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# EnterpriseOne Tools 8.94

## PeopleBook: Development Tools: Tables and Business Views

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**November 2004**

EnterpriseOne Tools 8.94 PeopleBook: Development Tools: Tables and Business Views  
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# About This PeopleBook

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

This preface discusses:

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

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**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.

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## 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.

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## 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.

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## 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.

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**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.

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### 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](mailto:peoplesoftpress@mmapartner.com).

## See Also

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

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

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

## Visual Cues

PeopleBooks contain the following visual cues.

### Notes

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

---

**Note.** Example of a note.

---

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

---

**Important!** Example of an important note.

---

### Warnings

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

---

**Warning!** Example of a warning.

---

### Cross-References

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

## Country, Region, and Industry Identifiers

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

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

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

## Country Identifiers

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

## Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

## Industry Identifiers

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

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

## Currency Codes

Monetary amounts are identified by the ISO currency code.

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## 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](mailto:doc@peoplesoft.com).

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

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## 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.

<b>As If Currency Code</b>	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.
<b>Batch Number</b>	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).
<b>Batch Date</b>	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.
<b>Batch Status</b>	<p>Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:</p> <p><i>Blank:</i> Batch is unposted and pending approval.</p> <p><i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.</p> <p><i>D:</i> The batch posted successfully.</p> <p><i>E:</i> The batch is in error. You must correct the batch before it can post.</p> <p><i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E.</p> <p><i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.</p>
<b>Branch/Plant</b>	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.
<b>Business Unit</b>	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.
<b>Category Code</b>	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.
<b>Company</b>	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.
<b>Currency Code</b>	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.
<b>Document Company</b>	<p>Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.</p> <p>If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.</p>

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

**Document Number**

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

**Document Type**

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

*P*: Accounts payable documents.

*R*: Accounts receivable documents.

*T*: Time and pay documents.

*I*: Inventory documents.

*O*: Purchase order documents.

*S*: Sales order documents.

**Effective Date**

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

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

**Fiscal Period and Fiscal Year**

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

**G/L Date** (general ledger date)

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



# Tables and Business Views Preface

This preface discusses the Tables and Business Views PeopleBook.

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## PeopleSoft Products

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

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## PeopleSoft Tables and Business Views

This PeopleBook covers the table, business view and table conversion design tools. These tools are members of the EnterpriseOne Tools suite. These tools are used to create, modify and administer EnterpriseOne tables and business views. Its chapters describe the design tools in general and then defines each form and feature in terms of how to use them in the development and implementation of each object. The chapters also describe attaching logic to table conversions for more complex processing.

---

## Additional Resources

These resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Enterprise One Tools 8.94 PeopleBook: Development Tools: Report Design Aid and Report Printing Administration Technologies	Support, Documentation, Documentation Updates, Release, 8.94, EnterpriseOne, EnterpriseOne Tools



# **PART 1**

## **Designing Tables**

**Chapter 1**  
**Getting Started with PeopleSoft Tables**

**Chapter 2**  
**Understanding Tables**

**Chapter 3**  
**Designing Tables**

**Chapter 4**  
**Table I/O**

**Chapter 5**  
**Table Event Rules**



# CHAPTER 1

## Getting Started with PeopleSoft Tables

This chapter provides an overview of preparing to create tables for use in PeopleSoft EnterpriseOne .

---

### PeopleSoft Tables and Business View Overview

This guide provides information on tables, business views, and table conversions. It consists of three parts:

- Designing Tables

Designing Tables provides an overview of tables and discusses how to create and modify tables. It also discusses table Input/Output (I/O) and table event rules.

- Designing Business Views

Designing Business Views provides an overview of business views and discusses how to create and modify them.

- Converting Tables

Converting Tables provides an overview of the table conversion process and discusses how to convert tables.

---

### Implementing Tables and Business View

To use Table Design and Business View Design for creating tables to include in the EnterpriseOne database, these tasks must be completed:

- You must have a valid EnterpriseOne user account.

Depending on how security has been configured for your system, you might need one or more roles assigned to you so that you can access Object Management Workbench (OMW) and the appropriate design tools.

- You need to discuss database permissions with a database administrator.

Because you must add and modify tables in the EnterpriseOne database, you need permissions to perform these actions.

- Required data items must be defined in the data dictionary.
- At a minimum, in OMW, you must be added to the default project in the role of a developer.
- OMW must be configured with transfer activity rules and allowed actions so object development can occur.



## CHAPTER 2

# Understanding Tables

This chapter provides an overview of the PeopleSoft EnterpriseOne Table Design tool.

---

## Understanding Table Design

PeopleSoft EnterpriseOne uses relational databases.

A database table stores the data used by applications in columns and rows. Each column is a data item, and each row is a record. You can create tables for use in an application.

You create tables by selecting data items from the data dictionary, and assigning key fields as indices. An index enables a database management system (DBMS) to sort and locate records quickly. You must define a table so that the PeopleSoft EnterpriseOne software recognizes that the table exists.

You must use Table Design to generate the table whenever you:

- Create new tables.
- Add or delete data items.
- Add or modify an index.





## CHAPTER 3

# Designing Tables

This chapter provides overviews of adding tables, naming tables, working with tables, viewing data in tables and discusses how to create tables.

---

### Adding Tables

Before you add a new table, determine whether an existing table contains the data items required by the application. If an appropriate table does not exist, you must create a new table.

When you add a new table, you should include the following audit trail columns:

- User ID (USER)
- Program ID (PID)
- Machine Key (MKEY)
- Date Updated (UPMJ)
- Time of Day (UPMT)

---

### Naming Tables

You use the following naming conventions when you add a table:

The table name can be a maximum of eight characters, and it should be formatted as *Fxxxxyyy*, where:

*F* = Data table.

*xx* (second and third digits) = the system code, such as:

- 00 - Foundation environment
- 01 - Address Book
- 03 - Accounts Receivable

*xx* (fourth and fifth digits) = the group type, such as:

- 01 - Master
- 02 - Balance
- 1X - Transaction

yyy (sixth through eighth digits) = object version, such as programs that perform similar functions but vary distinctly in specific processing.

LA through LZ = Logical file.

JA through JZ = Table join.

Columns include a two-character prefix used to uniquely identify the table columns. The first character must be alphabetic. The second character can be alphanumeric. You cannot assign special characters (for example, \$, #, or @). The data item name follows the column prefix. Typically, these column prefixes indicate the type of data included in the table; for example, the prefix of the columns in the F0101 (Address Book Master) table begin with *AB*.

A table description can be no more than 60 characters. Ensure that the table description is the topic of the table. If the table description comes from the iSeries, it should be the same name as the file that it represents, such as F0101 (Address Book Master) and F4101 (Item Master).

## Indices

If an index includes only one field, list the field as the index name (for example, Address Number).

For coexistence, EnterpriseOne indices must match logicals on the iSeries. When you run the Generate Table command in Table Design, EnterpriseOne automatically determines whether a matching file exists on the iSeries. If a matching iSeries file does not exist, then the system creates logical files on the iSeries. If a matching iSeries file exists, EnterpriseOne does not create any logicals on the iSeries.

If an index includes two fields, list them consecutively; for example, Address Number, Line Number ID.

If an index includes more than two fields, and the first two fields are the same as the first two fields of another index, list the first two fields and follow them by an alpha character; for example, Address Number, Line Number, A. Otherwise, list the fields and follow them by a plus sign (+); for example, Item Number, Branch, +.

Place a comma and space between each index field and between the last index field and the plus sign. Do not include more than 10 fields in an index.

The total length of the index name cannot exceed 19 characters. If you exceed 19 characters, the compiler displays a warning. This situation affects fetches that use the wrong index ID in business functions.

---

## Working with Table Design

Table Design presents the following forms within a single window:

- Table Columns, which displays the data items that make up your table.
- Data Dictionary Browser, which locates data items that can be selected and moved to the Table Columns form.
- Indices, which defines the unique data items for quicker sorting and updating of the table.
- Properties, which displays data item attributes for a selected data item in the Table Columns form.

This is a display-only form and is primarily used when you define indices.

When you modify or delete data items or indices, you must regenerate the table. Be aware that changes to a table can affect business views and forms that reference that table.

You use the Generate Table option to generate a newly modified table. Generating an existing table clears all data from the table.

---

**Important!** If you delete a table or delete columns from a table, any business views that reference the table or the deleted table columns are invalid. The system displays error messages when you generate the application.

---

If you use Table Design to delete a table, it deletes only the specifications; it does not delete the physical table.

## Selecting Data Items for the Table

Table columns are data items that store information used by an application. A data item must exist in the data dictionary before you can use it in a table. In Table Design, you can locate data items using the Query By Example (QBE) line of the Data Dictionary Browser. You can select data items by either dragging them to the Columns window or by double-clicking them. All selected data items are displayed in the Columns window. Tables can contain data items from multiple system codes.

## Defining Indices

Indices are used to find specific records and to sort records faster. Table indices are like tabs in a card file. Each index is made up of one or more keys, which are individual data items. You use indices to access data in a simple manner, rather than reading the data sequentially.

A table can have multiple indices; every table must have only one primary index. The primary index is the one unique identifier for each record in the table. Additionally, you can use the primary index to build business views. The system does not allow you to save a table without defining a primary index.

## Previewing Tables

You can preview information regarding a table in Table Design. You can review the information online or send it to a printer. You can review the following information:

- Description, the data item description.
- Type, indicates the field type.
- Len, indicates the length of the field.
- Alias, the data item alias.
- Data Item, the name of the data item.
- Table Column Prefix, the prefix of the columns.
- Indices, lists all of the indices created.

---

## Working with Tables

OMW provides a central location from which you can manage tables.

## Generating Tables

After you have selected data items for a table and assigned indices, you can configure the table for a specific data source.

You must generate a table to create a physical table in the database that is based on the specifications you defined. After the table is generated you can add data to the table. Table generation also creates an .H file, or header file, that is used in business functions and table event rules.

OMW employs the Object Configuration Manager application (P986110) to configure tables. You can configure the table within any existing data source. If you do not indicate a data source, the software automatically configures the table according to the default data source mapping. You can change the path code to generate table in a different location. Doing so causes the system to perform a drop statement, similar to the remove table, after which the table is re-created.

You must regenerate a table after you modify it. If you regenerate an existing table, the data in it will be lost. To ensure that data is not lost, you must export your data, generate the table, and then copy the data back into the new table.

## Generating Indices

If you create additional indices or modify existing ones, you must regenerate the indices. Doing so modifies the .H file, but you do not lose existing data as you do when you regenerate the entire table.

## Generating Header Files

Header files, or .H files, are used in business functions and table event rules. Occasionally, a table might have no header files. You can generate header files without having to generate the entire table.

## Copying Tables

Using the Copy Table option, you can copy tables from one data source to another. Doing so does not copy the table specifications. You can also use table conversion to copy tables from one data source to another.

### See Also

[Chapter 9, “Setting Up Table Conversions,” Copying Data with Table Input, page 72](#)

## Removing Tables from the Database

To completely remove a table from the system, you must use the Remove Table From Database operation on the Table Operations tab of the Table Design form that is available on the Object Management Workbench application. If you use Table Design to delete a table, it deletes only the specifications. You cannot physically delete a table using Table Design.

---

## Viewing the Data in Tables

You can use Data Browser (on Web Client) or Universal Table Browser (on Windows client) to view data in a table. Both tools enable you to verify the existence of data in a table, as well as to determine the structure of the table. Both tools can be used to view data in all EnterpriseOne supported databases, independent of the type of database that you access.

---

**Note.** Universal Table Browser is a Windows-executable application that is part of the EnterpriseOne Windows client install. You cannot use EnterpriseOne security to control user permissions for the Universal Table Browser. However, you can apply form security to the Table and Data Source Selection form (W98TAMC). This action secures the Universal Table Browser because the Windows executable cannot function without this form. All column and row security that you set up through Security Workbench applies to the Universal Table Browser.

Data Browser is part of the EnterpriseOne Web Client product. Currently you can not use EnterpriseOne security to control user permissions for the Data Browser. However, all column and row security that you set up for the business data will still be honored.

---

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## Creating Tables

This section discusses how to:

- Add tables.
- Select data items for tables.
- Define indices.
- Preview tables.
- Generate tables.
- Generate indices.
- Generate header files.
- Copy tables.
- Remove tables.
- View the data in tables.

## Forms Used to Create Tables

Form Name	Form ID	Navigation	Usage
Object Management Workbench	W98220A	Solution Explorer, Tools, Object Management Workbench.	View and select objects in projects
Add EnterpriseOne Object to the Project	W98220C	Object Management Workbench, select a project and click Add.	Add a new object to a project
Add Object	W9861AF	Add EnterpriseOne Object to the Project, select Table, and click the OK button.	Create a table
Table Design	W9860AL	Complete Add Object and click OK.	Select tables for a business view, select data items for a business view, use Select Distinct, create a table join, or create a table union.
Generate Table	W9866E	On Table Design, select the Table Operations tab, and then click Generate Table.	Generate tables.
Generate Indexes	W9866J	On Table Design, select the Table Operations tab, and then click Generate Indexes.	Generate indices.
Copy Table	W9866M	On Table Design, select the Table Operations tab, and then click Copy Table.	Copy tables.
Remove Table	W9866D	On Table Design, select the Table Operations tab, and then click Remove Table from Database.	Remove tables.
Universal Table Browser	Not Applicable (NA)	Cross Application Development Tools (GH902), Universal Table Browser.	View the data in tables.

## Adding Tables

Access the Add Object form.

To add tables:

1. Complete the following fields and click OK:

- Object Name
- Description
- Product Code
- Product System Code
- Column Prefix

- Object Use
2. On Table Design, select the Summary tab and revise the data in the following fields to alter the table properties:
    - Description
    - Product Code
    - Product System Code
    - Object Use
  3. To document the table, select the Attachments tab, and then type the attachment in the text-editing area.

## Field Descriptions

<b>Object Name</b>	Enter unique name that identifies the table. It has to be unique within the entire EnterpriseOne system.
<b>Product Code</b>	Enter a user defined code (98/SY) that identifies a system. Example values include: <i>01: Address Book</i> <i>03B: Accounts Receivable</i> <i>04: Accounts Payable</i> <i>09: General Accounting</i> <i>11: Multicurrency</i>
<b>Product System Code</b>	Enter a User-Defined Code (UDC) (98/SY) that specifies the system number for reporting and jargon purposes.
<b>Object Use</b>	Enter a code that designates the use of the object. For example, the object may be used to create a program, a master file, or a transaction journal. See UDC 98/FU.

## Selecting Data Items for Tables

Access the Table Design form.

To select data items for tables:

1. Select the Design Tools tab, and then click Start Table Design Aid.
2. On the Data Dictionary Browser form, use the QBE line to locate the data dictionary items that you want to include in the table.
3. To include a data item in your table, drag it from the Data Dictionary Browser to the Table Columns form.
4. To remove a column from a table, select the column and select Delete from the Edit menu.

After you select all of the data items for the table, you must define an index.

## Defining Indices

Access the Table Design form.

To define indices:

1. Select the Design Tools tab, and then click Start Table Design Aid.
2. On Table Design Aid, select the indices form so that it is active and the indices menu is visible.
3. From the indices menu, select the Add New option.

You can also drag indices from the column form into the index form.

The index description is Untitled; it is marked with a key icon that displays the letter *P* to indicate a primary index.

4. Enter a name for the index, and then press ENTER.
5. On the Table Columns form, select columns and drag them to the index.

A unique index is marked with a single key. You can toggle the unique status of a key by right-clicking and selecting Unique from the Index menu. The Unique Primary Index cannot be changed to a non-unique status.

6. Right-click the data item and select or clear the Ascending option to indicate the sort order of ascending or descending for an index column.

An upward-pointing arrow indicates that the index column is sorted in ascending order.

## Previewing Tables

Access the Table Design form.

Select the Design Tools tab, and then click Start Table Design Aid.. To preview tables, select the Columns form so that it is active and select Print Preview from the File menu.

A preview of the table appears on the Columns form in place of the column names.

## Generating Tables

Access the Table Design form.

Select the Table Operations tab, and then click Generate Table.

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

**Password** Enter the database password that corresponds to the object owner ID.

## Generating Indices

Access the Table Design form.

Select the Table Operations tab, and then click Generate Indexes.

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

**Password** Enter the database password that corresponds to the object owner ID.

## Generating Header Files

Access the Table Design form.

To generate header files, select the Design Tools tab, and then click Generate Header File.

The system generates an .H, or header, file.



## Copying Tables

Access the Table Design form.

Select the Table Operations tab, and then click Copy Table.

<b>Source Data Source</b>	Enter the name that identifies the source data source to copy from.
<b>Destination Data Source</b>	Enter the target data source to copy to.
<b>Object Owner ID</b>	Enter the object owner id of the target table.
<b>Password</b>	Enter the database password that corresponds to the object owner ID.

## Removing Tables

Access the Table Design form.

Select the Table Operations tab, and then click Remove Table from Database.

<b>Data Source</b>	Enter the name that identifies the data source.
<b>Password</b>	Enter the database password that corresponds to the object owner ID.

## Viewing the Data in Tables

To access Universal Table Browser, launch ActiveConsole and type *utb* in the fast path. Click the Open Table button on the toolbar. To access Data Browser, launch EnterpriseOne HTML client, and type *databrowser* in the fast path.

<b>Table</b>	<p>Enter a PeopleSoft EnterpriseOne table name.</p> <p>The name that identifies a table in PeopleSoft EnterpriseOne. For example, F0101 is the name of the Address Book master table. You can use the visual assist form to search for a table</p>
<b>Data Source</b>	<p>Select the name that identifies the data source.</p> <p>The data source in which the table resides. The default value is obtained from the Object Configuration Manager (OCM) settings for the environment in which the user is signed on. Use the visual assist to select from a list of valid EnterpriseOne data sources.</p>
<b>Format Data</b>	<p>Select the check box (yes or no option) that indicates whether the Universal Table Browser formats data once it is fetched from the database. Data Browser on the web does not provide this option. It always formats data after it is fetched from the database.</p> <p><i>Formatted:</i> The Universal Table Browser formats data according to the specifications of the EnterpriseOne data dictionary item. For example, assume that the data item PROC is a numeric field with a size of 15, and includes four display decimals. For a PROC value of 56.2185, the Universal Table Browser displays a formatted value (using the data dictionary editing) as 56.2185, even though the value is stored in the database as 562185.</p> <p><i>Unformatted:</i> The Universal Table Browser displays the data according to the specification of the database and the data item type (such as numeric).</p>

For example, assume the table data item PROC is a numeric field stored in the database. Depending on the database, this field might default to a size of 32 with a precision of 15 being a numeric data type. Because EnterpriseOne does not store the decimals in the database, a PROC value of 56.2185 would be stored by the database as 562185.0000000000000000 and displayed the same using Universal Table Browser.

## CHAPTER 4

# Table I/O

This chapter provides overviews of table I/O, buffered inserts, and handles and discusses how to work with table I/O.

---

## Understanding Table I/O

Use the Table I/O button in Event Rules Design to create instructions that perform table input and output (I/O). Table I/O allows you to access a table through event rules. You can use table I/O to do the following:

- Retrieve records.
- Update or delete records.
- Add records.

## Available Operations

Using table I/O, you can perform the following operations:

Operation	Description
FetchSingle	Combines Select and Fetch in a basic operation. Indexed columns are used for the Select; and non-indexed columns are used for the Fetch. The operation opens a table for I/O but does not close it. All tables that do not use handles close automatically when the form that uses them closes.
Insert	Inserts a new row.
Update	Updates an existing row. Only those columns mapped (presently in tables with or without handles) are updated. You can do partial key updates with tables and handles to tables. If you do not specify all the keys, then several records might be updated.
Delete	Deletes one or more rows in a table or business view.
Open	Opens a table or business view.
Close	Closes a table or business view.
Select	Selects one or more rows for a subsequent FetchNext operation.

Operation	Description
SelectAll	Selects all rows for a subsequent FetchNext operation.
FetchNext	Fetches rows that you specify. You can fetch multiple records with multiple FetchNext operations or with a FetchNext operation in a loop.

## Valid Mapping Operators

You can use the following operators for mapping specific table I/O operations:

Table I/O Operation	Mapping Operators
FetchSingle	Index Fields: =, <, <=, >, >=, !=, Like Non-Index Fields: Copy Target
Insert	All Fields: Copy Source
Update	Index Fields: = Non-Index Fields: Copy Source
Delete	All Fields: =
Open	N/A
Close	N/A
Select	All Fields: =, <, <=, >, >=, !=, Like
SelectAll	N/A

## Creating a Table I/O Event Rule

Table I/O event rules allow event rule support for database access.

---

## Understanding Buffered Inserts

You can use buffered inserts to improve performance when you insert hundreds or thousands of records into a single database table and you don't need immediate user feedback if an insertion failure occurs. You can use buffered inserts with table conversion, table I/O, batch processes, and business functions, but they are not available for interactive applications. Buffered inserts are available only with Oracle (V8 and above), DB2/400, and SQL Server. Buffered inserts are not available with Access, post-insert triggers, or multiple-table views. The PeopleSoft database middleware delivers records to the database management system one buffer load at a time.

When you request buffering, the database records are inserted individually and the buffer is automatically flushed when it fills; that is, the PeopleSoft database middleware delivers the buffer to the database management system. The buffer can also be explicitly flushed. For example, the buffer flushes automatically when you commit a transaction or when you close a table or view. The business function, table conversion engine, or table I/O can explicitly request that the buffer be flushed as well.

## Buffered Insert Error Messaging

Because the system provides no immediate feedback if an insertion fails, you should use caution when you decide to use buffered inserts. If an insertion fails, the error appears in the log file. Consequently, buffered inserts are used primarily with batch applications.

Unless you are using the Table Conversion application, you must request more detailed information from the middleware to get detailed error messages. In Table Conversion, the table conversion engine automatically performs this task. You can enable tracing to receive more detailed error messages. Otherwise, you get an error message that the insert failed. You should clear the output tables so that you do not receive duplicate error logging.

## Using Special Operations for Buffered Inserts

After you set up buffered inserts, you can use Special Operations to flush the buffers or get error messages.

---

## Understanding Handles

In EnterpriseOne Table I/O operations, the term *handle* refers to a type of file pointer. This file pointer connects the application or Universal Batch Engine (UBE) with the EnterpriseOne database middleware that communicates with the database manager. Handles point to a database table, and they are references to an address within the database middleware. Handles allow you to perform the following operations, which you cannot perform using non-handle table I/O operations:

- Concurrently open multiple instances of a single table or business view
  - Open a table or business view in an environment other than the environment that you signed on to
- This feature is particularly helpful when you receive an upgrade to PeopleSoft EnterpriseOne software or when you need to convert data from another system into PeopleSoft EnterpriseOne software.
- Pass handles into a form, named event rule, or business function so that you do not need to open a table or business view more than once

---

**Note.** You cannot use handles in transaction processing.

---

If you pass a handle to a form or a named event rule, the data structure for the form or named event rule must contain a member that is a HANDLE data item. In the form interconnect or business function call, you must assign a handle value from your event rules to the HANDLE data structure member. You can use this handle in the form or named event rule in the same way that you use any other table I/O handle.

You must explicitly open and close handles, unlike other table I/O operations in which the system implicitly open or close the table for you. You must open a handle before you can use it. All of the table I/O operations except Open work the same for handles as they do for tables or business views. When you are finished using a handle, you must explicitly close it. You close the handle in the same way that you close a table or business view except that you choose a handle instead of a table or business view.

## Using a Handle

To use a handle, you must do the following:

- Define the handle in the data dictionary.
- Create a handle variable in event rules.
- Open the handle explicitly.

After you create a handle data item, you must create a handle variable. You create a handle variable the same way in which you create other variables. You can use any scope that is necessary to create the handle variable.

After you create a handle variable, you must explicitly open the handle. Then, after performing the required table I/O, you must explicitly close it.

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Development Tools: Data Dictionary*, “Understanding the Data Dictionary”

---

## Working With Table I/O

This section discusses how to:

- Create a table I/O event rule.
- Use buffered inserts in table I/O.
- Use special operations for buffered inserts.
- Use a handle.

## Creating a Table I/O Event Rule

Access Event Rules Design.

To create a table I/O event rule :

1. Click the Table I/O button.
2. On Insert TableIO Operation, select an operation and click Next.
3. On Data Source, select the table, business view, or handle for which you want to perform I/O, and then click Next.

The Mapping form displays available objects that you can map to selected table columns. For SELECT statements, the available objects are used to build a WHERE clause. For FETCH statements, the available objects are used to receive data fetched from the database.

Key columns have an asterisk (\*) next to them.

4. Choose the column that you want to use, and then double-click the available objects that you want to map to that column.
5. Click the Operator button until you locate the operation that you want.

These selection operations are available. The default is equal.

- Equal

- Not Equal
  - Less Than
  - Less Than or Equal To
  - Greater Than
  - Greater Than or Equal
  - Like
6. Click Finish to save the operation and return to Event Rules Design.

## Using Buffered Inserts in Table I/O

Access Event Rules Design.

To use buffered inserts in table I/O:

1. Click the Table I/O button.
2. On Insert Table IO Operation, select the Open option in Advanced operations.
3. Click Next.
4. On Data Source, select the table that you want to use, and then click Advanced Options.
5. On Advanced Options, select Buffered Inserts, and then click OK.

## Using Special Operations for Buffered Inserts

Access Event Rules Design.

To use special operations for buffered inserts:

In Event Rules, at the point at which you want to perform either a Flush Insert Buffer or Get Error Data operation, click one of the following options:

- Flush Insert Buffer

To maintain data integrity, you should flush the insert buffer before you perform any operations other than an insert. If you fail to do so, the results of recent inserts might not be reflected in other operations, and the operations might not work properly.

When you use the flush insert buffer option for a specific table, you must flush the buffer before you close the table .

- Get Error Data

The Get Error Data option retrieves errors for records that the system did not insert properly. Depending on when your buffers are flushed, or when you begin another insert, you might overwrite the error information for a specific insert. If error information is critical, retrieve the information before the next insert begins.

If you need to perform special error handling, you should set it up after each table I/O insert and each Flush Insert Buffer option. Always retrieve the error information before you begin the next table operation.

---

**Note.** The return code of each table I/O statement is stored in system variable SV File\_IO\_Status. If an Insert or Flush Insert Buffer operation failed, the SV File\_IO\_Status system variable may contain a value of CO\_ERROR\_DETAILS\_AVAILABLE. If so, you need to call Get Error Data Table I/O Operation to retrieve the error data. The Get Error Data operation returns the values used in the insert for all the requested columns.

---

The following example illustrates how you can use `CO_ERROR_DETAILS_AVAILABLE`.

```
F0101.Insert //Attempt an insert
    SL AgingDaysAP1 -> TK Address Number
    RC Page - -> TK Tax ID
    SL TargetEnvironment -> TK Description - Compressed
If SV File_IO_Status is equal to CO_ERROR_DETAILS_AVAILABLE
    F0101.Get Error Data //Failed with errors so get errors
        //Map values used in insert to the
        //specified fields.
    SL AgingDaysAP1 <- TK Address Number
    RC TESTT <- TK Tax ID
    SL ReportName <- TK Description - Compressed
End If
```

## Using a Handle

To use a handle:

1. To create a handle type data dictionary item, access Data Item Specifications.

Use a Class type of `HANDLE` and a data type of 7.

The data item name can be a maximum of eight characters and should be formatted as `HFxxxxxx`:

where

*HF* = Designates a table I/O data item

*xxxxxx* = Represents the system code and group type used in the table name

For example, the table I/O data item name for table F4211 is `HF4211`.

On Data Item Specifications, to complete the handle data item, click the Edit Rule tab, type the table or business view name for the handle, and then save the data dictionary item.

2. On Event Rules Design, create a variable whose data dictionary is the handle data dictionary item you just created.
3. On Event Rules Design, click the Table I/O button.
4. From Advanced Operations, click Open.
5. Click Next.
6. On Data Source, click the Handles tab.
7. Choose the handle that you want to open, and then click Next.
8. Choose a variable that contains the name of the environment in which you want to open the table.  
If you want to open the table in the login environment, choose the system value *SL LoginEnvironment*. System values also exist for the source and target environment in Table Conversion if you use Table I/O in Table Conversion.
9. Click Finish.
10. After all table I/O statements are completed, close the handle. On Event Rules Design, click the Table I/O button. Select the Close option. Click Next. On Data Source form, click the Handles tab.
11. Choose the handle that you want to close, and then click Finish.



## CHAPTER 5

# Table Event Rules

This chapter provides an overview of table event rules and discusses how to work with table event rules.

---

## Understanding Table Event Rules

You use table event rules to attach database triggers (or programs) that automatically run whenever an action occurs against the table. An action against a table is called an event. When you create a PeopleSoft EnterpriseOne database trigger, you must first determine which event activates the database trigger; and then, you use Event Rules Design to create the database trigger.

Table event rules provide embedded logic at the table level. Table event rules have their own location, events, and system functions. When you use table event rules, neither the calling application nor the user is notified of changes or events to the table. No form or report interconnection is available with table event rules.

You can use table event rules for data integrity. For example, when you delete a record in Address Book, you might want to delete all associated records, such as phone and category codes. You can also use table event rules for currency. The *Currency Conversion is On* event rule handles currency information in table event rules.

The following is a list of the events to which you can attach event rules on a table-by-table basis:

- After Record is Deleted
- After Record is Fetched
- After Record is Inserted
- After Record is Updated
- Before Record is Deleted
- Before Record is Fetched
- Before Record is Inserted
- Before Record is Updated
- Currency Conversion is On

## Creating Table Event Rules

To create a table event rule, you must do the following:

- Create the table trigger in Event Rules Design.
- Generate the PeopleSoft EnterpriseOne table trigger as C code.
- Build the table trigger.

## Working with Table Event Rules

This section discusses how to create table event rules.

### Creating Table Event Rules

Access the Object Management Workbench.

To create table event rules :

1. Check out the table to which you want to attach event rules, and then click Design.
2. On Table Design, click the Design Tools tab, and then click Start Table Trigger Design Aid.  
Event Rules Design starts. You can use it to attach event rules to any of the events for the table.
3. From the Events list, select an event.
4. Click one of the following event rule buttons:

Button	Description
Business Function	Attaches an existing business function.
System Function	Attaches an existing PeopleSoft EnterpriseOne system function.
If/While	Creates an IF/WHILE conditional statement.
Assign	Creates an assignment or a complex expression.
Else	Inserts an ELSE clause, which is only valid within the bounds of IF and ENDIF.
Variables	Creates a Event Rule variable.
Table I/O	Allows event rule support for database access. Performs table input and output, data validations, and record retrieval.

You do not need to create and associate data structures to the table event rule functions. The table itself is the data structure that is passed to the table event rule function.

5. On Event Rules Design, click Save to save your event rule specifications, and then click Close to return to Table Design.
6. If you are creating a new table in Table Design, click the Table Operations tab, and then click Generate Table.

---

**Important!** Never perform this step on an existing table because it clears all data. Only perform step this for New Tables.

---

7. On Generate Table, complete the following fields, and then click OK:
  - Data Source
  - Password

8. On Table Design, click the Design Tools tab, and then click Build Table Triggers.

The Build Triggers option performs the following steps:

- Converts the event rule to C source code, which creates the files OBNM.c and OBNM.hxx (OBNM = Object Name). The source file will contain one function per table event rule event.
- Creates a make file to compile the generated code.
- Runs the make file to compile the new functions and to add them into JDBTRIG.DLL. This consolidated DLL contains table event rule functions.

9. To review a log of the build, click Generate Header File, and then open the file that is created by the system.

The creation of the table event rule is complete. The newly created or modified table event rule functions will now be called from the EnterpriseOne database middleware whenever the corresponding event occurs against the table.



## **PART 2**

# **Designing Business Views**

**Chapter 6**  
**Understanding Business Views**

**Chapter 7**  
**Designing Business Views**



## CHAPTER 6

# Understanding Business Views

This chapter provides an overview of business views.

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## Understanding Business Views

A business view is a selection of data items from one or more tables. After you create a table, use Business View Design to select only the data items that are required for your application. EnterpriseOne uses the business view that you define to generate the appropriate SQL statements necessary to retrieve data from any of the supported databases. After you define a business view, you can create a form that updates data in an interactive application or a report that displays data. Because you select only those data items that an application requires, less data is moved over the network.

Business views are required for creating applications and generating reports; they have the following characteristics:

- Contain all or a subset of data items from one or more tables.
- Link a PeopleSoft EnterpriseOne application to one or more tables.
- Join data items from multiple tables using table joins.

Business views are also a building block for text search indices, which enable full-text searching of data. To make a business view available for full-text searching, select the Text Search option on the properties form. Do not select this option if you do not plan to use the business view for full-text searching; doing so can negatively affect performance.

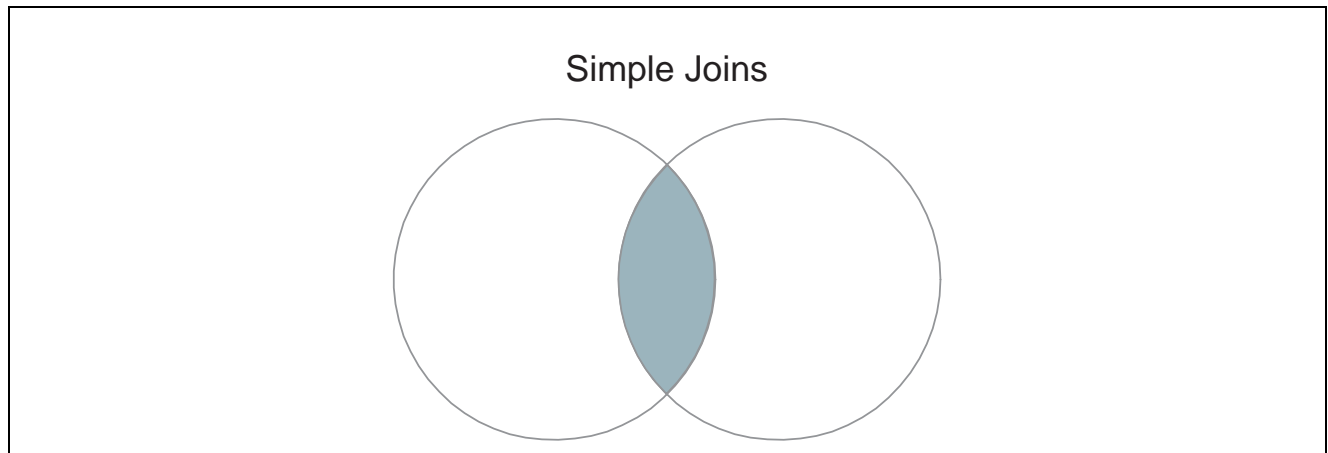
## Table Joins

Use the table join feature to join multiple tables in a business view. Joining tables enables you to combine fields from different tables for each record of the primary table. The join is performed using fields common to the tables. The joining fields satisfies a join condition, such as when the records, or rows, have the same value in the key fields. The primary table is the table where you initiate the join (usually the table on the left in Table Design) and the secondary table is the table where you conclude the join (usually the table on the right in Table Design). Several types of joins exist, including the following:

- Simple joins, also known as inner joins, which include only rows that match both the primary and secondary tables.
- Right outer joins, which include rows common to both the primary and secondary tables, and unmatched rows from the secondary table.
- Left outer joins, which include rows common to both the primary and secondary tables, and unmatched rows from the primary table.

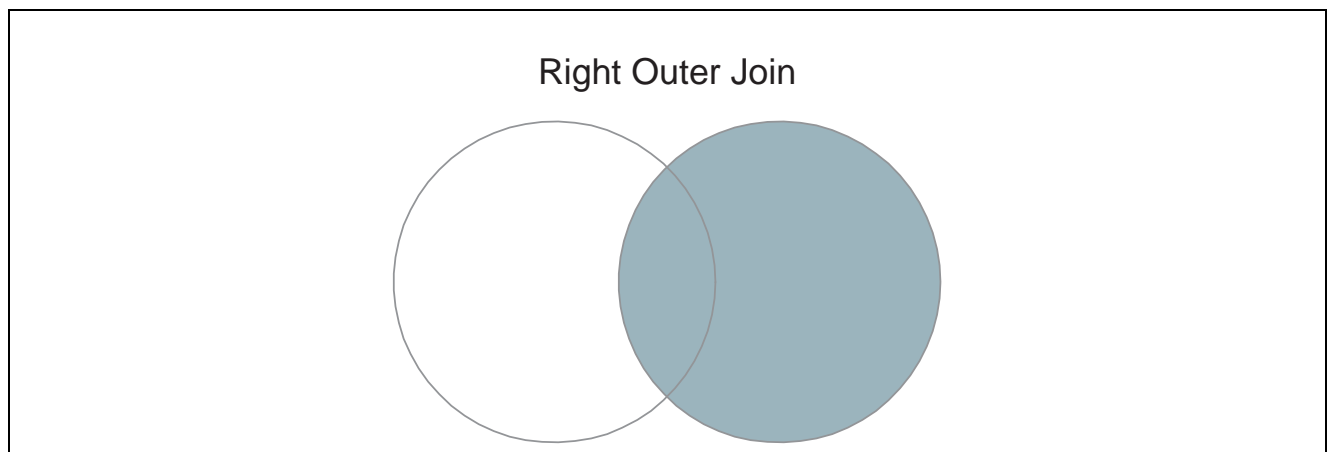
- SQL 92 left outer joins, which include rows common to both the primary and secondary tables, unmatched rows from the primary table, and any rows with null values from the secondary table regardless of any Where clause against the fields from the secondary table.

This graphic illustrates a simple table join:



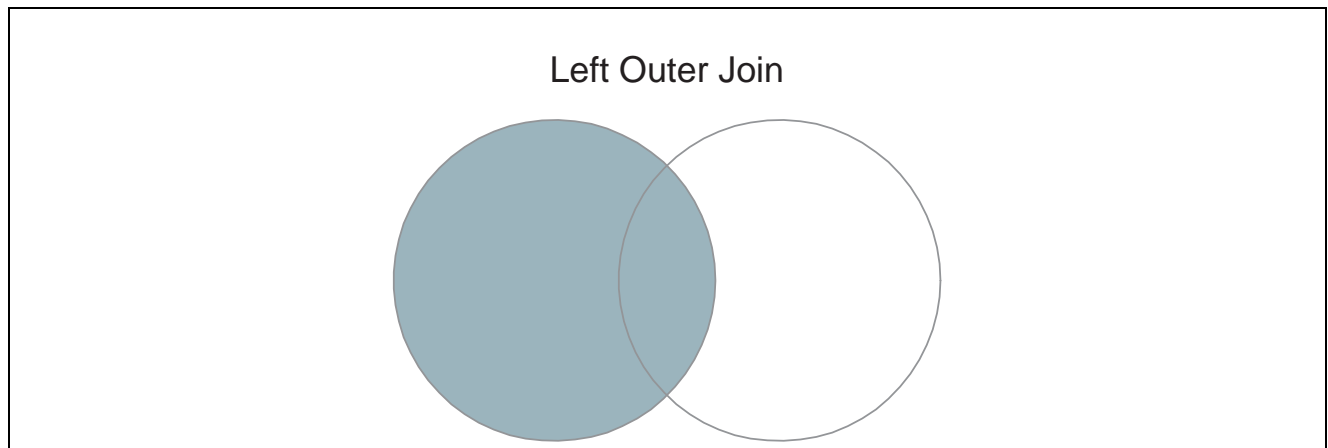
Simple Join

This graphic illustrates a right outer table join:



Right Outer Join

This graphic illustrates a left outer table join:



Left Outer Join



## Table Union

A table union joins entire tables. The system first checks for rows from the primary table, and then for rows with corresponding columns from the secondary table. If the rows from the two tables contain identical data, then only one of the records is retrieved in the union. Unions include rows from the primary table and corresponding columns from the secondary table.

This diagram illustrates a union:

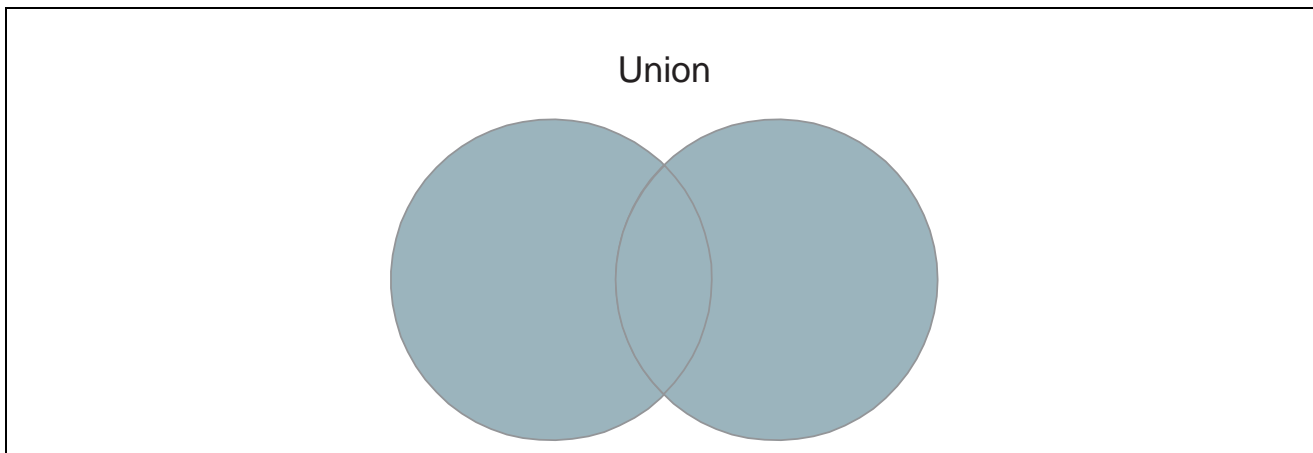


Table Union

## Select Distinct

You can use the Select Distinct feature to filter out duplicate rows in the business view query's output.

## Primary Key Fields

The fields included in the primary index of a table are displayed as key fields in Business View Design. These fields include a key icon next to the field name. The primary key fields of a table are always included in the business view. Business views then carry information from the table to an application. To carry forward additional information other than the primary key fields, select additional fields to include in the business view.



## CHAPTER 7

# Designing Business Views

This chapter provides an overview of adding business views, naming business views, working with business view design, and discusses how to create business views.

---

## Adding Business Views

Before you begin designing a business view, consider the purpose of the application and the data items required, and then identify which tables contain those data items. Adding a new business view does not affect performance; however, using an existing view that contains more columns than you need might negatively affect performance.

Business views usually contain more fields than are used on the form, grid, or batch application. The remaining fields are related to the fields that are not in use. If requirements change, these fields can be added to the application without redesign of the business view.

You can use different business views for each form type. Typically, search-and-select forms include the minimum number of fields required to keep them at a nominal size. They should include only the fields necessary for filtering searches and the associated output fields, such as descriptions.

Find/browse and parent/child forms include more fields and are typically larger than search and select forms. Find/browse and parent/child forms should include only those fields needed for filtering, and the associated output fields.

Input-capable forms include all of the fields from the table, and they are usually large. They include all of the fields necessary to add or update a record, including audit information.

---

## Naming Business Views

Use the following guidelines when naming a business view:

The Object Management Workbench name for a business view can be no longer than 10 characters and should be formatted as follows:

*VzzzzzzzzA*, where:

*V* = Business view.

*zzzzzzzz* = The characters that represent the primary table.

*A* = A letter that designates the view.

For example, V0101A is the first view of table F0101, V0101B is the second view of the same table, V0101C is the third view, and so on.

## External Developer Considerations for Naming Business Views

The term *external development* refers to applications created by developers who do not work for PeopleSoft, such as consultants who create custom applications for clients. To prevent interference between PeopleSoft EnterpriseOne and non-PeopleSoft EnterpriseOne objects, you must use caution when naming an external business view. When you create a new business view for an external application, format the business view name as follows:

*V*ssss9999, where:

*V* = Business view.

ssss = The system code for the enterprise.

9999 = A unique next number or character pattern within the enterprise.

Provide a business view description with a maximum of 60 characters. It should reflect the application description followed by the form type, such as Item Master Browse and Item Master Revisions.

Primary key fields should remain in the business view and should not be reorganized. If you try to remove a primary key field, you receive an error message.

---

**Note.** At least one business view for each table should include all columns. Use this business view for the level 01 section in all reports on which the file is based. Also, only one business view is allowed for each form type, except for a header/detail form. For header/detail forms, you can use two business views—one for the header portion of the form and one for the detail portion.

---

## Joined Business Views

To format the description of a joined business view, include the names of the tables being joined, separated by a forward slash (/). Place the primary table first.

For example, a join view is created by joining the F4101 (Item Master) table and the F4102 (Item Branch) table, and the F4101 table is the primary table, then the view should be named:

Item Master and Branch F4101/F4102

---

## Working with Business View Design

The Business View Design tool displays the following views:

- Table Joins view, which defines the tables over which you create the business view.
- Available Tables view, which locates tables for moving to the Table Joins view.
- Selected Columns view, which lists the data items from your table that are included in your business view.
- Object Properties view, which displays the properties of a selected data item in the Selected Columns view.

Note the following points when working with business views:

- If you delete a data item from a business view and that data item is used in an application, you receive an error when you attempt to run the application.

If this occurs, you must open the application and delete the data item from the application.

- When you delete an entire table from a business view, none of the applications that use the business view can run.

If this occurs, you must delete all items that reside in the deleted table or attach a different business view and connect all of the controls.

- If you delete a business view, any forms that use the business view will fail.

If this occurs, you must associate the forms to a new business view and connect all of the controls.

## Selecting Tables for Business Views

Because business views are created over tables, you must select tables from which to create the business view. Although you can create a large business view to retrieve and update only those columns that the application needs, performance is negatively impacted. Whenever possible, consider joining two smaller tables rather than creating one large business view that contains many data items.

## Selecting Data Items for Business Views

After you select tables for the business view, you must indicate the primary table. Then you can select the required data items to include in the business view. All data items in the selected tables are available for the business view.

Select the data items to include in an interactive or batch application. When you create an application, you do not have to use every item in the business view. Strike a balance between keeping the business view small for maximum performance and including enough fields to allow for future business requirements.

---

**Note.** If you include multiple tables in a joined business view, the primary key fields are automatically selected from the tables. You cannot remove the primary key fields from the business view.

If the required data item appears in multiple tables, you typically want to select the data item from the primary table. Selecting the same data item from multiple tables causes the data item to appear multiple times in the business view. If the same data item is selected from multiple tables, each data item will have its own table reference to identify its origin.

The business view join must be performed on fields of the same field type.

---

## Using Select Distinct

If a business view includes the primary key fields of the primary table, every row of the business view query is unique. The primary key field has a different value in each row, or record, of the primary table. If the business view does not contain all primary key fields of the primary table, then duplicate rows can occur during the business view query. You can eliminate the duplicate rows in the output by using the Select Distinct feature when designing the business view.

For example, Journal Entry is unique by line number and document number. Each document can contain multiple lines. If you need to display one record per document, you can use Select Distinct to fetch only the first occurrence of the document number, not all the detail lines within the document.

Any business view with a primary table that contains any of the following columns—which are used for currency support and security—might cause the Select Distinct feature to output duplicate values:

Column	Description
CO	Company
CRCD	Currency Code - From
CRDC	Currency Code - To
CRCX	Currency Code - Denominated In
CRCA	Currency Code - A/B Amounts
LT	Ledger Type
AID	Account ID
MCU	Business Unit
KCOO	Order Company (Company Code)
EMCU	Business Unit Header
MMCU	Branch
AN8	Address Number

### Example: Select Distinct Feature

The business view used for this example, Event Detail Business view (V98EVDTL), uses the primary index of the primary table, F89EVDTL (Event Detail File) table, by default. The primary index of an EnterpriseOne table must be unique. A unique primary index ensures that the system does not return duplicate values when the business view query is generated. However, Business View Design enables you to use any other index of the primary table when you process the business view. The following steps illustrate how the Select Distinct feature works:

1. In Business View Design Aid, select the primary table.
2. From the Table menu, select Change Index to change the primary table index.  
Change Index is available only for the primary table.  
The system displays a warning, indicating that the selected column list will be changed.
3. Click Yes to continue.

The Available Indices form appears. The first edit field on the form displays the current index of the table used by the business view. The default is the primary index.

4. For this example, select *Key by Formtyp, Evtype, Obj* from Available Indices, and then click OK.  
The Table Joins list and Selected Columns list reflect the keys of the new index.
5. Save the changes and exit Business View Design Aid.

Now, if you run an application that uses the V98EVDTL business view with Select Distinct disabled and the changed business view index (Key by Formtyp, Evtyp, Obj), the generated SQL statement is:

```
SELECT EDOBJTYPE, EDEVTYPE, EDFORMTYPE FROM PVC. F89EVDTL
```

Using this example, you might now have 281 rows of data from table F98EVDTL.

6. Reopen the V98EVDTL business view.
7. From the File menu, select Select Distinct.
8. Select Change Index to select the *Key by Formtyp, Evtyp, Obj* index from Available Indices and then click OK.
9. Save the business view and exit Business View Design Aid.

You might need to exit and restart the software. Because the software stores the business view in cache memory, even though you have changed the business view, the previous business view runs until it is cleared from cache memory.

Generate and rerun the same application using the V98EVDTL business view that completed (with Select Distinct activated). The generated SQL statement is:

```
SELECT DISTINCT EDOBJTYPE, EDEVTYPE, EDFORMTYPE FROM PVC. F98EVDTL
_Continue2
```

Using this example, you might now have only 53 rows of data from table F98EVDTL.

## Creating Table Joins

Create table joins to access multiple tables in a single application.

You typically use joins for forms that are not input-capable, such as find/browse forms, and reports. You do not usually use joins for forms that update and add to the database, because the relationship between the records must be precise. If you must use a join for an input-capable form, only use a join when the relationship between the two tables is simple.

If a business view uses multiple tables, link the tables by establishing joins between columns in those tables. The links define how rows from one table correspond to rows in another table.

When joining a field from one table to a field in another table, both fields must have the same data type. You can use the Object Properties form to view attributes for a column to determine whether you can use it in a join. The Object Properties form displays the attributes of the highlighted data item on the Selected Columns form.

Review each table and decide how the data in one table is related to the data in the other tables for your application or report. You might need to add columns or build new indices in a table, or even create new tables. If you build new indices, consider your needs carefully before you do so.

## Creating Table Unions

Unions are used to pull rows from tables that have the same structure. Unions pull rows that exist in both table. The table union option will only be available if the rows in one table are also included in the other table.

---

## Creating Business Views

This section discusses how to:

- Add business views.
- Select tables for business views.

- Select data items for business views.
- Use Select Distinct.
- Create table joins.
- Create table unions.

## Forms Used to Create Business Views

Form Name	Form ID	Navigation	Usage
Object Management Workbench	W98220A	Solution Explorer, Tools, Object Management Workbench.	View and select objects in projects
Add EnterpriseOne Object to the Project	W98220C	On the Object Management Workbench form, select a project and click Add.	Add a new object to a project.
Add Object	W9861AF	On the Add EnterpriseOne Object to the Project form, select Business View and click OK.	Create a business view.
Business View Design	W9860AL	On the Object Management Workbench form, select a business view and click Design. Select the Design Tools tab, and then click Start Business View Design Aid.	Select tables for a business view, select data items for a business view, use Select Distinct, create a table join, and create a table union.

## Adding Business Views

Access the Add Object form.

<b>Object Name</b>	The business view name. It has to be unique within the entire EnterpriseOne system. A
<b>Product Code</b>	A user defined code (98/SY) that identifies a system. Valid values include: <i>01:</i> Address Book <i>03B:</i> Accounts Receivable <i>04:</i> Accounts Payable <i>09:</i> General Accounting <i>11:</i> Multicurrency
<b>Product System Code</b>	A user-defined code (98/SY) that specifies the system number for reporting and jargon purposes.
<b>Object Use</b>	Designates the use of the object. For example, the object may be used to create a program, a master file, or a transaction journal. See UDC 98/FU.



**Text Search**

Select this option to enable running text searches on the data for this business view. When you select this option, you can later select the business view to build a text search index.

## Selecting Tables for Business Views

Access Business View Design form.

To select tables for business views:

1. On the Available Tables form, complete the following fields, and then click Find:

- Description
- Object Name
- Product Code

2. Select one or more tables and drag them to the Table Joins form.

This form is called Table Joins regardless of whether you are joining multiple tables or working on a single table.

The Table Joins form displays the tables that you select, along with the columns included in the tables. A key icon appears next to the primary key fields. The primary key fields are fields that are included in the primary index of the table. The primary table is where an application begins a search.

---

**Note.** To ensure maximum performance in applications, use the following limits to the number of tables joined in a business view:

Five tables if all joins are simple joins.

Three tables if any of the joins is an outer join or in the event of a union.

---

3. (Optional) Designate a primary table by double-clicking the title bar of the desired table.

If the business view contains multiple tables, the system automatically designates the first table added as the primary table. A crown icon appears in the upper-left corner of the primary table. If a business view contains only one table, that table is the primary table by default.

---

**Note.** To delete a table from a business view, select it and select Delete from the Table menu. Alternatively, right-click the table and select Delete from the pop-up menu.

---

## Selecting Data Items for Business Views

Access the Business View Design form.

To select data items for business views:

1. On the Table Joins form, double-click the data items to include in the business view.

Selected data items appear with a check mark on the Table Joins form. As you select each data item, the system adds it to the Selected Columns form.

---

**Important!** To ensure maximum system performance, do not include more than 256 columns in business views. Business views increase performance by moving less data through the network.

---

2. To delete data items from a business view, double-click the data item either on the Table Joins form or on the Selected Columns form.

## Using Select Distinct

Access the Business View Design form.

To use Select Distinct:

1. Select the primary table of the business view.
2. From the Table menu, select the Distinct Mode option.
3. From the Table menu, select Change Index to change the index of the primary table to a non-unique index.

## Creating Table Joins

Access the Business View Design form.

To create table joins:

1. On the Tables Joins form, click and draw a line that connects a column in the primary table to a column in a secondary table.

Although the column names do not have to be the same, the attributes for Data Type and Decimals must be identical before you can create table joins between two columns. To determine whether data items are candidates for a join, click a data item on the Table Joins form and view the data item attributes displayed on the Object Properties form.

2. Click the line that joins the two connected fields. This highlights both fields.
3. From the Join menu, select Types and then select one of the following join types:
  - Simple  
Simple is the default join type.
  - Left Outer
  - Right Outer
4. From the Join menu, select Operators and then select one of the following operators:
  - Equal (=)  
Equal (=) is the default operator.
  - Less than (<)
  - Greater than (>)
  - Less or equal (<=)
  - Greater or equal (>=)
5. To delete a join, click the line that connects the two fields and then select Delete from the Join menu. Alternatively, right-click the join and select Delete from the pop-up menu.

## Creating Table Unions

Access the Business View Design form.

To create table unions:

1. Select Union Mode from the Table menu.

Alternatively, click the Union Mode button on the toolbar.

2. Select the tables for which you want to create a table union.

The Union Mode is enabled only if all columns in one table also reside in the other table.



## **PART 3**

# Converting Tables

### **Chapter 8**

#### **Understanding Table Conversion**

### **Chapter 9**

#### **Setting Up Table Conversions**

### **Chapter 10**

#### **Running Table Conversions**

### **Chapter 11**

#### **Preparing Foreign Tables for Table Conversion**



## CHAPTER 8

# Understanding Table Conversion

This chapter provides overviews of table conversions, types of tables that you can convert, business views in table conversions, text files in table conversions, sort and selection criteria in table conversions, and input and output environments.

---

## Table Conversions

Table conversion is a type of batch process that enables you to rapidly manipulate the data in tables. The Table Conversion tool uses the following conversion types, which enable you to manipulate data in a variety of ways:

- Data Conversion enables you to transfer or copy data from an input table or business view into output tables using the logic necessary to perform the transfer.

You can also use Data Conversion to update records in a table or business view.

- Data Copy enables you to copy tables from one data source or environment to another data source or environment, when the tables are identical.
- Data Copy with Table Input enables you to copy tables based on information from an input table.

For example, the input table might provide information about which tables are copied, where they are copied, and so on.

- Batch Delete enables you to delete records from a table or business view.

The Table Conversion tool uses PeopleSoft EnterpriseOne tables, business views, and text files. The tool can also use tables that are not PeopleSoft EnterpriseOne tables if they reside in a database supported by PeopleSoft EnterpriseOne software; such as Oracle, Access, iSeries, or SQL Server. Tables that are not PeopleSoft EnterpriseOne tables are referred to as *foreign tables*.

When you create table conversions, you set up the conversion, review it, and then run it. The conversion can be saved and run multiple times. You can test the conversion by running it in proof mode.

Like batch applications, table conversions include a template and versions. You can override some of the properties within a version at runtime.

Table Conversion Design enables you to access any available environment for both input and output. The environments that you select determine which tables and business views are available for the conversion and where the tables reside. The environments that you select also determine the specifications, or descriptions, of tables and business views.

---

## Types of Tables That You Can Convert

You can use the following table types in table conversion:

- PeopleSoft EnterpriseOne tables.

These tables exist in Object Management Workbench. You can design and modify them using Table Design Aid. At design time, only the specifications are needed to reference the table. At runtime, the table must be generated. An instance of the table must occur in a particular database.

- Foreign tables.

These tables do not have a PeopleSoft EnterpriseOne definition, but they reside in a database supported by EnterpriseOne. You must set up a data source and environment in EnterpriseOne to point to the location of a foreign table.

### See Also

Chapter 11, “Preparing Foreign Tables for Table Conversion,” page 99

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## Business Views in Table Conversions

To transfer data from multiple tables to a single table or from multiple tables to multiple tables, you must establish a relationship among the input tables by defining a business view. A business view defines the relationship between two or more tables, and it joins the data into a single view. You can use PeopleSoft EnterpriseOne business views only for input to the table conversion, not for output. The system does not provide direct support for joining foreign tables. To use multiple non-PeopleSoft EnterpriseOne tables as input to a conversion, you must first define them through EnterpriseOne and then create a business view for them.

---

## Text Files in Table Conversions

You can import directly from or export directly to a text file. When you convert a text file, it is stored with a single, long text field. User-defined formats are stored the same for a text file as for any table. With a text file conversion, the table name includes the path and the file name. If you do not specify the path with the file name, the default path is used.

---

## Sort and Selection Criteria in Table Conversions

You can specify sort criteria in a table conversion. Sorting is used to process input rows in a sequence that groups related records together. Table Conversion Design enables you to add logic to determine when a change occurs to the value in a field. The sort and selection features simplify the process of writing records to multiple tables in a typical one-to-many conversion. For example, if you have a single table of customer information, you can sort the data by area code and split the table into individual tables for each area code. Similarly, you can specify selection criteria for the input table to convert only a subset of that table.



---

## Input and Output Environments

An environment consists of a path code and OCM mappings that indicate where PeopleSoft EnterpriseOne objects reside. Table Conversion Design enables you to specify an input and output environment, which is used to locate input and output tables. To locate foreign tables, the Table Conversion tool uses the default OCM mapping for tables.

The path code of the environment is used to locate specification files for the environment. This path code is usually a subdirectory of the EnterpriseOne directory on a workstation. To reference EnterpriseOne tables in an environment, the full path code must exist on the machines where the conversion is designed and run. Foreign tables can be referenced even if the path code does not exist.

The Table Conversion tool uses the following three environments when it processes a conversion:

- The environment you are signed into.
- The environment for the input tables.
- The environment for the output tables.

The environment you are logged into determines where the table conversion specifications are stored. You can select one environment for the input table or business view and one for the converted output tables. The three environments can be the same, or they can be different.

When you use EnterpriseOne tables or views in a conversion, the environment provides the details of each table or view, such as column names, data types, and descriptions. Because this information comes from the EnterpriseOne specification tables, the system table or view does not have to exist in the database for you to design a conversion; however, it must be created before the conversion is run. If you use a foreign table as input, you need to create it before you design the conversion because the tool obtains its information about the table directly from the database containing the foreign table. The environment also provides a default path for text files.

### See Also

Part 1, “Designing Tables,” page 1

Chapter 11, “Preparing Foreign Tables for Table Conversion,” page 99

*EnterpriseOne Tools 8.94 PeopleBook: Configurable Network Computing Implementation*, “Path Code Setup”

*EnterpriseOne Tools 8.94 PeopleBook: Configurable Network Computing Implementation*, “Environment Setup”

*EnterpriseOne Tools 8.94 PeopleBook: Configurable Network Computing Implementation*, “Data Sources”



## CHAPTER 9

# Setting Up Table Conversions

This chapter provides an overview of the table conversion setup and discusses how to:

- Start the table conversion director.
- Convert data.
- Define file formats for conversion input or output.
- Copy data.
- Copy data with table input.
- Delete groups of records.
- Use event rules in table conversions.

---

## Understanding Table Conversion Setup

This section lists prerequisites and discusses:

- Table conversion setup.
- Table conversion process flow.

### Prerequisites

Before you use the table conversion process, perform these tasks.

- If you are importing data from foreign tables, you must set up a data source and environment for those tables.

See [Chapter 11, “Preparing Foreign Tables for Table Conversion,” page 99](#).

- If you are converting data from multiple tables, you must create a joined business view for the tables.

See [Chapter 6, “Understanding Business Views,” Table Joins, page 29](#).

- To validate the data items within a table against the data dictionary as part of the conversion process, you must create a business function to perform the validation.

The Table Conversion tool does not provide automatic data dictionary validation for inputs or outputs.

See *EnterpriseOne Tools 8.94 PeopleBook: Development Tools: APIs and Business Functions*, “Business Functions”.

## Table Conversion Setup

You use a director to set up table conversions. Using the director, you can design table conversions for converting data, copying tables between locations, and deleting records within tables.

You can also define user-defined formats to use in the table conversion. You define these formats when you select the input or output tables. User-defined formats are flat file tables that store data as a continuous string of information, such as bank tapes.

After you set up a table conversion, you can save it and run it multiple times.

### See Also

Chapter 9, “Setting Up Table Conversions,” Understanding User-Defined Formats, page 63

## Table Conversion Process Flow

When you run a table conversion, the system triggers events that are similar to the events that are triggered when a report or application is run. These events are specific to the table conversion that you defined, and they provide pauses in the execution where you can attach logic.

In general, the event flow is the same for all table conversion types (Data Copy, Data Copy with Table Input, Batch Delete) because these conversion types are subsets of a data conversion. For example, the Data Copy conversion type does not include input and output tables; all actions are accomplished through the Process Begin event. The Data Copy with Table Input and Batch Delete conversion types do not include output tables; all actions are accomplished through the Process Begin, Process End, and Row Fetched events. This flexibility enables you to use table conversion types within other conversion types, if necessary.

The following diagram illustrates all events that can be triggered in a table conversion. Depending on the type of conversion that you define, some events might not be triggered. In the diagram, events are shown as a yes-or-no decision.

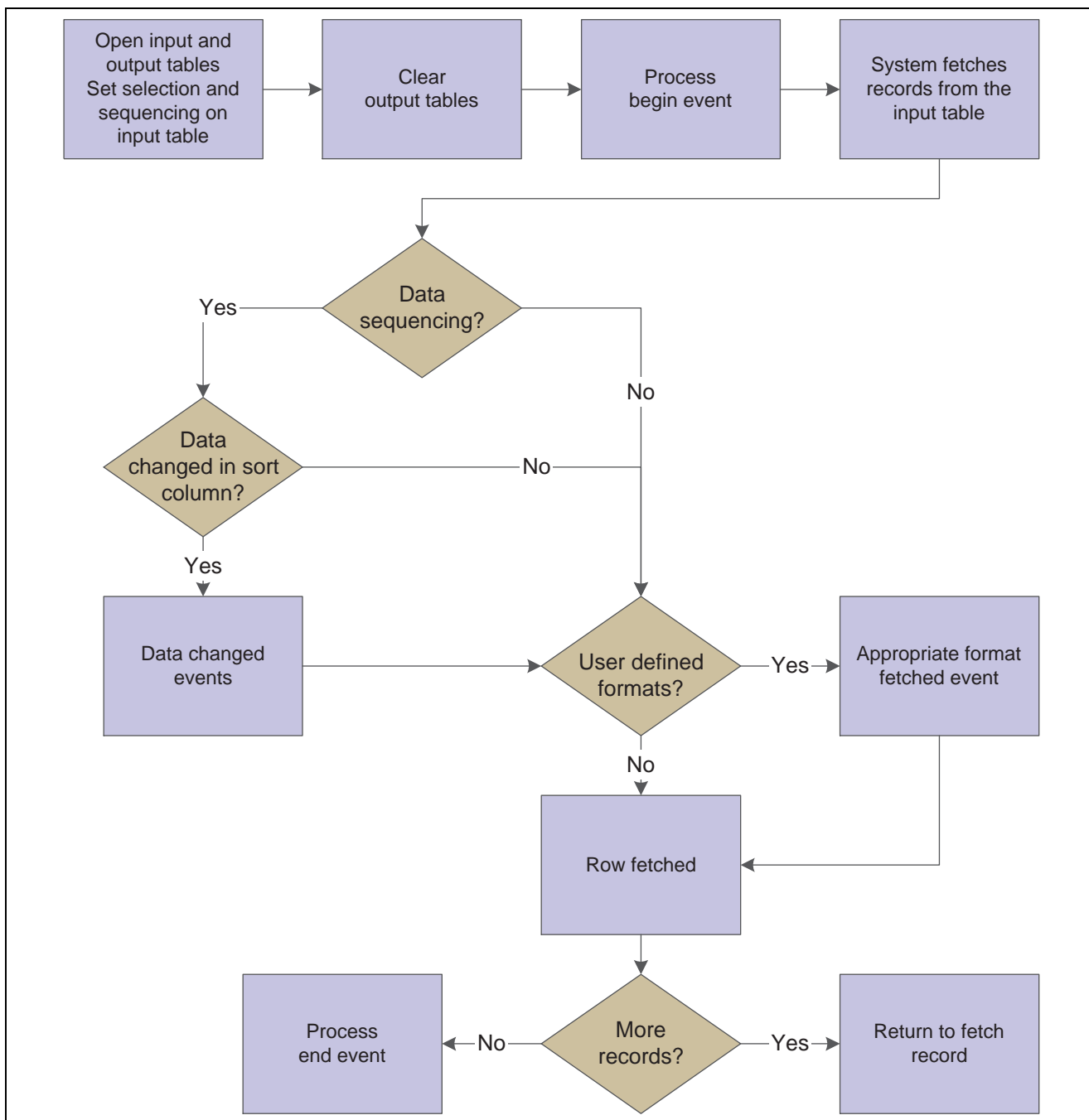


Table conversion event flow.

Events in table conversion occur in the following order:

1. Process Begin.

Before fetching records from the input table, the system invokes the Process Begin event. At this point, you can attach any logic that runs only once at the beginning of a conversion, or any other value that does not change for each record. This event is useful for mapping output fields that do not change for each record.

2. Data Changed.

If you use data sequencing, the system invokes a Data Changed event for any sequenced field that changes. Data Changed events are not cascaded or hierarchical. For example, you can attach an event rule to this event to total a field or group of values.

3. Format Fetched.

If you use user-defined formats (also known as flat files) in the input table, the system invokes a Format Fetched event for each record fetched from the input table. If you use multiple user-defined formats in a conversion, the Format Fetched event is called for the particular format that is found in the record.

4. Row Fetched.

An input table invokes a Row Fetched event after each row is fetched from the input table.

5. Process End

After all records have been processed, the system invokes the Process End event. You attach event rules to Process End to have the system process logic after all input records have been read; for example, to write a total record to an output table or to write a record to a log file to record the status of the conversion.

## Starting the Table Conversion Director

The navigation assistant, which appears within the Table Conversion director, provides a visual indicator of your progress in the setup process. You can use the navigation assistant to move to another step in the process by clicking the step in the assistant.

This section discusses how to:

- Add New Table Conversion.
- Start the Table Conversion director.

## Forms Used to Add New Table Conversion

Form Name	Form ID	Navigation	Usage
Object Management Workbench	W98220A	On Solution Explorer, Tools menu, Object Management Workbench.	View and select objects in projects.
Add EnterpriseOne Object to the Project	W98220C	On the Object Management Workbench form, select a project and click Add.	Add a new object to a project.
Add Object	W9861AF	On the Add EnterpriseOne Object to the Project form, select Batch Application and click OK.	Create a batch application.
Batch Application Design	W9860AL	Complete the Add Object form and click OK.	Start the Table Conversion director.

## Adding New Table Conversions

Access the Add Object form.

<b>Object Name</b>	Name of the table conversion. It has to be unique within entire PeopleSoft EnterpriseOne system.
<b>Product Code</b>	A user-defined code (98/SY) that identifies a system. Values include: <i>01</i> : Address Book <i>03B</i> : Accounts Receivable <i>04</i> : Accounts Payable <i>09</i> : General Accounting <i>11</i> : Multicurrency
<b>Product System Code</b>	A UDC (98/SY) that specifies the system number for reporting and jargon purposes.
<b>Object Use</b>	Designates the use of the object. For example, the object may be used to create a program, a master file, or a transaction journal. See UDC 98/FU.
<b>Table Conversion</b>	Select this option.

## Starting the Table Conversion Director

Access the Table Conversion Design form.

Select the Design Tools tab, and then click Start Table Conversion Design Aid.

The system displays the Introduction form for the Table Conversion director.

Follow the steps for the type of conversion that you want to perform.

### See Also

[Chapter 9, “Setting Up Table Conversions,” Converting Data, page 53](#)

[Chapter 9, “Setting Up Table Conversions,” Copying Data, page 68](#)

[Chapter 9, “Setting Up Table Conversions,” Forms Used to Copy Data with Table Input, page 73](#)

[Chapter 9, “Setting Up Table Conversions,” Deleting Groups of Records, page 75](#)

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## Converting Data

This section provides an overview of data conversions, lists prerequisites, and discusses how to:

- Define external data for conversion.
- Define the input and output environment for conversion.
- Define conversion input.
- Define conversion output.
- Map inputs to outputs.
- Specify conversion logging options.

- Review conversion results.

## Understanding Data Conversion

You use the Data Conversion option on the Table Conversion director to move data to tables from:

- A single table.
- Multiple tables defined in a business view.
- A single text file.

### Data Conversion Example

This data conversion example copies employee records from the F0101 table in the Login Environment to the F0101 in the CMB9 environment.

1. On the Introduction form of the Table Conversion director, select the Data Conversion option, and then click Next.

The External Data form appears.

2. Accept the default value, and click Next.

The Select Environments form appears.

3. Select *<LOGIN ENV>* for the input and *CMB9* for the output environment, and click Next.

The Select Input form appears.

4. From the Table tab, select Address Book Master and click Next.

---

**Note.** To find Address Book Master, you can enter *F0101* in the QBE line for the object name.

---

The Sequencing form appears.

5. Accept the default values, and click Next.

The Data Selection form appears.

6. Set the data selection criteria to *Where Search Type (ATI) is equal to E* to select current employees, and click Next.

The Select Outputs form appears.

7. From the Tables tab, select Address Book Master and click Next.

The Table Options form appears.

8. Because the Address Book Master file does not contain currency information, clear the check mark for Run Currency Triggers and then click Next.

The Mapping form appears.

9. Because you are converting data from similar files, select the Row Fetched event, click Map Same and click Next.

The system automatically maps data elements with the same aliases to each other.

The Logging Options form appears.

10. Select Log All Errors and Log Outputs so that you can review the conversion after it is complete and then click Next.

The Finish form appears.



11. Select No, I will create a version of this table conversion later, and click Finish.

The Table Conversion Review form appears.

12. Click Save before exiting.

You have created a table conversion.

## Prerequisite

Access the Introduction form of the Table Conversion director.

See [Chapter 9, “Setting Up Table Conversions,” Starting the Table Conversion Director, page 52.](#)

## Forms Used to Convert Data

Form Name	Form ID	Navigation	Usage
External Data	NA	On the Introduction form of the Table Conversion Director, select the Data Conversion option and click Next.	Specify external data (processing options, data structures) for the conversion.
Select Processing Option Template	NA	Click Select on the External Data form.	Attach a processing option template to the conversion.
Data Structure	NA	Click Define on the External Data form.	Define data structures to attach to the conversion.
Select Environments	NA	Click Next on the External Data form.	Specify input and output environments for the conversion.
Select Input	NA	Click Next on the Select Environments form.	Specify table, file, or business view to be converted.
Sequencing	NA	Click Next on the Select Input form. Click Data Sequencing on the Sequencing form.	Define data sequencing for a table or business view.
Data Selection	NA	Click Next on the Sequencing form.	Define selection criteria to indicate the data to be converted.
Select Outputs	NA	Click Next on the Data Selection form.	Specify table, or file, to store the converted data.
Table Options	NA	Click Next on the Select Outputs form.	Select additional options that control how records are processed during the conversion.
Mapping	NA	Click Next on the Table Options form.	Determine how data should be mapped from the input table to the output table and which event should be used.

Page Name	Object Name	Navigation	Usage
Mapping	NA	Click an output column on the Mapping form.	Specify advanced mapping options.
Logging Options	NA	Click Next on the Mapping form.	Specify information to be logged during the conversion process.
Finish	NA	Click Next on the Logging Options form.	Select whether to create a version
Object Properties	NA	Click Finish on the Finish form.	Review field properties.
Table Conversion Mappings	NA	Click the Mapping form.	Review mappings from input to output tables.

## Defining External Data for Conversion

Access the Introduction form of the Table Conversion director.

To define external data:

1. Select the Data Conversion option and then click Next.
2. On the External Data form, click Select to attach a predefined processing option template to the table conversion.
3. On the Select Processing Option Template form, select the processing option to use and then click OK to return to the External Data form.
4. To attach data structures, click Define.
5. On the Report Data Structure form, define the data structure to attach to the table conversion, and then click OK to return to the External Data form.

Data structures contain a list of parameters that can be used to pass data into the conversion when called through a report interconnect.

6. Click Next.

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Development Tools: Data Structure Design*, “Understanding Data Structures”

## Defining Input and Output Environments for Conversion

To define input and output environments,

Access the Select Environments form.

1. Select the input and output environments to use.

---

**Note.** Select `<LOGIN ENV>` if you are creating a table conversion that will be used by a customer who may not have the environments that you have. This option makes the table conversion use the environment that the user is logged into.

---

2. If you are creating a table conversion that will run in a different environment from the one where you create it, and the <LOGIN ENV> is not appropriate for the type of conversion that you are creating, select the Force Version to Override Input Environment option or the Force Version to Override Output Environment option.

For example, if you create a conversion that will be used by a client who does not have the environments that you have, you would select these options. When the conversion is invoked at the client site, the system will not run the conversion until the user selects the appropriate environments in which to run it.

3. Click Next.

## Defining Conversion Input

To define input:

Access the Select Input form.

1. Select the appropriate tab (based on whether the input is a table, a business view, a foreign table, or a text file).
2. If the input is a table or a business view, drag it to the Description form.

If you know the name of the table or business view, enter the name in the Object Name field in the QBE line and press ENTER.

You can select only one table or one business view per conversion. If the input consists of multiple tables, you must create a single, joined business view.

3. If the input is a text file, on the Text File tab, type the name of the file and then click Use; alternatively, you can click Browse and then open the appropriate text file.

For the iSeries, input text files are stored in the Integrated File System (IFS). Enter the path to the IFS before the file name.

If you change a table, business view, or text file, the system warns you that deleting tables removes all mappings from the table conversion. Click OK.

If you are using a text file or if you need to define a format for a table or business view, select the User Defined Format option.

4. To delete an input name, select it and press DELETE.
5. Click Next.
6. On the Sequencing form, select Data Sequencing to define data sequencing for a table or business view. If you specify a text file for input, you cannot define data sequencing or selection for that file.

---

**Note.** When you define data sequencing, you create new events that are available to you in the Mapping section of the director. One new event is created for each sequence column that you define. The event is called *XXXX Data Changed*, where *XXXX* is the column alias; for example, *ALPH Data Changed*. Each time the value in one of these columns changes from its previous value, the column's Data Changed event is invoked. This event is similar to a level break in report writing, except that the Data Changed events are not related to each other. Invoking one does not invoke the others.

---

7. Click Next.

The Data Selection form appears.

---

**Note.** You can define selection criteria only for database table columns. User-defined format columns are not available because they do not exist in the database.

---

On the Data Selection form, *Where* is the default value in the Operator column for the first set of criteria. For subsequent statements, *And* and *Or* become the available values for the Operator column and are selected by double-clicking the appropriate value.

8. Click the left operand field to display the list of available objects, and then do one of the following:
  - Scroll through the list until you find the desired object, select the object, and then double-click the object to populate the left operand column.
  - Type the first letters of the object name in the left operand field to find the object in the list, and then double-click the highlighted object.

When you double-click the object for the left operand column, the list of available values for the Comparison column appears.

9. Select one of the following comparison operators:

- is equal to
- is equal to or empty
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to
- is not equal to

10. Click in the right operand column to display a list of available objects, special values, or variables.

Your options in this column depend on the selection that you made in the Comparison column. Some of the following options might be available:

- Blank  
Enters a blank (space) value.
- Literal  
Enters specific values (see the following step for information about entering specific values)
- Null  
Indicates that no value is associated with the field.
- Zero  
Enters a value of 0.
- IC  
Indicates input table columns.
- RI  
Indicates values passed through a report interconnect to this table conversion.
- PO  
Indicates processing options values for this conversion.

- SL  
Indicates system literals.
11. If you enter a literal in the right operand column, the Single value form opens and you can enter values on the following tabs:
    - Single value  
Enter a single value, and then click OK. An example value might be a specific company.
    - Range of values  
Enter a range of values, and then click OK. An example might include companies from *00001* to *00060*. When using a range of values, only the *is equal to*, *is equal to or empty* and *is not equal to* logical operators are valid.
    - List of values  
To add values to the list, type each value in the field and then click Add. Repeat this process until the list of values is complete.  
  
An example list of values might include several user-defined codes for search types, such as *C* for customers, *E* for employees, and *V* for vendors. When using the list of values, only *is equal to*, *is equal to or empty* and *is not equal to* are valid logical operators.  
  
To delete a value, select the value and click Delete.  
  
Click OK when you are finished.
  12. To delete a line of criteria on the Data Selection form, select the row header to highlight the row, and then click the Delete button.
  13. To change the order of the criteria, select the row header to highlight the row, and then click the up or down button.
  14. Click Next.

## Defining Conversion Output

To define output:

Access the Select Outputs form.

1. Drag the table (or tables) that you want to use as outputs to the right side of the Description form, and click Next.
2. For text file conversions, from the Text File tab, select the file to use as the output and click Use.

---

**Note.** On the iSeries, output text files are stored in the IFS. Type the path to the IFS before the file name.

---

3. Click Next.
4. To delete an output, select the row and press DELETE.  
  
If you are using a text file—or if you need to define a user-defined format for a table or business view—click the User Defined Format button.
5. Click Next.
6. On Table Options, select any applicable options from the following:

- **Run Currency Triggers**

Select this option if a PeopleSoft EnterpriseOne table included in the conversion contains currency triggers. If a table contains currency fields and you do not select this option, the system cannot determine where the decimal should be placed within a field. If you do not select the currency trigger option and the source or destination fields are currency fields used in a calculation, you might receive unexpected results.

Do not select the Run Currency Triggers option if the input and output data sources are the same type (for example, Oracle, iSeries, or SQL Server) and no calculations are performed. Selecting this option results in slower performance.

You should not use currency triggers for an environment that has a different path code from the login environment.

- **Clear Output Tables**

Select this option to clear the output table before the conversion runs.

- **Force Row by Row Processing**

Select this option to test the table conversion or to ensure that the conversion always runs in row-by-row mode.

You can test a conversion to ensure that the mapping logic is correct. In this case, specify the number of rows to process. The number of rows can be defined in the jde.ini file under [TCEngine] or when you submit the conversion.

Select this option if you know that the values in the input table will produce duplicate keys in the output, and you want only the non-duplicate keys to be inserted.

Selecting this option results in slower processing.

- **Buffer Inserts To Output Tables**

Select this option to improve conversion performance if the conversion does not include any event rules to process insertion errors and you are processing row by row.

7. Click Next.

## Mapping Inputs to Outputs

To map inputs to outputs:

Access the Mapping form.

1. In the Events field, select the event on which mapping will occur.

In most cases, you use either the Row Fetched event or Format Fetched event. Use the Format Fetched event if you are working with a user-defined format.

2. Click Advanced ER to include additional event rule logic in the conversion.

The Event Rules Design form appears for the event that you select in the Events field of the Mapping form.

3. Click Map Same to allow the system to map the inputs directly to the outputs.

If the input and outputs share some of the same data, these fields are a direct map. For PeopleSoft EnterpriseOne tables, the system maps fields by data dictionary item. For foreign tables, the system maps by column name.

4. Drag inputs to outputs to manually define the inputs to the outputs.

---

**Note.** Click Delete to erase the mapping for a selected output. Click Delete All to erase the mapping for all outputs.

---

5. If multiple output files exist, select each file from the outputs list and map the appropriate input columns to the appropriate output columns.
6. To define advanced output, double-click an output column.  
The Advanced Outputs form appears. This form enables you to define literals, calculations, and other mappings without using Advanced ER. You can use an advanced input to add a literal value into a field. Alternatively, you can define a calculation to populate an output field, such as adding two input fields together.
7. On the Advanced Outputs form, select one of the following tabs and add the appropriate input:
  - Available objects  
Select the output column, select the appropriate object, and then click Apply.
  - Literal  
Select the output column, enter the appropriate value, and click Apply.
  - Defaults  
Select the Use Dictionary Defaults option, and then click Apply.  
Select this option to use the default value in the data dictionary at runtime. If no default values exist in the data dictionary, the system displays a warning message.
  - Calculation  
Click Define Calculation and then create a calculation in Expression Manager.
8. When you finish defining an advanced input, click Apply and then click Close.
9. On the Mapping form, select the Issue a Write for this Event option to insert a row to the selected output after performing all column mappings for this event.  
When you select the Issue a Write for this Event option, the system attaches the TC Insert Row event. This event is automatically inserted at the end of the event rules. You cannot move it to another area. To specify when and where a row is inserted, attach the User Insert Row system function using Advanced ER and move it to wherever you want.
10. Click Next.

### See Also

[Chapter 9, “Setting Up Table Conversions,” Table Conversion Process Flow, page 50](#)

[Chapter 9, “Setting Up Table Conversions,” Using Event Rules in Table Conversions, page 88](#)

## Specifying Conversion Logging Options

Click Next on the Mapping form to access the Logging Options form.

Click Next after selecting logging options.

### Log All Errors

Indicates that every error is logged, regardless of the logging option for type of operation that failed.

<b>Log Every Input Record</b>	Indicates that every input record should be logged in the table conversion log file.
<b>Log Deletes</b>	Indicates that every record deleted is logged in the table conversion log file.
<b>Log Updates</b>	Indicates that every record updated is logged in the table conversion log file.
<b>Log Copy Table Actions</b>	Indicates that the tables copied are logged in the table conversion log file.
<b>Log Details of Copy Table Actions</b>	Indicates that the detailed logging of each Copy Table action is performed.
<b>Proof Mode</b>	Indicates that the conversion is run in proof mode. In proof mode, the conversion is simulated and all actions are logged, but no data is changed.

---

**Note.** Proof mode is not an absolute proof mode. In some situations, the proof output might differ from the real output. If you insert the same record twice, for example, it may seem as though it worked in proof mode but, in reality, only one of the inserts works when you run the conversion in final mode.

---

## Reviewing Conversion Results

To review the results of the director:

Access the Finish form.

1. Select one of the following options:
  - Yes, create a version of this table conversion  
If you select yes, enter the version name.
  - No, I will create a version of this table conversion later
2. Click Finish to complete the process.  
The system displays the Properties form and the Table Conversion Mappings form.
3. Select the Table Conversions Mappings form and review the mapping.
4. Make changes as necessary by selecting the appropriate option from the View menu. If you are satisfied with the changes, click Save.
5. From the Conversion menu, select Exit.

### See Also

Chapter 9, “Setting Up Table Conversions,” Reviewing Conversion Results, page 62

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## Defining Formats for Conversion Input or Output

This section provides an overview of user-defined formats and prerequisites, and discusses how to:

- Define delimited file formats.
- Define fixed-width file formats.



## Understanding User-Defined Formats

The Table Conversion tool uses user-defined formats to handle fixed-width or Comma-Separated Value (CSV) files in a table or text file. These files are collectively known as flat files because they do not have relationships defined as relational database tables do. Usually, flat files are text files stored on a workstation or server. They are used to import or export data from applications that have no other means of interaction. For example, you might need to share information between PeopleSoft EnterpriseOne and an external application. If the external application does not support one of the same databases that EnterpriseOne supports, flat files might be the only way to transfer data between the two applications.

In a flat file, records are stored as a continuous string of information. The user-defined format provides instruction on how data is presented.

The following example illustrates a single database record of five columns: Last, First, Addr, City, and Phone:

Last	First	Addr	City	Phone
Doe	John	123 Main	Anytown	5551234

This record can be formatted as a comma-delimited string:

Doe, John, 123 Main, Anytown, 5551234

This record can also be formatted as a fix-width column format where each column is 8 characters long.

### Importing and Exporting Text Files

When you select a text file for input or output in a table conversion and do not specify a path, a default path is used. Conversions stored with the default path run on any platform. If an explicit path or iSeries library name is indicated for the file, then the file is created exactly as specified. Conversions stored in this way might not work on other platforms, depending on the nature of the file system on each platform.

The default paths on non-iSeries platforms are:

- path code\Import\file name
- path code\Export\file name

You cannot specify a default path for the iSeries. Rather, the default is always the Import or the Export directory under the path code of the input or output environment. For example, if you are running a conversion against a DV811 environment, the path in the file system might be \E811\DV811\import\myfile.txt.

If the conversion specifies a file name that includes anything other than the file name and extension, such as library/file(mbr) or \mytextfiles\myfile.txt, the conversion attempts to open the file as specified.

### Using User-Defined Formats as Input

If you use user-defined input formats, add event rules on the Format Fetched event. Without these event rules, the system ignores the format, and the data from the input table is never made available to the conversion. If your conversion does not require event rule logic, add comments in Event Rules Design.

User-defined formats work with text files and tables.

Because the procedure for importing and exporting data is database-specific, you should consult a database administrator for details.

## Using User-Defined Formats as Output

If you use user-defined output formats, add event rules on the Format Fetched event. Without these event rules, the system ignores the format and the data from the input table is never made available to the conversion. If your conversion does not require event rule logic, at least add some comments in this event for it to run.

User-defined formats work with text files and tables.

Because the procedure for importing and exporting data is database-specific, you should consult a database administrator for details.

## Prerequisite

Access the Introduction form of the Table Conversion director.

See [Chapter 9, “Setting Up Table Conversions,” Starting the Table Conversion Director, page 52.](#)

## Forms Used to Define Formats for Conversion Input or Output

Form Name	Form ID	Navigation	Usage
Select Input	Not Applicable (NA)	On Table Conversion Director, click Next to reach Select Input	Select input for the data conversion.
Select Output	NA	Click Next from Select Input to reach Select Output.	Select output tables for the data conversion.
User Defined Format - Type	NA	Click Define Formats on the Select Input form or the Select Output form.	Select a format type, or select a row format.
User Defined Format - Column Delimiter	NA	Select Delimited as the format type, and click Next on the User Defined Format Type form.	Select the character used to separate columns in the file.
User Defined Format - Multiple Format Definition	NA	Click Next on the User Defined Format - Column Delimiter form.	View the number of formats of the file.
User Defined Format - Multiple Format Names	NA	Click Next on the User Defined Format - Multiple Format Definition form.	Define the columns and the names of each format.
User Defined Format - Column Layout	NA	Click Next on the User Defined Format - Type form.	Define columns for the file format.
New Column Properties	NA	Click Add or Edit on the User Defined Format - Column Layout form.	Define column properties.
User Defined Format - Finish	NA	Click Next on the New Column Properties form.	Complete the format creation process.

## Defining Delimited File Formats

Access the Select Input form or the Select Outputs form.

To define delimited, single- or multiple-format files:

1. On the Select Input form or the Select Output form, ensure that you have selected a table, business view, or file. Select User Defined Format, and then click Define Format(s).

The User Defined Format - Type form appears.

2. Select the delimited format type.
3. Select one of the following row formats and click Next:

- Single Format (all rows have the same format).
- Multiple Formats (rows are in two or more formats).

The User Defined Format - Column Delimiter form appears.

4. Select the delimiter that separates the columns in the file:
  - Tab
  - Comma
  - Semicolon
  - Space
  - Other

5. Select the textual qualifier that is used to enclose a string of text:

- No Text Qualifier

Indicates that no character is used to qualify text in this user-defined file.

- Single Quotation Qualifier

Indicates that a single quotation mark is used to qualify text in this user-defined file.

- Double Quotation Qualifier

Indicates that a double quotation mark is used to qualify text in this user-defined file.

6. If you select Single Format on the User Defined Format - Type form and the first row contains column headings, select *The first row contains column headers*.

7. Click Next.

8. If you select Multiple Format on the User Defined Format - Type form, the system displays a Multiple Format Definition form. If you select Single Format, proceed to step 13.

9. On the User Defined Format - Multiple Format Definition form, enter the number of formats that your user-defined format contains.

10. To define the character length of the Designator column, complete the Length field.

11. Click Next.

The User Defined Format - Multiple Format Names form appears.

12. In the Designator column, name each format and define the values for each.

The Designator name should describe the data in the user-defined formats.

For example, suppose that a text file contains purchase order information. Lines in the table have information for a whole purchase order with the first field designated as POH; lines with a first field designated as POI contain information about individual items in the purchase order; and lines in the table with a first field designated as POT contain information about purchase order totals. In this scenario, you would enter POH as the designator of the first format, POI as the designator of the second format, and POT as the designator of the third format.

---

**Note.** You can rename the columns for each format to make it easier to remember the formats with which you are working. For example, you can rename the columns according to their function in the file, such as Header, Detail, and Total. These names will appear in the Inputs drop-down list in the Mapping section of the conversion. To rename columns, select the column and change the name of the column in the Name field.

---

13. Click Next.

The User Defined Format - Column Layout form appears.

14. Select a format from the list of available formats.

You define the columns for the format so that the system can parse the information from the file.

---

**Note.** To move the Format Designator, select the row and drag it to the new location.

---

15. For each column, click Add to define the column.

The New Column Properties form appears.

16. Modify the following fields as needed, and then click OK:

- Name
- Length
- Type

17. To edit an existing column, select it and click the Edit button. Change the properties on the Column Properties form.

18. To model the columns after an existing table, business view, or foreign table, click the Model button, select the appropriate tab, and then select the table or business view that you want to use as a model for the user-defined format.

---

**Note.** You cannot model the columns after an existing object unless the layout of the two objects match.

---

19. Click OK.

The system copies the format from the model that you selected and places it into the column layout grid.

20. Click Next.

The User Defined Format - Finish form appears.

21. Click Finish when you have completed defining formats.

The system returns to the Select Input form or the Select Output form.

## Defining Fixed-Width File Formats

Access the Select Input form or the Select Outputs form.'

To define fixed-width, single- or multiple-format files:

1. Select User Defined Format, and then click Define Format(s).  
The User Defined Format - Type form appears.
2. Select the fixed width format.
3. Select one of the following row formats and click Next:
  - Single Format (all rows have the same format).
  - Multiple Formats (rows are in two or more formats).
4. If you selected Single Format, proceed to step 10. If you selected Multiple Format, the system displays the Multiple Format Definitions form.
5. On the User Defined Format - Multiple Format Definition form, enter the number of formats that your user-defined file contains.

To define the character length of the Designator column, complete the Length field.

6. Click Next.

The User Defined Format - Multiple Format Names form appears.

7. In the Name column, provide a name for each format.

The name should describe the data in your user-defined formats.

For example, suppose that a text file contains purchase order information. Lines in the table have information for a whole purchase order with the first field designated as POH; lines with a first field designated as POI contain information about individual items in the purchase order; and lines in the table with a first field designated as POT contain information about purchase order totals. In this scenario, you would enter POH as the designator of the first format, POI as the designator of the second format, and POT as the designator of the third format.

---

**Note.** You can rename the columns for each format to make it easier to remember the formats with which you are working. For example, you can rename the columns according to their function in the file, such as Header, Detail, and Total. These names appear in the Inputs drop-down list in the Mapping section of the conversion. To rename columns, select the column and change the name of the column in the Name field.

---

8. Click Next.

The User Defined Format - Column Layout form appears.

9. Select a format from the list of available formats.

You define the column so that the system can parse the information from the file.

---

**Note.** If you need to move the Format Locator, select the row and drag it to the new location.

---

10. For each column, click Add to define the column layout.
11. On the New Column Properties form, modify the following fields as needed, and then click OK:
  - Name
  - Start
  - Length
  - Type

12. To edit an existing column, select it and click the Edit button. Change the properties in the Column Properties form.
13. To model the columns after an existing table, business view, or foreign table, click the Model button, select the appropriate tab, and then select the table or business view to use as a model.

---

**Note.** You cannot model the columns after an existing object unless the layout of the two objects match.

---

14. Click OK.

The system copies the format from the model that you selected and places it into the column layout grid.

15. Click Next.

The system displays the summary of user-defined formats that you have defined.

16. Click Finish when you are finished defining formats.

The system returns to the Select Input or Select Outputs form.

### See Also

[Chapter 9, “Setting Up Table Conversions,” Reviewing Conversion Results, page 62](#)

[Chapter 9, “Setting Up Table Conversions,” Using Event Rules in Table Conversions, page 88](#)

[Chapter 10, “Running Table Conversions,” Understanding Table Conversions, page 93](#)

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## Copying Data

You use the Data Copy option in the Table Conversion director to copy tables from one environment or data source to another. You also can import a copy table script to use in the conversion.

This section discusses how to:

- Define external data for copying.
- Define input and output environments for copying.
- Define data copy actions.
- Specify logging options for copying.
- Review data copy results.

### Prerequisite

Access the Introduction form of the Table Conversion Director.

See [Chapter 9, “Setting Up Table Conversions,” Starting the Table Conversion Director, page 52.](#)

## Forms Used to Copy Data

Form Name	Form ID	Navigation	Usage
External Data	NA	Select the Data Copy option on the Introduction form of the Table Conversion director and click Next.	Define external data for the copy.
Select Processing Option Template	NA	Click Select on the External Data form.	Attach a processing option template to the data copy.
Report Data Structures	NA	Click Define on the External Data form.	Define data structures to attach to the data copy.
Select Environments	NA	Click Next on the External Data form.	Specify input and output environments for the data copy.
Select Input	NA	Click Next on the Select Environments form.	Specify the data that you are copying.
Sequencing	NA	Click Next on the Select Input form. Click Data Sequencing on the Sequencing form.	Define data sequencing for a table or business view.
Data Selection	NA	Click Next on the Sequencing form.	Define selection criteria to indicate the data to be converted.
Table Options	NA	Click Next on the Data Selection form.	Select additional options that control how records are processed during the conversion.
Select Actions	NA	Click Next on the Table Options form.	Define actions for each column by event.
Logging Options	NA	Click Next on the Select Actions form.	Specify information to be logged during the data copy process.
Finish	NA	Click Next on the Logging Options form.	Review conversion results.
Table Conversion Actions	NA	Select Yes on the Finish form and click OK on the warning that appears.	Review mappings from input data to output tables.

## Defining External Data for Copying

Define external data for copying.

Access the Introduction form of the Table Conversion Director.

Select the Data Copy option and click Next.

See [Chapter 9, “Setting Up Table Conversions,” Defining External Data for Conversion, page 56.](#)

## Defining Input and Output Environments for Copying

Define input and output environments for copying.

On the Select Environments form, select an input environment and an output environment.

See [Chapter 9, “Setting Up Table Conversions,” Defining Input and Output Environments for Conversion, page 56.](#)

## Defining Data Copy Actions

To define data copy actions:

Access the Select Actions form.

### 1. Complete the following fields:

When you enter the name of a table, the system automatically populates the remaining fields for you. You can make changes to these fields as necessary.

- Table

If you want to copy a single table, select *<Literal>* and enter the name of that table on the Single Value tab.

If you do not know the name of the table that you want to copy, use the *<Find a Table>* option.

- To Table

Enter either the last table in a range of tables to be copied or leave the field blank, if you are copying a single table.

- Source Type

Select Data Source if the input and output sources are data sources. Select Environment if the input and output sources are environments.

If Data Source is selected, the system retrieves table definitions from the specifications in the login environment.

If Environment is selected, the system uses the input and output environment to locate data and specifications for the tables. This enables the specifications to be different in the input and output environment but the data is copied.

- Input Source

The input source is the data source or environment from which the inputs is read.

- Output Source

The output source is the data source or environment where the output is written.

- Create

If you select *<If Table Exists>*, the system creates the table in the output and runs the conversion only if both the table specifications and the actual table exist in the input.

If you select *<Yes>*, the system creates the table in the output. If the table already exists in the output, the system deletes it and creates a new table.

If you select *<No>*, the system assumes the table already exists in the output and does not create it.



- Clear

If you select *<If Table Exists>*, the system clears the table in the output only if it exists in the input.

If you select *<Yes>*, the system deletes all rows in the output table before copying the table.

If you select *<No>*, the output table will not be cleared.

---

**Note.** Selecting not to clear the output table might result in key conflicts.

---

- Copy

If you select *<Yes>*, the system copies the data from the input table to the output table using Map Same.

If you select *<No>*, no data is copied.

- Owner ID

- Owner Pwd

If the data source requires an owner ID and password, enter them here. If you leave these fields blank, the system enters the ID and password of the login user, or *<None>* if the data source does not have security.

2. To import an existing copy table script from another location, click the Import button. On Open, find the file that you want to import and click Open.

The system adds an action for each copy table item in the copy table script.

3. On Select Actions, click Advanced ER to add event rule logic to the copy table process.

You can use event rules to write a custom copy table script.

4. Click Next.

## See Also

Chapter 9, “Setting Up Table Conversions,” Using Event Rules in Table Conversions, page 88

## Specifying Logging Options for Copying

Access the Logging Options form.

- Click Next on the Select Actions form to access the Logging Options form.
- Click Next after specifying logging options.

### Log All Errors

Indicates that every error are logged, regardless of the logging option for type of operation that failed.

### Log Copy Table Actions

Indicates that each Copy Table action is logged.

### Log Details of Copy Table Actions

Indicates that the detailed logging of each Copy Table action is performed.

### Proof Mode

Indicates that the conversion is run in proof mode. In proof mode, the conversion is simulated and all actions are logged, but no data is changed.

## Reviewing Data Copy Results

To review the results of the director:

Access the Finish form.

1. Select one of the following options:
  - Yes, create a version of this table conversion  
If you select yes, enter the version name.
  - No, I will create a version of this table conversion later
2. Click Finish to complete the process.  
If you select yes in step 1, a warning message prompts you to save the changes.
3. Click OK.  
The system displays the Table Conversion Actions form.
4. Review your selections and, if satisfied, click Save.
5. From the File menu, select Exit.  
You can now run the table conversion.

**See Also**

[Chapter 9, “Setting Up Table Conversions,” Using Event Rules in Table Conversions, page 88](#)

[Chapter 9, “Setting Up Table Conversions,” Reviewing Conversion Results, page 62](#)

[Chapter 10, “Running Table Conversions,” page 93](#)

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## Copying Data with Table Input

This section provides an overview of copying data with table input, lists a prerequisite, and discusses how to:

- Define external data for copying with table input.
- Define input and output environments for copying with table input.
- Define inputs for copying with table input.
- Set table options.
- Define data copy actions for copying with table input.
- Specify logging options for copying with table input.
- Review data copy with table input results.

## Understanding Data Copying with Table Input

Data Copy with Table Input is similar to Data Copy, except that it also enables information for the process to come from an input table. The input table might provide information about which tables are copied, where they are copied, and so on. Data Copy with Table Input also enables you to select data.

For example, suppose that you create a table that includes a table name, the next backup date, and the backup frequency. You might populate this table with a list of tables to be archived and information specifying how often they are archived. You can then use Data Copy with Table Input to select all rows in which the backup date is less than or equal to the current date, and calculate a new backup date.

## Prerequisite

Access the Introduction form of the Table Conversion director.

See [Chapter 9, “Setting Up Table Conversions,” Starting the Table Conversion Director, page 52.](#)

## Forms Used to Copy Data with Table Input

Form Name	Form ID	Navigation	Usage
External Data	NA	Select the Data Copy with Table Input option on the Introduction form of the Table Conversion director and click Next.	Define external data for the copy.
Select Processing Option Template	NA	Click Select on the External Data form.	Attach a processing option template to the data copy.
Report Data Structures	NA	Click Define on the External Data form.	Define data structures to attach to the data copy.
Select Environments	NA	Click Next on the External Data form.	Specify input and output environments for the data copy.
Select Input	NA	Click Next on the Select Environments form.	Select input for the data copy.
Sequencing	NA	Click Next on the Select Input form.	Define data sequencing for a table or business view.
Data Selection	NA	Click Next on the Sequencing form.	Define selection criteria to determine the data to be converted.
Table Options	NA	Click Next on the Data Selection form.	Select Run Currency Triggers if currency fields are included in the copy.
Select Actions	NA	Click Next on the Table Options form.	Define actions for the data that you are copying.
Logging Options	NA	Click Next on the Select Actions form.	Specify information to be logged during the data copy process.
Finish	NA	Click Next on the Logging Options form.	Review conversion results.
Table Conversion Actions	NA	Select Yes on the Finish form	Review mappings from input data to output tables.

## Defining External Data for Copying with Table Input

On the Introduction form of the Table Conversion director, select the Data Copy with Table Input option and click Next.

See [Chapter 9, “Setting Up Table Conversions,” Defining External Data for Conversion, page 56.](#)

## Defining Input and Output Environments for Copying with Table Input

Select input and output environments for the data-copying with table input.

See [Chapter 9, “Setting Up Table Conversions,” Defining Input and Output Environments for Conversion, page 56.](#)

## Specifying Table Options

To specify table options:

Access the Table Options form.

1. Select the Run Currency Triggers option, if applicable.

Select this option if a PeopleSoft EnterpriseOne table included in the conversion contains currency triggers. If a table contains currency fields and you do not select this option, the system cannot determine where the decimal should be placed within a field. If you do not select the currency trigger option and the source or destination fields are currency fields used in a calculation, you might receive unexpected results.

Do not select the Run Currency Triggers option if the input and output data sources are the same type (for example, Oracle, iSeries, or SQL Server) and no calculations are being performed. Selecting this option results in slower processing.

You should not use currency triggers for an environment that has a different path code than the login environment.

2. Click Next.

### See Also

[Chapter 9, “Setting Up Table Conversions,” Table Conversion Process Flow, page 50](#)

## Defining Data Copy Actions with Table Input

Define data copy actions with table input.

See [Chapter 9, “Setting Up Table Conversions,” Defining Data Copy Actions, page 70.](#)

## Specifying Logging Options for Copying with Table Input

Click Next on the Select Actions form to access the Logging Options form.

Click Next after specifying logging options.

See [Chapter 9, “Setting Up Table Conversions,” Specifying Conversion Logging Options, page 61.](#)

## Reviewing Data Copy Results with Table Input

Review data copy results with table input.

See [Chapter 9, “Setting Up Table Conversions,” Reviewing Data Copy Results, page 71.](#)

## Deleting Groups of Records

This section provides an overview of batch deletion, lists a prerequisite, and discusses how to:

- Define external data for batch deletion.
- Define the environment for batch deletion.
- Define input for batch deletion.
- Specify logging options for batch deletion.
- Review deletion results.

## Understanding Batch Deletion

The Batch Delete option enables you to delete a range of records from a PeopleSoft EnterpriseOne input table or foreign table based on selection criteria that you define. For example, you can set up a batch delete table conversion that deletes records in an input table that do not contain valid data or records. You can also set up a conversion that deletes all records from a particular table.

### Example: Creating Purge Programs as a Batch Delete

The following example is a table conversion that deletes records from the input environment. Designing purge programs as batch-deletes enables you to purge records with control and accuracy. You can archive the purged data or remove it from the system permanently. The archiving process is shown in this example. Before you start this example, create a handle for the table.

See [Chapter 4, “Table I/O,” Understanding Handles, page 19](#).

1. On the Introduction form of the Table Conversion director, select Batch Delete and click Next.  
The External Data form appears.
2. Select a Processing Option template, and click Next.  
For this example, use *Purge Processing Option (T42000P)*.  
The Select Environment form appears with only source environments displayed.
3. Select the source environment in which to run the batch delete, and click Next.  
For this example, select the login environment *<LOGIN ENV>*. Select the Force Version to Override Input Environment option. This ensures that the person who runs the purge program provides a valid source environment from which to run the batch-delete.  
The Select Input form appears.
4. Select the table to purge and drag it to the Description area, and click Next.  
For the example, select *User Defined Code Types (F0004)*.  
The Table Options form appears.
5. Select Run Currency Triggers.  
The Data Selection form appears.
6. Select the data to purge by defining the field and criteria.  
For this example, select *Where IC UCD1 (User Defined Code - Class Code 1) is equal to Null*.
7. Click Next.

The Logging Options form appears.

8. Select information you would like logged, and then click Next.

For this example, do not log any information.

The Finish form appears.

9. Select *Yes, create a version of this table conversion* and enter the version name in the field.

For this example, use *XJDE001*.

10. On the warning form that indicates that the conversion needs to be saved, click OK.

The Selection for Batch Delete form appears.

11. In the Events field, select the Process Begin event and click Advanced ER.

The Event Rules Design form appears.

12. In Event Rules Design, add the following event rule variables with a report scope:

- *FXXXXHandle\_HFXXXX*
- *szArchiveDataSource\_DATS*
- *szPurgeDataSource\_DATS*
- *szErrorCode\_DTAI*
- *cRenameFlag\_EV01*
- *mnErrorNumber\_MATH01*

13. Enter the begin process event rules, along with any special logic.

For this example, use event rules for R42119P, as follows:

```

0001 // Check to see if the purged data is being archived
0002 //
0003 If PO cArchiveRecords is equal to "1"
0004 //
0005 // If the environment processing option is blank, stop processing.
0006 //
0007 If PO szArchiveEnvironmentName is equal to <Blank>
      Or PO szArchiveEnvironmentName is equal to <Null>
0008     Stop Conversion Processing("The archive environment is invalid.")
0009 Else
0010 //
0011 // Check to make sure that the archive environment and data source is not the
0012 // same as the input environment and data source
0013 //
0014 If PO szArchiveEnvironmentName is equal to SL SourceEnvironment
0015     Stop Conversion Processing("The source and archive environments are the same")
0016 Else
0017     //Get the data source of the archive environment
0018 Get and validate the data source for an environment/table (B98700)
      PO szArchiveEnvironmentName -> szEnvironment
      "FXXXX" -> szTableName (Replace x's with the name of your table.)
      VA rpt_szArchiveDataSource_DATS <- szDataSource

```

```

        VA rpt_szErrorCode_DTAI <- szErrorDataItem
        VA rpt_mnErrorNumber_MATH01 <- mnErrorNumber
0019 //
0020 //SAR #4337575 - B98700 has been modified to return an error if the table is
0021 //not found in the data source. Since we do not want the table to exist in the
0022 //archive environment, we need to bypass that error condition.
0023 //
0024     If VA rpt_szErrorCode_DTAI is not equal to <Blank>
        And VA rpt_szErrorCode_DTAI is not equal to <Null>
        And VA rpt_szErrorCode_DTAI is not equal to "072W"
0025         Stop Conversion Processing("No data source was found for the
archive environment")
0026     Else
0027         //Get the data source of the source environment
0028     Get and validate the data source for an environment/table (B98700)
        SL SourceEnvironment -> szEnvironment
        "FXXXX" -> szTableName (Replace x's with the name of your table.)
        VA rpt_szPurgeDataSource_DATS <- szDataSource
        VA rpt_szErrorCode_DTAI <- szErrorDataItem
        VA rpt_mnErrorNumber_MATH01 <- mnErrorNumber
0029     If VA rpt_szErrorCode_DTAI is equalto "072W"
0030         Stop Conversion Processing ("The table could not be found
in the source environment.")
0031     Else
0032         If VA rpt_szErrorCode_DTAI is not equal to <Blank>
            And VA rpt_szErrorCode_DTAI is not equal to <Null>
0033             Stop Conversion Processing ("No data source was found for
the source environment.")
0034         End If
0035     End If
0036         If VA rpt_szArchiveDataSource_DATS is equal to VA rpt_szPurgeDataSource_DATS
0037             Stop Conversion Processing ("The source and archive
environments have the same data source")
0038         Else
0039             //
0040             // Open a table with the same table name in the output
environment. The table
0041             // will be renamed later if the table name processing option was populated.
0042             //Replace the X's in the following statement to reflect the
name of your table.
0043             Copy Table Environment("FXXXX", <None>, SL SourceEnvironment,
PO szArchiveEnvironmentName, <Yes>, <Yes>, <No>, <None>, <None>, <Null>,
<Null>)
0044             //
0045             // Open a handle to the archive table
0046             // Replace the X's in the following statements to reflect the
name of your handle and table.
0047             VA rpt_FXXXXHandle_HFXXXX = FXXXX.Open Handle
0048             If VA rpt_FXXXXHandle_HFXXXX is equal to <Null>
0049                 Stop Conversion Processing ("Failed to open FXXXX in the

```

```

archive environment")
0050      End If
0051      End If
0052      End If
0053      End If
0054      End If
0055      End If

```

Map all event rule variables, even if you do not use every value.

14. Using this example, the system writes log messages on Stop Conversion Processing to the JDE.log and JDEDEBUG.log files.
15. On Selection for Batch Delete, select the Row Fetched event and click Advanced ER.
16. On Event Rules Design, enter the row fetched event rules, along with any special logic.

Ensure that you have mapped all parameters to a field, even if you do not use every value. This example includes event rules for R42119P, as follows:

```

0001 //
0002 // If we are archiving the purged records, write the record to the archive table
0003 //Replace the X's in the following statements to reflect the name of
your handle and table. Map the fields included in your table.
0004 If PO cArchiveRecords is equal to "1"
0005   FXXXX(VA rpt_FXXXXHandle_HFXXXX).Insert
      IC Order Company(Order Number) -> TK Order Company(Order Number)
      IC Document (Order No,Invoice,etc.) -> TK Document (Order No,Invoice,etc.)
      IC Order Type -> TK Order Type
      IC Line Number -> TK Line Number
      IC Order Suffix -> TK Order Suffix
      IC Business Unit -> TK Business Unit
      IC Company -> TK Company
      IC Document Company(Original Order) -> TK Document Company(Original Order)
      IC Original Order Number -> TK Original Order Number
      IC Original Order Type -> TK Original Order Type
      IC Original Line Number -> TK Original Line Number
      IC Company-Key (Related Order) -> TK Company-Key (Related Order)
      IC Related PO/SO/WO Number -> TK Related PO/SO/WO Number
      IC Related PO/SO/WO Order Type -> TK Related PO/SO/WO Order Type
      IC Related PO/SO Line Number -> TK Related PO/SO Line Number
      IC Agreement Number-Distribution -> TK Agreement Number-Distribution
      IC Agreement Supplement-Distribution -> TK Agreement Supplement-Distribution
      IC Address Number -> TK Address Number
      IC Address Number-Ship To -> TK Address Number-Ship To
      IC Address Number-Parent -> TK Address Number-Parent
      IC Date-Requested -> TK Date-Requested
      IC Date-Order/Transaction -> TK Date-Order/Transaction
      IC Date-Scheduled Pick -> TK Date-Scheduled Pick
      IC Date-Actual Ship Date -> TK Date-Actual Ship Date
      IC Date-Invoice -> TK Date-Invoice
      IC Date-Cancel -> TK Date-Cancel

```



IC Date-For G/L(and Voucher) -> TK Date-For G/L(and Voucher)  
IC Date-Promised Delivery -> TK Date-Promised Delivery  
IC Date-Price Effective Date -> TK Date-Price Effective Date  
IC Date-Promised Shipment -> TK Date-Promised Shipment  
IC Reference -> TK Reference  
IC Reference 2 -> TK Reference 2  
IC Item Number-Short -> TK Item Number-Short  
IC 2nd Item Number -> TK 2nd Item Number  
IC 3rd Item Number -> TK 3rd Item Number  
IC Location -> TK Location  
IC Lot/Serial Number -> TK Lot/Serial Number  
IC From Grade -> TK From Grade  
IC Thru Grade -> TK Thru Grade  
IC From Potency -> TK From Potency  
IC Thru Potency -> TK Thru Potency  
IC Days Before Expiration -> TK Days Before Expiration  
IC Description -> TK Description  
IC Description-Line 2 -> TK Description-Line 2  
IC Line Type -> TK Line Type  
IC Status Code-Next -> TK Status Code-Next  
IC Status Code-Last -> TK Status Code-Last  
IC Business Unit - Header -> TK Business Unit - Header  
IC Item Number - Related (Kit) -> TK Item Number - Related (Kit)  
IC Kit Master Line Number -> TK Kit Master Line Number  
IC Component Line Number -> TK Component Line Number  
IC Related Kit Component -> TK Related Kit Component  
IC Number of Component Per Parent -> TK Number of Component Per Parent  
IC Sales Catalog Section -> TK Sales Catalog Section  
IC Sub Section -> TK Sub Section  
IC Sales Category Code 3 -> TK Sales Category Code 3  
IC Sales Category Code 4 -> TK Sales Category Code 4  
IC Sales Category Code 5 -> TK Sales Category Code 5  
IC Commodity Class -> TK Commodity Class  
IC Commodity Sub Class -> TK Commodity Sub Class  
IC Supplier Rebate Code -> TK Supplier Rebate Code  
IC Master Planning Family -> TK Master Planning Family  
IC Purchasing Category Code 5 -> TK Purchasing Category Code 5  
IC Unit of Measure as Input -> TK Unit of Measure as Input  
IC Units-Order/Transaction Quantity -> TK Units-Order/Transaction Quantity  
IC Quantity Shipped -> TK Quantity Shipped  
IC Units-Qty Backordered/Held -> TK Units-Qty Backordered/Held  
IC Units-Quantity Canceled/Scrapped -> TK Units-Quantity Canceled/Scrapped  
IC Units-Future Quantity Committed -> TK Units-Future Quantity Committed  
IC Units-Open -> TK Units-Open  
IC Units-Shipped to Date -> TK Units-Shipped to Date  
IC Units-Relieved -> TK Units-Relieved  
IC Committed (H/S) -> TK Committed (H/S)  
IC Other Quantity (1/2) -> TK Other Quantity (1/2)  
IC Amount-Price per Unit -> TK Amount-Price per Unit  
IC Amount-Extended Price -> TK Amount-Extended Price

IC Amount-Open -> TK Amount-Open  
 IC Price Override Code -> TK Price Override Code  
 IC Temporary Price (Y/N) -> TK Temporary Price (Y/N)  
 IC Unit of Measure-Entered for Unit Price -> TK Unit of Measure-  
 Entered for Unit Price  
 IC Amount-List Price -> TK Amount-List Price  
 IC Amount-Unit Cost -> TK Amount-Unit Cost  
 IC Amount-Extended Cost -> TK Amount-Extended Cost  
 IC Cost Override Code -> TK Cost Override Code  
 IC Extended Cost-Transfer -> TK Extended Cost-Transfer  
 IC Print Message -> TK Print Message  
 IC Payment Terms Code -> TK Payment Terms Code  
 IC Payment Instrument -> TK Payment Instrument  
 IC Based on Date -> TK Based on Date  
 IC Discount-Trade -> TK Discount-Trade  
 IC Trade Discount (Old) -> TK Trade Discount (Old)  
 IC Price and Adjustment Schedule -> TK Price and Adjustment Schedule  
 IC Item Price Group -> TK Item Price Group  
 IC Pricing Category Level -> TK Pricing Category Level  
 IC Discount %-Cash -> TK Discount %-Cash  
 IC Document Company -> TK Document Company  
 IC Document (Voucher, Invoice, etc.) -> TK Document (Voucher, Invoice, etc.)  
 IC Document Type -> TK Document Type  
 IC Document-Original -> TK Document-Original  
 IC Document Type-Original -> TK Document Type-Original  
 IC Document Company-Original -> TK Document Company-Original  
 IC Pick Slip Number -> TK Pick Slip Number  
 IC Delivery Number -> TK Delivery Number  
 IC Sales Taxable(Y/N) -> TK Sales Taxable(Y/N)  
 IC Tax Rate/Area -> TK Tax Rate/Area  
 IC Tax Expl Code 1 -> TK Tax Expl Code 1  
 IC Associated Text -> TK Associated Text  
 IC Priority-Processing -> TK Priority-Processing  
 IC Printed Code -> TK Printed Code  
 IC Backorders Allowed (Y/N) -> TK Backorders Allowed (Y/N)  
 IC Substitutes Allowed (Y/N) -> TK Substitutes Allowed (Y/N)  
 IC Partial Line Shipments Allowed (Y/N) -> TK Partial Line Shipments Allowed (Y/N)  
 IC Line of Business -> TK Line of Business  
 IC End Use -> TK End Use  
 IC Duty Status -> TK Duty Status  
 IC Nature of Transaction -> TK Nature of Transaction  
 IC Primary/Last Supplier Number -> TK Primary/Last Supplier Number  
 IC Carrier Number -> TK Carrier Number  
 IC Mode of Transport -> TK Mode of Transport  
 IC Route Code -> TK Route Code  
 IC Stop Code -> TK Stop Code  
 IC Zone Number -> TK Zone Number  
 IC Container I.D. -> TK Container I.D.  
 IC Freight Handling Code -> TK Freight Handling Code  
 IC Shipping Commodity Class -> TK Shipping Commodity Class

IC Shipping Conditions Code -> TK Shipping Conditions Code  
 IC Serial Number-Lot -> TK Serial Number-Lot  
 IC Unit of Measure-Primary -> TK Unit of Measure-Primary  
 IC Units-Primary Quantity Ordered -> TK Units-Primary Quantity Ordered  
 IC Unit of Measure-Secondary -> TK Unit of Measure-Secondary  
 IC Units-Secondary Quantity Ordered -> TK Units-Secondary Quantity Ordered  
 IC Unit of Measure-Pricing -> TK Unit of Measure-Pricing  
 IC Unit Weight -> TK Unit Weight  
 IC Weight Unit of Measure -> TK Weight Unit of Measure  
 IC Unit Volume -> TK Unit Volume  
 IC Volume Unit of Measure -> TK Volume Unit of Measure  
 IC Reprice (Basket Price) Category -> TK Reprice (Basket Price) Category  
 IC Order Reprice Category -> TK Order Reprice Category  
 IC Order Repriced Indicator -> TK Order Repriced Indicator  
 IC Costing Method-Inventory -> TK Costing Method-Inventory  
 IC G/L Offset -> TK G/L Offset  
 IC Century -> TK Century  
 IC Fiscal Year -> TK Fiscal Year  
 IC Inter Branch Sales -> TK Inter Branch Sales  
 IC On Hand Updated -> TK On Hand Updated  
 IC Configurator Print Flag -> TK Configurator Print Flag  
 IC Sales Order Status 04 -> TK Sales Order Status 04  
 IC Substitute Item Indicator -> TK Substitute Item Indicator  
 IC Preference Commitment Indicator -> TK Preference Commitment Indicator  
 IC Ship date (PDDJ) overridden -> TK Ship date (PDDJ) overridden  
 IC Price Adjustment Line Indicator -> TK Price Adjustment Line Indicator  
 IC Price Adj. History Indicator -> TK Price Adj. History Indicator  
 IC Preference Production Allocation -> TK Preference Production Allocation  
 IC Transfer/Direct Ship/Intercompany Flag -> TK Transfer/Direct Ship/  
 Intercompany Flag  
 IC Deferred entries flag -> TK Deferred entries flag  
 IC Euro Conversion Status Flag -> TK Euro Conversion Status Flag  
 IC Sales Order Status 14 -> TK Sales Order Status 14  
 IC Sales Order Status 15 -> TK Sales Order Status 15  
 IC Apply Commission(Y/N) -> TK Apply Commission(Y/N)  
 IC Commission Category -> TK Commission Category  
 IC Reason Code -> TK Reason Code  
 IC Gross Weight -> TK Gross Weight  
 IC Gross Weight Unit of Measure -> TK Gross Weight Unit of Measure  
 IC Subledger-G/L -> TK Subledger-G/L  
 IC Subledger Type -> TK Subledger Type  
 IC Code-Location Tax Status -> TK Code-Location Tax Status  
 IC Price Code 1 -> TK Price Code 1  
 IC Price Code 2 -> TK Price Code 2  
 IC Price Code 3 -> TK Price Code 3  
 IC Status-In Warehouse -> TK Status-In Warehouse  
 IC Work Order Freeze Code -> TK Work Order Freeze Code  
 IC Send Method -> TK Send Method  
 IC Currency Code-From -> TK Currency Code-From  
 IC Currency Conversion Rate-Spot Rate -> TK Currency Conversion Rate-Spot Rate

IC Amount-List Price per Unit -> TK Amount-List Price per Unit  
 IC Amount-Foreign Price per Unit -> TK Amount-Foreign Price per Unit  
 IC Amount-Foreign Extended Price -> TK Amount-Foreign Extended Price  
 IC Amount-Foreign Unit Cost -> TK Amount-Foreign Unit Cost  
 IC Amount-Foreign Extended Cost -> TK Amount-Foreign Extended Cost  
 IC User Reserved Code -> TK User Reserved Code  
 IC User Reserved Date -> TK User Reserved Date  
 IC User Reserved Amount -> TK User Reserved Amount  
 IC User Reserved Number -> TK User Reserved Number  
 IC User Reserved Reference -> TK User Reserved Reference  
 IC Transaction Originator -> TK Transaction Originator  
 IC User ID -> TK User ID  
 IC Program ID -> TK Program ID  
 IC Work Station ID -> TK Work Station ID  
 IC Date-Updated -> TK Date-Updated  
 IC Time of Day -> TK Time of Day  
 IC Manufacturing Variance Accounting Flag -> TK Manufacturing  
 Variance Accounting Flag  
 IC Sales Order Status 17 -> TK Sales Order Status 17  
 IC Sales Order Status 18 -> TK Sales Order Status 18  
 IC Sales Order Status 19 -> TK Sales Order Status 19  
 IC Sales Order Status 20 -> TK Sales Order Status 20  
 IC Integration Reference 01 -> TK Integration Reference 01  
 IC Integration Reference 02 -> TK Integration Reference 02  
 IC Integration Reference 03 -> TK Integration Reference 03  
 IC Integration Reference 04 -> TK Integration Reference 04  
 IC Integration Reference 05 -> TK Integration Reference 05  
 IC Source of Order -> TK Source of Order  
 IC Reference -> TK Reference  
 IC Demand Unique Key ID -> TK Demand Unique Key ID  
 IC Pull Signal -> TK Pull Signal  
 IC Release Number -> TK Release Number  
 IC Scheduled Shipment Time -> TK Scheduled Shipment Time  
 IC Time-Release -> TK Time-Release  
 IC Date-Release -> TK Date-Release  
 IC Requested Delivery Time -> TK Requested Delivery Time  
 IC Actual Shipment Time -> TK Actual Shipment Time  
 IC Time-Original Promised Delivery -> TK Time-Original Promised Delivery  
 IC Time-Scheduled Pick -> TK Time-Scheduled Pick  
 IC Time-Future Time 2 -> TK Time-Future Time 2  
 IC Cross-Docking Flag -> TK Cross-Docking Flag  
 IC Cross-Docking Priority for Sales Orders -> TK Cross-Docking  
 Priority for Sales Orders  
 IC Dual Unit of Measure Item -> TK Dual Unit of Measure Item  
 IC Buying Segment Code -> TK Buying Segment Code  
 IC Current Buying Segment Code -> TK Current Buying Segment Code  
 IC Change Order Number -> TK Change Order Number  
 IC Address Number-Deliver To -> TK Address Number-Deliver To  
 IC Pending Approval Flag -> TK Pending Approval Flag  
 IC Revision Reason -> TK Revision Reason

```

IC Matrix Control Line Number -> TK Matrix Control Line Number
IC Shipment Number -> TK Shipment Number
IC Promised Delivery Time -> TK Promised Delivery Time
IC Project Number -> TK Project Number
IC Sequence Number -> TK Sequence Number
IC Item Revision Level -> TK Item Revision Level
IC Hold Orders Code -> TK Hold Orders Code
IC Business Unit-Header -> TK Business Unit-Header
IC Business Unit-Demand -> TK Business Unit-Demand
IC Currency Code-Base -> TK Currency Code-Base
IC Document Line Number-Original -> TK Document Line Number-Original
IC Date-Original Promised Delivery -> TK Date-Original Promised Delivery
IC Cross Dock Order Company(OrderNumber) -> TK Cross Dock Order
Company(OrderNumber)
IC Cross Dock Order No -> TK Cross Dock Order No
IC Cross Dock Order Type -> TK Cross Dock Order Type
IC Cross Dock Line Number -> TK Cross Dock Line Number
IC Cross Dock Order Suffix -> TK Cross Dock Order Suffix
IC Port of Entry or Exit -> TK Port of Entry or Exit
IC Payment Terms Override Code -> TK Payment Terms Override Code
IC Buyer Number -> TK Buyer Number
IC Promotion ID -> TK Promotion ID
IC Asset Item Number -> TK Asset Item Number
IC Parent Number -> TK Parent Number
0006 //
0007 // Do not delete the record if the insert to the archive table failed.
0008 //
0009 If SV_Error_Status is not equal to CO ERROR
0010   Delete Current Input Row
0011 End If
0012 Else
0013   Delete Current Input Row
0014 End If

```

17. On Selection for Batch Delete, select the Process End event and click Advanced ER.

18. On Event Rules Design, enter the process end event rules, along with any special logic.

Ensure that you have mapped all parameters to a field, even if you do not use every value. For this example, use event rules for R42119P, as follows:

```

0001 If PO cArchiveRecords is equal to "1"
0002 //
0003 // Close the table
0004 //Replace the X's in the following statement to reflect the
name of your handle and table.
0005 FXXXX(VA rpt_FXXXXHandle_HFXXXX).Close
0006 //
0007 // If the data was archived and the table name processing option was
populated,
0008 // rename the table.

```

```
0009  //  
0010  If PO szArchiveTableName is not equal to <Blank>  
      And PO szArchiveTableName is not equal to <Null>  
0011      Rename Table (B0000202)  
          "FXXXX" -> szOldTableName  
          PO szArchiveTableName -> szNewTableName  
          "<Blank>" -> szTableOwnerID  
          "<Blank>" -> szPassword  
          VA rpt_szArchiveDataSource_DATS -> szDataSource  
          VA rpt_cRenameFlag_EV01 <- cRenameTableSuccessful  
0012  End If  
0013 End If
```

## See Also

Chapter 9, “Setting Up Table Conversions,” Deleting Groups of Records, page 75

Chapter 4, “Table I/O,” Using a Handle, page 20

## Prerequisite

Access the Introduction form of the Table Conversion director.

See Chapter 9, “Setting Up Table Conversions,” Starting the Table Conversion Director, page 52.

## Forms Used to Delete Groups of Records

Form Name	Form ID	Navigation	Usage
External Data	NA	On the Introduction form of the Table Conversion director, select the Batch Delete option and click Next.	Specify external data sources for the conversion.
Select Processing Option Template	NA	Click Select on the External Data form.	Attach a processing option template to the deletion.
Report Data Structure	NA	Click Define on the External Data form.	Define data structures to attach to the deletion.
Select Environments	NA	Click Next on the External Data form.	Specify the environment for the deletion.
Select Input	NA	Click Next on the Select Environments form.	Specify the table where data is to be deleted.
Table Options	NA	Click Next on the Select Input form.	Select Run Currency Triggers if currency fields are included in the deletion.
Data Selection	NA	Click Next on the Table Options form.	Define selection criteria to indicate which data is to be deleted.
Logging Options	NA	Click Next on the Data Selection form.	Specify information to be logged during the deletion process.
Finish	NA	Click Next on the Logging Options form.	Select to create a version now or create a version later.
Selection for Batch Delete	NA	Select Yes on the Finish form and click OK on the warning to save the conversion.	Review deletion options.

### Defining External Data for Batch Deletion

From the Introduction form of the Table Conversion director, select the Batch Delete option and click Next.

See [Chapter 9, “Setting Up Table Conversions,” Defining External Data for Conversion, page 56.](#)

### Defining the Environment for Batch Deletion

On the Select Environment form, select the environment in which the table resides.

See [Chapter 9, “Setting Up Table Conversions,” Defining Input and Output Environments for Conversion, page 56.](#)

See [Chapter 9, “Setting Up Table Conversions,” Defining External Data for Batch Deletion, page 85.](#)

To define input:

1. On the Select Input form, drag the appropriate table to the column on the right.

You can select only one table per conversion. If you know the name of the table that you want to use, enter the name in the Name field in the QBE line and press ENTER.

---

**Note.** If you change the table, the system warns you that deleting tables removes all mappings from the table conversion.

---

2. To delete an input table, select it and press DELETE.
3. Click Next.

The Table Options form appears.

4. Select Run Currency Triggers if currency fields are included in the deletion.

Select this option if a table included in the conversion contains currency triggers. If a table contains currency fields and you do not select this option, the system cannot determine where the decimal should be placed within a field. If you do not select the currency trigger option and the source or destination fields are currency fields used in a calculation, you might receive unexpected results.

Do not use currency triggers for an environment that has a different path code than the login environment.

5. On the Data Selection form, define selection criteria for database table columns.

User-defined format columns are unavailable because they do not exist in the database.

*Where* is the default value in the Operator column for the first set of criteria. For subsequent statements, *And* and *Or* become the available values for the Operator column and are selected by double-clicking the appropriate value.

6. Click the left operand column to display the list of available objects, and then do one of the following:
  - Scroll through the list until you find the desired object, select the object, and then double-click the object to populate the left operand column.
  - Type the first letters of the object name in the left operand column to access the object in the list, and then double-click the highlighted object.

When you double-click the object in the left operand column, the list in the Comparison column automatically appears.

7. Select one of the following comparison operators:

- is equal to
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to
- is not equal to

8. Click the right operand column to display a list of objects, special values, or variables. Your selections in this column depend on the selection that you made in the Comparison column. Some of the following options could be available:

Option	Description
Blank	Enters a blank (space) value.
Literal	Enters specific values.



Option	Description
Null	Indicates that no value is associated with the field.
Zero	Enters a value of 0.
IC	Indicates an input table column.
RI	Indicates a value passed through a report interconnect to this table conversion.
PS	Indicates a processing option value for this report.
SL	Indicates a system value.
VA	Indicates an event rule variable.

9. If you select the literal option in the right operand column, the form that opens enables you to enter the following
  - Single value  
Enter a single value, and then click OK. An example value is a particular company.
  - Range of values  
Enter a range of values, and then click OK. An example is companies from *00001* to *00060*. When using a range of values, only the *is equal to*, *is equal to or empty* and *is not equal to* logical operators are valid.
  - List of values  
To add values to the list, type each value in the field and then click Add. Repeat this process until the list of values is complete.  
  
An example list of values might include several user-defined codes for search types, such as *C* for customers, *E* for employees, and *V* for vendors. When using a list of values, only *is equal to*, *is equal to or empty* and *is not equal to* are valid logical operators.  
  
To delete a value, select the value and click Delete.  
  
Click OK when you are finished.
10. To delete a line of criteria on the Data Selection form, select the row header to highlight the row, and then click Delete at the top of the form.
11. To change the order of the criteria, select the row header to highlight the row, and then click the up or down button.
12. In the Events field, select the appropriate event from the drop-down list. You must select the *Row Fetched* event when deleting rows; otherwise, no records are deleted.  
  
When you run the conversion, the system fetches the rows one at a time, run the conversion for each row, and delete the record from the input.
13. Make sure the Delete All Selected Records option is selected.  
  
This option inserts the Delete Current Input Row system function into event rules.
14. Click the Advanced ER button to insert additional event rule logic.
15. Click Next.

## Specifying Logging Options for Batch Deletion

Click Next on the Data Selection form to access the Logging Options form.

Click Next after specifying logging options.

See [Chapter 9, “Setting Up Table Conversions,” Specifying Conversion Logging Options, page 61](#).

## Reviewing Deletion Results

To review the results of the director:

Access the Finish form.

1. Select one of the following options:

- *Yes, create a version of this table conversion*

If you select yes, enter the version name.

- *No, I will create a version of this table conversion later*

2. Click Finish to complete the process.

The system displays the Selection for Batch Delete form.

3. On the Selection for Batch Delete form, review the options that you specified for the batch-delete conversion. If you are satisfied with your selections, click Save. Otherwise, make changes as necessary and then click Save.

4. From the File menu, select Exit.

You can now run the conversion.

### See Also

[Chapter 9, “Setting Up Table Conversions,” Using Event Rules in Table Conversions, page 88](#)

[Chapter 9, “Setting Up Table Conversions,” Reviewing Conversion Results, page 62](#)

[Chapter 10, “Running Table Conversions,” page 93](#)

---

## Using Event Rules in Table Conversions

This section provides an overview of event rules in table conversions and discusses how to create event rules in table conversions.

## Understanding Event Rules in Table Conversions

You can use event rules to build complex functional logic into table conversions. For example, you can use event rules to insert information into a table or delete rows in a table based on specific conditions.

You attach event rules to an event, such as Process Begin, Row Fetched, Format Fetched, and Process End.

Event rules in table conversions include system functions that are specific to the Table Conversion tool.

## Table Conversion System Functions

The following table lists each system function that you can use in event rules within a table conversion:

System Function	Description
CopyTableDataSource	Use this system function to copy a table or range of tables from one data source to another. The system copies tables based on specifications in the login environment.
CopyTableEnvironment	Use this system function to copy a table or range of tables from one environment to another. The system copies tables based on specifications in the input and output environments. If the specifications differ, the system performs a map-and-drop. This means that it creates a mapping between like fields in the source and destination tables, and it ignores all other fields.
TCInsertRow	The table conversion system inserts this system function when you select the Issue a write for this event? option and it cannot be moved. This function instructs the system that data should be written to the output table.
UserInsertRow	Use this system function to specify when and where a row is inserted into the specified output table.
DeleteCurrentInputRow	Use this system function to delete the current record from the input table.
UpdateCurrentInputRow	Use this system function to update the current record in the input table after it has been modified.
SetSelectionAppendFlag	Use this system function to determine whether selection criteria added by the system function SetUserSelection append or replace the existing selection criteria on the input table.
SetUserSelection	Use this system function to conditionally modify data selection on the input table. Call SetSelectionAppendFlag before calling SetUserSelection to determine whether to replace or append the existing data selection information in the input table.

## See Also

[Chapter 9, “Setting Up Table Conversions,” Table Conversion Process Flow, page 50](#)

*EnterpriseOne Tools 8.94 PeopleBook: Development Tools: Event Rules and System Functions, “Understanding Events, Event Rules, and Runtime Processing”*

## Form Used to Create Event Rules in Table Conversions

Form Name	Form ID	Navigation	Usage
Event Rules Design	NA	Click the Advanced ER button on a form where the option resides.	Define event rules for table conversions.

## Using Event Rules in Table Conversions

To use event rules in table conversions:

1. On a form with an Advanced ER button, from the Events drop-down list, select the event to which you want to attach event rules.
2. Click the Advanced ER button.
3. On the Event Rules Design form, select any of the following buttons to define specific business logic:
  - **Assignment**  
Enables you to assign a fixed value, a field, or a mathematical expression to a field or variable.
  - **If/While**  
Enables you to create If and While logic statements, which are conditional instructions for event rule logic.
  - **Business Function**  
Enables you to attach an existing PeopleSoft EnterpriseOne business function to an event. Business functions can retrieve a next number value for a new customer or convert Julian calendar dates to month, day, and year.
  - **System Function**  
Enables you to attach an existing PeopleSoft EnterpriseOne system function, such as Copy Table Environment or User Insert Row.
  - **Variables**  
Enables you to create event rule variables, using existing data items, to store values for additional processing. Event rule variables can be used to accumulate totals, record the number of records that are read, and so on.
  - **Else**  
Enables you to create Else logic statements. An Else statement is automatically inserted after an If statement.
  - **Table I/O**  
Enables you to open tables in the input, output, or login environment. Table I/O enables you to read data from tables other than the input table and use the data to create an output record. For example, suppose that you create a table conversion that loops through records in the F0101 (Address Book Master) table. The conversion copies the records to another table, loops back through the records to find each customer that has a specific employee as a contact, and copies the information to the output table.
  - **Report Interconnect**  
Enables you to connect a batch process or report to the table conversion.
4. After defining the event rules, click OK.

5. Repeat steps as necessary to attach logic to multiple events.

**See Also**

Chapter 4, “Table I/O,” page 17



## CHAPTER 10

# Running Table Conversions

This chapter provides an overview of table conversions and discusses how to:

- Submit table conversions.
- Test table conversions.

---

## Understanding Table Conversions

When you run a table conversion, you submit it using a batch version. To track the conversion process, you can use tracing. The tracing feature writes the details of the conversion process to a log. You can define the trace level to control the level of detail included in the log. When you test a table conversion, you can select to have the conversion proceed one row at a time, which enables you isolate problems or unexpected results.

---

## Submitting Table Conversions

When you submit a batch version to process your table conversion, you can override the conversion properties, such as input and output environment or trace level, and override the location where your table conversion will process.

This section discusses how to:

- Override table conversion properties.
- Override table conversion location.

---

**Note.** If you submit a table conversion from a web client, you can only override processing options, location, and job queue.

---

## Forms Used to Submit Table Conversions

Form Name	Form ID	Navigation	Usage
Work With Batch Versions-Available Versions	W98305A	Report Management (GH9111), Batch Versions	Select the table conversion template.
Table Conversion Prompting	W98305D	Highlight a version on the Work With Batch Versions form and click Select.	Work with versions.
Properties	NA	Select the Properties option on the Table Conversion Prompting form and click Submit.	Review and override the environments, data selection, table options, and logging options specified within the conversion.
PeopleSoft Data Sources	W98305B	Select the Override Location option on the Table Conversion Prompting form and click Submit.	Select a data source to use as an override location.

## Overriding Table Conversion Properties

Access the Work With Batch Versions—Available Versions form.

To override the table conversion properties:

---

**Note.** If you override your table conversion properties at runtime, your selections at for that single process and will not be saved with the version. To change the properties of the version so they are saved for subsequent processing, on Work With Batch Versions, select Properties from the Row menu.

---

1. Complete the Batch Application field and click Find.

If you do not remember the exact name of the table conversion, you can use the visual assist in the Batch Application field to search for the correct table conversion.

2. Highlight a version and click Select.
3. On the Table Conversion Prompting form, select the Properties option and click Submit.

---

**Note.** If you are running a table conversion from a web client, you cannot select the Properties option. You can only select and modify processing options.

---

4. On the Properties form, review and override the environments, data selection, table options, and logging options specified in the table conversion.

These forms are similar to the forms in Table Conversion Design.

5. To use debug logging, select the Debug Logging tab to perform these steps:
  - To use the jde.ini settings for the trace level and row-by-row conversion process, select the *Use ini settings for trace level and number of rows to process* option. This option ensures that the system uses the settings contained in the jde.ini file instead of the values entered in the Trace Level and Number of Rows fields.
  - To override the trace level in the jde.ini file, clear the *Use ini settings for trace level and number of rows to process* option. Enter a value from 0 to 10 in the Trace Level field.



- To convert a specific number of records (for example, if you want to test the table conversion), clear the *Use ini settings for trace level and number of rows to process* option. Enter the number of rows to convert in the Number of Rows field. If you enter 0 in this field, the system processes all rows.

This option corresponds to the StopAfterRow setting in the jde.ini file. If you enter a value here, you override any specifications in the jde.ini file.

6. Click OK to save your changes to the version.

The system submits the table conversion.

## See Also

[Chapter 10, “Running Table Conversions,” Testing Table Conversions, page 95](#)

## Overriding Table Conversion Locations

Access the Work With Batch Versions-Available Versions form.

You can override the location where you want to process your table conversion. This enables you to process your table conversion even if the server that you normally use is inoperable.

To override the table conversion location:

1. Select the version and click Select.
2. On the Table Conversion Prompting form, select the Override Location option and click Submit.
3. On the PeopleSoft Data Sources form, select the data source to use and click Select.

---

## Testing Table Conversions

This section provides an overview of table conversion testing and discusses how to:

- Set the trace level for debug logging.
- Force row-by-row conversion.

## Understanding Table Conversion Testing

You can test your table conversion in proof mode to ensure that it runs as expected without errors. You can log debug information about the conversion while it runs. You can also force the conversion to run one row at a time, which is useful if the conversion normally runs as an insert-from-select.

To log debug information about a table conversion, enable tracing and set a trace level from 0 to 10 in the jde.ini file according to the level of detail that you want to include in the log.

You define the debug logging detail in the jde.ini file; if necessary, you can override the jde.ini settings on the batch version of a table conversion.

If you set the trace level for logging at 1, the system logs basic information about the table conversion, such as name, inputs, outputs, event rule logic, and how many rows were inserted. If you set the trace level at 10, the system logs all information about every column in every format, including user-defined formats, processing options associated with the table conversion, and all other information involved in the table conversion process. The higher you set the trace level, the more information the system supplies about the table conversion process.

When you test a table conversion, you can force a row-by-row conversion. You can also set a trace level on your workstation or on the server, depending on where you run the conversion.

## Difference Between Logging Options and Debug Logging

Logging options, which you define when you set up a table conversion, can log all errors that occur during the conversion or can log all records that are copied, deleted, or updated. They can also log the details of copy table actions.

Debug logging logs more detailed information about the conversion. This information enables you to pinpoint the exact area in the conversion where errors occurred.

---

**Note.** If you modify the debug logging in the batch version, you override the settings in the jde.ini file.

---

## Trace Levels

The following information is specific to each trace level:

Trace Level	Logging Information
Level 1	Logs general information about the conversion, such as name, inputs, outputs, event rule logic, and how many rows were inserted.
Level 2	Logs function call traces, such as starting conversion, ending conversion, and inserting rows. Also includes all level 1 information.
Level 3	Logs the points at which event rules are executed. Also includes all level 1 and level 2 information.
Level 4	Not applicable.
Level 5	Logs the points at which jdeCallObject is executed, such as calls to business functions from event rules. Also includes all level 1, level 2, and level 3 information.
Levels 6-8	Not applicable.
Level 9	Logs the content of columns during input, event rules, and before output. Also includes all level 1, level 2, level 3, and level 5 information.
Level 10	Logs all information contained in the first nine levels.

---

**Important!** Do not set the trace level at 10 when running a table conversion on tables that contain large amounts of data. The system writes the data to your server, and large amounts of data can cause it to run out of disk space. You can, however, specify a specific number of rows to run by selecting the Properties option in the batch version of the table conversion.

---

## Setting the Trace Level for Debug Logging

You can define a trace level for debug logging either on a workstation or on a server, depending on where you run the table conversion.

To enable tracing and set the trace level on a workstation:

1. Open the jde.ini file on the workstation.
2. To enable tracing and to set the trace level on a workstation, add the following new information to the jde.ini:

```
[TCEngine]
_continue-
TraceLevel=n
```

where  $n$  is a number from 0 through 10.

3. To enable tracing and to set the trace level on a workstation, modify the following information in the jde.ini:

```
[Debug]
Output=File
```

```
[UBE]
UBESaveLogFile=1
```

To enable tracing and set the trace level on a server:

1. Open the jde.ini file on the server.
2. To enable tracing and to set the trace level on a server, add the following new information to the jde.ini:

```
[TCEngine]
_continue
TraceLevel=n
```

where  $n$  is a number from 0 to 10.

3. To enable tracing and to set the trace level on a server, modify the following information in the jde.ini:

```
[Debug]
Output=File
```

```
KeepLogs=1
```

## Forcing Row-By-Row Conversion

You can force a row-by-row conversion, on your workstation or the server, when you want to test your table conversion. You can also specify a specific number of rows to process in combination with forcing a row-by-row conversion.

To force row-by-row conversion:

1. Open the jde.ini file.
2. Add the following new information to the jde.ini file:

```
[TCEngine]
ForceRowByRow=1
_continue -
```

To specify the number of rows to process:

1. Open the jde.ini file.
2. In the jde.ini file, beneath the [TCEngine] header, add the following:

`StopAfterRow= $n$`

where  $n$  is the number of rows that you want to process.

## CHAPTER 11

# Preparing Foreign Tables for Table Conversion

This chapter provides an overview of foreign tables and discusses how to:

- Add PeopleSoft EnterpriseOne data sources.
- Add PeopleSoft EnterpriseOne environments.
- Set up default OCM mappings.

---

## Understanding Foreign Tables

Foreign tables are text files, or any other files or tables, not recognized by PeopleSoft EnterpriseOne software. However, they must reside in a database that is supported by PeopleSoft EnterpriseOne, which includes Oracle, Access, iSeries, or SQL Server.

Before you can work with foreign tables in Table Conversion Design, you must define the database to PeopleSoft EnterpriseOne. This definition is created when you set up an ODBC data source, or an Oracle OCI data source, that points to the database where the foreign tables reside.

You must also add a data source in EnterpriseOne that points to the ODBC or Oracle data source you defined. For each ODBC data source, database instance, or library that contains foreign tables, you must set up an environment. The environment points to the PeopleSoft EnterpriseOne data source, which in turn points to the database or library. In addition, you must set up an ODBC mapping from the data source to the environment.

---

**Note.** When you work with foreign tables, you must address database authority with a database administrator. Your PeopleSoft EnterpriseOne user ID (or, if you are using the PeopleSoft EnterpriseOne security server feature, the database user to which it maps) may be changed so that you have authority to use the tables in the foreign database. Without this authority, you cannot view the tables in Table Conversion Design. Under certain conditions, the table conversion engine must create temporary tables in the output environment and requires create-and-drop authority for the database.

---

---

## Adding PeopleSoft EnterpriseOne Data Sources

This section discusses how to add a PeopleSoft EnterpriseOne data source.

## Forms Used to Add PeopleSoft EnterpriseOne Data Sources

Form Name	Form ID	Navigation	Usage
Machine Search & Select	W986115E	From System Administration Tools (GH9011), select Data Source Management, Database Data Sources	Specify where the data source resides.
Work With Data Sources	W986115A	On the Machine Search & Select form, select the computer on which the data source resides, and then click Select.	Add a data source.
Data Source Revisions	W986115O	On the Work With Data Sources form, click Add.	Define data source information.

## Adding PeopleSoft EnterpriseOne Data Sources

Access the Data Source Revisions form.

<b>Data Source Use</b>	Indicates how the data source is configured—Servers (SVR) to run UBEs and business functions or a Database (DB) to access table data.  Enter <i>DB</i> in this field to identify the data source as a database data source. Only database data sources are used when accessing data in tables.
<b>Data Source Type</b>	The type of database.
<b>Data Class</b>	A user-defined code value that describes the type of tables in the database, such as business data, control tables, data dictionary, and so on.
<b>Platform</b>	The type of physical hardware the database resides on, such as <i>AS/400</i> , <i>Linux</i> , <i>Sun Microsystems</i> , and so on.
<b>Database Server Name</b>	The name of the machine where the database or file resides.
<b>Object Owner ID</b>	The database table prefix or owner.
<b>Database Name</b>	The name assigned to the database during installation, such as <i>HPDEVORAP</i> or <i>HP9000</i> .  Depending on the data source type, this field is used differently. If an Oracle data source is added, then this field contains the Oracle connect string. If a Microsoft Access, SQL*Server or Client Access data source is added, then this field contains the Windows ODBC data source name. To minimize the number of connections to SQL*Server, it is recommended that the ODBC data source name is the machine name where the SQL*Server database resides and that the catalog name is defined using the individual database name. For example, if you have two databases, DatabaseA and DatabaseB, on a machine called INTELNT, this field would contain INTELNT and the catalog name would be set to DatabaseA for one data source and DatabaseB for the other data source.  The data source name can be different from the ODBC or Oracle database name, if necessary.

## Adding PeopleSoft EnterpriseOne Environments

The easiest way to add an environment to PeopleSoft EnterpriseOne is to copy an existing environment. This section discusses how to add PeopleSoft EnterpriseOne Environments.

### Forms Used to Add PeopleSoft EnterpriseOne Environments

Form Name	Form ID	Navigation	Usage
Work With Environments	W0094E	Environment Management (GH9053), Environment Master	Select an environment to copy.
Copy Environment	W0094B	On the Work With Environments form, click on an environment to copy and from the Row menu, select Copy Environment.	Enter a name for the new environment.

## Adding PeopleSoft EnterpriseOne Environments

Access the Work With Environments form.

To add PeopleSoft EnterpriseOne environments:

1. Click the environment that most closely matches the environment that you want to create (such as the environment you are logged in to or any other environment you can access from your workstation), and then select Copy Environment from the Row menu.
2. On Copy Environment, type an environment name in the New Environment field.
3. To copy only the \*PUBLIC OCM mappings of an environment, select the Copy \*PUBLIC Records Only option.

The Copy \*PUBLIC Records Only option is selected by default. Clear the option to copy all mappings for the environment including individual users, and \*PUBLIC.

4. Click OK.

### See Also

*EnterpriseOne Tools 8.94 PeopleBook: Configurable Network Computing Implementation*, “Environment Setup,” Working with an Environment

## Setting Up Default OCM Mappings

This section provides an overview of OCM mappings and discusses how to set up default mappings.

### Understanding OCM Mapping

You map PeopleSoft EnterpriseOne objects, such as tables, by environment. When you define a default OCM mapping, you select an existing environment and map that environment’s objects to the data sources where those objects exist.

You must create a default map for the TBLE object type. You create this mapping with a literal value of DEFAULT as the object name and TBLE as the object type. You must then indicate the data source where this table object resides. When you create a default map for the TBLE object type, all table objects point to the default data source unless the table is mapped individually. In addition, the Table Conversion tool uses this mapping for foreign tables.

Each environment must have a default map for table objects for the \*PUBLIC user profile because no inherent default location exists for table objects. If table objects do not have a default map and are not explicitly mapped by name, PeopleSoft EnterpriseOne produces a Select/Failed error message when it tries to access the tables. Additionally, the tables do not appear in the input or output forms in Table Conversion Design.

## Forms Used to Set Up Default OCM Mappings

Form Name	Form ID	Navigation	Usage
Machine Search and Select	W986110D	Tools (GH90), System Installation Tools, Advanced Operations, Object Configuration Manager	Locate data sources.
Work With Object Mappings	W986110B	Select a data source.	Add new mappings.
Object Mapping Revisions	W986110C	On the Work With Object Mappings form, click Add.	Define new mappings.

## Setting Up Default Mappings

Access the Machine Search and Select form.

To set up default OCM mappings:

1. Select the data source that stores the OCM table with which you want to work, and click Select.
2. On the Work With Object Mappings form, click Add.

The Object Mapping Revisions form appears. On this form, you define the mapping for the object.

3. Enter the following information:

- Environment Name

For environment or version applications, this is the path code that identifies the location of the application or version specification data.

For install application, the environment name is also called the *plan name* and is used to uniquely identify an upgrade environment for instal/reinstall.



- Object Name

A unique name that identifies as system object. PeopleSoft EnterpriseOne architecture is object-base. Discrete software objects are the building blocks for all applications, and developers can reuse the objects in multiple application. The OMW tracks all EnterpriseOne objects. Examples of these objects include:

Interactive applications

Batch applications (such as reports)

Business functions

Data structures

Tables

Business views

Media object data structures

On this form, this is the name of the object that you want to map. To create a default map for all objects of a specific type, enter the literal value *Default* into this field, then enter the object type into the Object Type field.

- Primary Data Source

The primary data source refers to the location of the object to be mapped within the environment. Enter the data source name that you defined for your foreign tables.

- System Role

A profile that you use to classify EnterpriseOne users into roles to efficiently apply system security. You give users with a common role access to specific programs.

When creating a new profile, the name of the user or role must begin with an asterisk (\*) so that it does not conflict with any system profiles.

On this form, you can enter an individual user, a role, or the literal value \*PUBLIC. You typically enter \*PUBLIC in this field.

- Data Source Mode

Indicates whether the primary or secondary data source should be used.

Enter *P* in this field, if the primary data source should be used.

- Allow QBE

You can use this field to indicate whether applications based on the table include a QBE line.

You should select to have QBE allowed to help prevent database integrity issues.

JDEBASE middleware uses this field to determine whether or not to use row-level record locking.

4. Click OK to save your object mapping.

The system displays the new mapping with an inactive status.

5. Change the status to *active*.

You can now access the tables in this data source by using this environment in your table conversion.

**See Also**

*EnterpriseOne Tools 8.94 PeopleBook: Configurable Network Computing Implementation*, “Object Configuration Manager,” Working with the Object Configuration Manager

*EnterpriseOne Tools 8.94 PeopleBook: Configurable Network Computing Implementation*, “Data Sources”

# Glossary of PeopleSoft Terms

<b>absence entitlement</b>	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.
<b>absence take</b>	This element defines the conditions that must be met before a payee is entitled to take paid time off.
<b>academic career</b>	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).
<b>academic institution</b>	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.
<b>academic organization</b>	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.
<b>academic plan</b>	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.
<b>academic program</b>	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
<b>accounting class</b>	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.
<b>accounting date</b>	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.
<b>accounting split</b>	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
<b>accumulator</b>	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.
<b>action reason</b>	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.
<b>action template</b>	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.
<b>activity</b>	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
<b>address usage</b>	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.
<b>adjustment calendar</b>	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.
<b>administrative function</b>	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.
<b>admit type</b>	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
<b>agreement</b>	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.
<b>allocation rule</b>	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.
<b>alternate account</b>	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.
<b>analysis database</b>	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.
<b>AR specialist</b>	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
<b>arbitration plan</b>	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
<b>assessment rule</b>	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.
<b>asset class</b>	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
<b>attribute/value pair</b>	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
<b>audience</b>	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.
<b>authentication server</b>	A server that is set up to verify users of the system.
<b>base time period</b>	In PeopleSoft Business Planning, the lowest level time period in a calendar.
<b>benchmark job</b>	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
<b>billing career</b>	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.
<b>bio bit or bio brief</b>	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.
<b>book</b>	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
<b>branch</b>	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
<b>budgetary account only</b>	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."
<b>budget check</b>	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
<b>budget control</b>	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.
<b>budget period</b>	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.

<b>business event</b>	<p>In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.</p> <p>In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).</p>
<b>business unit</b>	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
<b>buyer</b>	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.
<b>campus</b>	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.
<b>catalog item</b>	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.
<b>catalog map</b>	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
<b>catalog partner</b>	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
<b>categorization</b>	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
<b>category</b>	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.
<b>channel</b>	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
<b>ChartField</b>	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.
<b>ChartField balancing</b>	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
<b>ChartField combination edit</b>	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
<b>ChartKey</b>	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.
<b>checkbook</b>	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.
<b>checklist code</b>	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.

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

<b>constituents</b>	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).
<b>content reference</b>	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.
<b>context</b>	<p>In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.</p> <p>In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.</p> <p>In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.</p>
<b>control table</b>	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.
<b>cost profile</b>	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.
<b>cost row</b>	A cost transaction and amount for a set of ChartFields.
<b>course</b>	<p>In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.</p> <p>See also <i>class</i>.</p>
<b>course share set</b>	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.
<b>current learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
<b>data acquisition</b>	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).
<b>data elements</b>	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
<b>dataset</b>	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.
<b>delivery method</b>	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.

<b>delivery method type</b>	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.
<b>directory information tree</b>	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
<b>division</b>	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.  See also <i>population</i> and <i>cohort</i> .
<b>document sequencing</b>	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.
<b>dynamic detail tree</b>	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.
<b>edit table</b>	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.
<b>effective date</b>	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.
<b>EIM ledger</b>	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
<b>elimination set</b>	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
<b>entry event</b>	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.
<b>equitization</b>	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.
<b>equity item limit</b>	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.

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

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

<b>GL Interface process</b>	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
<b>group</b>	<p>In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).</p> <p>In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.</p>
<b>incentive object</b>	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.
<b>incentive rule</b>	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.
<b>incur</b>	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
<b>initiative</b>	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.
<b>inquiry access</b>	<p>In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.</p> <p>See also <i>update access</i>.</p>
<b>institution</b>	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.
<b>item</b>	<p>In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).</p> <p>In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.</p> <p>In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.</p>
<b>item shuffle</b>	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

<b>joint communication</b>	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.
<b>keyword</b>	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.
<b>KPI</b>	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
<b>LDIF file</b>	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
<b>learner group</b>	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.
<b>learning components</b>	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.
<b>learning environment</b>	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.
<b>learning history</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
<b>ledger mapping</b>	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i> ) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
<b>library section</b>	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.
<b>linked section</b>	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.
<b>linked variable</b>	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.
<b>LMS</b>	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

<b>load</b>	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.
<b>local functionality</b>	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.
<b>location</b>	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
<b>logistical task</b>	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.
<b>market template</b>	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.
<b>mass change</b>	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.  See also <i>3C engine</i> .
<b>match group</b>	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.
<b>MCF server</b>	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
<b>merchandising activity</b>	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.
<b>meta-SQL</b>	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.
<b>metastring</b>	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.
<b>multibook</b>	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).
<b>multicurrency</b>	The ability to process transactions in a currency other than the business unit's base currency.

<b>national allowance</b>	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.
<b>need</b>	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
<b>node-oriented tree</b>	A tree that is based on a detail structure, but the detail values are not used.
<b>pagelet</b>	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.
<b>participant</b>	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
<b>participant object</b>	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
<b>partner</b>	A company that supplies products or services that are resold or purchased by the enterprise.
<b>pay cycle</b>	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
<b>payment shuffle</b>	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.
<b>pending item</b>	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.
<b>PeopleCode</b>	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.
<b>PeopleCode event</b>	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
<b>PeopleSoft Internet Architecture</b>	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.
<b>performance measurement</b>	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.
<b>period context</b>	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.
<b>person of interest</b>	A person about whom the organization maintains information but who is not part of the workforce.

<b>personal portfolio</b>	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
<b>plan</b>	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.
<b>plan context</b>	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.
<b>plan template</b>	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.
<b>planned learning</b>	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
<b>planning instance</b>	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
<b>population</b>	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.  See also <i>division</i> and <i>cohort</i> .
<b>portal registry</b>	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.
<b>price list</b>	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.
<b>price rule</b>	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.
<b>price rule condition</b>	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.
<b>price rule key</b>	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.
<b>primacy number</b>	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.
<b>primary name type</b>	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.
<b>process category</b>	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
<b>process group</b>	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.
<b>process definition</b>	Process definitions define each run request.
<b>process instance</b>	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.
<b>process job</b>	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.
<b>process request</b>	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.
<b>process run control</b>	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.
<b>product category</b>	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.
<b>programs</b>	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.
<b>progress log</b>	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.
<b>project transaction</b>	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
<b>promotion</b>	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
<b>prospects</b>	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.
<b>publishing</b>	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.



<b>rating components</b>	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
<b>record group</b>	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.
<b>record input VAT flag</b>	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
<b>record output VAT flag</b>	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
<b>recname</b>	The name of a record that is used to determine the associated field to match a value or set of values.
<b>recognition</b>	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.
<b>reference data</b>	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
<b>reference object</b>	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).
<b>reference transaction</b>	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.
<b>regional sourcing</b>	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.
<b>relationship object</b>	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
<b>remote data source data</b>	Data that is extracted from a separate database and migrated into the local database.
<b>REN server</b>	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
<b>requester</b>	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

<b>reversal indicator</b>	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
<b>role</b>	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.
<b>role user</b>	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.
<b>roll up</b>	In a tree, to roll up is to total sums based on the information hierarchy.
<b>run control</b>	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.
<b>run control ID</b>	A unique ID to associate each user with his or her own run control table entries.
<b>run-level context</b>	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.
<b>search query</b>	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.
<b>search/match</b>	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.
<b>seasonal address</b>	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.
<b>section</b>	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.
<b>security event</b>	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
<b>serial genealogy</b>	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
<b>serial in production</b>	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
<b>service impact</b>	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.
<b>service indicator</b>	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.

<b>session</b>	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
<b>session template</b>	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.
<b>setup relationship</b>	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
<b>share driver expression</b>	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.
<b>single signon</b>	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.
<b>source key process</b>	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.
<b>source transaction</b>	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.
<b>speed key</b>	See <i>communication key</i> .
<b>SpeedChart</b>	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.
<b>SpeedType</b>	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
<b>staging</b>	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
<b>standard letter code</b>	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.
<b>statutory account</b>	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

<b>step</b>	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
<b>storage level</b>	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.
<b>subcustomer qualifier</b>	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
<b>Summary ChartField</b>	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).
<b>summary ledger</b>	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.
<b>summary time period</b>	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.
<b>summary tree</b>	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
<b>syndicate</b>	To distribute a production version of the enterprise catalog to partners.
<b>system function</b>	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
<b>TableSet</b>	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.
<b>TableSet sharing</b>	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.
<b>target currency</b>	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
<b>tax authority</b>	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.
<b>template</b>	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.
<b>territory</b>	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
<b>3C engine</b>	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,

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

<b>3C group</b>	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
<b>TimeSpan</b>	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.
<b>trace usage</b>	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.
<b>transaction allocation</b>	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.
<b>transaction state</b>	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.
<b>Translate table</b>	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.
<b>tree</b>	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.
<b>tuition lock</b>	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i> ) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
<b>unclaimed transaction</b>	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.
<b>universal navigation header</b>	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.
<b>update access</b>	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.  See also <i>inquiry access</i> .
<b>user interaction object</b>	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).

<b>variable</b>	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.
<b>VAT exception</b>	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
<b>VAT exempt</b>	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
<b>VAT exoneration</b>	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
<b>VAT suspension</b>	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
<b>warehouse</b>	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
<b>work order</b>	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.
<b>worker</b>	A person who is part of the workforce; an employee or a contingent worker.
<b>workset</b>	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.
<b>worksheet</b>	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.
<b>worklist</b>	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.
<b>XML schema</b>	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
<b>yield by operation</b>	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
<b>zero-rated VAT</b>	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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