is business data, control tables, central objects, and version. (The central objects data source is also specified on Path Code Master.)

Records with an environment *LOGIC are used for logic and server map data sources. These are set up when selecting an enterprise server.

Table Data Classes

A table is associated with a data class using a field on the Object Librarian table (F9860.sicldf). Table data classes can be modified two ways:

- Object Management Workbench (P98220). Select the table in the left tree view in OMW and click Design. Select the Install/Merge Codes tab and modify the Data Class value. Click OK. Modifying the data class does not affect existing OCM mappings; it is only used when creating mappings for a new environment.
- Table Data Classes (P98503). This application can be used to modify the data class for several tables at once. This application should only be used by a system administrator. From menu GH9611, select Table Data Classes. Use the QBE to filter the list of tables in the detail area. Select one or more tables. Click Select. Type in the new data class value and click OK.

Data Load

Environment Director can automate data load for an environment using UBEs. Cases might exist, however, when you wish to use third-party tools to load the data (that is, DTS, BCP, Import/Export, CPYLIB). In these cases, the default data load can be de-selected in the director.

Creating New OCM Mappings

OCM mappings (TBLE, GT, BSFN, UBE) can be created for new or copied environments.

New and Copied

OCM for the new environment is created in two steps: first, mappings for tables and GTs are set up; second, BSFN and UBE mappings are configured.

TBLE, GT When Creating New Environments

The software finds the data class for each table or GT object in the Object Librarian Master Table (F9860). Based on the environment and data class for the object, the data source name is fetched from the Data Sources by Environment table (F98511). If a record is not found, the software looks for a record for the data class where environment name is DEFAULT (a shared data source). If that data source is the default mapping, a mapping with object name DEFAULT is created; otherwise, the actual object name is used. Mappings are not created for tables in the Planner and Internal data classes.

TBLE, GT When Copying Environments

The software looks at each *PUBLIC OCM record for TBLE and GT objects for the environment being copied. It then fetches the data class for the object from Object Librarian. It then looks in F98511 for the data source in the new environment for that data class. If the data source is different from that in OCM, it changes the mapping to point to the new data source.

When Creating New or Copying Existing Environments

The OCM generation algorithm for UBEs and BSFNs is identical, but the output depends on whether the default mapping is LOCAL or an enterprise server.

Default Mapping to LOCAL

A default mapping to LOCAL is created. Server mappings are created for any object whose Location (labeled Business Function Location for BSFNs and Process Location for UBEs) in OMW is Server Only (F9860.SIBFLOCN = 3).

Default Mapping to Server

A default mapping to the enterprise server is created. LOCAL mappings are created for any object whose Location (labeled Business Function Location for BSFNs and Process Location for UBEs) in OMW is Client Only (F9860.SIBFLOCN = 1).

The default mappings are as follows:

Type/	Base Environment (DV811, PS811, PD811, PY811)	JAS/WTS Environment (JDV811, JPS811, JPD811, JPY811)
UBE	Enterprise Server	Enterprise Server
BSFN	LOCAL	Enterprise Server

Object Name	Data Class
F0094	S
F9860	O
F9200	D
F0101	B
F01012	B
F0004	T
F98710	C
F983051	V
GT92002	D
GT9860A	O
GT3711	B
GT4801	B

Environment	Object Name	User/Role	Data Source
ENV1	DEFAULT	*PUBLIC	Business Data - ENV1
ENV1	F0094	*PUBLIC	System - 811
ENV1	F9860	*PUBLIC	Object Librarian - 811

Environment	Object Name	User/Role	Data Source
ENV1	F9200	*PUBLIC	Data Dictionary - 811
ENV1	F0004	*PUBLIC	Control Tables - ENV1
ENV1	F983051	*PUBLIC	Versions - PY811
ENV1	GT92002	*PUBLIC	Data Dictionary - 811
ENV1	GT9860A	*PUBLIC	Object Librarian - 811
ENV2	DEFAULT	*PUBLIC	Business Data - ENV2
ENV2	F0094	*PUBLIC	System - 811
ENV2	F9860	*PUBLIC	Object Librarian - 811
ENV2	F9200	*PUBLIC	Data Dictionary - 811
ENV2	F0004	*PUBLIC	Control Tables - ENV2
ENV2	F983051	*PUBLIC	Versions - DV811
ENV2	GT92002	*PUBLIC	Data Dictionary - 811
ENV2	GT9860A	*PUBLIC	Object Librarian - 811

CHAPTER 6

Data Sources

This chapter provides an overview of data sources, database data sources, and logic data sources and discusses how to:

- Plan data sources.
- Work with data sources
- Run data source reports.

Understanding Data Sources

Data sources are the building blocks that you use to set up an enterprise configuration. Data sources define to PeopleSoft EnterpriseOne all the databases and logic machines required by the PeopleSoft EnterpriseOne configuration.

The data sources define where the database tables reside and where the software runs logic objects for the enterprise. Data sources can point to:

- A database in a specific location (for example, an MSDE database, such as JDELocal located in \E811\data, or an iSeries data library, such as PRODDATA)
- A specific machine in the enterprise that processes logic

Data source definitions are stored in the Data Source Master table (F98611). Workstations use a common table F98611, which generally resides in the system data source on the enterprise server. PeopleSoft EnterpriseOne servers that process logic and request data require their own unique definitions for data sources; therefore, they have their own table F98611 in the server map data source.

At least two sets of table F98611 exist. They reside in a centralized system data source normally kept on an enterprise server and accessed by workstations, and in a server map data source, which each logic server requires.

Understanding Database Data Sources

A database is a grouping of tables in a database management system. You must identify databases to the applications that access them. You can distribute databases across a network and involve various servers and database management systems. A database data source identifies the database information that the software needs to connect to a database.

Data Source Names

You define names to identify the data source. You should use a meaningful name for your data sources. For example, to indicate that you are storing business data for production users, the data source name could be Business Data - Prod.

PeopleSoft EnterpriseOne provides demonstration data source names at installation; you can use these for your own data sources.

See Also

EnterpriseOne PeopleTools 8.11 Upgrade Supplemental Reference Guide

Database Names

The data source definition must contain information about the database and the server in which it is located. Different database management systems identify the databases in different ways. For example, you must identify Oracle databases by the Oracle SQL*Net V.2 connect string. You must identify databases that you access through ODBC by the ODBC data source name.

Network Machine Name (Server Name)

Database management systems reside on a machine. You must identify this machine to the network so that other computers can access its resources. You must provide to PeopleSoft EnterpriseOne (in the data source definition) the machine name for the server that hosts the database management system in which the database resides.

Understanding Logic Data Sources

A logic machine is the machine on which batch applications and master business functions run. You must identify logic machines using a data source definition. The data source definition must include the network information about the machine, such as a server name - HP9000, for example.

When mapping logic objects for distributed processing, the software uses the machine data source (distributed processing data source) as the target location for processing logic objects.

Required Data Source Types

You must set up a minimum number of data sources for PeopleSoft EnterpriseOne to run. Two of the required data sources define machines that process logic in the enterprise. The other data sources define various databases used in the enterprise.

The installation software provides samples of these required data sources to build your system configuration.

Distributed Processing Data Source

This data source definition contains information that the software uses to identify the logic machine in the network. You need to define each logic machine as a data source.

Local Data Source

This data source defines the PeopleSoft EnterpriseOne workstation. Use this data source to override the process location of a batch application that you mapped in the Object Configuration Manager to run on the server.

Business Data Data Source

This data source is used when you divide the business data into multiple owners or libraries, which can reside on the same enterprise server or on different ones. Each group of data requires a separate data source.

Some examples of business data include:

- Production data (non technical data, such as financial and manufacturing data)
- Test data
- Demo data (demonstration or training data)
- Conference Room Pilot (CRP) data

The installation software provides demonstration data that you can copy to supported host databases. The data source name is Business Data - PS811.

Control Table Data Source

This data source consists of user defined codes, menus, and next numbers.

Data Dictionary by Release Data Source

This data source enables you to store data dictionary master tables in a central location to allow easier administration of changes. Group these master tables together to form a data dictionary database. You should share one data dictionary between the production (such as PD811) and development (such as DV811) path codes. The software allows one data dictionary per path code, but multiple data dictionaries are not recommended or supported. The Data Dictionary data source is named by base release number-for example, Data Dictionary - 811, Data Dictionary - B7334, or Data Dictionary - B732.

System Data Source

This data source consists of the technical tables you use to run all PeopleSoft EnterpriseOne applications. You must set up one system data source per release. When running applications, the system tables provide:

- Object mappings (location of tables, batch processes, and business functions)
- Data source definitions
- EnterpriseOne security
- Next IDs (used for development only)

All workstations use a central set of system tables usually stored on the enterprise server but not on the deployment server. Each logic server requires its own subset of system tables. These server system tables are stored in the server map data source.

See Also

Chapter 6, “Data Sources,” Server Map Data Source, page 67

System Table Caching

When a user firsts logs on, the software uses the user ID and environment to retrieve information from the system tables for that user and environment. This information is cached in memory on the workstation. Any time a change is made to the central system tables, dynamic caching of the system information occurs for those workstations with an active PeopleSoft EnterpriseOne session.

How PeopleSoft EnterpriseOne Connects to the System Data Source

When PeopleSoft EnterpriseOne starts on a workstation, the software attempts to connect to the base data source found in the workstation jde.ini file. If this data source is unavailable, the software attempts to connect to a secondary data source for system information. It is important to have processes for ensuring that the alternate system data source location contains current information. You can maintain an alternate data source's information using table conversion or data replication.

The jde.ini file should look like the example for the primary system data source connection:

[DB SYSTEM SETTINGS]

.

.

Default Env=DEMO811A

Default PathCode=DEMO

Base Datasource=System 811

Database=System 811

.

.

.

Secondary System Data Source connection

[DB SYSTEM SETTINGS - SECONDARY]

Base Datasource=Access32

Object Owner=

Server=

Database=Access32

During installation, the Release Master application relates the system data source to a release. Configuring the release updates the setup.inf file used during the workstation install to create the jde.ini file.

See Also

Chapter 6, "Data Sources," Storing Object Librarian and Central Objects, page 67

Major Technical Tables in the *EnterpriseOne PeopleTools 8.11 Installation Supplemental Reference*

Object Librarian Data Source

This data source points to the Object Librarian tables you use for custom development. You should have only one set of Object Librarian tables for each software release, regardless of how many path codes (sets of central objects) you maintain. This data source can reside on any supported platform. The Object Librarian data source is named by base release number; for example, Object Librarian - 811.

Central Objects Data Source

This data source points to the source objects (central objects specifications), as well as the User Overrides table (F98950). Central Objects data sources are databases.

If you have multiple path codes, each must have a separate Central Objects data source. Developers check objects out of a Central Objects data source for modification. When the developer checks in the objects, the system copies the objects from the developer's workstation to the relational database tables in the Central Objects data source. You must set up one Central Objects data source for every path code needed in the configuration, for example, Central Objects - PD811 or Central Objects - DV811.

You must have a Central Objects data source for:

- Pristine objects
- Production objects
- Development objects

You connect each Central Objects data source to a path code used by the environments that you created for the configuration. This data source must reside in a SQL server or Oracle database, and can reside on any PeopleSoft-supported platform that can run those databases. For best performance and use of table space, you should keep the central objects in Oracle UNIX. If your configuration does not include a UNIX enterprise server, you should use Microsoft SQL Server or Oracle on the deployment server.

Storing Object Librarian and Central Objects

The Object Librarian and the Central Objects data sources can reside on either Oracle Server or Microsoft SQL Server. The Object Librarian also can reside in DB2/400 and can be on a machine separate from the Central Objects data source, which resides on Oracle or Microsoft SQL Server.

Here are some recommendations:

- For businesses with an Oracle/UNIX platform, store the Object Librarian and the Central Objects data sources in Oracle. Otherwise, store them on the deployment server's Oracle Server or Microsoft SQL Server database.
- Regardless of which database is storing the relational database (RDB) components of the central objects, you must store the C programming language components on the deployment server that is accessible to all workstations for deployment and redeployment. Therefore, we recommend storing C components on the deployment server.

Server Map Data Source

This data source enables you to create for each logic server its own subset of system tables, which are called server map tables. Server map tables are required for each logic server. You must maintain these tables to ensure integrity with the workstation's system tables.

Use Server Map data sources to establish unique object mappings for logic servers. When batch jobs and business functions running on the server request data, they look to the Object Configuration Master and the Data Source Master tables in the server map data source; this is necessary because the mappings are different.

For example, suppose a user logs on to an environment that maps static local data on the workstation, dynamic transaction data to the server, and the master business functions and batch processes to the server. The user enters a sales order and clicks OK to enter the order, which runs the Sales Order Entry master business function on the server. It does not make sense for the master business function to go back to the workstation to retrieve user defined codes and tax information; therefore, the server map Object Configuration Manager table maps all data to the appropriate server data source.

These tables in the Server Map database are unique to a server's perspective of processing:

Table	Description
Object Configuration Master (F986101)	Provides logic objects processing on a server request data and perhaps other logic objects. When these requests are made to PeopleSoft EnterpriseOne running on a server, Object Configuration Master must be accessed to find the correct mappings for the data and logic objects. Servers might have different mapping requirements than workstations. For example, you should map all user defined codes locally to the workstation for performance during interactive processing. Server processing would require you to map these files locally to a server database to enhance server processing performance.
Job Control Status Master (F986110)	Records information about batch jobs launched on a server.
Job Number Master File (F986111)	Records next numbers for batch jobs launched on a server.

See Also

Chapter 3, "Object Configuration Manager," *Working with the Object Configuration Manager*, page 15

Versions Data Source

This data source corresponds to the path code, as in Versions - PD811. It stores versions and processing option information. It includes these tables:

- Versions List (F983051)
- Processing Option Text (F98306)

Planning Data Sources

Because the data sources are the building blocks of your configuration, the proper identification of all required data sources is critical to having a correct configuration to support your business needs.

These data source types require just one data source definition for each release:

- Object Librarian
- System

- Data Dictionary
- Local

These data source types might require you to define multiple data sources for each type to support your business requirements:

- Business Data (production, test, CRP, and PS811 demo data)
- Distributed Processing (one per logic server)
- Server Map (one per logic server)
- Central Objects (one per path code)
- Control Tables

To plan for data sources:

1. Evaluate the location of your system data.
2. Identify all of the enterprise servers in your configuration that will host logic:
 - Set up one distributed processing data source for each enterprise logic server.
 - Set up one Server Map data source for each distributed processing data source.
3. Evaluate how many groups of PeopleSoft EnterpriseOne objects you require to support your business environment, such as production, pristine, and development. Set up one Central Objects data source for each group of objects.
4. Evaluate the various locations of your business data:
 - Set up one Business Data data source for each database and library that contains Business Data tables that PeopleSoft EnterpriseOne applications use.
 - Set up one Control Table data source for production and one for testing.

Working with Data Sources

The database data sources and logical data sources applications enable you add or modify a database data source or logic data source, respectively. After you add a new data source, you must update the Release/Data Source Map table (F00948) using the Release/Data Source Map application.

Forms Used to Work With Data Sources

Form Name	Form ID	Navigation	Usage
Work with Data Sources	W986115A	From the System Administration Tools menu, select Database Data Sources.	Add or modify a data source.

Data Source Naming Conventions

When you add data sources, observe these naming conventions:

- Limit to 30 characters

- Text is case sensitive
- Text is space sensitive

Specific exceptions for the Client Access data source are listed in the Client Access Data Source Name section.

Client Access Data Source Name

The names of Client Access data sources must conform to these standards:

- Limit to 32 characters
- Begin with an alphabetic character
- Do not use these characters: { } [] () ? * = ! @ ;

Note. You must type the data source name before you can use the Client Access ODBC driver to access iSeries data.

Table Owner (Object Owner ID)

Oracle and SQL Server database management systems have unique table owner IDs for each group of tables. For example, the database that contains the system tables might have an owner such as E811SYS. You must identify the table owner ID for Oracle and SQL Server database management systems.

Adding or Modifying a Data Source

This task explains how to add a database or logic data source to a Data Source Master table (F98611) in the system data source, or modify an existing data source. Use this application to modify or add a data source definition after the software is initially installed.

As part of adding or modifying, you also can enter or modify sizing and override information for tables and data sources.

To add or modify a data source:

Access Database Data Sources.

1. On the Machine Search & Select form, select the data source that you want to work with, and click Select.

The Machine Search & Select form displays those data sources that have the OCM Data Source field turned on in the Data Source Revisions form. Workstations use the system data source for their mappings. Each enterprise server has a unique server map data source.

2. On the Work With Data Sources form, perform one of these actions:

- To add a data source, click Add.
- To modify an existing data source, click Find. Locate the data source that you want to modify and click Select.

Important! If you want to view your data sources without adding or changing one, ensure that you exit from the Data Source Revisions form by clicking Cancel instead of OK. When you click OK, the system assumes that you have added or changed a data source, and the existing ODBC drivers might not work correctly. You will have to modify them using the ODBC Data Source Administrator applet accessible from the Control Panel.

- On the Data Source Revisions form, complete or modify all required fields, and then click OK. The application displays only the fields required for the data source type being configured.

If you are creating a JDBNET data source, select *JDBNET Data Source*, and complete these fields:

Data Source Name	Enter the name that identifies the data source.
JDBNET Server Map Data Source Name	<p>A JDBNET data source is a server data source that can be accessed by JDENet running on that server. Note the data source name that will be used for the JDBNET client configuration.</p> <p>This data source is a 30-character string that is reserved for future use in the Data Source Master table (F98611).</p>

If you select *DB* as the value in the Data Source Use field, the program displays these fields for each Data Source Type:

Library Name	Enter the name of the SQL Server database name. This name is required for SQL Server ODBC and SQL Server OLEDB data sources.
Object Owner ID	Enter the database table prefix or owner.
Database Name	<p>Enter the name assigned to the database during installation, such as HPDEVORAP or HP9000.</p> <p>--- FORM SPECIFIC ---</p> <p>Depending on the data source type, this field is used differently. If the data source type is Oracle, then this field contains the Oracle connect string. If the data source type is Microsoft Access, SQL*Server or Client Access, then this field contains the Windows ODBC data source name. In order to minimize the number of connections to SQL*Server, it is recommended that the ODBC Data Source name is the machine name where the SQL*Server Database resides and that the Catalog name is set for the individual database name. For example, if you have two databases, DatabaseA and DatabaseB, on a machine called INTELNT, this field would contain INTELNT and the Catalog name would be set to DatabaseA for one data source and DatabaseB for the other data source.</p>
Database Instance	Enter the name of the server instance. This name is required for SQL Server ODBC and SQL Server OLEDB data sources.
Schema	Enter the database table prefix or owner.
Database Alias Name	Enter the name of the SQL Server database. This name is required for SQL Server ODBC and SQL Server OLEDB data sources.
ODBC Data Source Name	Enter the name assigned to the database during installation, such as HPDEVORAP or HP9000.

If you select *SVR* as the value in the Data Source Use field, the program displays only these fields for each Data Source Type:

Server Map Data Source Name	Enter the name assigned to the database during installation, such as HPDEVORAP or HP9000.
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- Select Advanced from the Form menu to select additional options.

The form displays options that are related to the data source type being configured. Additional options include:

Unicode	Use this option to indicate whether a database supports Unicode. This option is required for all data sources.
Use Decimal Shift	<p>Check this option to automatically shift decimals when retrieving or updating data based on specifications in the data dictionary. This field is for PeopleSoft EnterpriseOne tables only. Non-PeopleSoft EnterpriseOne tables should be in a separate data source with decimal shift turned off. If you bring in a PeopleSoft EnterpriseOne table as non-EnterpriseOne table, the system does not recognize the fields in this table that have been decimal shifted. This is not checked in Table Conversion.</p> <p>Use this flag to SELECT or CLEAR row-level record locking for the data source.</p> <p>You should have this flag turned ON to help prevent database integrity issues.</p> <p>JDEBASE middleware uses this flag to determine whether or not to use row-level record locking.</p>
Use Julian Dates	Check this option to store dates in a Julian format. Otherwise, dates are stored as defined in the Microsoft Windows Control Panel. The system automatically turns this flag off for non-EnterpriseOne tables.
Support For Updates	<p>Use this flag to SELECT or CLEAR row-level record locking for the data source.</p> <p>You should have this flag turned ON to help prevent database integrity issues.</p> <p>JDEBASE middleware uses this flag to determine whether or not to use row-level record locking.</p>
OCM Data Source	Use this flag to specify whether the data source will contain an OCM table (F986101). If you enable this flag, the system displays a 1 in the OCM Data Source field on the Work With Data Sources form. You should only set this flag for the system data source and any server map data sources. That is, you should not enable this setting for any database data source or log data sources that are not system or server map data sources.
Use Table Owner	Use this flag to activate use of the Owner ID field.
LOB Data Type Support	<p>Use this option to indicate whether a database supports a LOB data type. This option is required for all AS400 and Oracle data sources.</p> <hr/> <p>Note. If you select <i>I - DB2 UDB</i> on OS/400 as the data source type, you can select either LOB Data Type Support or iSeries BLOB Support, but not both.</p> <hr/>
AS/400 BLOB Support	The setting for the AS400 Binary Object (BLOB) Data source indicates whether a data source may contain EnterpriseOne BLOB Tables.
5. On the Data Source Revisions form, select Port from the Form menu to specify database server port information.	
Database Server Port Number	Specify the JAS server port number. This number is required for SQL Server ODBC, SQL Server OLEDB, and Oracle data sources.

Oracle SID Name	Specify the name of the server instance. This name is required for SQL Server ODBC and SQL Server OLEDB data sources.
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6. Click OK.

If you set Processing Option 2 for this form to create ODBC Data Sources, the program displays the Configure ODBC window with these options:

Silent	Select this option to automatically configure the ODBC data source in the background.
Manual	Select this option to enter or change ODBC drivers. You can add or update ODBC drivers to reflect the data source that you just added or changed.
Skip	Select this option to skip the configuration of the ODBC data source.

See Also

Chapter 3, “Object Configuration Manager,” Working with the Object Configuration Manager, page 15

Setting Processing Options for Database Data Sources and Logical Data Sources (P986115)

Processing options enable you to specify the default processing for programs and reports.

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

For reports, processing options enable you to specify the information that appears on reports. For example, you set a processing option to include the fiscal year or the number of aging days on a report.

Do not modify PeopleSoft EnterpriseOne demo versions, which are identified by ZJDE or XJDE prefixes. Copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

Defaults Tab

These processing options enable you to:

- Specify a local (database) data source or a server data source
- Indicate whether you want to create an ODBC data source when the Workstation Installation program runs

1. Data Source Type	Indicates how the data source is configured: Servers (SVR) to run UBEs and Business Functions or a Database (DB) to access table data.
2. ODBC Data Sources	Use this processing option to specify whether to create an ODBC data source during the workstation installation process. Values are: Blank: Do not create ODBC data sources. / Create Client Access, SQL Server and DB/2 data sources.

Modifying the Release/Data Source Map Table

The Release/Data Source Map program (P00948) enables you to define the release level for a data source for a data source type. When you add a new data source, you need to update the Release/Data Source Map table (F00948). This table contains entries for the data dictionary, Object Librarian, versions lists, and workflow, and organizes the entries according to release.

When you copy or transfer objects between data sources, the software checks the release of each data source and then determines whether the source data source and the target data source reside in compatible releases. If Unicode conversion is needed (for example, transfer from an Xe version to a PeopleSoft EnterpriseOne 8.10 version), the software converts the data for you when you are using a release of PeopleSoft EnterpriseOne 8.10 or greater.

The software does not allow you to move or copy objects between data sources with incompatible releases. When you add a data source, if a record is already found in the Release/Data Source Map table for the data structure and data type entered, the system displays an error. You can only have one release level defined for a data source per data type.

To enter or modify table and data source sizing or override information:

1. Access the Database Data Sources or Logical Data Sources form.
2. On the Machine Search & Select form, find the data source that you want to work with, and click Select.
3. On the Work With Data Sources form, select Database Sizing or Default Sizing from the Row menu.

Note. You also can access this application from the Object Configuration Manager application.

4. To add table and data source sizing information, on Work with Table and Data Source Sizing, click Add. The Revise Table and Data Source Sizing form appears. On this form, you can revise or add table and index information for a data source or table.
5. To modify existing table and data source sizing information, on the Work with Table and Data Source Sizing form, select the desired data source.

The Revise Table and Data Source Sizing form appears with previously entered information.

Note. Alternatively, to display the Revise Table and Data Source Sizing form, select Default Database from the Row menu of the Work With Data Sources form. When you do this, the DEFAULT value is entered at the Object Name field so that default values are used for the form. If you change the object name from *DEFAULT*, the fields that were formerly filled with default values appear.

6. To add new parameters rather than modify existing ones, complete these fields:

For Oracle Data Sources:

- Data Source
- Object Name

For UDB Data Sources:

- Data Source
- Table Name

Note. You can define parameters for all objects in a data source by entering DEFAULT in the Object/Table Name field.

7. On the Revise Table and Data Source Sizing form, complete or modify these fields:

For Oracle Data Sources

- Index Initial Storage
- Index Next Storage

- Table Percent Increase Storage
- Table Minimum Extent
- Table Maximum Extent

These values are valid for both the table information and the index information.

For UDB Data Source:

- Target Operating System
- Table - Table Space Manager
- Database Alias Name
- Physical Database Name
- Table - Table Space
- LOB Default Size (bytes)
- Percentage Free Space per Index Page
- Table - Table Space 32K
- Index Table Space
- LOB - Table Space
- Percentage Free Space per Table Page
- Minimum Percentage of Free Space
- LOB - Log Changes
- LOB - Compact Data
- Initial Logging
- Volatile Table
- Append Mode

Note. For Oracle data source, if the object name is DEFAULT, the only fields you can enter or modify on the Revise Table and Data Source Sizing form are Table Space Name and Index Space Name.

- To enter override information for Oracle data sources, select Overrides from the Row menu of the Revise Table and Data Source Sizing form.
This option is also available from the Row menu of the Work With Table and Data Source Sizing form.
- On the Revise Table and Data Source Overrides form, complete or modify these fields:
 - Copy Data (Y/N)
 - Create Tables(1/0)
- Click OK to return to the previous form. If necessary, click OK on all subsequent forms until you return to the System Administration Tools menu.

See Also

Chapter 6, “Data Sources,” Adding or Modifying a Data Source, page 70

Running Data Source Reports

The Data Source Master batch processes enable you to create a report for a data source or a comparison report for two data sources.

The Data Source Master batch processes are called from a report driver (R98611B), although other PeopleSoft EnterpriseOne reports do not require a report driver. You use the R98611B report driver to set processing options for each report. Any data selection for a report must be entered for the specific report, not from the driver. When you finish entering processing options and data selection, you run the report from the driver.

Creating Options for Data Source Reports

The following task describes how to set processing options for a data source report through the report driver.

To set processing options for data source reports:

1. From the Advanced Operations menu (GH9012), select Data Source Master Report or Data Source Master Comparison.
2. On Work With Batch Versions - Available Versions, click Find and then select one of the reports.
3. From the Row menu, select Processing Options.
4. On the UBE Driver tab, enter information for the report driver.
5. Click the tab for the report whose processing options you want to enter.
6. Click OK to save.

Setting Processing Options for Data Source Master (R98611) and Data Source Master Comparison (R986112)

The processing options that are set from the report driver enable you to enter parameters for the Data Source Master Report (R98611) and the Data Source Master Compare Report (R986112).

The processing options for the report you are running must be completed. Because the XJDE0001 version of the report runs, if data selection is necessary it must be done on the XJDE0001 version of the report.

UBE Driver Tab

Use this processing option to specify which report you want to run.

1. Data Source Master Report Name	Use this processing option to specify the name of the report you want to run. Values are: <i>R98611</i> - Data Source Master Report <i>R986112</i> - Data Source Master Compare
Version	Use this processing option to specify the version that you want to use for the report.

R986112 Tab

Use these processing options to specify the parameters for the R986112 report.

- 1. Data Source One** Use this processing option to specify the names of the data sources that you want to compare. If necessary, you can use the Visual Assist feature to locate valid data sources. Click the Visual Assist button to display the Data Source Search and Select form.
- 2. Comparison Data Source Two** Use this processing option to specify the names of the data sources that you want to compare. If necessary, you can use the Visual Assist feature to locate valid data sources. Click the Visual Assist button to display the Data Source Search and Select form.
- 3. Comparison Method** Use this processing option to specify the comparison method used. Values are:
/ Compare one direction only. Print only the records found in the first data source, but not in the second data source.
 Blank: Compare both directions. Print records found in the first data source but not in the second data source, and also the records in the second data source that don't exist in the first data source.
- 4. Exceptions** Use this processing option to specify whether to print only the report exceptions, or every record from the data selection, noting the differences between the data sources. Values are:
/ Print exceptions only
 Blank: Print all records

R98611 Tab

Use this processing option to specify the data source to use for the R98611 report.

- 1. Data Source Name** Use this processing option to specify the Data Source that you want to use to produce the report.

Running the Data Source Master Comparison Report

Run the Data Source Master Compare report (R986112) to compare Data Source Master tables (F98611) between two data sources. For example, you might compare the F98611 table in the system data source to the F98611 table for a given server map data source. Data sources should always be defined differently on each machine.

Prerequisite

Use the report driver to enter processing options for the report.

Setting Up Data Selection for the Data Source Master Comparison

To set up data selection for Data Source Master Comparison:

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, enter *R986112* in the Batch Application field, and then click Find.
3. Double-click version XJDE0001.

4. On Version Prompting, click the Data Selection option and then click Submit.
5. On the Data Selection form, select from the appropriate columns to specify the exact records that you want to compare.
6. Click OK.

Running the Data Source Master Comparison

The data source master comparison can be run by:

To run Data Source Master Comparison:

1. From the Advanced Operations menu (GH9012), select Data Source Master Comparison.
2. On Work With Batch Versions - Available Versions, click Find and then select the version that corresponds to the report that you want to run.
3. Click Select.
4. On Version Prompting, click Submit.

Running the Data Source Master Report

Run the Data Source Master Report (R98611) to print a report of the Data Source Master table (F98611) for a specific data source.

Setting Up Data Selection for the Data Source Master Report

The data selection for the data source master report can be set up by:

To set up data selection for the Data Source Master Report:

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, type *R98611* in the Batch Application field and click Find.
3. select version XJDE0001, and then select Data Selection from the Row menu.
4. On the Processing Options form, enter the processing options and click OK.
5. On Report Output Destination, select On Screen or To Printer and click OK.
6. On the Data Selection form, select from the appropriate columns to specify the exact records.
7. Click OK.

Running the Data Source Master Report

To run the Data Source Master Report:

1. From the Advanced Operations menu (GH9012), select Data Source Master Report.
2. On Work With Batch Versions - Available Versions, click Find and then select the version that corresponds to the report that you want to run.
3. Click Select.

4. On Version Prompting, click Submit to run the report.

CHAPTER 7

Middleware

The chapter discusses:

- Application communication.
- Middleware.
- JDENET communication middleware.
- JDEBase database middleware.

Understanding Application Communication

In a client/server environment, applications must communicate across different platforms. These platforms can have different communications protocols, database management systems, and hardware operating systems. For clients to communicate with servers and servers to communicate with other servers, a mechanism must exist that can bridge multiple protocol and multiple vendor issues. This mechanism is a layer of software called middleware, which resides between the operating system and the business applications. It is important to have an application architecture that is based on a single, consistent middleware strategy.

Understanding Middleware

PeopleSoft EnterpriseOne provides the following types of middleware:

JDENet Communication Middleware	Performs the connections from client to server and server to server, and sends messages for distributed requests. It is a peer-to-peer, message-based, socket-based, multi-process communication middleware solution.
JDEBase Database Middleware	<p>Provides platform-independent application program interfaces (APIs) for multiple database access. These APIs are used in these two ways:</p> <ul style="list-style-type: none"> • By PeopleSoft EnterpriseOne applications that dynamically generate platform-specific Structured Query Language (SQL), depending on the data source request. • As open APIs for writing advanced business functions in the C programming language. The software uses these APIs to dynamically generate platform-specific SQL statements. <p>JDEBase also provides client-to-server and server-to-server database access. To accomplish this, the software is integrated with a variety of third-party database drivers, such as IBM Client Access/400 database software and Microsoft Open Database Connectivity (ODBC) programming interface.</p>

Understanding JDENet Communication Middleware

To communicate with each other across a network, the two computers must share a communications protocol (or set of protocols). A communications protocol is a formal set of rules that specifies the format and relationship for exchanging data among different devices. The communication middleware is concerned with these protocol layers:

Network Layer	The network layer handles addressing and routing information, error checking, and retransmission requests.
Transport Layer	<p>The transport layer provides connection-oriented data-delivery services across networks. This layer provides end-to-end data exchanges in which systems maintain a session or connection with each other for the reliable, sequenced exchange of data.</p> <p>PeopleSoft EnterpriseOne supports the TCP/IP protocol suite.</p>
Application Layer	The application layer provides application-to-application interaction and data exchange. JDENet is the application layer communication middleware.

JDENet Communication Middleware

JDENet is the PeopleSoft EnterpriseOne proprietary communication middleware package that provides server-to-server and client-to-server communication.

JDENet is a peer-to-peer middleware solution. For example, think of a client as a network conversation initiator and a server as a network conversation responder. In this example, a client always initiates the conversation by asking for something from another machine; and a machine acts as a server when it responds to a network request, such as when it gives something asked for by the client. In this peer-to-peer middleware solution, the distinction between client and server is determined by which machine starts the conversation. Any machine, running on any platform, can act as a client or as a server at a given time.

With JDENet, communication between client and server occurs through messages. JDENet messages contain processing requests, such as requests for business functions, batch jobs, or PeopleSoft EnterpriseOne login security. JDENet messages can originate from the client or the server. JDENet handles database requests only if multiple servers are in use and if they are different server types.

Application requests (messages) can be synchronous or asynchronous. A synchronous message, such as calling a business function, requires the client to wait for the server to complete the request. An asynchronous request, such as a batch process, enables the client to continue with another task while the software processes the request. In some circumstances, business functions can also be called asynchronously.

Socket-Based Communication

A socket is a communications endpoint through which an application sends or receives packets of data across a network. Sockets provide a duplex communication channel between one or more systems. JDENet uses stream sockets to provide end-to-end communications. Sockets guarantee that the data arrives intact.

Message-Based Communication

Message-based communication means that applications send service requests for logic or data in the form of messages that are received and stored in a queue for processing. The middleware handles message transmission, which enables the client application to process other tasks. Without messaging services to handle these jobs, the application must wait until the request is handled and the results returned.

Messaging is most appropriate for event-driven applications. It is the opposite of remote procedure calls (RPC), which are synchronous. The message packaging and "handshaking" of JDENet ensures that the message transmission is complete.

Process-Based Design

Although client workstations can have more than one copy of PeopleSoft EnterpriseOne loaded, only one PeopleSoft EnterpriseOne Windows-executable application can be running at any one time. The software uses an internal network process (also referred to as a net process) called JDENet to communicate a request to the PeopleSoft EnterpriseOne server.

Servers also have a net process called JDENet. This process communicates with the client workstations and routes request messages to appropriate dedicated PeopleSoft EnterpriseOne processes. In turn, the dedicated processes route work to the appropriate platform-specific logic processes, such as DLLs, shared libraries, and job queues. A server can have multiple PeopleSoft EnterpriseOne main processes, multiple dedicated processes, multiple DLLs, shared libraries, and job queues.

The advantage of this architecture is that multiple workstations can make requests to the same server at one time. You can control the number of workstations that can make and maintain a session connection to a main server process. You also can define the total number of dedicated processes (and the number of each type) that the software uses to process specific types of workstation requests.

Network Processes

A relationship exists among network processes, dedicated processes, and logic processes. This relationship is specifically defined by the `jde.ini` file on the enterprise server. Every enterprise server must have at least one PeopleSoft EnterpriseOne network process, which is referred to as a `JDENET_n` job. This job handles network connections and traffic for PeopleSoft EnterpriseOne.

As defined in the `jde.ini` file for each server, multiple `JDENET_n` processes can exist. Regardless of the number of `JDENET_n` processes that exist, the initial `JDENET_n` process serves as the master listener.

If multiple `JDENET_n` jobs are specified, the software starts the jobs as required, allocating a job to each request. When the maximum number of `JDENET_n` processes is started, the software automatically alternates between the currently running `JDENET_n` jobs until the maximum number of connections is reached, providing load balancing among network processes. If the maximum number of connections for the `JDENET_n` job is met on a given server, a client or server cannot initiate an additional PeopleSoft EnterpriseOne session on that server until an existing session connection is ended. By design, all connections to `JDENET_n` persist for the duration of a session.

For example, suppose that the `jde.ini` file on the server specifies that four `JDENET_n` processes are enabled. The first `JDENET_n` request is routed to the master listener, which is the initial `JDENET_n` process that is run at server start-up. When a second request to `JDENET_n` is received, the master listener receives the request and assigns it to a second `JDENET_n` process, which it then starts. This assignment persists for the duration of the session between the requesting device and the server. The same process occurs for the third and fourth `JDENET_n` requests. When the fifth request is received, it is assigned to the first `JDENET_n` process, and the cycle continues.

Kernel Processes

The `JDENET_n` process is responsible for handling the network layer of communication. If the `JDENET_n` job determines that the incoming message is a request for logic processing, it routes the request to an appropriate `JDENET_k` job. The software determines an appropriate `JDENET_k` job based on message identifiers. The `JDENET_k` job is the process that provides the link between the `JDENET_n` job and the appropriate platform-specific processing job. The `JDENET_k` process is applicable only to servers.

The `JDENET_k` job handles the two-way routing to and from the various logic processes, and the `JDENET_n` job handles the return delivery to the appropriate machine. Eleven dedicated kernel types exist, and each is responsible for a specific type of PeopleSoft EnterpriseOne process.

Examples of logic processes include dynamic link libraries (`.dll`) for Windows platforms, shared libraries (`.sl`) for UNIX platforms, and `JDENet` processes for iSeries platforms.

Understanding JDEBase Database Middleware

Different database management systems (DBMS) have their own version of Structured Query Language (SQL). For example, the following illustrates how Microsoft SQL Server, Oracle, and DB2/400 handle the same SQL statement:

Microsoft SQL Server	SELECT * FROM PRODDTA.F0101
Oracle	SELECT * FROM PRODDTA.F0101;
DB2/400	SELECT * FROM PRODDTA/F0101

The purpose of a database middleware layer is to provide a common interface to interpret the various versions of SQL. PeopleSoft EnterpriseOne has a database middleware product called JDEBase, which is a common set of application programming interfaces (APIs) that programmers can call to request data and perform data manipulation logic. JDEBase interprets the generic APIs and converts the SQL into the appropriate statements for PeopleSoft EnterpriseOne to access the database.

Multiple databases in a distributed environment require a monitoring program to ensure database integrity. This monitoring program is referred to as a transaction monitor. The JDEBase database middleware has an embedded transaction monitor.

JDEBase provides:

- The ability to insulate developers from platform-specific SQL coding
- Rapid development of native drivers
- Server-to-server communication
- Transaction processing

JDEBase provides a set of APIs to the developer and a set of translation programs to PeopleSoft EnterpriseOne. The translation programs are embedded in the data source definitions.

For example, suppose a data request for Address Master is made. The Object Configuration Manager (OCM) determines which data source contains the requested table. The Data Source Master table (F98611) provides the database information.

CHAPTER 8

Modes of Processing

This chapter provides an overview of methods for running interactive applications, direct-connect processing, store-and-forward processing, and batch-of-one processing and discusses how to:

- Work with direct-connect processing.
- Work with store-and-forward processing.
- Download business data.

Understanding Methods for Running Interactive Applications

PeopleSoft EnterpriseOne provides many ways for you to run interactive applications. The method you select depends on your needs and your system configuration. All methods enable you to distribute data and logic in a manner that optimizes both the power of the workstation and the data integrity of the server.

The software has four operation modes for interactive applications.

Understanding Direct-Connect Processing

With direct-connect processing, when you run an application you are connected to a server that contains the major business data. The direct-connect model enables you to distribute data and logic. For performance reasons, consider distributing the data and logic in a manner that reduces network traffic and unnecessary input and output on the server.

While PeopleSoft EnterpriseOne enables batch applications to run locally, a business reason for doing this rarely exists. Therefore, all batch applications should be set up for server processing (distributed).

See Also

Chapter 8, “Modes of Processing,” Working with Direct-Connect Processing, page 89

Understanding Store-and-Forward Processing

The store-and-forward model was designed for users who need to enter transactions on a workstation that is disconnected from a server. For example, a sales representative working away from the office can use a laptop to enter an order. With store-and-forward processing, a user can connect to the network and transfer the data later.

PeopleSoft EnterpriseOne applications designed for store-and-forward processing are separate applications. These applications perform edits on static data and other critical information that must be valid in order to process an order. After initial edits are complete, the software stores the transaction in work tables, called Z files, on the workstation. When a network connection is established, Z files are uploaded to the enterprise server. The transactions are edited again by a master business function, which then updates the records into transaction files.

The upload process, which is the batch process that the user initiates, transfers data from the workstation and completes these actions:

- Copies order information from the work tables on the workstation to work tables on the server.
- Updates the Transaction Control File table (F0041Z1) on the server with one transaction for each record, and provides one of these statuses: uploaded, processing, complete with errors, or complete without errors.
- Updates the F0041Z1 table on the workstation to indicate that the software uploaded the transactions. This action prevents the software from uploading the same transaction more than once.
- Invokes a master business function on the server to repeat all local editing and additional editing that was not deemed critical during order entry, and writes records to the permanent transaction tables.
- Sends success or error messages to the Work Center, where users can review and clear them.
- Updates the F0041Z1 table on the server and workstation with the status of each transaction processed in the upload.

The Work Center sends a message for each completed job (with or without errors) to the user who executed the process. To clear an error, look at the details. If the error requires a user action, bring up the transaction where the error occurred.

See Also

Chapter 8, “Modes of Processing,” Working with Store-and-Forward Processing, page 90

Understanding Batch-of-One Processing

Batch-of-one processing combines the performance benefits of the store-and-forward model with the realtime updates of transaction data found in direct-connect processing. Batch-of-one processing uses the store-and-forward application (P4004Z) with the standard production environment, for example PD811, which means that the local workstation has a physical connection to the network. The P4004Z application still uses the Z files, but these tables are located on the enterprise server. Each sales order is written directly to the enterprise server.

Batch-of-one processing reduces network traffic because the P4004Z application performs fewer field-by-field edits. For this reason, it is ideal for sales order entry over a wide-area network (WAN).

When using batch-of-one processing, the user gives up direct access to the F4201 and F4211 files, which contain the most current and complete data on all sales orders. Since the P4004Z application does not directly access those files, it can only review, update, and delete current orders in the Z files. After those orders are moved to the production files (F4201 and F4211), the user would have to use the P4210 application to review, update, or delete a sales order.

To set up subsystem or online mode processing, change the processing option in the Recurring Orders (P4004Z) application.

Subsystem

The subsystem type of batch-of-one processing has a version of the R40211Z batch application running in the background. The subsystem batch application periodically checks the Z files on the enterprise server, performs the batch edit function when data is present and ready to be processed, and then transfers the data from the Z files on the enterprise server into production tables F4201 and F4211.

Note. Version ZJDE0002 of the R40211Z batch application is shipped with a period of 30 milliseconds. This means that this batch application runs at a frequency of 33.3 times per second, which is not the best use of CPU resources on the enterprise server. Should batch-of-one subsystem mode be used in a production environment, a more reasonable figure for this value should be 15,000 milliseconds, or once every 15 seconds.

Online Mode

The online mode option presents the batch application printer selection screen following completion of the sales order. After choosing the printer, a version of the R40211Z batch application performs the batch edit function, transferring data from the Z files on the enterprise server into production tables F4201 and F4211.

The software sends all errors to the Work Center. Users can set an option to have the software prompt them when a new message is sent, or they can wait and view all messages.

Zero-Client Processing

Zero-client processing enables you to connect to PeopleSoft EnterpriseOne applications and data from the workstation using only an internet browser. This mode of processing is similar to direct-connect processing because the data and the logic are stored in a central location. This configuration enables you to maintain storage requirements on the workstation easily.

Working with Direct-Connect Processing

In direct-connect processing, workstations are connected directly to servers that can store data and process logic. For performance reasons, distribute the data and logic in a manner that reduces network traffic and unnecessary input and output on the server.

Recommendations for Data and Logic Distribution

To achieve the best performance with direct-connect processing, use these locations for data and logic processing:

- Map the transaction data to a data server.
- Map user defined codes and menus to the workstation. You also can map other static files locally. If the maintenance costs are more than the performance returns in mapping these tables locally, you can map them to a data server.
- Map all batch applications to the enterprise logic server.

Setting Up Direct-Connect Processing

The process overview for setting up direct-connect processing is as follows:

- Create a production environment and verify that the new environment uses a production path code.

- Determine the name of the master business functions that you should map to the server, if applicable.
- Modify the Object Configuration Manager mappings for the new environment.

See Also

[Chapter 4, “Environment Setup,” Adding an Environment, page 47](#)

[Chapter 3, “Object Configuration Manager,” Working with the Object Configuration Manager, page 15](#)

Object Mappings for Direct-Connect Environments

Depending on your configuration, you might require multiple direct-connect environments. For example, to support multi-tiered configurations you might need an environment that maps all application processing to one server and all data to a corporate server.

Master Data Administration Environment

The data administrator uses the Master Data Administration environment to maintain the published tables in the central location. To set up this environment:

- Map all table objects to a business data source on the server.
- Map user defined codes and menus to a control table data source on the server.

The control data contains the published set of user defined codes.

- Map system tables to the system data source.
- Map Object Librarian tables to the Object Librarian data source.
- Map data dictionary tables to the data dictionary data source.
- Map batch applications to the server.

Locating Master Business Functions

In a direct-connect environment, you need to identify the master business functions so that you can map them to a server.

Working with Store-and-Forward Processing

Store-and-forward processing is a mode of processing that enables users who are disconnected from a server to enter transactions and then later to connect to the server to upload these transactions. For example, remote sales people who use laptops can process transactions and then upload those transactions to the server later. Store-and-forward processing can also help departments that have store-and-forward applications by enabling them to enter transactions in a disconnected state (which improves performance because the applications perform all edits locally), and then upload those transactions to the server during off-peak hours.

The software minimally edits the transactions on the store-and-forward machine, which enables fast entry. A master business function performs full editing when the user uploads the store-and-forward transactions to the enterprise server.

These environments must be in place for store-and-forward processing:

- A store-and-forward environment for disconnected transaction entry

- A direct-connect environment for uploading transactions to the enterprise server

Note. To maintain data integrity, ensure that unique next numbers or document types exist for each store-and-forward user. Depending on your business requirements, these solutions are recommended:

If the enterprise has a small number of store-and-forward users, you can assign a separate document type for each user. For example, user 1 might have document type S1, user 2 might have document type S2, and so on. When user 1 uploads order number 1009, the order would be 1009 S1. User 2 would forward record 1009 S2. This method avoids data corruption by creating data unique to a specific sales person and maintaining separate business data during the upload process.

Do not use all the document types for store-and-forward users because you might need document types for other areas in the enterprise.

Document types range from A0-Z9. If you think you might use all of the document types for store-and-forward users, you should consider the following solution to maintain data integrity in a store-and-forward environment.

If the enterprise has a large number of store-and-forward users, assign each user a unique range of next numbers to assign to records. For example, user 1 assigns only numbers between 0001 and 9999; user 2 assigns only numbers between 10000 and 19999; and so on. Multiple records do not share numbers, so the enterprise maintains data integrity. This method can be difficult to manage, so you should use this method only if other methods will not work for the enterprise.

Prerequisites

Before you complete the tasks in this section:

- Create a new environment for store-and-forward processing. This environment should use the production path code. You can call this environment SFPD811 or something similar.

Do not create the environment by copying an existing environment, because the copy will include that environment's Object Configuration Manager (OCM) mappings. Also, make sure that the just-in-time installation flag is set to N to disable just-in-time installation for the store-and-forward environment.

- SQL Server Client must be installed on the administrator's local workstation.

Setting Up Store-and-Forward Processing

Setting up store-and-forward processing is a one-time process that you do after each workstation installation.

To set up store-and-forward processing:

Access Object Configuration Manager.

1. Create a default map for table (TBLE) objects for the store-and-forward environment that points to the local data source called EnterpriseOne Local - PD811.
2. After you have created the store-and-forward environment, add it to the store-and-forward users' environment list.

Copy the store-and-forward database files (StoreFwd.mdf and StoreFwd.ldf) from the *\\deployment server machine name\E811\planner\data* directory on the deployment server to the *\E811\pd811\data* directory on the administrator's local workstation.

3. Attach the data files, StoreFwd.mdf and StoreFwd.ldf, to the database StoreFwd. There should now be two databases under the *\E811\pd811\data* directory on the administrator's workstation.

4. From the \E811\pd811\data directory on the administrator's workstation, copy these tables from the JDELocal_PD811 database that has the most current data to the StoreFwd database:

F0004	User Defined Code Types
F0005	User Defined Codes
F0082	Menu Master File
F00821	Menu Selections File
F0083	Menu Text Override File
F0084	Menu Path File

Note. You can use the DTS of the SQL Server Client to export the tables.

Ensure that the administrator's workstation is set up as a subscriber to the menu and user defined code tables so that future releases have the latest tables.

5. From the \E811\pd811\data directory on the administrator's workstation, detach the databases JDELocal_PD811 and StoreFwd.
6. Delete the JDELocal_PD811.mdf and JDELocal_PD811.ldf files.
7. Rename StoreFwd.mdf as JDELocal_PD811.mdf. and rename StoreFwd.ldf as JDELocal_PD811.ldf.
8. Attach the JDELocal_PD811.mdf and JDELocal_PD811.ldf files to the database JDELocal_PD811.
9. Ensure that all of the technical and business data tables are in the JDELocal_PD811 database on the administrator's workstation and that all of the tables (except user defined codes and menus) are empty.

If any tables are missing, import them from the JDELocal_PD811 database located on the deployment server in this path: \\deployment server machine name\E811\planner\data. Ensure that you import only the structure and not the data. That is, import only empty tables (except for user defined codes and menus).

10. Copy all data dictionary tables (F92*) or a full data dictionary TAM file to the store-and-forward client machine.

the initial setup of store-and-forward processing is complete. You must perform the administration and end-user tasks explained in this chapter at least once to enable store-and-forward processing.

Administering Store-and-Forward Processing

Create the JDELocal_PD811 database on the administrator's workstation. End users need the JDELocal_PD811 database to perform store-and-forward processing. This task refreshes the server store-and-forward database.

Note. You must perform the previous task at least once. The administrator should perform it on a regular schedule to ensure accurate and current data for the store-and-forward users.

Downloading Technical Data

For store-and-forward processing, you must copy the technical data tables from the production environment to the administrator's workstation. Use the Environment Database Creation application (R98403) to perform this process, which uses a Copy Table script. When this process is complete, users can run the technical data locally after they install the store-and-forward package. (Users do not have access to the server during store-and-forward transaction processing.)

The administrator's workstation must have the latest production package installed. Perform this task only if your technical data has changed.

To download technical data:

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, type *R98403* in the Batch Application field and click Find.
3. Select the version titled Populate System Tables for Store & Forward, and click Select.
4. On the Version Prompting form, select the Data Selection option and click Submit.
5. On the Data Selection form, ensure that all of the technical data tables are listed in the data selection area of this form.
6. Click OK.
7. Enter these values for the processing options, and click OK:

Environment tab

1. Enter the name of the target Environment for the database to be created for. (If this report is called from another process, the target Environment will be passed in.)

Enter the name of the store-and-forward environment that you created, such as SFPD811.

2. or Enter the name of the target Data Source for the database to be created for.

If you do not enter the previous option, enter the name of the store-and-forward data source.

3. Enter a 1 to load Production Data or a 2 to load Demonstration Data. The default is to load production data. (If this report is called from another process, this flag will be passed in.)

You should always enter 2 for demonstration data because this batch process looks at the Copy Data Y/N flag in the Object Librarian record to determine whether data should be copied for this table. Because some of these technical tables will be specified with a NO for the Copy Data Y/N flag, a value of 2 for this processing option means the software will ignore that flag and copy all of the normal production data for those tables.

4. Enter the name of the source Data Source for Loading the Data. (If this report is called from another process, the source Data Source will be passed in.)

Leave blank if you are copying from many data sources, and use the next processing option instead. If you use this option, enter a data source name such as EnterpriseOne Local.

5. or Enter the name of the source Environment for the database to be copied from. (If this report is called from another process, the source Environment will be passed in.)

Instead of entering a data source name, enter the name of the source environment. Use this option instead of the previous option if you have multiple data sources from which to copy that all reside within one environment.

Update tab

6. Enter a 0 for Proof Mode or a 1 to create the Environment Database. The default is Proof Mode.

Enter 1 to generate a report and copy the technical tables to the local machine.

7. Enter an A to recreate existing tables in data sources that allow automatic table creation. The default is not to recreate tables.

Enter A to clear files and recreate the data.

8. Enter a 1 to only copy tables that exist in the source data source. The default is to copy all tables.

Leave blank.

9. Enter a Y to add records without clearing the target table. This is used for language tables. The default is to clear the target table.

After you enter processing options, Copy Table runs and then a Copy Table message box provides a status of the download.

Print tab

10. Enter a 1 to only print exceptions. The default is to print all lines.

Enter 1 to print only the exception lines of the report. Leave this option blank to print the report.

This report describes any errors encountered during the download, including a list of any technical tables missing from the JDELocal_PD811 database on the administrator's workstation.

Licensing tab

11. Enter a Y to create all tables or an N to create licensed tables only. The default is to create all tables.

Enter Y to create all tables.

12. Enter a Y to print all tables in the report or an N to print licensed tables only. The default is to print all tables. Enter Y to print all tables.

Downloading Business Data

Because business data is shared by multiple store-and-forward users, run this batch process to download the records for the master tables that pertain to all of the store-and-forward applications from the server to the JDEMasters database.

Prerequisite

Use the database administration application to ensure that all business data table definitions exist within the JDELocal_Data database on the administrator’s workstation.

Downloading Business Data

To download business data:

1. Access the Batch Versions form.
2. On the Work With Batch Versions - Available Versions form, type *P00140* in the Batch Application field, and then click Find.

Note. For all non-populated business data tables, you must run the Environment Database Creation (R98403) batch application.

All of the versions that PeopleSoft ships appear. These versions are the batch processes that download the business data table.

You must run each version of the business data tables that you need copied to the administrator’s local machine.

-
3. Select the business data table version, and then select Run Version from the Row menu.
 4. On the Version Prompting form, click Submit.
 5. On the Report Output Destination form, select a destination and then click OK.
 6. On Environment Overrides, complete these fields with the name of the source environment and then click OK:

Source Environment Override	Ensure that this is the normal production environment, which points to all of the publisher tables that you have set up.
Target Environment Override	Ensure that this is the store-and-forward environment, which should have all of its OCM mappings pointing to Local.

Note. On the Environment Overrides form, if you click a Browse button, the Environment Search form appears. Select the appropriate environment, and click Select.

7. Based on the specific store-and-forward application needs, run the appropriate version for the Store and Forward Download (P00140) application.

Each version populates one master table on the JDELocal_PD811 database. Ensure that the batch process runs locally, rather than on a server.

Users can run this batch process from their workstation after they have copied the database from the server to their workstation. Therefore, the administrator could skip this step, leaving the business data tables empty.

Making the Database Accessible to End Users

You must deploy the JDEmasters database created with the technical and business data downloading processes. You must make this database accessible to the store-and-forward users because this is the database that they copy to their workstations.

To make the database accessible to end users:

1. Copy the JDELocal_PD811.mdf and JDELocal_PD811.ldf files from the administrator's workstation to a shared folder on the deployment server.
2. Attach this database as needed to keep the business data synchronized.

Verifying the Correct Store-and-Forward Settings in the jde.ini File

A store-and-forward user's jde.ini [DB SYSTEM SETTINGS] must be set correctly in order for store-and-forward processing to work on an end-user's workstation.

To verify the correct store-and-forward settings in the jde.ini file:

1. In the store-and-forward end user's jde.ini file, ensure that in the [DB SYSTEM SETTINGS] section, the Default Env is set to SFPD811.
2. In the [DB SYSTEM SETTINGS - SECONDARY] section, verify that the default value is set to Local - PD811. This default environment accesses the local JDELocal_PD811 database after the primary network database setting times out.

You can also change the setup.inf file to have the default environment set to SFPD811 for the production packages so that the store-and-forward users do not need to update their jde.ini file after each workstation installation. The settings should look as follows:

```
[DB SYSTEM SETTINGS]
Default Env=SFPD811
Default Pathcode=PD811
[DB SYSTEM SETTINGS - SECONDARY]
Base Datasource=Local - PD811
Database=JDELocal_PD811
```

Updating the End-user Database for Store-and-Forward Processing

the store-and-forward users must perform this task at least once to enable store-and-forward processing on their workstations.

Note. Users should perform this task on a regular schedule to ensure accurate and current data. You should establish procedures for how often store-and-forward users need to refresh their database from the server.

To update the end user database for store-and-forward processing:

1. Ensure that store-and-forward users have the current production package installed on their workstations.
2. With their workstations connected to the enterprise, store-and-forward users should copy the JDELocal_PD811.mdf and the JDELocal_PD811.ldf files from the shared folder on the server to the /E811/data directory on their workstations.

Uploading Store-and-Forward Transactions

This process describes how to upload to the enterprise server the transactions entered by store-and-forward users. A batch application uploads transactions from the work files on the local machine to the work files on the server.

To upload store-and-forward transactions:

After the users have completed their transactions, they are ready to upload their store-and-forward transactions. Have users log off, reconnect their workstations to the enterprise network, reboot their workstations, and then log on to their normal production environment.

1. Access the Batch Versions form.
2. On Work With Batch Versions - Available Versions, type one of these applications in the Batch Application field and then click Find:
 - *R0911Z1* for Store and Forward Journal Entry Upload
 - *R0411Z1* for Store and Forward Upload
 - *R42101Z* for Sales Store and Forward To Server

You must run each of these versions separately to upload each type of transaction that you processed with store-and-forward processing.
3. Select the upload version and then click *Select*.

Note. To properly process the data, you must run this batch application locally on the workstation.

This process copies these store-and-forward work files from your workstation to the server:

- Transaction Control File table (F0041Z1)
- Journal Entry Transactions - Batch File table (F0911Z1)
- Voucher Transactions - Batch Upload table (F0411Z1)
- Batch Receiver File - Order Headings table (F4001Z)
- Batch Receiver File - Order Details table (F4011Z)

After you run each upload batch process, the software creates and displays a transmission upload report for all of the transactions that you upload to the server.

4. Use this report to verify that the software uploaded the transactions correctly.
5. From the server, run PeopleSoft EnterpriseOne.

6. On the Work With Batch Versions - Available Versions form, type one of these applications into the Batch Application field and click Find:

- *R09110Z* for Journal Entry Batch Processor
- *R04110Z2* for Store and Forward Voucher Batch Processor
- *R40211Z* for Recurring Orders Edited Creation

The batch application uses the data from the work files to create records in the transaction files on the server.

Store-and-forward processing is now complete.

Technical Data Tables Needed for Store-and-Forward

The following technical data tables must reside on the user's local machine, which the tables use for store-and-forward processing.

Table	Description
F0002	Next Numbers - Automatic
F00021	Next Numbers by Company/Fiscal Year - Automatic
F0092	Library Lists - User
F00921	User Display Preferences
F00922	User Display Preferences Tag File
F00924	User Install Packages
F00925	User Access Definition
F0093	Library List Control
F0094	Library List Master File
F00941	Environment Detail - EnterpriseOne
F00942	Object Path Master File
F00945	Release Master
F00950	Security Workbench Table
F98111	Imaging Constants
F983051	Versions List
F98306	Processing Option Text
F9860	Object Librarian Master Table
F986101	Object Configuration Master

Table	Description
F98611	Data Source Master
F98613	Business View Environmental Server
F9865	Form Information File
F98825	Package Deployment Scheduling
F98950	User Overrides Table
F98980	Font Override by Language

See Also

Chapter 8, “Modes of Processing,” Downloading Technical Data, page 93

Business Data Tables Needed for Store-and-Forward

The business data tables necessary to run the Voucher Entry (P0411Z1), Journal Entry (P0911Z1), and Sales Order Entry (P4004Z) applications must reside on the local machine used for store-and-forward processing. To copy these tables to the local machine, you must copy each table separately.

Prerequisite

Before you complete the tasks in this section:

- Before end-users download the User Defined Code tables (F0004 and F0005) for any of the verticals (such as Journal Entry, Voucher Entry, or Sales Order Entry), they should use these criteria to make sure that they need these tables:
- The end-user needs to perform data selection on these tables.
- The system administrator has not populated these tables as part of the store-and-forward JDELocal_PD811 database provided for end users.

Voucher Entry (P0411Z1)

The table below lists the tables needed to run the Voucher Entry application.

Table	Description
F0004	User Defined Code Types
F0005	User Defined Codes
F0006	Business Unit Master
F0008	Date Fiscal Patterns

Table	Description
F0008B	Date Fiscal Patterns - 52 Period Accounting
F0009	General Constants
F0010	Company Constants
F0012	Automatic Accounting Instructions Master
F0013	Currency Codes
F0014	Payment Terms
F0022	Tax Rules
F0041Z1	Transaction Control File
F0101	Address Book Master
F0111	Address Book - Who's Who
F0150	Address Organization Structure Master
F0116	Address by Date
F0401	Supplier Master
F0411Z1	Voucher Transactions - Batch Upload
F0901	Account Master
F0907	Chart of Accounts Format
F0911Z1	Journal Entry Transactions - Batch File
F4008	Tax Areas
F4801	Work Order Master File

Note. Additional tables might be necessary.

Journal Entry (P0911Z1)

The table below lists the tables needed to run the Journal Entry application.

Table	Description
F0004	User Defined Code Types
F0005	User Defined Codes
F0006	Business Unit Master

Table	Description
F0008	Date Fiscal Patterns
F0008B	Date Fiscal Patterns - 52 Period Accounting
F0009	General Constants
F0010	Company Constants
F0012	Automatic Accounting Instructions Master
F0013	Currency Codes
F0014	Payment Terms
F0022	Tax Rules
F0041Z1	Transaction Control File
F0101	Address Book Master
F0111	Address Book - Who's Who
F0150	Address Organization Structure Master
F0116	Address by Date
F0301	Customer Master
F0901	Account Master
F0907	Chart of Accounts Format
F0911Z1	Journal Entry Transactions - Batch File
F4008	Tax Areas
F4801	Work Order Master File

Note. Additional tables might be necessary.

Sales Order Entry (P4004Z)

The table below lists the tables needed to run the Sales Order Entry application.

Table	Description
F0004	User Defined Code Types
F0005	User Defined Codes
F0006	Business Unit Master

Table	Description
F0006D	Business Unit Alternate Description Master
F0008	Date Fiscal Patterns
F0008B	Date Fiscal Patterns - 52 Period Accounting
F0009	General Constants
F0010	Company Constants
F0012	Automatic Accounting Instructions Master
F0013	Currency Codes
F0014	Payment Terms
F0022	Tax Rules
F0041Z1	Transaction Control File
F0101	Address Book Master
F0111	Address Book - Who's Who
F0116	Address By Date
F0150	Address Organization Structure Master File
F0301	Customer Master
F0401	Supplier Master
F0901	Account Master
F0907	Chart of Accounts Format
F4001Z	Batch Receiver File - Order Headings
F40073	Preference Hierarchy File
F4008	Tax Areas
F4009	Distribution/Manufacturing Constants
F40095	Default Locations/Printers
F4013	Order Processing Cross Reference File
F4011Z	Batch Receiver File - Order Details
F40205	Line Type Control Constants File
F4070	Price Adjustment Schedule (Advanced Pricing only)

Table	Description
F4071	Price Adjustment Type (Advanced Pricing only)
F4072	Price Adjustment Detail (Advanced Pricing only)
F4075	Price Variable Table (Advanced Pricing only)
F4092	Group Code Key Definition Table
F4094	Item/Customer Key ID Master File
F41001	Inventory Constants
F41002	Item Units of Measure Conversion Factors
F41003	Unit of Measure standard conversion
F4101	Item Master
F4102	Item Branch File
F4106	Item Base Price File
F4201	Sales Order Header File
F4207	Price by Item
F4208	Price by Customer
F4801	Work Order Master File

CHAPTER 9

Typical Customer Configuration

This chapter provides an overview of the recommended setup and a typical configuration.

Understanding the Recommended Setup

PeopleSoft EnterpriseOne can be configured in many ways. Examples and recommendations for the setup follow.

You should follow PeopleSoft-recommended setup and naming standards wherever possible, unless a strong business case exists to support the need to change. Following the typical setup and naming standards enhances the likelihood of success and minimizes confusion when communicating with individuals outside the core project team who are not aware of your specific configuration.

If you want to customize your configuration, you should change only the descriptions with the typical setup, not the names. Upgrades will be easier with fewer manual steps if you use the PeopleSoft-recommended naming standards.

An environment description is important because the description appears on the environment list of the login screen where the user selects the environment. The environment description should define:

- Path code
- Data type (such as production, test, or prototype)
- Data location
- Location that batch applications will execute

Understanding a Typical Configuration

This chapter helps you understand a configuration from the perspective of the workstation. That is, the mappings presented in this chapter are for workstation-to-enterprise server mappings, not server-to-server mappings (for example, mappings for the server map are not listed). Although PeopleSoft ships EnterpriseOne with a typical configuration, you can change it.

Understanding Your Environments

You should understand the basic environments of a PeopleSoft EnterpriseOne configuration. For each environment, this chapter describes:

- The path code

- The purpose
- The object mappings

For a given release, all environments you receive from PeopleSoft share common data sources. For example, for PeopleSoft EnterpriseOne 8.11, these data sources are common to all environments:

- System - 811
- Object Librarian - 811
- Data Dictionary - 811

Environment-Specific Data Sources for UNIX and Windows

These data sources are specific to a particular UNIX and Windows environment. For each environment, a separate data source must exist.

- Central objects
- Versions tables
- Business data
- Control tables
- Local - xxxx

Where xxxx is the path code for the environment.

Production Environment (PD811)

Below are data sources for the production environment.

Path Code	PD811
Central Objects data source	Central Objects - PD811
Versions Tables data source	Versions - PD811
Business Data data source	Business Data - PROD
Next Numbers data source	Control Tables - Prod
Menu/UDCs data source	Control Tables - Prod

Prototype Environment (PY811)

Below are data sources for the prototype environment.

Path Code	PY811
Central Objects data source	Central Objects - PY811
Versions Tables data source	Versions - PY811
Business Data data source	Business Data - CRP

Next Numbers data source	Control Tables - CRP
Menu/UDCs data source	Control Tables - CRP

Development Environment (DV811)

Below are data sources for the development environment.

Path Code	DV811
Central Objects data source	Central Objects - DV811
Versions Tables data source	Versions - DV811
Business Data data source	Business Data - TEST
Next Numbers data source	Control Tables - Test
Menu/UDCs data source	Control Tables - Test

Pristine Environment (PS811)

Below are data sources for the pristine environment.

Path Code	PS811
Central Objects data source	Central Objects - PS811
Versions Tables data source	Versions - PS811
Business Data data source	Business Data - PS811
Next Numbers data source	Business Data - PS811
Menu/UDCs data source	System Local - PS811

Planner Environment (PSFTPLAN)

Path Code	PLANNER
Central Objects data source	Not applicable
Planner Tables data source	Planner - 811
Versions Tables data source	Versions Local
Business Data data source	Business Data Local
Next Numbers data source	Control Tables Local
Menu/UDCs data source	Control Tables Local

Deployment Environment (DEP811)

Below are data sources for the deployment environment.

Path Code	PLANNER
Central Objects data source	Not applicable
Versions Tables data source	Versions Local
Business Data data source	Business Data Local
Next Numbers data source	Control Tables Local
Menu/UDCs data source	Control Tables Local

Remote Environments

Remote environment names are preceded by a 3-character location code followed by a J for Java application server or a W for Windows terminal server.

For example:

xxxJPD811 indicates a Java application server for the PD811 environment at location xxx.

xxxWTS811: Indicates a Windows terminal server for the TS811 environment at location xxx.

The path codes and data sources for remote environments are identical to the base environments.

PD811 Environment

Below are data sources for a remote production environment.

Path Code	PD811
Purpose	PD811 is the live production environment for the end users who will have a tested and released package on their machine. Batch applications run on the server. Eventually, more than one production environment might be established for different types of distributed data, logic, and modes of processing.

PD811 - Object Mappings

Below are object mappings for a production environment.

Mapping	Explanation
Business Data - PROD	The default object mapping. Tables that are not specifically mapped by other data sources use this data source as their default mapping. This mapping includes the F00165 - Media Objects Storage table.

Mapping	Explanation
Central Objects - PD811	Maps to the central object tables, including F98950 - User Overrides.
Control Tables - Prod	Maps to the next number tables.
Data Dictionary - 811	Maps to the data dictionary tables and the data dictionary media object text in the GT92002 - Data Dictionary - Glossary Information data structure.
Logic Data Source	Maps to the machine on which batch applications are run.
Object Librarian - 811	Maps to the object librarian tables and the object librarian media object text in these data structures: <ul style="list-style-type: none"> • GT9860A - Object Librarian Generic Text Structure • GT9862A - Business Function Notes • GT98DSA - Data Structure Notes - Structure and Item • GT98DSB - Data Structure Notes - Structure and Item • GT98TMPL - Media Object Templates
Local - PD811	Maps to the user defined code tables.
System - 811	Maps to the system tables.
Versions - PD811	Maps to the version tables, including: <ul style="list-style-type: none"> • F983051 - Versions List • F98306 - Processing Option Text

PY811 Environment

Below are data sources for a remote prototype environment.

Path Code	PY811
Purpose	<p>PY811, the prototype environment, is the staging environment for production. Constants tables and master tables (such as company constants, fiscal date patterns, and item master) are populated with customer data during the prototype process.</p> <p>Copy the tables to the production environment before you go live. After you run the Installation Workbench, no business data exists until you enter it. When appropriate, you should refresh the test data from PD811, which represents the production data.</p>

PY811 - Object Mappings

Below are object mappings for a prototype environment.

Mapping	Explanation
Business Data - CRP	The default object mapping. Tables that are not specifically mapped by other data sources will use this data source as their default mapping. This mapping includes the F00165 - Media Objects Storage table
Central Objects - PY811	Maps to the central object tables, including F98950 - User Overrides.
Control Tables - CRP	Maps to the next number tables.
Data Dictionary - 811	Maps to the data dictionary tables and the data dictionary media object text in the GT92002 - Data Dictionary - Glossary Information data structure.
Logic Data Source	Maps to the machine on which batch applications are run.
Object Librarian - 811	Maps to the object librarian tables and the object librarian media object text in these data structures: <ul style="list-style-type: none"> • GT9860A - Object Librarian Generic Text Structure • GT9862A - Business Function Notes • GT98DSA - Data Structure Notes - Structure and Item • GT98DSB - Data Structure Notes - Structure and Item • GT98TMPL - Media Object Templates
Local - PY811	Maps to the user defined code tables.
System - 811	Maps to the system tables.
Versions - PY811	Maps to the version tables including: <ul style="list-style-type: none"> • F983051 - Versions List • F98306 - Processing Option Text

DV811 Environment

Below are data sources for a remote development environment.

Path Code	DV811
Purpose	<p>DV811, the development environment, is the testing environment for development objects. This environment shares the test data that TS811 uses. Developers log in to this environment to modify objects and test them before transferring the changed objects to the PD811 path code.</p> <p>Once you have transferred objects into PD811, a user can install a recent PRD package that has not been released to end users and log in to either CRP or TST for additional testing.</p>

DV811 - Object Mappings

Below are object mappings for a development environment.

Mapping	Explanation
Business Data - PROD	The default object mapping. Tables that are not specifically mapped by other data sources use this data source as their default mapping. This mapping includes the F00165 - Media Objects Storage table
Central Objects - DV811	Maps to the central object tables, including the F98950 - User Overrides table.
Control Tables - Production	Maps to the next number tables.
Data Dictionary - 811	Maps to the data dictionary tables and to the data dictionary media object text in the GT92002 - Data Dictionary - Glossary Information data structures.
Logic Data Source	Maps to the machine on which batch applications are run.
Object Librarian - 811	Maps to the object librarian tables and to the object librarian media object text in these data structures: <ul style="list-style-type: none"> • GT9860A - Object Librarian Generic Text Structure • GT9862A - Business Function Notes • GT98DSA - Data Structure Notes - Structure and Item • GT98DSB - Data Structure Notes - Structure and Item • GT98TMPL - Media Object Templates
Local - DV811	Maps to the user defined code tables.
System - 811	Maps to the system tables.
Versions - DV811	Maps to the version tables, including; <ul style="list-style-type: none"> • F983051 - Versions List • F98306 - Processing Option Text

PS811 Environment

Below are data sources for a remote test environment.

Path Code	PS811
Purpose	<p>Use the PS811 environment to test pristine (unaltered) objects with PeopleSoft demonstration data. Also use this environment for training classes. You must have this environment to compare modified objects to pristine objects.</p> <p>When you encounter a software problem that PeopleSoft Worldwide Customer Support cannot duplicate, they will ask you to log in to the pristine environment to duplicate the problem. Routinely (such as monthly or quarterly), you should refresh the data that this environment uses with the PeopleSoft demonstration data shipped with the software.</p>

PS811 - Object Mappings

Below are object mappings for a test environment.

Mapping	Explanation
Business Data -PS811	The default object mapping. Tables that are not specifically mapped by other data sources use this data source as their default mapping. This mapping includes the F00165 - Media Objects Storage table.
Data Dictionary - 811	Maps to the data dictionary tables and to the data dictionary media object text in the GT92002 - Data Dictionary - Glossary Information data structure.
Logic Data Source	Maps to the machine on which batch applications are run.
Object Librarian - 811	<p>Maps to the object librarian tables and to the object librarian media object text in these data structures:</p> <ul style="list-style-type: none"> • GT9860A - Object Librarian Generic Text Structure • GT9862A - Business Function Notes • GT98DSA - Data Structure Notes - Structure and Item • GT98DSB - Data Structure Notes - Structure and Item • GT98TMPL - Media Object Templates
Local - PS811	Maps to the user defined code tables.
System - 811	Maps to the system tables.
Versions - PS811	<p>Maps to the version tables, including:</p> <ul style="list-style-type: none"> • F983051 - Versions List • F98306 - Processing Option Text

Understanding Typical Data Sources

If the enterprise server has Oracle Server or Microsoft SQL Server and is a more powerful machine than the deployment server, for performance reasons we recommend that you put all data sources (except the local data sources) on the enterprise server instead of the deployment server.

Data Sources

Data Source Name	Owner and Purpose
Business Data - CRP	<p>The owner is CRPDTA.</p> <p>The library is CRPDTA.</p> <p>The CRP business data. Before going live, you should copy much of this data to Business Data - PROD.</p>
Business Data - PS811	<p>The owner is PRSTDTA.</p> <p>The library is PRSTDTA.</p> <p>The pristine data shipped with the software.</p>
Business Data - PROD	<p>The owner is PRODDTA.</p> <p>The library is PRODDTA.</p> <p>The production business data.</p>
Business Data - TEST	<p>The owner is TESTDTA.</p> <p>The library is TESTDTA.</p> <p>The test data entered during CRP or converted from non-PeopleSoft systems.</p>
Central Objects - PY811	<p>The owner is PY811.</p> <p>The library is COPY811.</p> <p>The central objects data source associated with the PY811 path code. After you create and test the modifications in this path code, transfer them to the PD811 path code.</p>
Central Objects - DV811	<p>The owner is DV811.</p> <p>The library is CODV811.</p> <p>The central objects data source associated with the DV811 path code. After you create and test the modifications in this path code, transfer them to the PD811 path code.</p>
Central Objects - PS811	<p>The owner is PS811.</p> <p>The library is COPS811.</p> <p>The central objects data source associated with the PS811 path code.</p>

Data Source Name	Owner and Purpose
Central Objects - PD811	<p>The owner is PD811.</p> <p>The library is COPD811.</p> <p>The central objects data source associated with the PD811 path code. Transfer objects into this data source after you have tested them in path code DV811.</p>
Control Tables - CRP	<p>The owner is CRPCTL.</p> <p>The library is CRPCTL.</p> <p>The control tables used in the CRP environment.</p>
Control Tables - Prod	<p>The owner is PRODCTL.</p> <p>The library is PRODCTL.</p> <p>The control tables used in the production environment.</p>
Control Tables - Test	<p>The owner is TESTCTL.</p> <p>The library is TESTCTL.</p> <p>The control tables used in the test environment.</p>
Data Dictionary - 811	<p>The owner is DD811.</p> <p>The library is DD811.</p> <p>The single data dictionary that all environments use.</p>
LOCAL	<p>No owner exists.</p> <p>The data source that defines the local machine to PeopleSoft EnterpriseOne. Use it to override reports to the workstation.</p>
machine name	<p>No owner exists.</p> <p>A value that defines the logic host to PeopleSoft EnterpriseOne.</p>
machine name - Server Map	<p>The owner is SVM811.</p> <p>The server map for the logic server.</p>
Object Librarian - 811	<p>The owner is OL811.</p> <p>The Object Librarian, which is release specific.</p>
Control Tables Local	<p>No owner exists.</p> <p>The data found in the PSCTL811 MSDE. This data is used only in the planner.</p>

Data Source Name	Owner and Purpose
System Local	<p>No owner exists.</p> <p>The data found in the PSSY811 MSDE. This data is used only in the planner.</p>
Data Dictionary Local	<p>No owner exists.</p> <p>The data found in the PSDD811 MSDE. This data is used only in the planner.</p>
Object Librarian Local	<p>No owner exists.</p> <p>The data found in the PSOL811 MSDE. This data is used only in the planner.</p>
Versions Local	<p>No owner exists.</p> <p>The data found in the PSVL811 MSDE. This data is used only in the planner.</p>
Local - PY811	<p>No owner exists.</p> <p>The source that contains the User Defined Codes (UDCs): Control Tables - CRP.</p>
Local - DV811	<p>No owner exists.</p> <p>The source that contains the User Defined Codes (UDCs): Control Tables - Test.</p>
Local - PS811	<p>No owner exists.</p> <p>The source that contains the User Defined Codes (UDCs): Business Data - PS811.</p>
Local - PD811	<p>No owner exists.</p> <p>The source that contains User Defined Codes (UDCs): Control Tables - Production.</p>
System - 811	<p>The owner is SY811.</p> <p>The library is SY811.</p> <p>The single set of system tables that all environments use.</p>
Versions - PY811	<p>The owner is PY811.</p> <p>The library is COPY811.</p> <p>The source that contains the versions list and processing option text tables for the PY811 environment.</p>

Data Source Name	Owner and Purpose
Versions - DV811	<p>The owner is DV811.</p> <p>The library is CODV811.</p> <p>The source that contains the versions list and processing option text tables for the DV811 environment.</p>
Versions - PS811	<p>The owner is PS811.</p> <p>The library is PS811.</p> <p>The source that contains the versions list and processing option text tables for the PS811 environment.</p>
Versions - PD811	<p>The owner is PD811.</p> <p>The owner is COPD811.</p> <p>The source that contains the versions list and processing option text tables for the PD811 environment.</p>

The Configuration at a Glance

This table summarizes the data, environments, central objects (path codes), and packages that you need:

Requirement	Explanation
Data	<p>You might have these sets of data:</p> <ul style="list-style-type: none"> • Conference Room Pilot (CRP) business data • Conference Room Pilot (CRP) control tables • Data Dictionary (all environments share) • PeopleSoft pristine data • Production business data • Production control tables (used by the PD811 environment) • Object Librarian (all environments share) • System (technical data all environments share) • Test business data • Test control tables (used by TS811 and DV811 environments) • Versions

Requirement	Explanation
Central Objects (Path Codes)	<p>You should have these sets of central objects or path codes, which are release-specific:</p> <ul style="list-style-type: none"> • PY811 central objects • DV811 central objects • PS811 central objects • PD811 central objects
Environment	<p>The installation process defines the environments, which are as follows:</p> <p>PY811</p> <p>CRP objects (possibly testing a package you have not released to production users), with data mapped to CRP. The path code is PY811 with table objects mapped to CRP data.</p> <p>DV811</p> <p>Development objects with test data. The path code is DV811, with table objects mapped to test data.</p> <p>PS811</p> <p>Pristine objects with PeopleSoft pristine demo data. The path code is PS811, with objects mapped to PeopleSoft pristine data</p> <p>PD811</p> <p>Production objects with production data. The path code is PD811, with table objects mapped to production data.</p> <p>TS811</p> <p>CRP objects with test data. The path code is PY811, with table objects mapped to test data</p>

Requirement	Explanation
	<p>If you are not planning any development projects, you need only two path codes: PY811 and PD811. You should create a development path code if you plan to do extensive software modification.</p> <p>The fewer path codes you use, the better. With each additional path code comes version control maintenance that is time consuming unless a good reason exists for the additional path code. Even when making extensive software modifications, you should have only these four path codes (sets of central objects):</p> <p>PY811</p> <p>This path code contains a practice set of objects that are tested during conference room pilot before transferring objects to production. It is for deploying quick fixes or making minor modifications that you will quickly transfer to production. It can also be used as a place to test modifications that were done in the development path code before taking the risk of transferring them to the production path code.</p>

Requirement	Explanation
	<p>DV811</p> <p>Use this path code for normal development. Upon successful testing, transfer the objects to the PY811 path code, using Object Transfer, and distribute to the users through a package build and a workstation installation.</p> <p>PS811</p> <p>This is the set of pristine objects shipped from PeopleSoft. You should not make changes to this path code other than paper fixes from PeopleSoft. This path code is used to compare PeopleSoft standard software to any custom solutions you have implemented in other path codes. You should keep a copy of this path code so that you have a clean copy of the software in case you need to refresh anything.</p> <p>PD811</p> <p>This is the production path code. Just-in-time installations come directly from this location, and production server objects are also deployed from here. After testing software changes in PY811, transfer them to PD811 and then deploy the changes to the enterprise servers and workstations.</p>
Packages	<p>All path codes share the same Object Librarian tables, the same system data source, and, normally, the same data dictionary. The only distinct tables across path codes are central objects/specifications (F987*), Versions List (F983051), and Processing Option Text (F98306).</p> <p>At PeopleSoft, we have determined that each package should have an A and B version, and that you alternate between these versions when you build packages.</p> <p>If you are using both full and partial packages, you would have four packages for each path code. This setup gives you two full packages (A and B) for production and two partial packages (A and B) for production. For example:</p> <ul style="list-style-type: none"> • PD811FA (Standard Production Full A) • PD811FB (Standard Production Full B) • PD811PA (Standard Production Partial A) • PD811PB (Standard Production Partial B)

Glossary of PeopleSoft Terms

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

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

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

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

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

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

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

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

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

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

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

GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . 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	<p>In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).</p> <p>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.</p>
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	<p>In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.</p> <p>See also <i>update access</i>.</p>
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	<p>In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).</p> <p>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.</p> <p>In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.</p>
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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