PeopleSoft®

EnterpriseOne Tools 8.94 PeopleBook: Software Update

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Open Source Disclosure

Contents

About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- 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.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press 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

Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: 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.

U: 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.

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

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.

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.

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 explains how to update PeopleSoft software using both Application Software Updates (ASUs) and Electronic Software Updates (ESUs). Initial sections describe how to prepare for the process. Later sections describe how to install the software update on the deployment server.

Software Update Guide

This guide describes how to:

- Define prerequisites.
- Use software updates.
- Check modification and merge flags.
- Use PeopleSoft customer support.

CHAPTER 1

Getting Started

This chapter provides an overview of PeopleBooks and discusses:

- Required knowledge.
- Types of software updates.
- The PeopleSoft EnterpriseOne update process.

Understanding PeopleSoft EnterpriseOne PeopleBooks

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

This section discusses:

- PeopleSoft EnterpriseOne application prerequisites
- Obtaining documentation updates

PeopleSoft EnterpriseOne 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 EnterpriseOne applications.

See the Foundation Guide.

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

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

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 can find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on the PeopleBooks CD-ROM.

Note. Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. Updates are continually posted as the upgrade process is refined.

See Also

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

Required Knowledge

This guide is designed for management information system (MIS) managers and installers.

It outlines the procedures you follow to apply software updates for PeopleSoft EnterpriseOne. To update successfully, you must have a working knowledge of these topics:

- PeopleSoft EnterpriseOne installation and upgrade concepts
- Hardware and software requirements.
- Database setup and management.
- Enterprise platforms and operating systems.

Types of Software Updates

PeopleSoft EnterpriseOne distributes four types of software updates. All are installed on the deployment server, and require a specification merge and an update package build, if updates are to be distributed to workstations. In addition, Electronic Software Updates (ESUs) are distributed as downloads from the Update Center; other updates are distributed on CD.

These are the types of software updates:

- Application Software Update (ASU)

  An ASU contains enhancements to objects, or additional objects. ASUs usually include updated control tables; ASU installation requires a specification merge and, usually, a control table merge.

- Electronic Software Update (ESU)

  An ESU contains fixes and updates to PeopleSoft EnterpriseOne objects, and is generally smaller in scope than an ASU. Most ESUs can be downloaded from the Update Center, unlike other types of updates.

- Language Update

  A Language Update contains translated text, to accompany updated objects that may have been issued in an earlier update. A Language Update may include updated control tables

- Tools Release

  A Tools Release contains an update to foundation code, and updates only the \system directory. Tools Releases are not described in this guide. Information about downloading and installing them is included on the Tools Release installation CD.

PeopleSoft EnterpriseOne Update Process

This section describes the update process and discusses how to obtain updates for PeopleSoft EnterpriseOne.

Understanding the Update Process

PeopleSoft releases complete PeopleSoft EnterpriseOne versions such as PeopleSoft EnterpriseOne 8.10 and PeopleSoft EnterpriseOne 8.11. However, between releases the company issues software updates: ASUs, ESUs, Language Updates, and Tools Releases. You can apply these updates to enhance the system or correct problems. Some updates may concern functions you don't use, and in this case there is no need to apply that particular update.

Summary updates: PeopleSoft also issues periodic summary updates that include all individual updates that have been issued. You can apply the summary update instead of the individual updates.

Software updates and the SAR system: The software update process is initiated when an issue is raised. At that time a Software Action Request (SAR) is opened in the PeopleSoft SAR system, to track progress on the issue and its resolution. Developers add and modify the objects as necessary to resolve the issue, and the added and revised objects remain associated with that SAR. The SAR is named with a seven-digit number, for example, SAR 4535205.

When the resolution is complete and tested, an update is built and prepared for distribution. The update contains all new and revised objects associated with that SAR, and perhaps other SARs as well. When you apply the update, those objects are added or merged to the system.

A SAR is always associated with a single issue. However, an update may be associated with one or more SARs; an update can contain new and revised the objects associated with several different SARs.

Contact your representative or Customer Support for information about obtaining update CDs. ESUs can be downloaded from the Update Center. This section discusses the procedure for locating and downloading ESUs.

To search the Update Center for software updates:

Navigate to Customer Connection and select Updates and Fixes in the left pane.

Select PeopleSoft EnterpriseOne + World Update Center (Log In).

1. In the Search Type field, select Electronic Software Updates.
2. You can filter the search by using these criteria:
   - Release
   - Platform (ESUs are built only for the CLIENT platform.)
   - Software Update Name, ID (SAR) and Object Name
3. Once you have chosen the updates, select the + to the left of the update to move to the Download Basket.

To download the software the update:

Complete this task once you have selected the updates and put them in the download basket.

1. Select the Updates link in the download basket to start downloading the updates.
2. Launch the Deployment Assistant to complete the installation of the downloads.

CHAPTER 2

Preparing for a Software Update

This chapter provides an overview of preparing for a software update and discusses how to:

- Check modification and merge flags.
- Use PeopleSoft customer support.

Checking Modification and Merge Flags

This task ensures that your modifications are carried forward to the new release. Before you update, perform these steps to review or set the modification flags on the Object Librarian records for all modified objects.

Do not run the Specification merges until you check the flags for all path codes containing modified objects.

The Software Update Cover Letter

Each Software Update distribution CD includes a cover letter in PDF format. Read the cover letter before installing the update. The cover letter includes this information:

- The Software Update package name (for specification merge).
- The *from release* and *to release*, which is used for Control Table Merge.
- Manual steps specific to the update (for example, for UDC Merge).
- Tables that must be copied from Control Tables Local (PSCTL).
- Other Software Updates that must be applied before or after the Software Update from the CD.

Minimum Technical Requirements (MTRs)

You can access the MTR listing from this Customer Connection location: Home | Implement, Optimize and Upgrade | Supported Platforms.

Using PeopleSoft Customer Support

Customer Connection contains a link to customer support functions and information. Select the Support link (left navigation bar) to view information about issues and Software Action Requests (SARs) that you have initiated, and to access the Update Center. Through the Update Center, you can research and download Electronic Software Updates (ESUs).

If you need further assistance with PeopleSoft EnterpriseOne software updates, you can contact PeopleSoft customer support by phone, fax, or email. On the Customer Connection page, use the Support link to obtain the latest contact information. Limit questions to those regarding PeopleSoft software. For questions about operating systems, databases, and other software products, contact the appropriate vendor.

During normal business hours, a confirmation is sent within one hour of submitting issues by the Web, email, or fax. An issue number is assigned immediately when reporting by telephone, and this number references all activity related to the issue.

CHAPTER 3

Understanding Customer Preparation

This chapter provides an overview of the update process and discusses how to:

- Use customer checklists.
- Define process overview.
- Prepare to update the software.

Defining Customer Preparation

The support structure consists of components such as databases, operating systems, and hardware. To update PeopleSoft EnterpriseOne successfully, prepare the support structure before you start the process.

Using Customer Checklists

We encourage you to complete the tasks in the Customer Preparation section of this guide before you begin the update process. The tasks in this section prepare the system for the update process.

Check off each of the tasks as you complete them:

- Review the Process Overview section.
- Prepare the prototype environment.
- Prepare the development environment.
- Check modification and merge flags.
- Prepare environments for update.
- Verify custom changes in master control tables.

Working with the Process Overview

There are many ways to set up your configuration. We recommend you follow the typical setup and naming conventions wherever possible, unless there is a strong business case that supports the need to change.

Note. For more information about the typical customer configuration that is shipped with the software, see the section Typical Customer Configuration in the Configurable Network Computing Implementation Guide.

Nearly all commands in this guide are case-sensitive. In addition, all the commands described illustrate the recommended directory structure. If your machine's directory structure is different, modify the commands to match your directory structure.

The update process consists of these steps:

- Preparing the current release
- Installing the software update from CD-ROM (or downloading from the Update Center) to the deployment server
- Updating the development and prototype environments by running Installation Workbench
- Updating the production environment

The update process assumes:

- The development path code for the current release contains all modifications that are in progress
- The production path code for the current release contains only tested and approved modifications
- The prototype environment for the current release points to a copy of production data (not live production data)
- The prototype path code contains the same modifications as the production path code

Defining Process Overview

This section discusses how to:

- Define types of updates.
- Define what an update preservers and replaces.
- Define the installation process.
- Define process flow.

Defining Types of Updates

PeopleSoft EnterpriseOne distributes these types of software

- Application Software Update (ASU)
- Electronic Software Update (ESU)
- Language Update
- Tools Release

This document describes the installation process for all updates except the Tools Releases. You need to know which type of update you are installing.

Note. For a description of each type of update, see Understanding Software Updates in the Software Update Guide.

Defining What an Update Preserves and Replaces

If your business requires custom modifications, follow these rules to help ensure a smooth and predictable update. These rules describe which of your modifications the update process preserves and which modifications the update replaces.

1. Preserve means that during an update you do not lose your custom modifications when the current software automatically merges them with the new PeopleSoft applications shipped with the update. If there is a direct conflict between your specifications and PeopleSoft specifications, the update process uses your specifications. When there is no direct conflict between the two, the update process merges the two specifications.
2. Replace means the update replaces your modifications and does not merge them into the update. You will need to redo your custom modifications after the update completes.

Note. If possible, transfer all modifications to one path code. Do this only if you have tested and approved all modifications or if you have modifications only in development. Having only one environment to update significantly shortens the process.

For details about what is preserved and replaced during an update, see:

- Interactive application rules.
- Report rules.
- Application text changes.
- Table specification rules.
- Control table rules.
- Business view rules.
- Rules for event rules.
- Data structure rules.
- Business function rules.

Note. For more information about custom modifications and how they are affected by the update process, see the Package Management Guide.

Interactive Application Rules

Do not delete controls, grid columns, or hyperitems on existing PeopleSoft EnterpriseOne applications; instead, hide or disable them. The new software might use these for calculations or as variables, and deleting them might disable major functionality.

An update preserves custom changes to:

- New applications.
- New objects to existing forms, including:
  - New hyperitems.
  - New controls.
  - New grid columns.
  - Any style changes, such as fonts and colors.

- Any code-generator overrides.
- Data dictionary overrides.
- Location and size changes for controls.
- Sequence changes for tabs or columns.

An update replaces custom forms on existing PeopleSoft EnterpriseOne applications.

Report Rules

These rules apply to report specifications that were created using Report Design.

An update preserves these changes:

• New reports.

• New objects to existing reports, including:
  - Constants
  - Alpha variables
  - Numeric variables
  - Data variables
  - Runtime variables
  - Database variables
  - Dictionary variables
  - Any style changes, such as fonts and colors
  - Location and size changes for objects
  - Data dictionary overrides

An update replaces custom sections on existing reports.

Application Text Changes

An update preserves overrides done in Form Design Aid, Report Design, or Interactive or Batch Vocabulary Overrides.

Table Specification Rules

An update merges your table specifications from one release level to the next.

An update preserves these changes:

• New tables.

• Custom changes to PeopleSoft tables.

An update replaces columns added or removed from existing PeopleSoft tables. This includes changing field length, field type, and decimal position.

Instead of adding a new column to an existing PeopleSoft table, use a tag file with system codes 55 - 59. For custom tag files, be aware of data item changes in the PeopleSoft data dictionary. From one release to the next, PeopleSoft EnterpriseOne might change certain data item attributes, such as data item size, which can affect data integrity and how data is stored in the database.

For this reason, you might need to use the Table Conversion tool to convert the tag file data to the new release level. For base PeopleSoft files, the update process takes care of the data dictionary changes by upgrading the PeopleSoft EnterpriseOne database to the new release level. An update preserves custom indices over the custom tag files.

Control Table Rules

An update merges your control tables from one release level to the next using the Change Table process, which uses your control tables, not PeopleSoft tables, as the basis to do the data merge.

An update preserves these changes:

- Data dictionary custom changes, such as changes to row, column, and glossary text. The update process uses your data dictionary as the base, and in case of a conflict with PeopleSoft data items, your changes override.
- User-defined codes. The update process merges any new hard-coded PeopleSoft values. (Values owned by PeopleSoft are system 90 and higher, and H90 and higher.) The process also reports any PeopleSoft hard-coded values that conflict with your custom values.
- PeopleSoft EnterpriseOne Workflow. The update process merges any PeopleSoft additions, updates, or deleted Workflow Process in your data. In case of a conflict PeopleSoft overrides.

Note. For more information about merges, see Merges in the Installation Reference Guide.

Business View Rules

Do not remove columns from existing business views. Changing business views that applications use can cause unpredictable results when you run the application. If you need to hide columns, do so at the application design level using either Form Design Aid or Report Design. There is not much of a performance gain by deleting a few columns from a business view.

An update preserves these changes:

- New custom business views.
- New columns, joins, or indices to the existing business views.

An update replaces columns removed from PeopleSoft business views.

Rules for Event Rules

An upgrade preserves these changes:

- Custom event rules on a new custom control.
- For PeopleSoft applications, reports, tables, and business function events that do not have any PeopleSoft event rules attached to the same event.
- An upgrade replaces modifications to PeopleSoft applications, reports, tables and business function events that have existing rules attached.

Data Structure Rules

An update preserves all of these custom data structures:

- Forms
- Processing options
- Reports

- Business functions
- Generic text

An update replaces these custom modifications to PeopleSoft data structures:

- Forms
- Processing options
- Reports
- Business functions
- Generic text

Business Function Rules

For any new custom business functions, create a new (custom) parent Dynamic Link Library (DLL) directory to store your custom modifications. For more information, see the Development Tools Guide.

An update preserves new custom business function objects.

An update replaces modifications that you made to existing PeopleSoft business functions and any business functions added to existing PeopleSoft business function objects.

Defining the Installation Processes

The installation processes consist of:

- Deployment server installation.
- Installation Workbench.
- Workstation installation.

Deployment Server Installation

The deployment server is the central point of the software update process. The update program for the deployment server copies the software update from the CD (or the download Web site) to the deployment server. From the deployment server, you distribute the software update to one or more enterprise servers and the workstations.

The program guides you through the update process, which installs the update based on the information you provide. The program also updates the Windows registry with information about the update.

Installation Workbench

Installation Workbench carries out the software update. It functions as a central point for all the processes required to install environments. Some processes that install environments might require you to perform procedures manually. Installation Workbench makes sure you perform procedures in the proper order, insulating you as much as possible from platform-specific environment setup.

Workstation Installation

The Client Workstation Installation is a stand-alone Windows application that reads the deployment preferences information from the system tables to drive the workstation installation process. The PeopleSoft EnterpriseOne software is installed on the client workstations, referred to as workstation in this guide, from the deployment server. Workstations have Microsoft Windows for their operating systems.

Workstations must have these access rights:

- Read/write access to the client directory on the primary deployment server in the base location.
- Read access to the System tables.
- Read access to the subdirectories located under the \pathcode\package directories, for example, \\deployment\E811\PD811\package.

Define Process Flow

This table describes the process of the update:

Process step	Tasks
Customer preparation	Customer checklist
	Preparing to update
	Hardware and software requirements
	Disk space requirements
	Detail worksheet
Deployment server installation	Installing the software update on the deployment server
Installation workbenches	Running the software update installation workbenches
Customer modifications and packages	Retrofitting customer modifications
	Building and testing packages
Production environment update	Updating the production environment

Updating the Software

Your server configurations should be set up the same as when you installed the software initially. At the least, you must review this information to make sure you have the correct configurations, the correct user and role ID settings, adequate authorities, and adequate disk space.

Then before you begin the update, you must prepare the current development, production, and prototype environments.

Preparing to Update the Software

This section discusses how to:

- Prepare the prototype environment.
- Prepare the development environment.

- Check modification and merge flags.
- Back up servers and databases.
- Prepare the localization update.

Preparing the Prototype Environment

This table lists the requirements for preparing the prototype environment.

Task	Details
Personnel	Installer or system administrator
Logon status	On the deployment server, in the deployment environment, logged on as user PSFT with the database password for user PSFT.
Prerequisites	None
Concurrent Tasks	None

To make sure you retain all modifications from the base prototype environment, complete these tasks:

- Transfer all tested and approved modifications to the base prototype path code.
- After the transfer finishes, build a prototype package.
- Deploy the prototype package to workstations you want to run at the base release.

Preparing the Development Environment

This table lists the requirements to prepare the development environment.

Task	Details
Personnel	Installer or system administrator
Logon status	On the deployment server, in the development environment, logged on as user PSFT with the database password for user PSFT.
Prerequisites	None
Concurrent Tasks	None

To make sure you retain all modifications from the base development environment, complete these tasks:

- Make sure that all work in progress is checked into the development path code. From a development workstation, use the Promotion Manager or your own query or report to verify that objects are not checked out.
- Build the development package in preparation for deployment to one or more workstations.

Deploy the development package to one or more workstations. You will use these workstations later to help verify that all modifications were carried forward to the new release.

While you update, you cannot make any modifications (except changes to custom business functions written in C language) to carry forward to the next release.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Package Management, “Working with Objects”

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

Checking Modification and Merge Flags

This task ensures that your modifications are carried forward to the new release. Before you update, perform these steps to review or set the modification flags on the Object Librarian records for all modified objects.

Do not run the Specification merges until you check the flags for all path codes containing modified objects.

To check modification and merge flags:

This table lists the requirements for checking modification and merge flags.

Task	Details
Personnel	Installer or system administrator
Logon status	On a workstation that accesses Object Librarian tables, or from the deployment server, in the deployment environment.
Prerequisites	Make sure you have prepared your environments for the update.
Concurrent Tasks	None

Log onto a workstation or to the deployment environment on the deployment server.

From the Advanced Operations (GH9611) menu, select Specification Merge Selection (P98401).

1. On Specification Merge Selection, complete these fields:

   Location Type the name of the deployment server that contains the central objects specifications.

   Path Code Type the name of the associated path code (prototype or development).

2. On the QBE line, type *C* in the Mod Flag field to list the changed objects, then click Find.
3. For each object that appears in the grid, verify that the Mod Flag field is set to *C*, and the Mrg Opt field is set to *1* (merge), which ensures that the modifications are merged when the specification merges run during the update workbenches.

   Do not set the Mrg Opt field to *1* unless you want objects merged or saved.

4. When you finish reviewing or modifying the records, click Close.

To verify the accuracy of modifications, some additional queries are strongly recommended to avoid missing any modified objects. For example, SY = 55 - 59.

Note. You can also print the Object Librarian Modifications Report (R9840D), which lists all added and modified objects. After the update finishes, review this report to verify whether the object modifications were carried forward to the new release. For more information about the Object Librarian Modifications report, see Reports in the Installation Reference Guide.

To verify custom changes in master control tables:

This table lists the requirements to verify custom changes in master control tables:

Task	Details
Personnel	Installer or database administrator
Logon status	On the workstation, for each applicable environment, logged on as user PSFT with the database password for user PSFT.
Prerequisites	None
Concurrent Tasks	None

1. Verify that these master control tables for the data dictionary reside in a relational database accessed by the Data Dictionary data source:
   - F9200
   - F9202
   - F9203
   - F9207
   - F9210
   - F9211
   - F9212
   - F00165 (GT92002)
2. Verify that these master control tables for Solution Explorer tasks reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment):
   - F9000
   - F9001
   - F9002
   - F9005
   - F9005D
   - F9006
   - F9006D
   - F9020
   - F9022

- F9050

3. Verify that these master control tables for user-defined codes reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).
   - F0004
   - F0005
4. Verify that these master control tables for workflow reside in a relational database accessed by the Control Tables - Production data source (for production) or Control Tables - CRP (for prototype environments) or Control Tables - Test (for the development environment).
   - F98800
   - F98800D
   - F98800T
   - F98810
   - F98810D
   - F98811
   - F98830
   - F98840
   - F98845

Backing Up Servers and Databases

Before beginning the software update, back up the entire deployment server, the enterprise server (the complete directory structure for the base installation), and the Oracle or SQL Server databases.

Preparing the Localization update

If you are an Argentina Localization customer, you must complete all the tasks in Appendix A: Setting Up Argentina Localizations. These tasks describe how to set up the software to automatically handle all future updates to the localization that are installed by ESUs.

CHAPTER 4

Understanding Deployment Server Installation

This chapter provides an overview of the deployment server installation process and discusses how to install the software update on the deployment server.

Defining the Deployment Server Installation

The software resides on an Intel Pentium-based deployment server running Windows. The update process enables you to deploy the software update to the enterprise servers and workstations. The installation program loads the software update on the deployment server.

The installation process for the deployment server:

- Installs the objects from the CDs or the Web.
- Updates the Windows NT registry.

Installing the Software Update on the Deployment Server

The following process installs the software update on the deployment server. This installation process uses one CD, or can be downloaded from the Update Center on Customer Connection (ESU and Solution Explorer Content Update only).

Before you run the installation program, shut down all programs running on the deployment server that could cause Dynamic Link Library (DLL) conflicts (such as Internet Explorer or Adobe Acrobat Reader).

To install the software update on the deployment server:

This table lists the requirements for installing the software update on the deployment server:

Action	Tasks
Personnel	Installer
Logon status	Logged on to the deployment server with administrator rights. You must log off PeopleSoft EnterpriseOne before completing this task.
Prerequisites	You must create the PSFT user.
Concurrent Tasks	None

1. Select one of these options:
   - For an Electronic Software Update (ESU), navigate to this web page to download the Software Update:

     Customer Connection - Updates & Fixes - PeopleSoft EnterpriseOne & World Update Center.
   - If you are installing from a setup CD, Insert the setup CD into the CD drive, and double-click the installmanager.exe file. The Installation Setup Screen appears.
2. (ESU only) If you are installing an ESU from the Update Center, open the Download Manager, and use this tool to download the appropriate update. The Terms of Use screen appears; click *I Accept* to proceed. On the File Setup panel specify *Run this Program from its current location*. The Installation Setup Screen appears.
3. Click Next. The package size is calculated.
4. On the Installation Setup Type, click Finish.
5. When the installation finishes, the Deployment Server Setup form tells you whether the installation was successful.

CHAPTER 5

Software Update Impact Analysis Tool

This chapter provides an overview of the Software Update Analysis Tool and discusses how to work with the Software Update Impact Analysis Tool.

Understanding the Software Update Impact Analysis Tool

The Software Update Impact Analysis Tool has been added to help manage your software update. This tool is used to gauge the level of impact a software update will have on your existing system. Users may access this tool from a client workstation or the deployment server.

This is a list of features that this tool provides:

- Identification of what Software Action Requests (SARs), objects, and control files will be applied to the system.
- Special instructions for SARs.
- List of objects associations with a SAR.
- Lists any dependent software updates.
- Identification any table conversions within a software update.

It can also be used to manage the application of the software update to your system. A system administrator may assign specific objects, control files, and SARs to individual users. Users who have been assigned objects can update the status of approved objects, SARs, and control files that have been assigned to them. They can also keep track of the status of their approvals.

Working with the Software Update Impact Analysis Tool

This section provides an overview of working with the Software Impact Analysis Tool and discusses how to:

- Access the software update impact analysis tool.
- Utilize the software update impact analysis tool.
- Configure a new analysis.
- Analyze your software update.
- Review the results in the Impact Analysis - Master view.
- Assign objects to users.
- Notifying users of assignments by email.

- View any prerequisites prior to installing a software update.
- Viewing objects that will be affected by the software update.
- Accepting assigned objects.
- Viewing SARs.
- Viewing Control Files in the Software Update.
- Work with the scheduler view.
- Working with the analyze report.

Accessing the Software Update Impact Analysis Tool

To access the Software Update Impact Analysis Tool:

1. Logon to a PeopleSoft EnterpriseOne client with administrative privileges.
2. In the fast path enter GH9612.
3. From the Software Updates menu, right-click Software Update Impact Analysis → Prompt For → Values.
4. Enter the path to the location of the update.xml file (for example, \\deployment server name\E811\ImpactAnalysis). Since this utility can be run from a client or the deployment server, it is important that the XML files are located in a central location. By default, the XML files will be downloaded to the unc path provided in the previous example by the installation of a software update.
5. Click OK.

Utilizing the software update impact analysis tool

From the Software Updates menu (GH9612), select Software Update Impact Analysis (P96710).

Note. Within this form, a list of earlier analyses are listed in the main work area. This is the core navigation screen that will enable you to access many of the features available within this tool.

Configuring a new analysis

To configure a new analysis:

1. Click Add.
2. When creating a new report complete these fields:

Software Update Name	Click the browse button to search for the software update you wish to analyze. Select the desired software update. Click the Select button on the tool bar. This will populate the Software Update Name field in the setup screen.
Description	Enter additional details on this update on this fields text box
Environment Name	Enter the environment to do the analysis on (for example, DV811)
Expected Completion Date	Enter the date you anticipate to complete the analysis
Percent Complete	Enter the percent complete for this update

Impact Analysis Status	Use the visual assist to select the status of the impact analysis (for example, 03 - In Process, 02 - Configure)

3. Click OK to return to the SU Impact Analysis Master screen.

Analyzing your software update

On the SU Impact Analysis Master screen, highlight the record that was created in the previous steps. Once this is completed click the Analyze row exit.

Note. Once this step has been completed analysis processing occurs in the background. This processing may take several moments. Once it is completed a success message will appear in the status bar area.

Reviewing the results in the Impact Analysis - Master View

From the SU Impact Analyses Master screen select the Master View row exit.

The overall view of the analysis displays and includes:

- SARs.
- Objects and control files in SARs.
- What objects are affected / merged.

Note. The master view should be accessible to the CNC administrative user only by enforcing security.

Assigning objects to users

Objects may be assigned to different users within this tool for further analysis.

1. To assign objects to users, select the Assign exit row.
2. Highlight the object you wish to assign and click the Select exit row.

   A check mark will appear to the left of the item you selected. Multiple records can be selected at once within this screen as well.
3. In the Assigned To text box enter the address book number of the user who will receive the assignment.
4. To complete this process, select the Assign option from the row exit.

Notifying users of assignments by email

Complete this task to notify users of their assignments by email.

1. Select the Form exit.
2. Select one of these row options:

Approval Report	Shows the latest states of what users have done with objects.
Notify all	Sends a global email notification to all users that have been assigned objects (past and present).
Notify today's assigners	Sends an email notification to users who have been assigned today.

3. To exit this screen click the Close button. This will take you to the Impact Analysis - Master View.
4. Click the Close button again to enter the SU Impact Analysis Master screen.

Viewing any prerequisites prior to installing a software update

Complete this task to view the prerequisites before you update the software.

1. Within the SU Impact Analysis Master screen select the Pre-reqs View exit row.

   The Pre-reqs View displays any prerequisites that may be required to apply a software update. These requirements may include:

   - Base line software updates that are required prior to installing the current software update.
   - Indicates any quarterly updates that already have the dependent / baseline software update.
   - Through the Install Status column, it will indicate if an update has been installed.
2. To exit this item, click the Close button to re-enter the SU Impact Analysis Master screen.

Viewing objects that will be affected by the software update

Select the Object View row to display this screen.

Select one of these radio buttons to filter objects:

Objects that will be affected by applying this software update (Default)	Lists all affected objected delivered by the software update.
All objects delivered with this software update	Lists all objects in the software update.

Accepting assigned objects

Complete this task to accept the assigned objects.

1. In the object window, accept a job by selecting it in the object window.
2. Click the Approved exit row.

   The administrator might modify these text fields:

Impact Analysis Status	Through a visual assist, various values may be assigned to indicate the status (for example Accept / Completion).
Percent Complete	A percent completed may be assigned to indicate the progress of analyzing the object.
3. Click the OK button to return to the Impact Analysis - Object View Screen.
4. Click the Close button to return to the main screen (SU Impact Analysis Master)

Viewing SARs

Complete this task to view relevant SARs.

1. Click the SAR View row.

   Select on of these options:

New SARs delivered	List new SARs available in the software update.
All SARs delivered	Lists all SARs in the software update.

View Objects associated with each SAR	Select this check box if you wish to view objects associated with a specific SAR.
Special Instructions exit row	Lists any additional details special instructions that may be associated with a specific SAR.

2. Click the Close button to return to the Impact Analysis SAR View screen.

Approved exit row	Same as noted earlier.

3. Click the Close button again to return to the SU Impact Analysis screen.

Viewing control files in the software update

Complete this task to view the Control Files.

1. To access this option, click the Control File View row.

   The Control File View lists all control files in a software update and will indicate the merge options for individual items.

   Select one of these exit row options:

Approved	Same as indicated earlier.
Detail	What specifically has changed within a control file.

2. Click the close button to return to the SU Impact Analysis Master screen

Working with the scheduler view

Complete this task to view the scheduled merges and table conversions.

1. Click Scheduler View from the exit row.

   The Scheduler viewer lists merges and table conversions that will be performed when the software update is executed.

2. Click the Close button to return to the SU Impact Analysis Master screen.

Working with Analyze Report

Click the Analyze Report exit row.

This report is a complete summary, in Adobe Acrobat format, of the impact analysis results.

CHAPTER 6

Running Software Updates

This chapter provides an overview of the software update process and discusses how to run the Software Update program.

Understanding Software Updates

After downloading the software update or updates, selecting the update to install, and selecting the environment to be updated, you run the software update workbenches in either attended mode or unattended mode.

You will use the Table Conversion Workbench if you are applying any Application Software Update (ASU).

Depending on the update, you can use these workbenches:

- Table Conversion Workbench runs the table conversions that convert the technical and application tables to the new format. It then updates the Table Conversion Scheduler table (F98405) to reflect completion, and writes a conversion log record to the Table Conversion - History Log table (F984052).
- Control Table Workbench runs the batch applications for the planned merges that update the data dictionary (DD), user-defined codes (UDCs), menus, and workflow tables. It then updates the F98405 table to reflect completion, and writes a conversion log record to the F984052 Table Conversion History Log.
- Specification Table Merge Workbench runs the batch applications that update the specification tables. It then updates the F98405 table to reflect completion, and writes a conversion log record. The Object Librarian and Versions List merges are now a part of the specification merge.
- Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 811 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

Working with the Software Updates

The software update application combines a series of individual update workbenches into a single process. You will see only the workbenches that apply to your update.

You can run the workbenches manually (attended mode), or automatically (unattended mode). If you run the workbenches unattended, you will start the update as described. The status of each individual workbench will display as the workbench begins. Unattended mode is the default.

Starting and Running the Software Updates

This section provides an overview of starting and running the software updates and discusses how to:

- Select environments and start the software.
- Restore a backup.

Selecting Environments and Starting the Software Update

The following procedure lets you select environments and starts the software update workbenches in unattended mode or attended mode. Unattended mode is the default.

In unattended mode, if an error is encountered in any of the individual workbenches, the process stops. Fix the error and continue. The software update resumes.

This procedure also creates an Object Management Workbench (OMW) project, an installation plan, and an update package for this update. In addition, the procedure optionally creates a backup of specs, so that the original specs can be restored if necessary.

Do not lock the deployment server during the software update (for example, with a screen saver password) because doing so pauses some processes. In addition, do not minimize any of the workbench forms, or the software update will not continue to the next workbench form until it is again maximized.

If you use a SQL Server database, be sure that these database options are selected before you start the software update:

- Select Into/Bulk Copy.
- Truncate Log on Checkpoint.

This table lists the requirements for starting the update workbenches:

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user PSFT with the database password for user PSFT, in the PSFTPLAN environment.
Prerequisites	Software update installed on the deployment server.
Concurrent Tasks	None

To select the environment and start the update workbenches:

On the deployment server, log on to the PSFTPLAN (planner) environment as user PSFT with the database password for user PSFT.

From the System Installation Tools menu (GH9612), select Application Software Update, or Electronic Software Update, depending on the type of update you are installing.

1. On Work with Software Updates, select the software updates you want to install. You can select more than one update. Click Next.

   The Work with Software Updates panel presents these row exits:

- Select

  Selects the software update, and puts a check mark in the media object column for the selected row.

- Deselect

  Deselects the software update, and puts an X in the media object column for the selected row.

- Update Detail

  Provides more information on the software update

- Update Status

  Shows the statuses of the processes that run during the software update.

- Update Sched Comp

  Displays all merges (DD Merge, Spec Merge, and so forth) that are scheduled for the software update.

- Update Objects

  Displays all objects, SARs and dependencies that are part of the software update. Use this exit to check for dependent and baseline updates.

  Note. If you don't install the correct dependent or baseline updates, the system will display an error message.

- Update Cntrl Table

  Displays all DD, UDCs, Menus, Favorites, Tips of the Day, and Report Director Templates that are delivered with the software update.

- Update Table Changes

  Displays table changes delivered with the software update.

- Update Index Changes

  Displays index changes delivered with the software update.

- Update History

  Shows the environment and plan history of the software update.

- Advanced Setup

  The program performs a series of common processes when each software update is run on the first environment. If you want to run these processes on a second environment, however, you must use this option to select processes that you want to run again. Note that you must clear the check boxes for the processes you want to run again.

- Update Delete

  Deletes the update package from the deployment server (planner\package\update name). Note that this does not delete the grid record corresponding to the software update.

- Update Uninstall

  Deletes all information for the selected ESU so that it can be reinstalled.

  Note. Because the Update Reinstall / Uninstall process deletes the ESU database, before beginning the update reinstall you must exit PeopleSoft EnterpriseOne, then re-enter before using this option, to ensure that all PeopleSoft EnterpriseOne processes and connections to the database are closed.

2. Double-click the environments where you want the software update installed.
3. If you want the software update to run in unattended mode, verify that the Unattended Workbench check box is selected. Unattended Workbench is checked by default.
4. If you want to make a backup of specs, so that the original specs can be restored, select the Backup check box. Backup is selected by default.

   Note. If you have custom modifications and will be retrofitting these to the new update, it is strongly recommended that you make a backup of your original specs. For more information about retrofitting, see Retrofitting Custom Modifications.

   The Backup option creates a backup directory with the path planner\package\software update\pathcode.bak. Source, Include, and Data directories are created in this backup directory. The Source and Include directories include business function backups. The Data directory has a file backup.mdb that stores all spec backups in a relational database format. Control tables (data dictionary, UDC, and others) are not backed up.
5. Select the Coexistent check box if the software update is coexistent.

   The Software Update Environment Selection panel also presents these row exits:

   - Select

     Selects the environment to be updated, and puts a checkmark in the media object column for the selected row.
   - Deselect

     Deselects the environment to be updated, and puts an X in the media object column for the selected row.
   - Restore Backup

     If backups were performed for a software update for a specific environment, this option restores all specs and business functions. Control tables are not backed up and hence will not be restored. For information about restoring a backup, see Restoring a Backup.
   - Delete Backup

     Deletes the backup directory created, and frees up disk space. A warning message is displayed if no backup was performed.
   - Affected Objects

     Use this exit to view:

Objects that will be installed
SARs that will be installed to a specific path code
Checked out objects
Modified objects
Objects with tokens

   - Advanced Setup

     When applying software updates to alternate environments, we recommend that you do not perform the spec merge. Instead, transfer objects using OMW. However, this exit enables you to override this option and run the spec merge.

Restoring a Backup

Use this procedure to restore a backup you made while starting the software update. If you are not restoring a backup, skip this section and proceed to Completing the Update.

You can restore a backup if you selected the Backup check box on the Software Update Environment Selection panel, as described previously.

To restore a backup:

From the System Installation Tools menu (GH9612), select Application Software Update, or Electronic Software Update. The Work with Software Updates panel appears.

1. Select the software update for which you want to restore the backup.
2. Click Next. The Software Update Environment Selection panel appears.
3. Select the environment for which you want to restore the backup.
4. On the Row Exit menu, click Restore Backup. The backup is restored.

   This may take several minutes.
5. Click Cancel to close the Software Update Environment Selection panel.

Note. The restore process doesn't remove objects that were added through the software update. If you wish to remove the added objects, use the Object Management Workbench (OMW) project created by the software update. A list of added objects can be found in the software update spec merge report.

If you are restoring objects for a software update that you have already transferred to other pathcodes, make sure you re-transfer the restored specs to the other pathcodes using OMW. If you wish to remove the added objects in all pathcodes, use the OMW project created by the software update.

Completing the Update

This section provides an overview of the completion process for the attended mode and discusses how to complete these update workbenches:

- Run Table Conversions.
- Configure your control tables.
- Merge your specification tables.
- Restart the Specification Merge.
- Configure your packages.
- Validate the update.

If you selected the unattended mode, the process begins and all workbenches are completed automatically. In this case, skip the following tasks and continue with “Custom Modifications and Packages.”

When the workbenches are complete, an update package must be built.

When the software update begins, status messages appear in the status bar at the bottom of the screen reporting progress. If an error occurs, the process stops. In this case, click Previous to return to the Work with Software Updates screen, and then, on the Row menu, click Update Status. Status messages are displayed.

Running Table Conversions

If you are running the software update in unattended mode, this process is run automatically.

To run table conversions:

1. On Table Conversion Workbench, to determine how the table conversions will be run, click either of these options:
   - Synch - Synchronous mode. select this option to run one conversion after another. This is the default.
   - Asynch - Asynchronous mode. Do not select this option. It is for future use.
2. From the Form menu, select Convert All.

Note. To do one conversion at a time, select the appropriate detail records, and then select Convert Selected from the Form menu.

Note. While the conversions run, you can track their progress by selecting Table Conversion\Merge Log (P984052) from the System Installation Tools menu (GH961). The program shows a scrolling list of the conversions that have been processed.

Configuring your control tables

If you are running the software update in unattended mode, this process is run automatically.

Complete this task to configure your control tables.

1. On Control Table Workbench, the system displays all control table merges in the detail area. From the Form menu, select Merge All.
2. After each merge finishes, verify the output of the report produced.
3. From Control Table Workbench, click Next.

Merging your specification tables

If you are running the software update in unattended mode, this process is run automatically.

To merge your specification tables:

1. On Specification Table Merge Workbench, from the Form menu, select Merge All.
2. After the merge finishes, verify the output of the report that is produced.
3. After all merges complete, click Next.

   The Package Workbench form appears.

Restarting the Specification Merge

If you are running the software update in unattended mode, this process is run automatically.

If the Specification Merge stops before it completes successfully because the merge of an object fails, you can restart it from the point where it stopped. If all merges complete successfully, you can skip this task.

To restart the Specification Merge:

This table lists the requirements for restarting the specification merge.

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user PSFT with the database password for user PSFT, in the PSFTPLAN environment.
Prerequisites	Specification merge must be stopped.
Concurrent Tasks	None

Before you restart the Specification Merge you must set the status of the failed merge back to Not Processed (zero). The restarted Specification Merge will skip completed merges and process the failed merge and all subsequent merges.

Use this procedure to set the status of the failed merge back to Not Processed (zero):

From Advanced Operations menu (GH9611) select Specification Merge Status (P98700).

1. On the SpecMerge Status panel, complete these fields:

   Package Name Enter the name of the software update

   Source Environment Enter PSFTPLAN (the Planner environment).

   Target Environment Enter the name of the environment you are updating.

2. Click Find. All objects that are part of the specification merge are displayed.
3. Select the object for which the specification merge failed. The object will have a status of 4 (Error) in the Merge Status column.
4. On the Row Exit menu, click Reset Merge Status. The Reset Merge Status panel appears.
5. In the New Merge Status field, specify *0* (zero, or Not Processed).
6. Click OK.

   The object's merge status is changed.

7. Click Close.

You can now restart the specification merge.

Configuring your packages

If you are running the software update in unattended mode, this process is run automatically.

Package Workbench transfers the F9603 and F9631 Package Information tables from the Planner data source to the System - 811 data source. It then updates the Package Plan Detail table (F98404) to reflect completion.

If you are running the software update in unattended mode, this process is run automatically.

Task	Details
Personnel	Installer
Logon status	On the deployment server, logged on as user PSFT with the database password for user PSFT, in the deployment environment (DEP811).
Prerequisites	None
Concurrent Tasks	None

1. On Package Workbench, review your packages.
2. From the Form menu, select Configure. The Congratulations form appears.
3. Click Finish. The Software Updates History report will appear.

   Note. After this screen appears, processing continues to occur in the background. Once completed the program displays a message that the update was completed successfully.

   After this report appears processing continues in the background. Once this is completed, an Update Completion message appears.
4. Click OK.

See Also

Chapter 6, "Running Software Updates," Restarting the Specification Merge, page 32

EnterpriseOne Tools 8.94 PeopleBook: Package Management

Reports in the *EnterpriseOne PeopleTools 8.11 Installation Supplementation Guide.*

Validating the update

After the spec merge process, PeopleSoft EnterpriseOne generates the Software Update Report (R96701) that lists the updated objects and the SARs addressed by the update. This report is summarized in a PDF file that opens automatically once the update process is complete. If the spec merge process fails, this report is not created.

To validate the update process, view the R96701 report and note the value of the Object Install Flag for each of the objects listed in the report.

Object Install Flag value	Description
0	The object was not updated because the existing object in the environment is more recent that the object in the software update.
1	The object is selected to be applied to the environment. (This is the status of all objects in the list before the upgrade starts, but should not be observed when the update process is complete.)
2	Updated object was applied to the environment.

CHAPTER 7

Custom Modifications and Packages

This chapter provide an overview of custom modifications and packages and discusses how to:

- Retrofit custom modifications.
- Use Visual ER Compare.
- Use Package Management.

Working with Custom Modifications and Packages

At this point you are ready to retrofit your custom modifications into the new release of the software. The section also explains how to build and test the packages you will deploy to the workstations.

If you made a backup of original specs and business functions, you can restore this backup.

Note. For information about restoring a backup, see Restoring a Backup in the Software Update Guide.

Retrofitting Custom Modifications

Most users modify their software to make the functionality more applicable to their business situation. When you update to a new release, you need to transfer your modifications to the new release.

Because recreating custom modifications each time you update the software would be a laborious process, this chapter explains how to integrate the custom modifications you made in your current software into the updated software. This integration, called retrofitting, enables you to refit the customizations that can be merged into each new version of the software.

To retrofit modifications, you need a workstation with the upgraded software and the development tools. These tools enable you to compare the customizations that your current ERP software merged into the new software with any path code in the system. Thus you can easily compare the upgraded modifications with a version of your modifications before the upgrade or with the pristine environment of the new release.

This table lists the requirements to retrofit custom modifications.

Task	Details
Personnel	Programmer - preferably the same one who did the custom modifications
Logon status	On the workstation on which you will retrofit object modifications, typically in the development or prototype environment.

Task	Details
Prerequisites	The environment has been updated and a package has been built and deployed to the desktop being used.
Concurrent Tasks	You can do nearly any other task at the same time.

To retrofit custom modifications:

1. From the workstation on which you will retrofit the object modifications, check out the modified objects.

   Note. To check out objects, see Object Management Workbench in the Development Tools Guide.

2. Use the Visual ER Compare tool to compare the updated local specs with those saved in the backup that was created during the software update. If you did not create a backup, you can compare the updated local specs with central objects resident in a path code that has not yet been updated.

   The Visual ER Compare tool enables you to directly copy event rules from the original specifications to the upgraded specifications. See Using Visual ER Compare for more information about this procedure.

3. Use the other design tools described in the PeopleSoft EnterpriseOne Development Tools Guide to retrofit other modified components of objects. For example, use FDA to retrofit control modifications in applications.

4. Use the Windows utility WinDiff tool to display differences in business function source code.

   Before you can use WinDiff, you must indicate the path to WinDiff on the Environment tab in System Properties, which you can access from the Windows Control Panel. You can find help information about WinDiff in the documentation provided with Visual C++.

   To build path codes to the source files for the business function on the source and target of the merge, select Differences from Work With Changed Objects. WinDiff compares the files in the two locations.

5. Redo any custom event rules for Do Initialize events because they have been removed from the UBE event list.

6. When you finish testing and retrofitting the modifications, check them back in and rebuild the package.

7. Test and fix the modifications, then rebuild and redeploy the corrected package. Repeat this step until all the modifications are functioning properly.

Using Visual ER Compare

This section provides an overview and discusses how to:

- Launch Visual ER Compare.
- Work with Visual ER Compare.

Understanding the Visual ER Compare Interface

When you launch Visual ER Compare, the Visual ER Compare form appears. A tree-structured menu of the ER appears on the left. The rest of the form displays a splitter window with the source ER (on the left) and the target ER (on the right). The target ER is your local ER.

In the ER window, the system uses fonts of different colors to display the rules that exist in both source and target but are different and the rules that exist in one location but not the other. The system indicates a change in the parent node if one or more of its children have been changed. In the ER panes, the system highlights the lines that differ. If lines have been added to or deleted from one side, blank lines appear on the other. Disabled lines are indicated with an exclamation point. The system uses fonts of different colors to display the rules that have changed in content or that have been added or deleted. You can change the display colors by selecting User Options from the View menu, and then selecting Set Colors.

Visual ER Compare uses an algorithm to compare lines to determine if a change has occurred. If a certain percentage of the target line is different from the source line, then the system marks the line as being different. You can change the sensitivity of the comparison by selecting User Options from the View menu and then selecting Comparison Factors. To include disabled ER lines in the comparison, click Disable Partial Matching for Disabled ER. To change the percentage of difference required to highlight a line as being changed, enter a number in the Partial Match Ratio field. The default value of .50 means that a minimum of 50 percent of the target line must vary from the source line to trigger the system to mark it as being changed.

You can select a different source by selecting Open Source from the File menu.

Working with Visual ER Compare

Visual ER Compare is a utility that lets you compare event rules (ER) on the local workstation to ER in the central objects data source of any defined pathcode, TAM specifications, or ESU backup. For example, if you make changes to the ER for an application and then want to compare your changes to the ER in the server application, you would use Visual ER Compare.

Visual ER Compare provides a line-by-line, on-screen comparison. You can change the target ER (your local version) within the utility by moving lines directly from the source ER. You can also remove or disable lines. In addition to providing an on-screen comparison, you can select to print a report detailing the changes as well.

Launching Visual ER Compare

Perform this task only to objects with attachable ER (applications, UBEs, tables, and NER business functions).

This table lists the requirements to launch the Visual ER Compare tool:

Task	Details
Labor Hours	Variable, depending on the number of custom modifications
Computer Hours	Variable, depending on the number of custom modifications
Personnel	Programmer - preferably the same one who did the custom modifications
Logon status	On the workstation on which you will retrofit object modifications, typically in the development or prototype environment.
Prerequisites	The environment has been updated and a package has been built and deployed to the desktop being used.
Concurrent Tasks	You can do nearly any other task at the same time.

From Cross Application Development Tools (GH902), select Object Management Workbench (P98220).

To launch Visual ER Compare:

1. On Object Management Workbench, check out an object.
2. Select the object you checked out, and then click the Design button in the center column.
3. On the Design form, click the Design Tools tab.
4. Click Visual ER Merge.
5. On Select the Location of Source Specifications, perform one of these actions:
   - Click Select PathCode, and then enter the server location of the source object (the object to which you want to compare the local ER).
   - Click Advanced TAM, and then enter the TAM location of the source object (the object to which you want to compare the local ER). ESUs are delivered in a TAM package, so use this method to compare the local ER to an object packaged in an ESU.
   - Click ESU Backup. After applying a software update, this tool can be used to retrofit custom ER from the customized copy on the ESU backup.

Working with Visual ER Compare

Use the ER menu tree view to identify and display specific ER components that have changed. If a parent node is identified as being changed, expand it to see which of its children are different. Double-click an event in the ER menu to display its associated code. You can display more than one event at a time. Use the Tile option in the Window menu to view different ER events simultaneously.

To move from change to change, right-click in either the source or target pane and selecting Next ER Difference to move forward or Previous ER Difference to move backwards.

You can change the target ER with Visual ER Compare. You can also print the changes.

Note. If you want to copy all of the changes from the source to the target, you can use the AutoMerge feature, as described in Using AutoMerge section of the Software Update Guide.

Changing the Target ER

Perform any of these actions to change the target ER:

Task	Details
To copy selected lines from source to target	Select the lines to copy, right-click in the source pane, and then select Copy Right.
To delete selected lines from the target	Select the lines to delete, right-click in the target pane, and then select Delete.
To enable or disable selected lines in the target	Select the lines to enable or disable, right-click in the target pane, and then select Enable/Disable ER.

Note. Use the shift key to select multiple, contiguous lines and the control key to select multiple, noncontiguous lines.

After making changes, right-click and select Save ER. This action saves the changes to a buffer. When you open a new source or to exit Visual ER Compare, the system prompts you to save the changes again. If you elect to save the changes at this time, then the system updates the object on the workstation; otherwise, the changes will be lost.

Printing a Visual ER Compare Report

You can print a report comparing the source and target ER. You can show the comparison for a particular event or for all of the ER in the object.

To print a report for an event, double-click the event in the ER menu, right-click in either pane, and then select Print ER.

To print a report for the entire object, select Print ER from the File menu.

Using AutoMerge

Use AutoMerge when you want the system to change the target ER to include the source ER. You can use AutoMerge to change a particular event or to update all of the ER in the object.

Important! Before performing an AutoMerge for an entire object, do a comparison to be certain that you really want all of the changes that the system detects.

To use AutoMerge on an event, double-click the event in the ER menu, right-click in either pane, and then select AutoMerge.

To use AutoMerge on an entire object, select Advanced Operations from the View menu, and then select AutoMerge.

Building and Testing Packages

The package management process provides a means to create a package, to define and build a package, and to deploy packages to both servers and workstations using a step-by-step director process.

Note. The software update process creates the package definition; you simply build and test the package.

There are several instances in which you will need to update or set up a workstation or server with the PeopleSoft EnterpriseOne software. You might need to set up a new workstation, deploy custom solutions to all or to selected users, create a new path code for development, or deploy a fix.

To include any modifications (changed or added business functions or applications) into a package for deployment to workstations (for example, DV811FB or DV811PB), you must define and build one of your own.

See Also

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

Chapter 8

Environment Updates

This chapter provides an overview of environment updates and discusses how to update the production environment.

Understanding How to Update the Production Environment

This chapter explains how to update the live production environment. Before proceeding with these instructions, you should test the new modifications with a copy of production data in the prototype environment.

Update the production environment after you update and test development and prototype environments.

Do not include additional environments when updating the live production environment. The purpose of isolating the update of production is to minimize production downtime.

The PeopleSoft Global Support Center maintains several documents that describe how to manage and promote Software Updates. These documents address many details of the update process and complement the current documentation. To access these documents, open a browser and enter the following URL:

See http://www.peoplesoftcustomer.comwww.peoplesoftcustomer.com

Log on to Customer Connection, and click Customer. In the lower right pane, click Search Solution and do a keyword search for the following solution IDs. Click the link for the Solution ID and scroll to the bottom of the page to access the attached document.

Document	Solution ID
Best Practice for Managing Software Updates	200783413
Best Practice for Applying and Promoting Software Updates	200783414
Understanding and Managing Planner ESUs	200783415

Updating the Production Environment

This section discusses how to:

- Update the production environment.
- Prepare to use the updated production environment.

Updating the Production Environment Using OMW

You update the production environment (and other environments) using Object Management Workbench (OMW).

The software update process creates an OMW project for this update. To update the production environment, promote the project in OMW to the appropriate status as defined by the activity rules. (For example, if you are using default PeopleSoft conventions, you can promote a project from Development to Prototype by changing the status from *21* to *26*. For more information about your organization's activity rules, see your PeopleSoft EnterpriseOne administrator.)

Note. For more information about Object Management Workbench, see the System Administration Guide.

Preparing to Use the Updated Production Environment

After you update the production environment, you create a new package, deploy the new package to a workstation, and test the modifications there.

This table lists the requirements to use the updated production environment:

Action	Details
Personnel	Installer or system administrator
Logon status	On the enterprise server, logged on as user PSFT with the database password for user PSFT.
Prerequisites	Run the installation plan for the production environment.
Concurrent Tasks	None

To prepare to use the updated production environment:

1. Create a new package.

   Note. For information about creating a package, see Package Build in the Package Management Guide.

2. Deploy the new production package to the workstation.
3. Surface test the updated production environment.

   After you finish testing the environment, you can deploy the package to other workstations.

CHAPTER 9

Update Completion

This chapter discusses how to build Word Search tables.

Building Word Search Tables (ASU only)

Word Search helps you locate a task by name using the Find It! program. The installation of this table is optional.

For the Find It! program to work, you must run the Word Search generation program (R91014 with version XJDE0001). This UBE populates the Word Search table (F91014) with a list of complete and partial Task Names used by the Find It! program. When you run the Word Search Build Generation program, the system builds the word search table for the environment you are signed on to.

You can verify that the F91014 table is populated by accessing the table from UTB and noting the value in the TMSRCHWRD column for each record. This column contains the name of the task used by Find It! You can then test the FindIt functionality by entering a term in FindIt that you find in the table.

Note. For more information on Find It!, see the Foundation Guide.

APPENDIX A

Setting Up Localizations

This appendix provides an overview of localizations and discusses how to:

- Add the Localization.
- Change the revision level.
- Set processing options for R96450.

Understanding How to Set Up Localizations

To install localizations using Electronic Software Updates (ESUs), the customers should run the Work with Enhancements application and register the Localization with the PeopleSoft EnterpriseOne Installation system.

When you run the Work with Enhancements application, it registers the Localization with the PeopleSoft EnterpriseOne Installation system and enables the software to correctly handle all future updates to the Localization. When you register an enhancement from an ESU, the software update system will correctly apply the ESU to your system.

R96450 is a UBE that enables and disables localization code. When ESUs are shipped out, all localization objects are disabled in the ESU. The R96450 enables the correct objects based on the enhancement and revision level that you entered in the Work With Enhancements application.

Whenever you register an enhancement, change an enhancement's revision, or delete an enhancement, the Work With Enhancements application displays a warning message that it will run the R96450 to synchronize the Central Objects with the new enhancement level. The version of the R96450 run will update the DV811 Central Objects.

Adding the Localization

Complete this task to add the localization to the PeopleSoft EnterpriseOne environment.

On the deployment server, sign on to the DEP811 environment.

In the fastpath, type *P96450*.

Note. In order to run the application, you must install the most recent Planner ESU.

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1. On Work with Enhancements, click Add.
2. On the Edit Enhancement Info screen, complete these fields:

Enhancement Type Type or select *ARGENTINA*

Revision Type the revision number of the Quarterly Update that you obtained in the previous task.

3. Click OK.

   The program displays a warning message indicating that you are about to register a new enhancement.

4. Click OK.

   A UBE runs that automatically updates the Country server NERs to reflect the new enhancement information. This UBE takes about a minute to complete.

   For more information about the R96450 UBE, see the R96450 section.

5. When the UBE completes, open the generated UBE report, and ensure that the report has not recorded any errors. If the report contains errors, forward the report to your GSC representative.

6. If the UBE runs successfully without errors, the Localization should be successfully registered. The software will now correctly manage the localization for all subsequent software updates.

   Once you have registered the localization, you may take PeopleSoft ESUs as normal.

Changing the Revision Level

Complete this task to update the revision number of the localization.

1. On the Work With Enhancements browse form, select the row for ARGENTINA.
2. Click Select.
3. Type new revision number in the Revision box and press OK.

   The program displays a warning message.

4. Click OK to synchronize the NER to the new enhancement revision level.

Setting Processing Options for R96450

These values are the default processing options and data selection for the XJDE001 version. You can tell that you are running the XJDE001 version because the P96450 prompts you with the warning that it will run R96450 version XJDE0001.

The default processing options are:

Environment Name DV811

Enter the name of the environment for which you want to update the NERs

Enhancement Operation E

E indicates that the NER for localization will be enabled.

Generate NER <blank>

	A blank value indicates that the NER source will not be regenerated (for example, you will need to build a full package and deploy to get the changes to a client workstation)
Level of Detail	0 A value of 0 indicates that only errors and lines changed will be printed on the report
Proof or Final	1 A value of 1 indicates that the UBE will update the NER.

A data selection of 70 means that only NER objects belonging to system code 70 (localization) will be affected.

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

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.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

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.

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 *receivables specialist.* 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 In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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).

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
In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

Class ChartField
A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clearance
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.

clone
In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort
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.

See also *population*and *division*.

collection
To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule
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.

comm key
See *communication key.*

communication key
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 *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

compensation object
In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure
In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition
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.

configuration parameter catalog
Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan
In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

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 — 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.

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.

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.

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 — 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.

See also *class.*

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 — Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

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 *population* and *cohort*.

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 *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

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 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.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing 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.

fact In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term 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.

forecast item 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.

fund 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.

gap 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.

generic process type In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* 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.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* 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 by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process

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

group

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

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

incentive object

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

incentive rule

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

incur

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

initiative

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

inquiry access

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

See also *update access.*

institution

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

item

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

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

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

item shuffle

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

joint communication — In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword — In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI — An abbreviation for *key performance indicator.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

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 *learning management system.* 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 *1*—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 *3C engine*.
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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.

national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
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 *compensation object.*
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 *division* and *cohort*.

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 *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

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 *real-time event notification server* 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
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.

In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template
In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management 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 *communication key.*

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 *basis* 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 *Communications, Checklists, and Comments engine.* 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 *Communications, Checklists, and Comments group.* 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 *locked*) 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 *inquiry access.*

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 *value-added tax exception.* 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 *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* 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 *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. 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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