

PeopleTools 8.4:
PeopleSoft Application Designer

PeopleSoft®

PeopleTools 8.4: PeopleSoft Application Designer

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Glossary

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PeopleSoft Application Designer

Preface

This PeopleBook describes the fundamental elements of developing applications for PeopleSoft Internet Architecture using PeopleSoft Application Designer. You'll find detailed reference information about how to create web-based pages for PeopleSoft applications. For information that is specific to your application, please refer to your PeopleSoft application documentation.

Note. As a licensee of PeopleTools, you are licensed to use the base portal technology, which is limited to navigation to licensed PeopleSoft applications. If you want to register additional non-PeopleSoft content, customize your homepage, or create any pagelets, you must license PeopleSoft Enterprise Portal.

The "About This PeopleBook" preface contains general product line information, such as related documentation, common page elements, and typographical conventions. This book also contains a glossary with useful terms that are used in PeopleBooks.

See PeopleSoft Glossary.

About This PeopleBook

This book provides you with the information that you need for implementing and using *PeopleTools 8.4* applications. Complete documentation for this release is provided on the CD-ROM PT84PBR0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to all of the PeopleBooks.

This section contains information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to each PeopleSoft product line, and information on ordering additional copies of our documentation.

Before You Begin

To benefit fully from the information covered in this book, you should have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be

comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate the PeopleSoft system, much of the information in these books is not procedural. That is, these books do not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. PeopleBooks expand on the material covered in PeopleSoft training classes.

PeopleSoft Application Fundamentals

Each PeopleSoft application PeopleBook provides implementation and processing information for your PeopleSoft database. However, there is additional, essential information describing the setup and design of your database contained in a companion volume of documentation called *PeopleSoft Application Fundamentals*.

PeopleSoft Application Fundamentals contains important topics that apply to many or all PeopleSoft applications across each product line. Whether you are implementing only one PeopleSoft application, some combination of products within a product line, or an entire PeopleSoft system, you should be familiar with the contents of this central PeopleBook. It contains fundamental information such as setting up control tables and administering security.

The PeopleSoft Applications Fundamentals PeopleBook contains common information pertinent to all applications in each product line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals* and other PeopleBooks.

Related Documentation

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM and additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection website:

<http://www.peoplesoft.com/corp/en/login.asp>

You can find updates and additional documentation for this release, as well as previous releases, on PeopleSoft Customer Connection (<http://www.peoplesoft.com/corp/en/login.asp>). Through the Documentation section of 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 delivered on your PeopleBooks CD.

Important! Before you upgrade, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Hard-copy Documentation

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We make 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 the following methods:

Internet	From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft Internet site: http://www.peoplesoft.com/ .
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559 .
Email	Send email to CPI at callcenter@conpub.com .

PeopleBooks Standard Field Definitions

Throughout our product documentation, you will encounter fields and buttons that are used on many application pages or panels. This section lists the most common fields and buttons and provides standard definitions.

Field	Definition
As of Date	The last date for which a report or process includes data.
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Freeflow text up to 30 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

For more information about effective dates, see [**Understanding Effective Dates in Using PeopleSoft Applications.**](#)

EmplID (employee ID)	Unique identification code for an individual associated with your organization.
-----------------------------	---

Field	Definition
Language or Language Code	<p>The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them.</p> <p>Language also refers to the language spoken by an employee, applicant, or non-employee.</p>
Process Frequency group box	<p>Designates the appropriate frequency in the Process Frequency group box:</p> <p>Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Always executes the request every time the batch process runs.</p> <p>Don't Run ignores the request when the batch process runs.</p>
Report ID	The report identifier.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
<hr/> <p>For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics in the PeopleTools documentation.</p> <hr/>	
Request ID	A request identification that represents a set of selection criteria for a report or process.
User ID	The system identifier for the individual who generates a transaction.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your company's structure and processing options.
Short Description	Freeflow text up to 15 characters.

Typographical Conventions and Visual Cues

We use a number of standard conventions and visual cues in our online documentation.

The following list contains our typographical conventions and visual cues:

(monospace font)	Indicates a PeopleCode program or other program example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as Save and Run).
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: <i>field value</i> . We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not 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 W.
Cross-references	The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in <i>italics</i> indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Here's an example: <hr/> For more information , see Documentation on CD-ROM in <i>About These PeopleBooks: Additional Resources</i> . <hr/>

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!**, the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates cross-references to related or additional information.

Warning! Text within this bar outlined in red indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page or process.
Object Name	Gives the system name of the panel or process as specified in the PeopleTools Application Designer. For example, the Object Name of the Detail Calendar panel is <code>DETAIL_CALENDAR1</code> .
Navigation	Provides the path for accessing the page or process.
Prerequisites	Specifies which objects must have been defined before you use the page or process.
Access Requirements	Specifies the keys and other information necessary to access the page. For example, SetID and Calendar ID are required to open the Detail Calendar page.

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 our documentation, 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 comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Using PeopleSoft Application Designer

This chapter provides an overview of PeopleSoft Application Designer and discusses how to:

- Use PeopleSoft Application Designer components.
- View PeopleCode.
- View internet options.
- Work with definitions.
- Build and maintaining data.

Understanding PeopleSoft Application Designer

Every PeopleSoft Internet Architecture (PIA) application contains a collection of related definitions that work together for a specific purpose. Developing and adapting PeopleSoft applications is a step-by-step process in which you define and build the definitions, establish relationships among definitions, implement security, run your PeopleSoft application in an internet browser, and test every aspect thoroughly. You use one interactive tool, PeopleSoft Application Designer, for the majority of these activities. PeopleSoft Application Designer is an integrated development environment that enables you to work with the numerous definitions of a business application in a single work area.

This section discusses:

- PeopleSoft Internet Architecture.
- Change tracking and change control.

PeopleSoft Internet Architecture

PIA uses an internet browser for interacting with online PeopleSoft applications. You design applications using PeopleSoft Application Designer, and for the browser, the PeopleTools dynamically generates HTML pages based on page and component definitions.

PIA features include:

- Ability to easily create robust and high-performance internet applications of PeopleSoft transactions that look and function like web pages.

- Support for as many existing page controls and concepts as possible.

Controls include push buttons, radio buttons, and drop-down list boxes; concepts include upgrading and multilingual support.

- Ability for the application to operate independently or in a menu system.

Change Tracking and Change Control

PeopleSoft Application Designer includes change tracking and change control features so that you can manage your adaptations and upgrades as an integrated part of your development process. You can enable change tracking, change control, or both.

Change Tracking

Change tracking automatically audits changes to PeopleTools definitions that you make using PeopleSoft Application Designer. This enables you to identify the definitions that you have changed. This automatic audit helps to document and simplify the upgrade process.

Change Control

Change control adds an additional level of control over who can make changes and how much information is captured about each change. *Definition locking* controls access to definitions. Locking a definition (such as a page) gives you exclusive control of that definition to make changes; however, other users can view it.

You control these features using options in the Tools menu, Change Control Administrator dialog.

See Also

Using Change Control

Using PeopleSoft Application Designer Components

This section discusses how to:

- Start PeopleSoft Application Designer.
- Use the Application Designer window components.

Starting PeopleSoft Application Designer

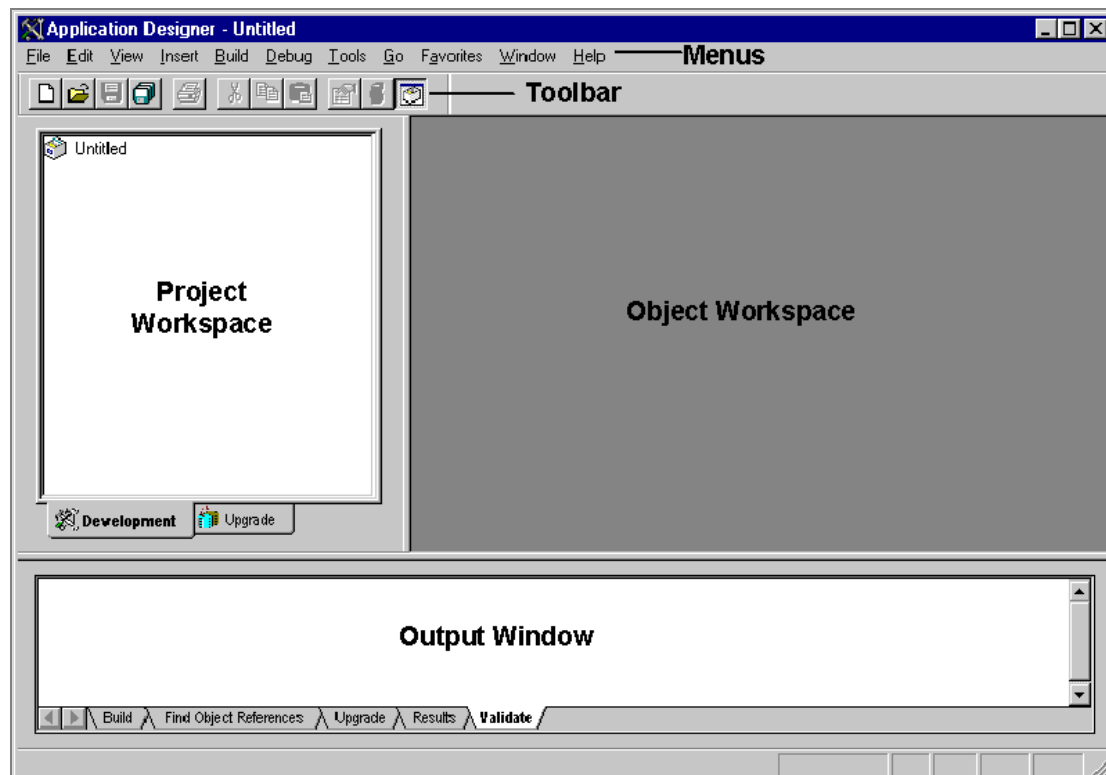
Open your PeopleTools application. Select Go, PeopleTools, Application Designer from the Tools menu.

Using the PeopleSoft Application Designer Window Components

The PeopleSoft Application Designer window includes the following six main components.

Component	Description
Title bar	Displays the name of the open project and active definition.
Menu	Provides access to PeopleSoft Application Designer commands and features.
Toolbar	Displays buttons useful in editing the active definition.
Project workspace	Provides a graphical representation of the components contained in a project. The project workspace has two folder tabs: <ul style="list-style-type: none"> • Development View • Upgrade View
Definition workspace	Displays individual definitions that you open.
Output window	Contains the output text from PeopleSoft Application Designer operations, such as Build (SQL Create and Alter), Find Definition References, Upgrade, Results, Validate, and PeopleCode Log.

Note. PeopleSoft recommends that you maximize the Application Designer window to make optimal use of the different workspaces.



PeopleSoft Application Designer components

Application Designer Window Menus

This section reviews the general PeopleSoft Application Designer menus. Specific menus appear for each individual definition when it is open and active. Those menus are covered in the sections about each definition.

<i>File Menu Commands</i>	<i>Usage</i>
New	Create and open a new definition.
Open	Open a selected, existing definition.
Close	Close the active definition in the definition workspace.
Save	Save the active definition in the definition workspace.
Save As	Save the active definition. This enables you to change the name as you save it.
Save All	Save all open definitions.
Save Project	Save the project.
Save Project As	Save the active project definition. This enables you to change the name of the project as you save it.
Print Project	Print an Upgrade Project Report for all the elements in the open project.
Merge Projects	Create a new project from selected definitions of two existing projects.
Project Properties	Edit properties for the open project.
Definition Properties	Provide general comments and change attributes for the active definition. You can change attributes for Use, Type, and Internet properties depending on the definition type.
Rename	Rename selected definitions.
Delete	Delete selected definitions from the database.
Page Setup	Select the type of data to print, and set up borders and margins.
Print Preview	View an onscreen preview of the printout.
Print	Print the active definition in the definition workspace.
View Report	View a report of the definition in an open window in workspace.
Report from File, Print Preview	View a print preview of a selected report file that is saved to a disk.
Report from File, Print	Print a selected report file from a disk.

File Menu Commands	Usage
Report from File, View Report	View a report from a selected report file that is saved to a disk.
Last Opened Definitions	View and open one of the last five opened definitions.
Exit	Close and exit from PeopleSoft Application Designer.

Note. Following are the general menu commands in the Edit menu. Other menu commands appear when a definition is active in the definition workspace. Those menu items are described in each specific definition section.

Edit Menu Commands	Usage
Undo	Reverse last action.
Redo	Repeat last action.
Cut	Remove the selected area and hold it in memory for later use.
Copy	Duplicate a selected area and hold it in memory.
Paste	Insert information from a Cut or Copy command.
Delete	Delete a selected area.
Find Definition References	Search for all related definitions and references (fields, records, pages, PeopleCode, and so on) to the current open definition. The results appear on the Display window: Find Definition References tab.
Find in...	Search through all PeopleCode or SQL programs for a text string that you describe in a dialog box. You can also specify which type of PeopleCode and SQL programs to search.

View Menu Commands	Usage
View Definition	View a definition that is referenced in the active definition.
View PeopleCode	View PeopleCode characteristics of the active definition.
View Internet Options	Activate and deactivate PIA options for pages and page controls in PeopleSoft Application Designer. The default is activated.

View Menu Commands	Usage
Filtering	Select a filter option for your view of Upgrade: <ul style="list-style-type: none"> • No Filtering. • Selected for Upgrade Action. • Not Selected for Upgrade Action. • Custom Filtering.
Toolbar	Activate and deactivate the toolbar.
Status Bar	Activate and deactivate the status bar.
Project Workspace	Activate and deactivate the project workspace display.
Output Window	Activate and deactivate the output window display.

Insert Menu Commands	Usage
Current Definition into Project	Insert the active definition into the project.
Definitions into Project	Display a dialog box to insert definitions into the project.

Build Menu Commands	Usage
Current Definition	Display a dialog box to build or alter the record definition that is currently active in the definition workspace.
Project	Display a dialog box to build (SQL Create and SQL Alter) all records in the project.
Settings	Display a dialog box in which you set parameters that apply to build operations.

Debug Menu Commands	Usage
PeopleCode Debugger Mode	Start the PeopleCode Debugger, invoking a debugging session and causing a full Debug menu to appear. Once in Debugger mode, a Local Variables watch window appears in the definition workspace. See <i>PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, Debugging Your Application</i> .

Tools Menu Commands	Usage
Validate Project	Validate attributes of the active project.

<i>Tools Menu Commands</i>	<i>Usage</i>
Compile All PeopleCode	Validate all of the PeopleCode in the current database.
Compile Project PeopleCode	Validate the PeopleCode in the current project.
Compare and Report	Compares two projects and reports on the differences.
Copy Project	Copies the current project to a database, to a file, or exports a project from a file to your database.
Data Administration	Open dialog boxes that describe space allocation in the database.
Change Control	Open dialog boxes to view history or set system-wide change control options as the administrator.
Upgrade	Use functions for upgrading an application project.
Translate	Use options for translating base and operator language databases.
Miscellaneous Definitions	Use options for setting custom field formats, toolbars, colors, styles, and access profiles.
Bulk Operations	Enables you to insert, modify, or delete certain definition types across your entire database in one operation.
Options	Select commands specifying insertion commands, definition language preference, validating options, PeopleCode fonts, definition ownerID, and more.

<i>Window Menu Commands</i>	<i>Usage</i>
Cascade	Cascade all of the definitions that are not minimized in the definition workspace into overlapping layers of definitions with the definition names visible.
Tile	Reorganize and resize all of the definitions that are not minimized in the definition workspace so that they are all visible and do not overlap.
Arrange Icons	Neatly group together all of the minimized definitions in the definition workspace.
Close All	Close all of the definitions in the definition workspace.

<i>Help Menu Commands</i>	<i>Usage</i>
Current Window	Provides context-sensitive help related to the active window by opening the appropriate PeopleBook in the appropriate location.

Help Menu Commands	Usage
PeopleBooks Library	Takes you to the PeopleSoft Online Library (the online documentation for PeopleTools and the PeopleSoft applications that you have licensed).
About PeopleTools	Displays the PeopleTools release level, application release, user ID, database name, database type, and application server name.

Application Designer Window Toolbar

Following are the toolbar buttons for frequently used commands. The command name appears in parentheses following the description).



Create a new definition and open it in the definition workspace (File, New).



Open an existing definition in the definition workspace (File, Open).



Save the active definition (File, Save).



Save all open definitions (File, Save All).



Open the Print Records dialog box for printing records and other definitions (File, Print).



Remove the selected area and hold it in memory for later use (Edit, Cut).



Duplicate a selected area and hold it in memory (Edit, Copy).



Insert information from a Cut or Copy command (Edit, Paste).



Open the Definition Properties dialog box (File, Definition Properties).



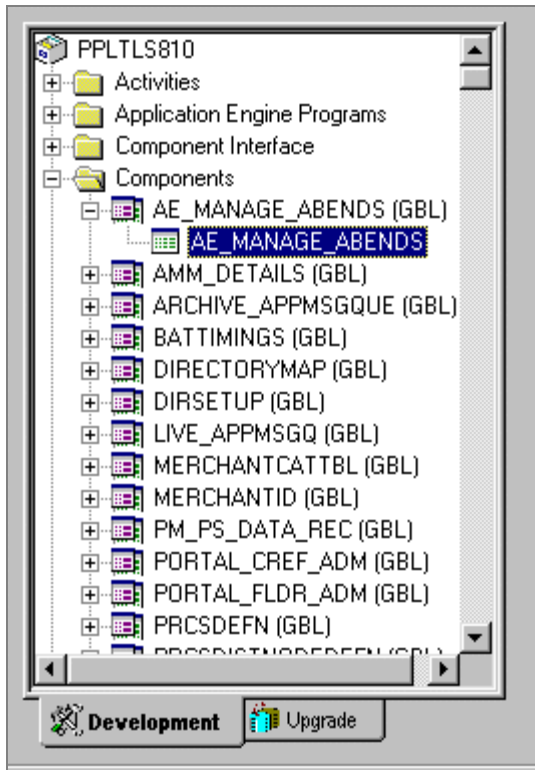
Open the Build dialog box (Build, Current Definition).



Toggle the display of the project workspace (View, Project Workspace).

Project Workspace

View projects and their associated definitions in the project workspace. A project organizes and presents the definitions of a business application in logical groups for easier development, adaptation, maintenance, and upgrade.



Project workspace shown with a project open

Work with a development project or an upgrade project by clicking either the Development tab or the Upgrade tab at the bottom of the project workspace.

The text on the Development and Upgrade tabs might not appear if there is not enough room to display them onscreen.

Definition Workspace

Use the definition workspace to create and modify definitions, which can be maximized, minimized, cascaded, or tiled in the workspace.

Output Window

The output window displays status messages of various PeopleSoft Application Designer operations. The output is organized into different categories using tabs at the bottom of the window.

The text displayed in the output window is context-sensitive, enabling you to select it to perform related operations. For example, if you have a field definition open, select Edit, Find Definition References to list the definitions that reference the active field definition. The list appears in the output window. Then, double-click any of the related definitions listed to open them.

The output window contains several tabs that relate to numerous functions that you can perform with PeopleSoft Application Designer.

Tab	Usage
Build	Create tables, indexes, and views, and alter tables. If you specify the <i>Log to Output Window</i> option in the Build settings, then errors, warnings, and informational messages appear here. You can control the level of detail that appears.
Find Definition References	View definitions that are used or referenced by other definitions. Double-click a definition to open it.
Upgrade	View upgrade actions that are initiated from PeopleSoft Application Designer.
Results	View messages related to project operations, like opening a project or inserting definitions into the project.
Validate	Validate projects and components, and view the results.
Find in...	View the Find in... dialog box output. Double-click a definition to open it. The Find In... search can also be limited to a specific project, rather than the entire database.
PeopleCode Log	View errors that you receive when you're in the debugger stepping through code.

Viewing PeopleCode

This section provides an overview of PeopleCode and discusses how to view PeopleCode.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, Understanding PeopleCode and Events **and** Using the PeopleCode Editor

Understanding PeopleCode

PeopleCode is the structured programming language built into PeopleTools that extends the functionality of the PeopleTools environment. All PeopleCode programs are associated with a “parent” definition. These PeopleCode programs are considered part of the definitions of their parent components and you edit them as part of the definitions.

PeopleCode and SQL Editor

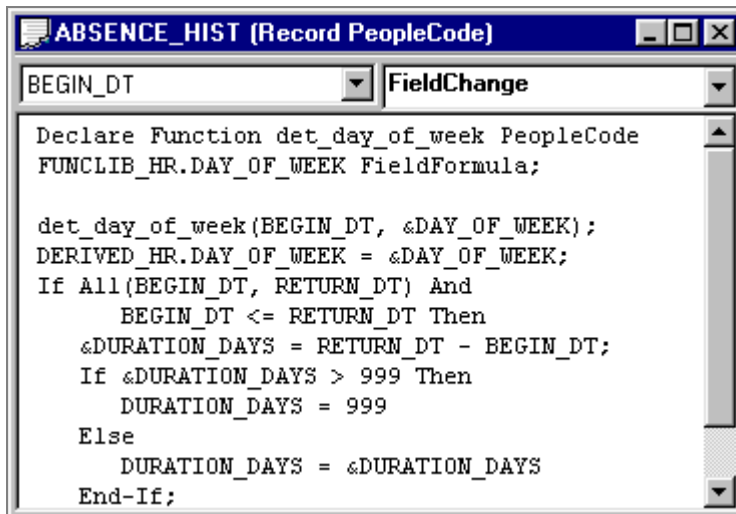
SQL Editor is a tool that enables you to construct SQL definitions. SQL Editor has a similar look and feel to the PeopleCode editor. You can access SQL Editor from the following definitions:

- Records based on SQL and dynamic view.
- PeopleSoft Application Engine actions.

- PeopleCode editor.

Navigation Between PeopleCode Programs

The PeopleCode editor enables you to edit and navigate all PeopleCode programs that belong to the same parent definition.



Working in the PeopleCode editor

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, Introducing the SQL Editor

PeopleCode and the Application Packages Editor

From an Application Package you can access the PeopleCode programs associated with the classes of the package.

The Application Packages editor and the PeopleCode editor interfaces are similar. You can add, delete, and change text: you can use the find and replace function; you can validate the syntax. When you save your application package, the code is automatically formatted (indented and so on), just as it is in the PeopleCode editor.

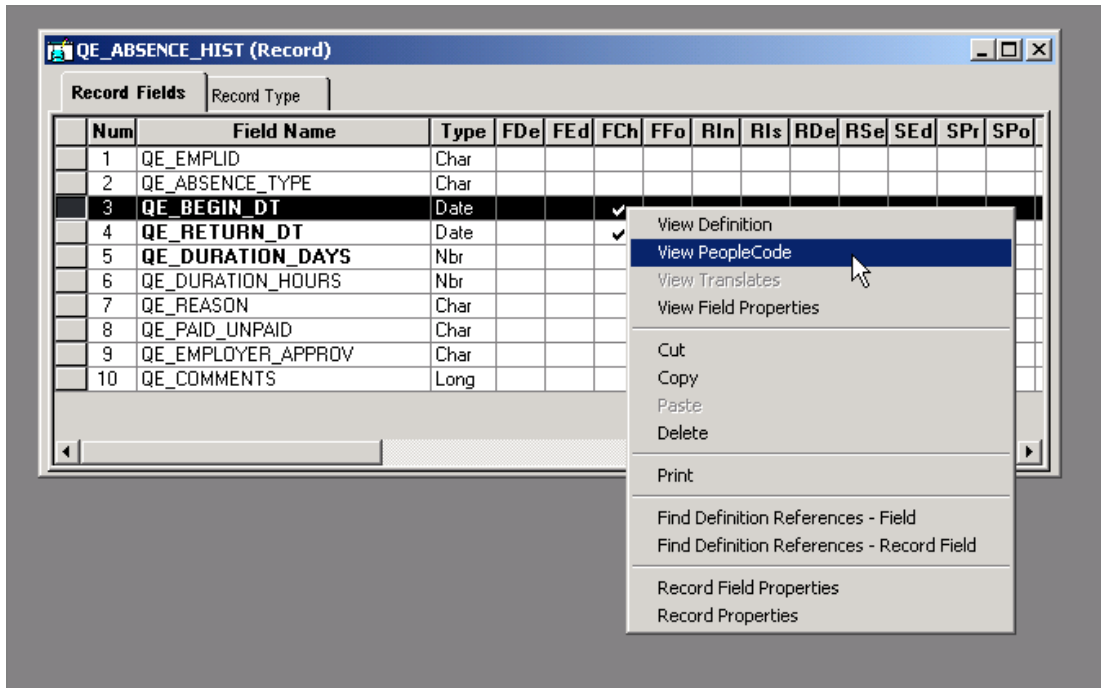
See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, Introducing Application Packages

Viewing PeopleCode

PeopleCode programs can be associated with many items, such as record fields, pages, components, and application messages. You can access any PeopleCode program from its related definition. Use the PeopleCode editor to edit your programs.

As an example, *one* of the ways to access PeopleCode from *one* of the many places that PeopleCode is stored is to access Record Field PeopleCode from an open record definition.



Accessing FieldChange PeopleCode from the BEGIN_DT field

To view Record Field PeopleCode from PeopleSoft Application Designer:

1. Open a record definition in PeopleSoft Application Designer.
2. Click the View PeopleCode toolbar button to view the PeopleCode display for the record.
3. Select a field containing PeopleCode in the record definition.
4. Double-click the cell under the column heading for the type of PeopleCode that you want to view.

You can also right-click on a definition and use the pop-up menu to access or view the PeopleCode.

Working With Definitions

This section provides an overview of definitions and discusses how to:

- Open definitions.
- View definitions.
- View and edit definition properties.
- Create definitions.
- Rename definitions.
- Delete definitions.
- Insert definitions into a project.
- Remove definitions from a project.
- Find definitions.
- Save definitions.
- Close definitions.

Understanding Definitions

You can create or modify many types of definitions in PeopleSoft Application Designer.

Development Definitions

The following table lists development definitions.

<i>Definition</i>	<i>Description</i>
Activity	Workflow map showing the individual steps, events, and routings that comprise a complete activity in a business process.
Application Engine	Program comprising SQL statements and PeopleCode programs to run in batch mode as an alternative to using COBOL or SQR programs.
Application Package	Used to create Application Classes, which could be used to either extend the functionality of existing PeopleTools classes (Rowset, Array, and so on) or to create your own classes.
Approval Rule Set	Workflow maps that provide a visual representation of approval rules. Virtual Approver and GetApprovers both read approval rule sets to determine who must approve transactions.
Business Interlink	Provides a gateway between PeopleSoft applications and the services of an external system.
Business Process	Workflow maps that provide a visual overview of the activities involved in a procedure.
Component	Represents a logical business transaction or a set of logically related pages that are processed together.

Definition	Description
Component Interface	Externalizes access to a component so that it can be used by a third party or an application message.
Field	Individual pieces of data—such as an employee ID—that can be entered by the user and stored in the database, in a column on a table, or in a view.
File Layout	Definition (or mapping) of a file to be processed. It identifies <i>where</i> data fields are located in a file.
HTML	Indicates where HTML code can be inserted on a page.
Image	Stores and displays images, such as employee photos, product pictures, and so on.
Menu	Enables access to the components that you build and the pages contained in the components.
Message	Based on a multilevel structure, similar to components, that defines the data to insert into the application message at runtime.
Message Channel	These correspond to groups of message definitions and help order messages properly, enhance scalability, and provide a simple way to define processing characteristics of many similar messages as a single group.
Mobile Page	A PIA page based on a synchronizable component interface for display on disconnected mobile devices, such as laptops or PDAs.
Page	Pages provide a way to enter, view, and edit data online. The system validates user input, writes it to the database, and retrieves and displays it upon request.
Project	User-defined collection of related definitions created for developing, adapting, or upgrading a PeopleSoft application.
Problem Type	Used in optimization to tie the optimization application records, the optimization transactions, and the optimization plug-in together as one entity.
Record	All of the data that resides in PeopleSoft applications is stored in tables, or records, as part of a relational database system. Each record definition describes the properties of an underlying SQL table.
SQL	Can be entire SQL programs or fragments of SQL statements that you want to reuse.
Style Sheet	Collection of styles that can be used by PIA application pages.

Opening Definitions

Use the definition workspace when accessing or creating definitions.

To open a definition:

1. Select File, Open.

The Open Definition dialog box appears.

2. Select the type of definition that you want to open from the **Definition** drop-down list box.
3. Provide selection criteria.

Enter a definition name or description (or the beginning characters of either). Other selection criteria options might be available, depending on the definition type.

4. Click **Open**, or press ENTER, to display definitions matching the selection criteria that you entered.

To clear the current selection criteria and start over, click **New Search**. To change how the search list is displayed, do one of the following:

- Click the **List** button to see only the names of the definitions.
- Click the **Details** button to see the names and descriptions, which is the default.

5. Select the definition to open.
6. Double-click the definition that you want to open in the definition workspace, or highlight the definition and click **Open**.

You can also use the shift-click selection technique to select more than one definition to open in a single action, or right-click to view a pop-up menu, where you can open, print, rename, or delete the selected definition.

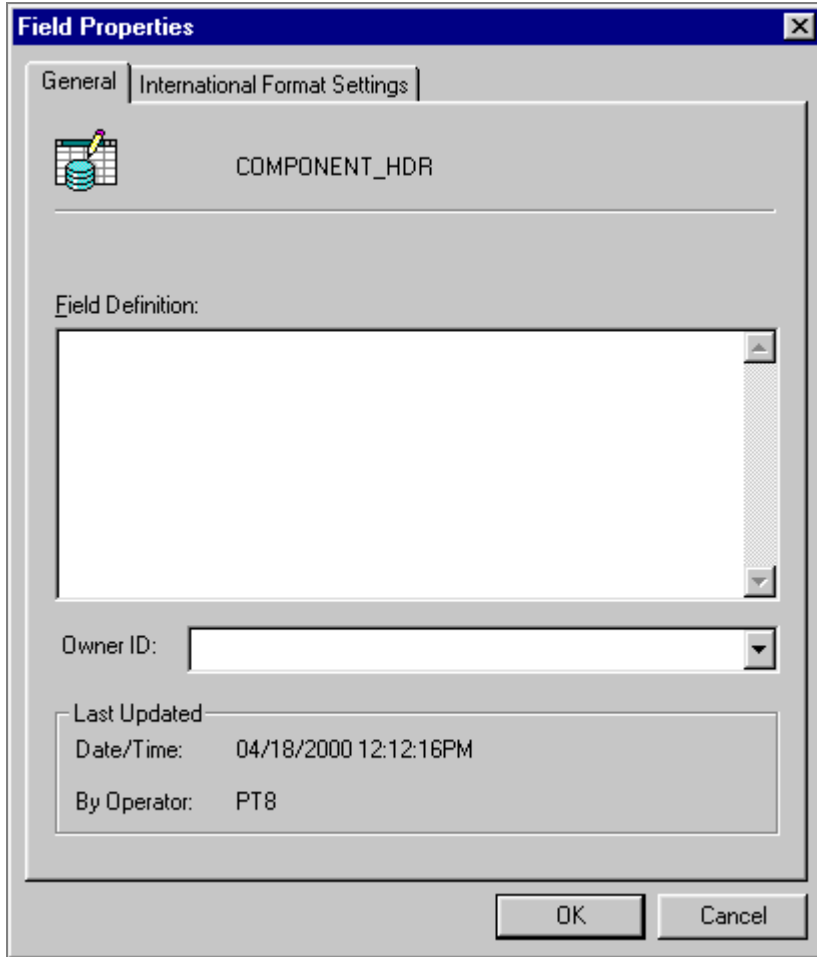
Viewing Definitions

In the project workspace, you can view a definition that is referenced by the active definition.

To view a definition, select View, View Definition. You can also right-click the definition to be referenced and select *View Definition* from the pop-up menu.

Viewing and Editing Definition Properties

Each definition type has properties associated with it. To view or edit definition properties, select File, Definition Properties. You can also click the toolbar button or press ALT+ENTER.



Properties dialog box

The Definition Properties dialog box always includes a General tab that provides a place to display and enter descriptions and comments regarding the definition.

An optional **Owner ID** drop-down list box is provided to designate the owner of an individual definition. This helps identify which application team last made a change to a definition. Set the default Owner ID for new definitions in the Options dialog box, Owner Id tab.

Creating Definitions

When building or adapting an application, try to use existing definitions as much as possible; when that's not possible, create new definitions.

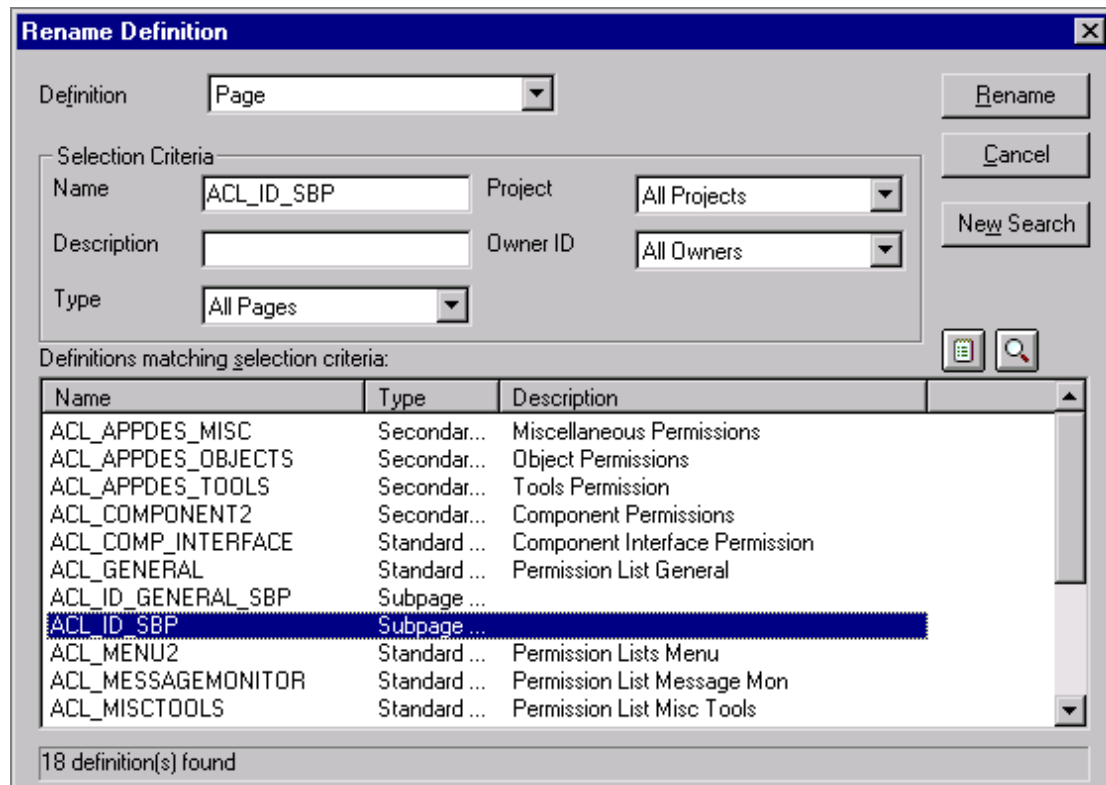
To create a new definition:

1. Select File, New.
2. Select the definition type.

The new definition appears in the definition workspace.

Renaming Definitions

You can rename existing definitions in a database at any time.



Rename Definition dialog box

To rename a definition in the database:

1. Select File, Rename.

The Rename Definition dialog box looks like the Open Definition dialog box, and you select definitions in the same way.

2. Specify the definition type and any selection criteria that are useful in locating the definition that you want to rename.

The Rename Definition dialog box does not have a **Select** button. So, after entering either a partial name or description of the definition, press ENTER to retrieve a list of definitions matching your selection criteria.

3. Select the definition that you want to rename.

4. Click the **Rename** button in the dialog box and double-click the selected definition, or right-click to select *Rename* from the pop-up menu.
5. The selected definition name in the Rename Definition dialog box is in edit mode.
6. Change the selected definition name and press RETURN.

You are prompted to close any open definitions, if any are open, before you can save the new name. You are also prompted with a Confirm Rename dialog box before you can save the change.

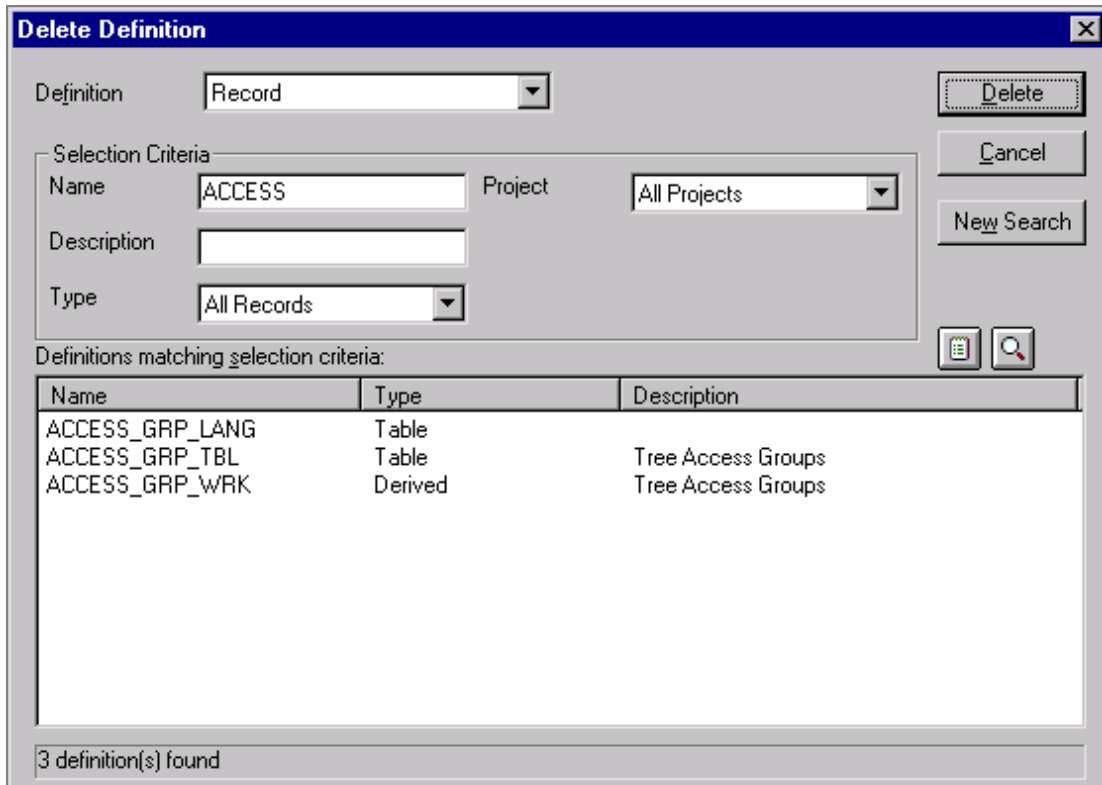
7. Press **OK** to complete the renaming of the selected definition.

Deleting Definitions

Deleting a definition is different than *removing* a definition from a project. When you remove a definition from a project, the reference to the definition is removed from the project, but the definition still exists in the database and thus may be a part of any other project. Deleting a definition, however, permanently removes the definition from the database. Any projects or other definitions that contains the deleted definition are affected.

Before deleting a definition you should find all references to that definition by running Find Definition References. For example, a field definition you want to delete may be referenced by both record and page definitions.

Note. If you delete a component definition, you must delete all component interfaces based on that definition.



Delete Definition dialog box

To delete a definition from the database:

1. Select File, Delete.

The Delete Definition dialog box looks like the Open Definition dialog box, and you select definitions in exactly the same way.

2. Specify the definition type and any selection criteria that are useful in locating the definition that you want to delete.

After entering either a partial name or description of the definition, press ENTER to retrieve a list of definitions matching your selection criteria.

3. Select the definition that you want to delete.

To select multiple definitions, hold down either SHIFT or CTRL while clicking the appropriate definitions.

4. Click the **Delete** button and confirm that you want to delete the selected definition.

Inserting Definitions Into a Project

You can:

- Insert definitions individually.
- Select a number of definitions to insert as a group.

Insert into Project dialog box

Inserting a Single Definition

To insert a single definition into a project:

1. Open the definition that you want to insert into the project.
Make sure that the definition is the active definition in the definition workspace.
2. Select Insert, Current Definition into Project.
The definition is added to whichever project is currently open.

Inserting a Group of Definitions

To insert a group of definitions into a project:

1. Select Insert, Definitions into Project.

The Insert into Project dialog box appears.

2. Select the type of definition to insert from the Definition drop-down list box.

To see all available definitions of that type, including upgrade-only definition types, click the Insert button or press ENTER.

3. (Optional) Enter the selection criteria.

Name	Enter the definition name or a partial field name and press ENTER.
Type	Narrow your search by selecting a specific definition type, such as View for a record definition.
Owner ID	Narrow your search further by selecting an application with which the definition is used.

Enter the definition name or a partial field name. Enter the definition type, or leave the selection criteria blank and press ENTER to see a list of all definitions of the selected definition type. For definSelect an Owner ID if available.

4. Select the definitions to insert.

To select multiple definitions, hold down either SHIFT or CTRL while clicking the appropriate definitions.

5. (Optional) Specify which related definitions to insert.

To insert related definitions, specify them in the list of related definitions. To select multiple related definitions, hold down either SHIFT or CTRL while clicking the appropriate definitions.

Note. After you insert definitions into a project, the upgrade-only definitions appear in the Upgrade View of the project workspace, not the Development View.

The status bar at the bottom of the Insert into Project dialog box indicates that definitions have been inserted. Additionally, the Results tab on the output window displays the number of definitions inserted each time you perform an insert.

Removing Definitions from a Project

Removing a definition from a project is different than *deleting* it from the database. When you remove a definition from a project, the reference to the definition is removed from the project, but the definition still exists in the database and thus may be a part of any other project.

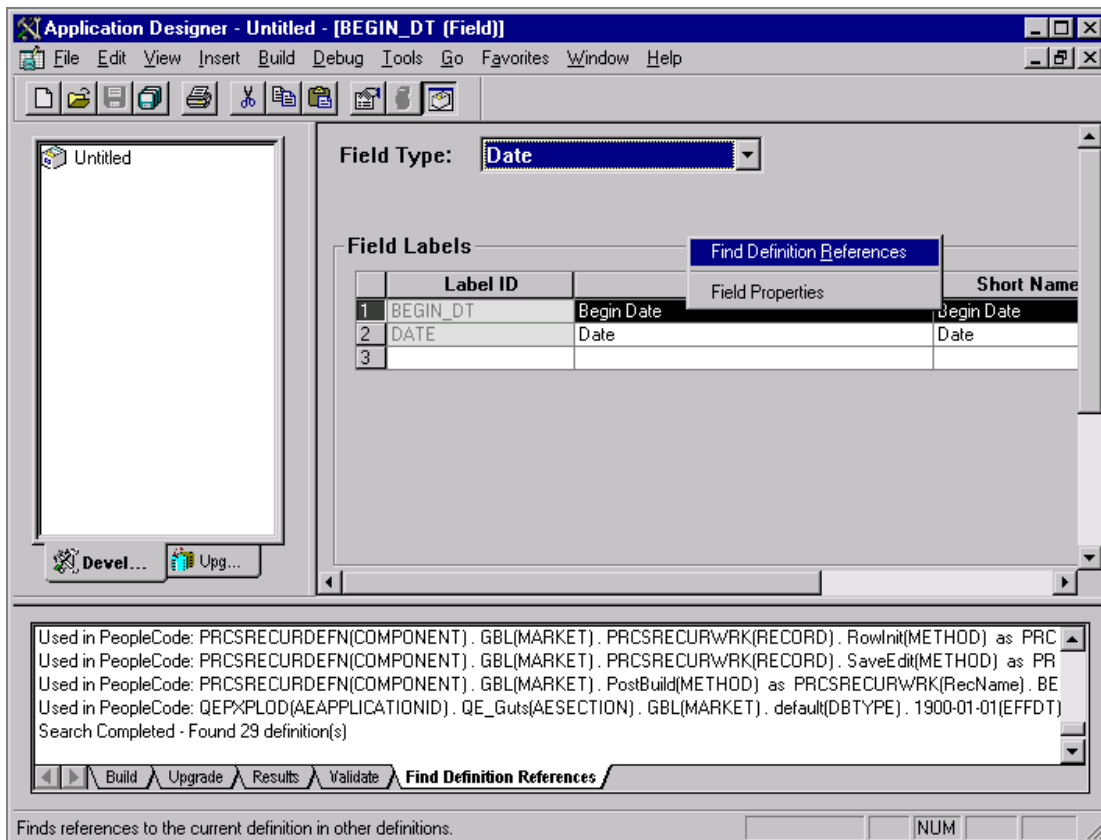
To remove definitions from a project:

1. In the project workspace, select the definition that you want to remove from the project.
To select multiple items, highlight one or more nodes using the CTRL key while clicking the definitions to remove.
2. Press DELETE, or right-click to select *Remove from Project* from the pop-up menu.
This does not delete the definition; it just removes it from the project.

Finding Definitions

Although a project keeps track of your definitions, the definitions are not actually embedded in the project.

Note. There is a distinction between *related* definitions and *referenced* definitions. A *related* definition is one that *is used by* the current definition. A definition *reference* is one that *uses* the current *definition*. For example, in the case of a component, pages in the component are related *definitions*. The menus that use the component are its *definition* references.



Finding definition references

To find definition references:

1. Open the definition in the definition workspace.
2. Select Edit, Find Definition References, or right-click the definition and select *Find Definition References* from the pop-up menu.

After you select this item, a search of the database takes place, and the results appear on the Find Definition References tab of the output window.

3. Select any definition displayed in the output window by double-clicking it.

The selected definition opens in the definition workspace.

4. After you find a definition, select the definition reference and right-click to view the pop-up menu.

Note. Double-clicking any entry in the Find Definition References output window opens the appropriate mode of PeopleSoft Application Designer. If you double-click a related record that was found, the record opens, and the field for which you were looking is highlighted.

Available Definition Types

This table lists the definition types that the Find Definition References feature supports.

Definition Type	Can Reference	Detects This Reference
Records	Pages	Page field
	Components	Search record and “add search record”
	Records	Record as an edit table on other record fields; in subrecords, other records
Pages	Pages (subpages and secondary pages)	Subpage or secondary page is a page field of the page
	Components	Component contains the page
	Projects	Project contains the page
	PeopleCode	PeopleCode references in a page
Components	Menus (standard menus)	Item of standard menu is associated with the component
	Menus (pop-up menus)	Item of pop-up menu is associated with a transfer definition that refers to the component
	Component Interfaces	Component interface is associated with the component
	Projects	Project contains the component
	PeopleCode	PeopleCode references in a component

Definition Type	Can Reference	Detects This Reference
Menus	Menus (pop-up menus)	Item of pop-up menu is associated with a transfer definition that refers to the menu
	Pages	Page and page field to menu (pop-up menus only)
	Pages	Page field of page uses the menu as a pop—up menu of the page field
	Pages	Page uses the menu as a pop-up menu of the page
	Projects	Project contains the menu
	Business processes and business process maps	Activities to a menu
	Activities	Step of activity is associated with the menu
	Activities	Message agent of activity is associated with the menu
Fields	Records	Record field use
	Pages	Page field use

Saving Definitions

To retain the changes that you make, you must save the definition. However, you must *name* new definitions before you can save them.

To save a definition:

1. Click the **Save** button on the toolbar, or select either File, Save or File, Save As to save a definition.

The Save and Save As commands save a single definition. Use the File, Save All command or the Save All toolbar button to save all open definitions at once.

2. If you're saving a page or component, specify the language or market.

For a page definition, the **Language** drop-down list box appears; for a component, the **Market** drop-down list box appears.

Closing Definitions

To close a definition, either select File, Close or click the Close Window icon on the title bar of the active definition's window. You can also select Window, Close All to close all open definitions.

Building and Maintaining Data

This section provides an overview of data building and maintenance and discusses how to:

- Create SQL tables.
- Use the multiple document interface (MDI).
- Use drag-and-drop.
- Use pop-up menus.
- Use property sheets.
- Use dynamic toolbars and menus.
- Configuring the environment.

Understanding Data Building and Maintenance

The underlying database definitions must be kept in sync with PeopleSoft definitions. Therefore, from PeopleSoft Application Designer, you must do the following:

- Submit SQL Alter and Create commands for all types of database definitions.
- Manage the database index.
- Manage the table space.
- Manage the DDL model for tables, indexes, and table spaces.

Creating SQL Tables

To access data, you must create a SQL table and then store data in the fields and records. The process of running the SQL necessary to synchronize the database with records, indexes, and DDL is called *Build*.

The Build processes definitions at the following three levels:

- Current record.
- Selected records in the project workspace.
- All records in the project.

See Also

Building SQL Tables and Views

Using the Multiple Document Interface

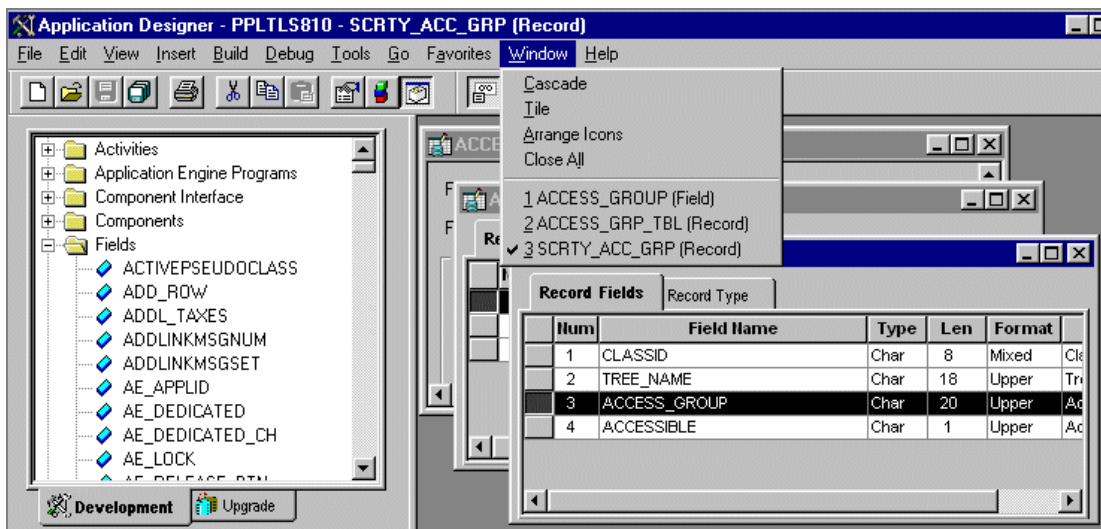
PeopleSoft Application Designer makes use of an MDI. This means that each window in the definition workspace of PeopleSoft Application Designer represents a view of a definition, and you can have multiple windows open at the same time. These definition windows must stay inside the borders of the definition workspace, but they can be maximized, minimized, cascaded, or tiled in that space.

You can have different types of definition windows open at once, such as menu, field, record, and page windows. This enables you to work with different definitions simultaneously, simplifying the process of designing a group of related definitions.

Active Windows

Although you can have multiple windows open at the same time, only one window can be active at any moment. Make a window active by selecting it in the definition workspace. The active window always appears on top with the title bar in *active window title* color.

In addition to clicking on a window to make it active, you can also use the Window menu. This menu displays the windows that are currently open with a check mark next to the active one. Change the window that is currently active by selecting it from the menu.



Window menu

Other options from the Window menu include *Cascade*, *Tile*, *Arrange Icons*, or *Close All* windows.

Using Drag-and-Drop

PeopleSoft Application Designer makes ample use of drag-and-drop mouse techniques. For example, you can drag a field from a record definition and drop it onto a page definition. You can then drag the page onto a component and drag the component onto a menu. Using the

drag-and-drop technique is faster and simpler than using menu commands to manipulate definitions.

To drag and drop a definition:

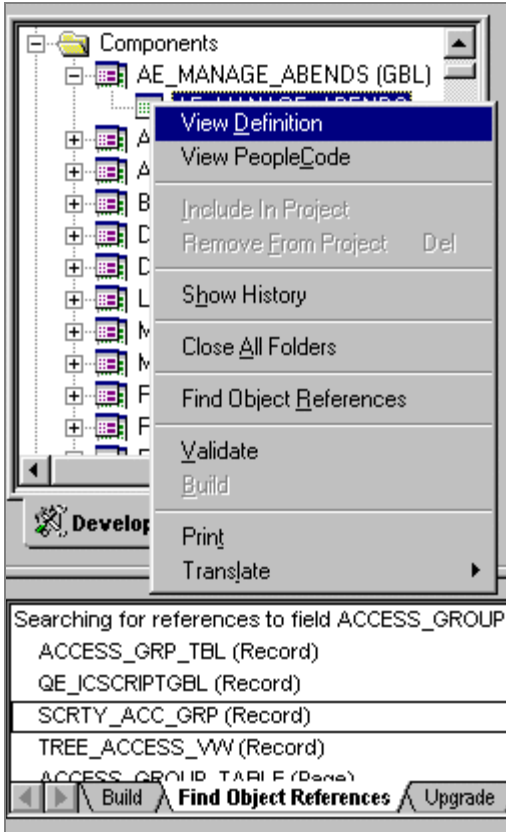
1. Open the definition *from which* you want to drag in either the project workspace or the definition workspace.

For example, to drag a field from an existing record definition to a new page definition, first open the record containing the field. You can open it in the definition workspace or expand the record in the project workspace so that the fields are displayed. With the appropriate field displayed, you can drag and drop it into another definition.

2. Open the definition *to which* you want to drag.
3. Drag the definition from one definition to the other.

Using Pop-up Menus

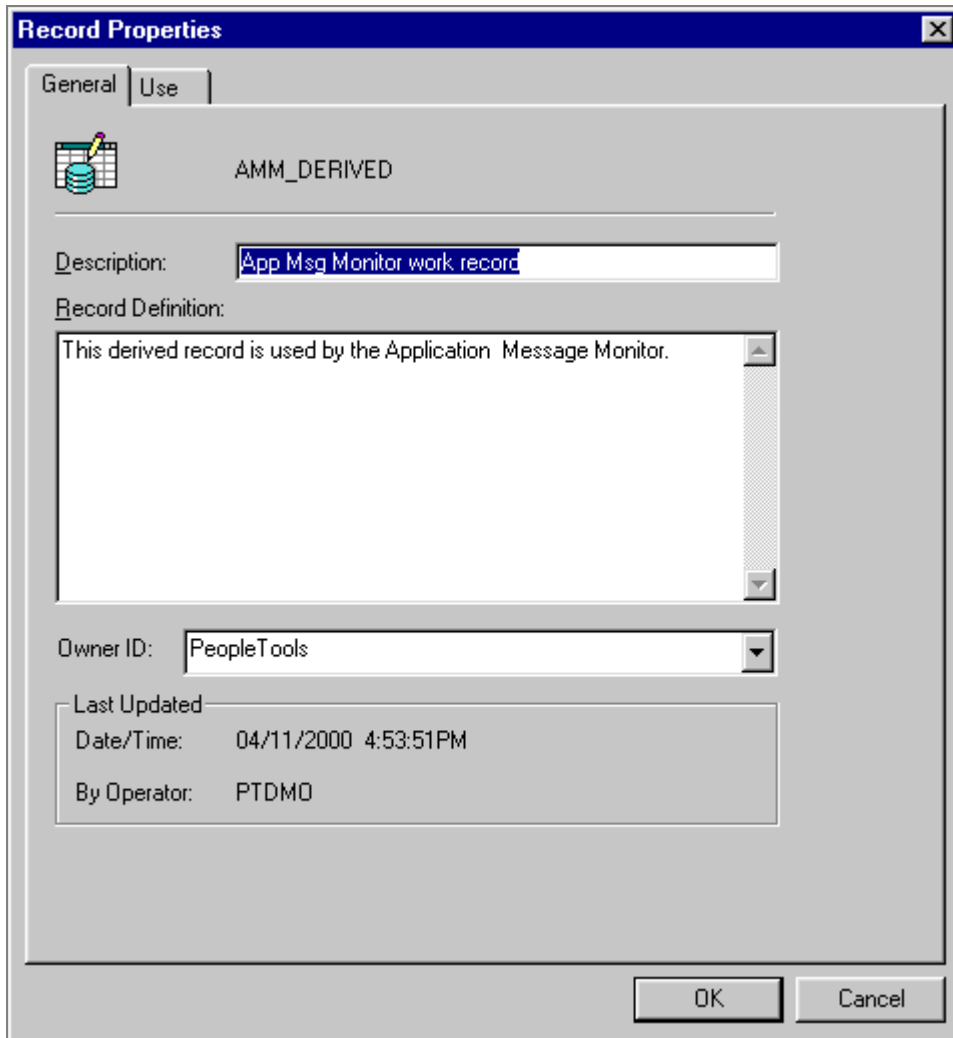
Pop-up menus are context-sensitive menus that appear at the current location of the mouse pointer whenever you click the alternate mouse button (typically, the right mouse button). They provide efficient access to numerous PeopleSoft Application Designer commands. Because pop-up menus appear at the current location of the pointer, they eliminate the need to move the pointer up to the menu bar or to a toolbar. A pop-up menu contains only the commands that apply to the selected definition or the current context.



Component definition pop-up menu

Using Property Sheets

A property sheet is a dialog box that displays the user-definable properties of a definition. A property sheet typically appears when you select the Properties command for a definition type either by selecting the File, Definition Properties menu and clicking the corresponding toolbar button, or by right-clicking the definition and selecting *Properties* from the pop-up menu. You can also press ALT+ENTER to display the property sheet for the active definition.



Property sheet example

With PeopleSoft Application Designer, every definition that you can open (menus, pages, components, records, fields, and so on) has an associated property sheet. Definition properties that are specific to the definition type are grouped together in these definition property sheets. For example:

- Record Type and Record Use properties are both found in the Definition Properties sheet for records.
- Translates are found in the Definition Properties sheet for fields.
- Menu groups and menu labels are found in the Definition Properties sheet for menus.
- Search record, actions, and internet settings are found in the Definition Properties sheet for components.

Using Dynamic Toolbars and Menus

The PeopleSoft Application Designer toolbar and menu changes based on the type of definition that is active. For example, when a page definition is active, the toolbar displays buttons that represent the definitions that you can add to a page. This technique is also known as *morphing*.

The change is so subtle that it can be missed easily. This is because the menu bar names are consistent between definition types. However, if you look at the menu items and toolbars closely, you see a distinct difference. For example, if a *page* window is active, the menus and toolbars change to include actions and options applicable to a *page* definition—as in the Show Grid option on the View menu and the introduction of the Layout menu. In addition, *page*-specific toolbars are also displayed.

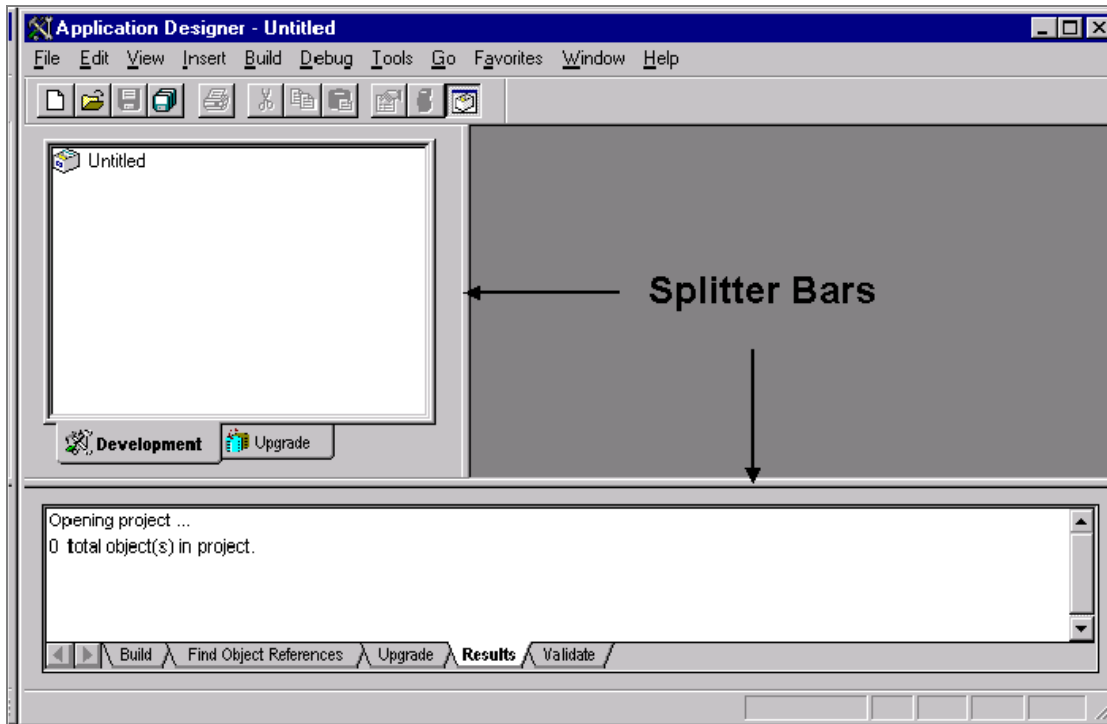
In the same respect, if a *record* window is active, the menus and toolbars morph to include actions and options applicable to a record definition. For example, different options are available on the View menu (such as View, Field Display, and so on). Different toolbar buttons for record definition actions also appear.

Configuring the Environment

PeopleSoft Application Designer is highly configurable, enabling you to tailor the tool to your needs or preferences.

Splitter Bars

A splitter bar is a thin vertical or horizontal bar that separates windows inside a parent window. Using the splitter bar enables you to resize two windows at the same time. Splitter bars are used between the project workspace, definition workspace, and output window.



Splitter bars make it easy to resize your workspace

To resize a PeopleSoft Application Designer workspace, drag any one of the splitter bars. Drag the splitter bar to change the size of the project workspace, definition workspace, or output window.

Dockable Windows and Toolbars

You can freely move PeopleSoft Application Designer windows and toolbars to either anchor (or “dock”) to parts of the main application window, or to make them “float” freely anywhere that you want them to appear. When you dock a toolbar or window, you anchor it to the top, sides, or bottom of the main window.

To move or dock a PeopleSoft Application Designer window or toolbar, drag the window title bar or the appropriate toolbar to a new location. If you move the window or toolbar near the top, bottom, or sides of the main window, the window or toolbar “snaps” into place, meaning that it is docked. However, if you press and hold CTRL and then drag the window or toolbar, you can prevent it from automatically docking when it is near the edge of the window.

Note. Use caution when running the PeopleCode Debugger with “undocked” windows.

View Menu

The View menu enables you to display or hide different PeopleSoft Application Designer components (such as the project workspace, output window, and toolbar).

CHAPTER 2

Working With Projects

This chapter provides an overview of the PeopleSoft Application Designer *projects* and discusses how to:

- View projects.
- Open, create, and save projects.
- Merge projects.
- Create a maintenance project.
- Set project options.
- Validate projects.

Understanding Projects

A PeopleSoft Application Designer project is an efficient way to organize your definitions as you develop and configure your application. A project keeps track of all definition types as a simple list of definition names; however, a project is *not* where the definitions are *stored*. Development definitions exist outside of the project in your PeopleSoft database.

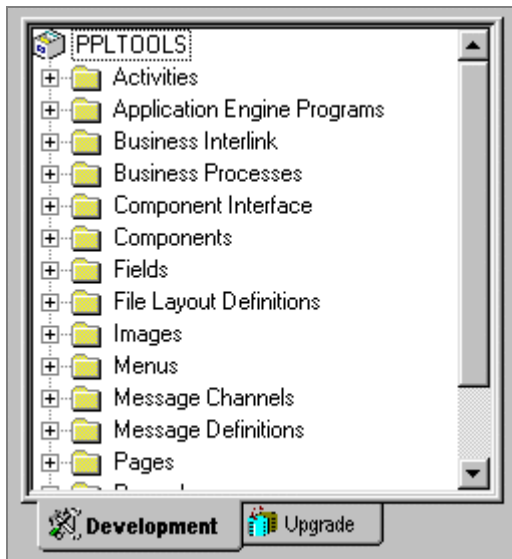
You are not required to use projects in PeopleSoft Application Designer—you can open and edit individual definitions without associating them with a project. However, using projects can help you:

- Organize related definitions.
- Understand relationships among definitions.
- Coordinate the work of several developers.
- Streamline upgrade tasks.
- Search for fields or records.

Viewing Projects

On the left-hand side of your screen, the project workspace displays one project at a time and all of its definitions, making them easily accessible for opening and editing. It includes two

views representing the collection of definitions in the project: Development and Upgrade. Switch between the views by clicking on the folder tabs at the bottom of the project workspace. To open folders and view related definitions, click the expand (+) button.



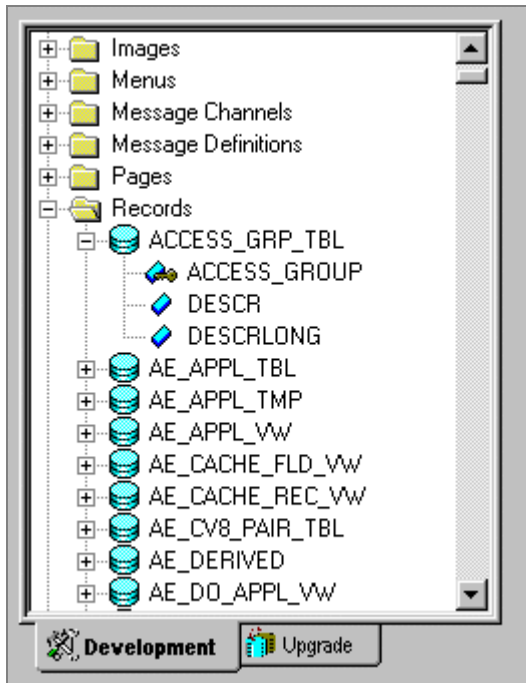
Project workspace

This section discusses how to:

- Access definitions for a project.
- View definitions that are available for upgrade.

Accessing Definitions for a Project

The project folder contains a folder for each definition in the project. In the Development view, access the definitions for a project by double-clicking the definition.



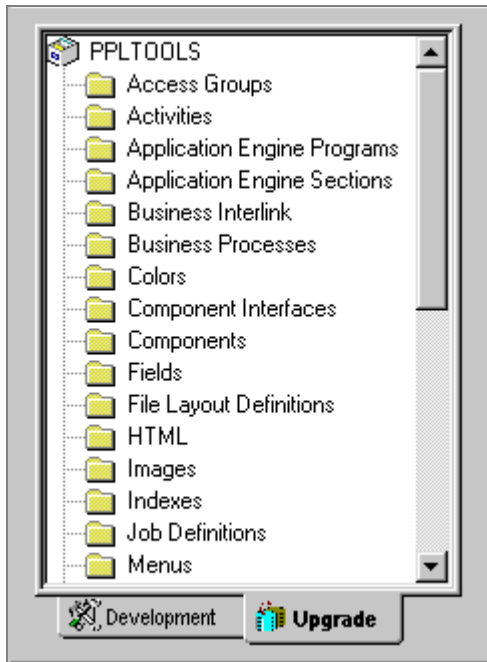
Development view in the project workspace

The definitions appear in a *project tree*, organized by definition type.

The development view also shows definitions that are closely related to the definitions in a project. Access these related definitions by clicking the expand (+) button on an definition type that has related definitions. For example, if you click the expand (+) button on Components, you see the related page definitions in the project workspace. Double-click any page definition to open it, even if it is not explicitly defined as part of the project.

Viewing Definitions That are Available for Upgrade

The Upgrade view helps to streamline the migration of definitions—such as records, pages, or PeopleCode—from one PeopleSoft database to another. It displays all of the definitions available for upgrade and attributes related to the upgrade process. When you double-click an definition type in the Upgrade view, an upgrade definition window appears in the definition workspace, displaying the definitions of that type that are available for upgrade and the associated upgrade options.



Upgrade view in the project workspace

This view is important when moving changes into production and when upgrading to new PeopleSoft releases. Definitions in development projects and upgrade projects are interchangeable, meaning that components that were developed in PeopleSoft Application Designer can be copied or compared using the Upgrade view.

See Also

Upgrading with PeopleSoft Application Designer

Opening and Creating Projects

Note. Changes that you make to a definition in a project are also reflected outside the project. Before you change a definition in a project, be aware of how it might affect other definitions outside the project. For example, when you rename or delete a field, you do so *globally*. Although you can enter a project name as selection criteria in certain PeopleSoft Application Designer dialog boxes (like Open, Rename, and Delete), this is just to narrow the list of definitions returned in the selection list.

This section discusses how to:

- Create a new project.
- Open an existing project.
- Save a project.

Opening an Existing Project

To open a project:

1. Select File, Open.

The Open Definition dialog box appears.

2. Specify *Project* in the **Definition** field.
3. Enter the optional selection criteria.

The **Selection Criteria** list reflects the selected definition type. Enter the project name or description (or the beginning characters of either).

4. Click **Open** (or press ENTER) to display projects matching the selection criteria that you entered.

To clear the current selection criteria and start over, click **New Search**.

5. Double-click the project that you want to open in the definition workspace, or select the project and click **Open**.

If you right-click a project name, a pop-up menu appears so that you can open, print, rename, or delete the selected project.

Creating a New Project

When you start PeopleSoft Application Designer, an empty project titled “Untitled” always appears, whether you use the project or not. Unlike other definitions, only one project can be open at a time. Although PeopleSoft encourages you to develop in projects, you can hide the project workspace window and ignore the project entirely.

To create a new project:

1. Select File, New from the menu.
2. Highlight **Project** as the new definition type to create, and click **OK**.

Note. Another way to create a new project is to open an existing project. Then, select File, Save Project As, and enter a new name for the project. All of the existing definitions in the project are also copied.

Saving a Project

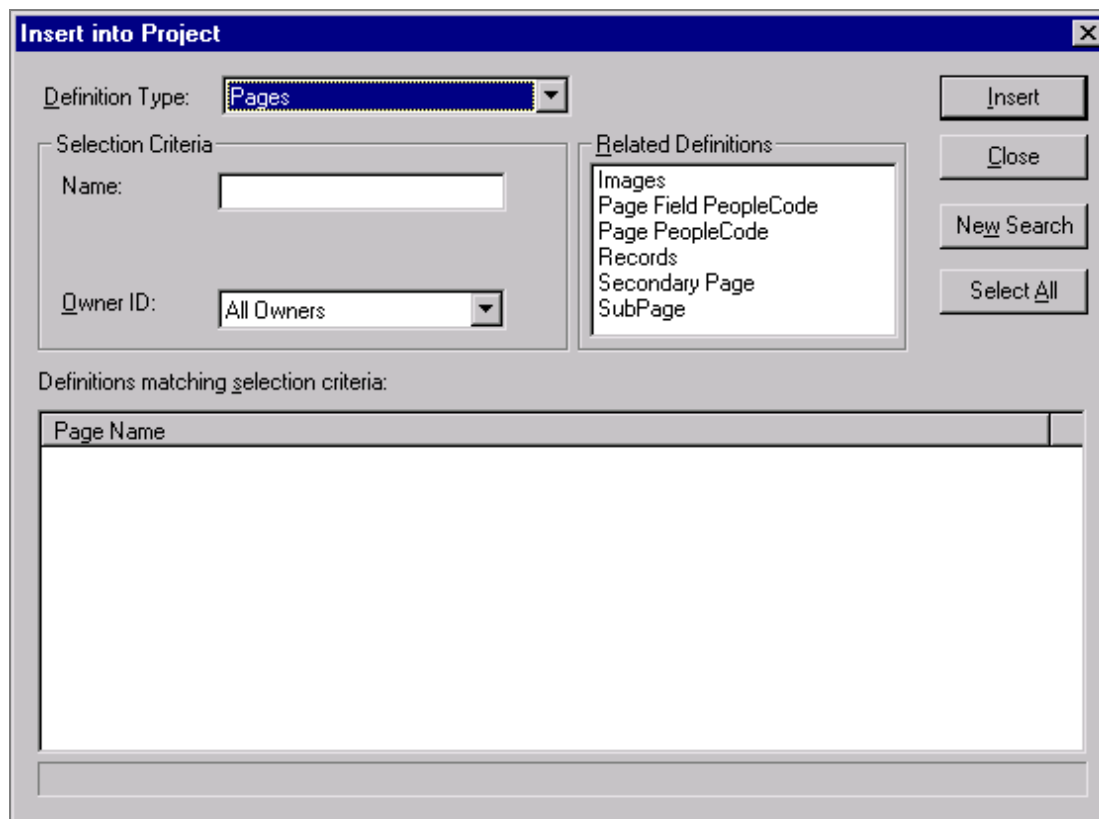
Use a different command when saving an entire project than when saving other types of definitions.

To save a project select File, Save Project. You can also select File, Save Project As to save the project with a new name. This is a good way to make a copy of a project, because the original project still exists under the original name.

The save toolbar button saves whichever definition is active in the definition workspace, but it cannot be used to save an entire project.

Inserting Definitions into a Project

You can add definitions to a project by selecting Definitions into Project from the Insert menu.



Insert into Project

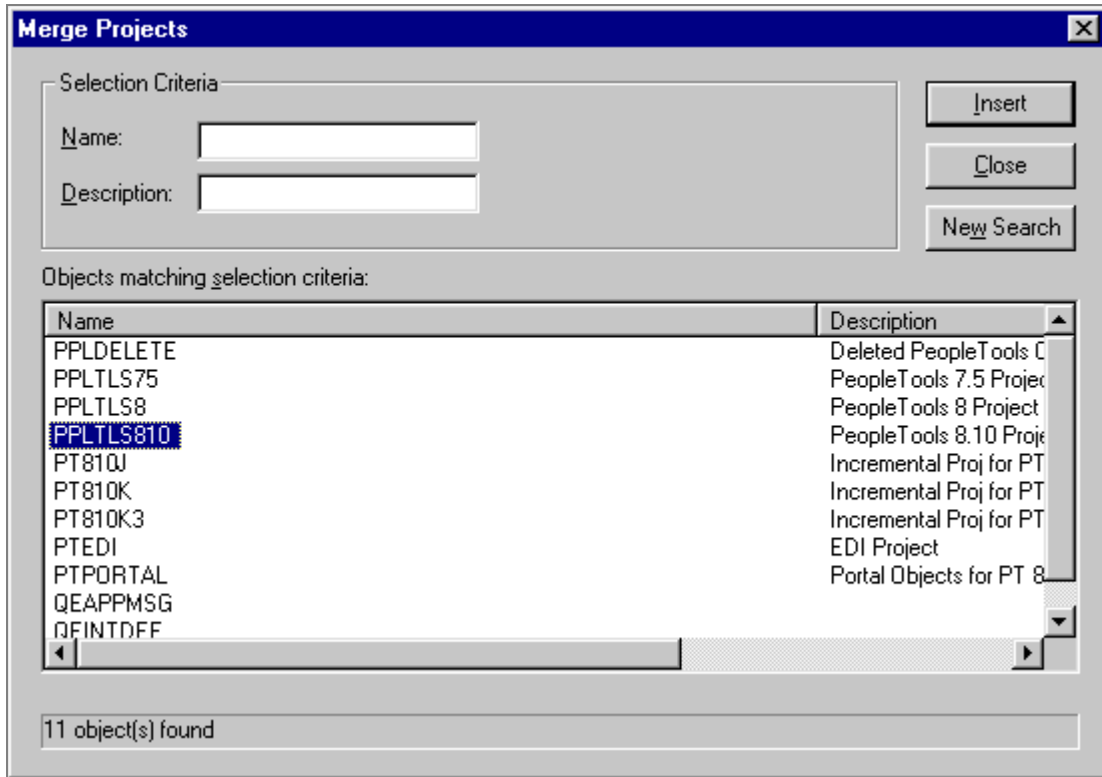
To insert a definition into a project:

1. Open the Insert into Project dialog box.
2. Select the definition type you want to insert from the drop-down list box.
3. Enter Selection Criteria to narrow your search.
4. Press ENTER or click Insert.
5. Select one or more definitions from the displayed list.

6. Press ENTER or click Insert.

Merging Projects

You can merge two or more projects by inserting all of the definitions from one project into another.



Merge Projects dialog box

To merge projects:

1. Open the project in which you want to insert another project.
2. Select File, Merge Projects.
The Merge Projects dialog box appears.
3. Enter Selection Criteria.
 - a. Enter a project name or description (or the beginning characters of either).
 - b. Click Insert or press ENTER to display projects matching the selection criteria you entered.
4. Select a project to insert into your currently open project.

Double-click the project that you want to insert, or highlight the project and click Insert. To select multiple projects use the SHIFT or CTRL keys.

5. Click **Insert**.

All selected definitions are inserted into the project in one action. After each insert, note the information in the status bar and on the Results tab in the output window.

Creating Maintenance Projects

Use a maintenance project when you copy a maintenance release database to a target database. In addition to simplifying the software upgrade, maintenance projects enable you to:

- Track applied software fixes in a log.

When you copy a maintenance project to a target database, the following information is recorded in the PS_MAINTENANCE_LOG file:

- Incident Ids.
- Descriptions of the fixes.
- Date the project was imported.
- Users who delivered or applied the fix.

View this log file to identify what fixes have been applied to your databases. Also use this feature to track and deliver your own modifications to your PeopleSoft system.

- Handle dependency incidents.

You can track the incidents and dependent incidents that have been included in the project.

Note. Maintenance projects are intended to be used when upgrading your PeopleSoft database with new software releases. They are usually created and shipped by PeopleSoft. However, because this feature is available to you for your internal software update process, it is described in this section.

Project Properties

General | Incidents | Dependencies

TESTDE

Description:

Comments:

Maintenance Project

Last Updated

Date/Time: 07/27/00 12:07:55PM

By User: PTDMO

Application Upgrade Target

Server:

Database:

User:

OK Cancel

Maintenance project properties

To create a maintenance project:

1. Create a new project.
2. Open the Project Properties dialog box.
3. Select the **Maintenance Project** check box.
4. Select the Incident tab.

PeopleSoft uses this area to specify incidents related to the maintenance project.

- a. If you are tracking your own incidents, enter the names of the fixes, or the incident IDs fixed in this project. The system logs them to the *PS_MAINTENANCE_LOG* file and includes them when copying the project.

PeopleSoft recommends that if you enter an incident or update ID, use a character prefix. PeopleSoft fixes use numeric IDs; for example, 000000000012345.

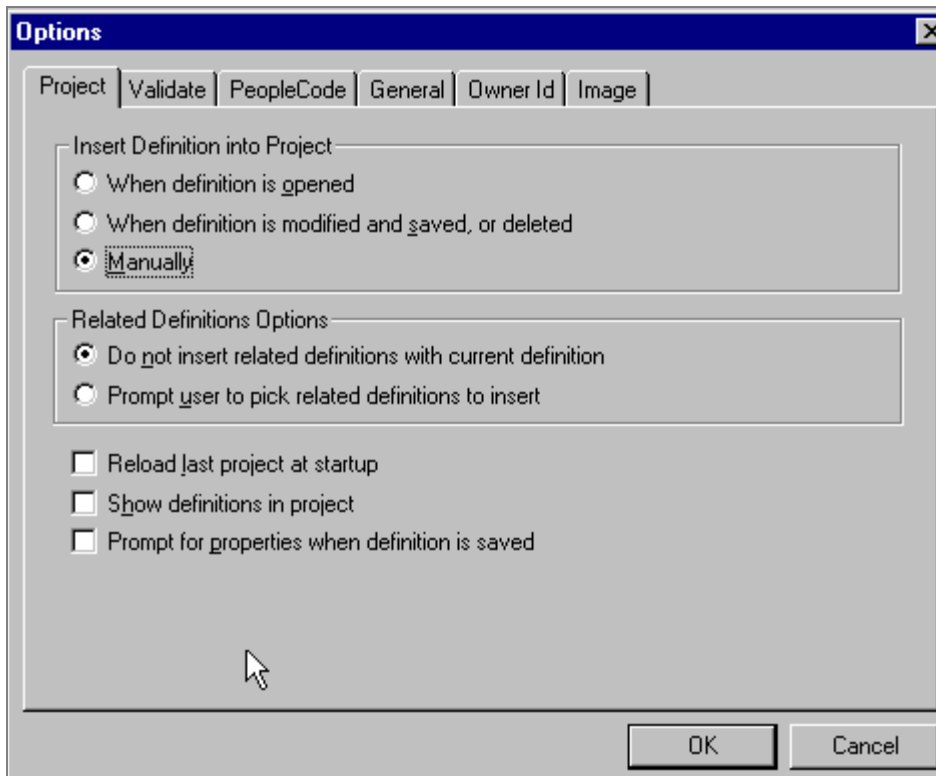
- b. Click the **Add** or **Delete** button.
5. Select the Dependencies tab.

List dependencies that this project might have here. The incidents that you enter here are checked against those listed in the log file to verify whether the fix has been applied.

- a. Enter the incident ID for the incident that you want to add to, or delete from, the list.
- b. Click the **Add** or **Delete** button.
- c. Click OK when finished adding or deleting incidents.

Setting Project Options

Set processing options for all project operations in the Project Options dialog box.



Setting project options

To set project options:

1. Select Tools, Options.

The Options dialog box appears.

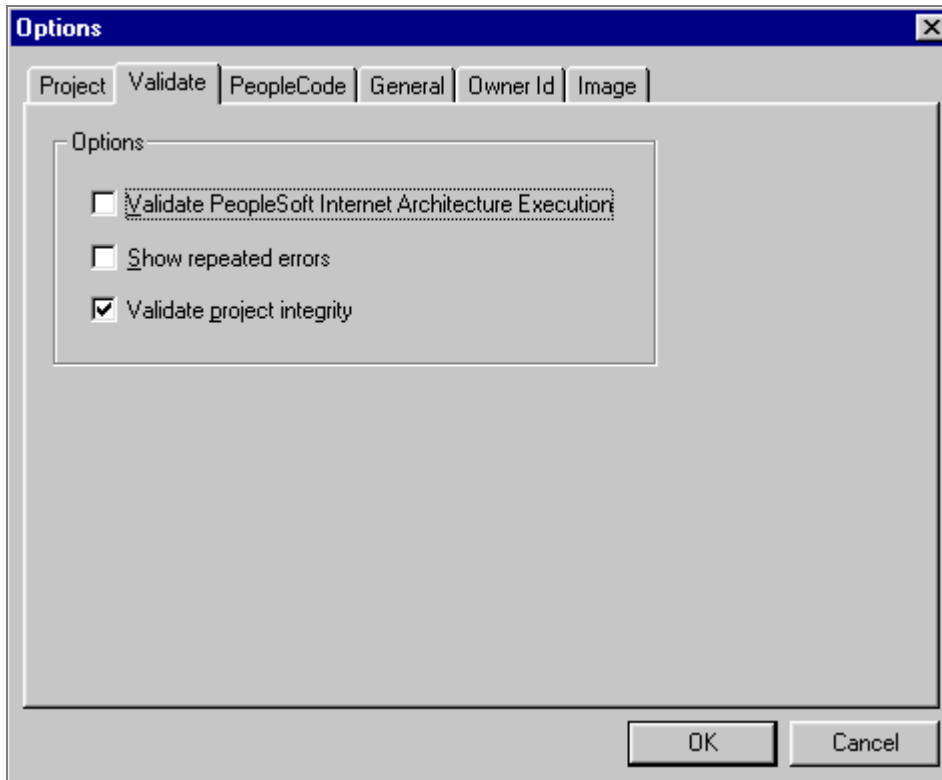
2. Select the Project tab in the Options dialog box.

Use this tab to define when and how definitions are added to the project and how the project appears in the project workspace.

When definition is opened	Automatically inserts any definition that you open into the current project.
When definition is modified and saved, or deleted	Automatically inserts any definition that you save into the current project.
Manually	Does not automatically insert any definition into the current project. This is the default option. Use the Insert menu to insert a definition into the project.
Do not insert related definitions with current definition	Does not prompt you to include related definitions. Only the specified definition is inserted, not related definitions.
Prompt user to pick related definitions to insert	When using Insert, Current Definition into Project, a dialog box appears, prompting you to pick which related definitions to insert.
Reload last project at startup	When starting PeopleSoft Application Designer, the project that was last opened in the previous session opens automatically.
Show definitions in project	Displays a black mark next to icons for definitions that are explicitly in a project (Development view) to indicate that they are in the project. Attribute definitions, which are not explicitly part of the project, are not marked.
Prompt for properties when definition is saved	Prompts you with a definition properties dialog box before you can save the definition.

Validating Projects

PeopleSoft Application Designer includes a validate utility to make sure that all definitions included in the project actually exist in your database. An important part of the PeopleSoft upgrade process involves validating your upgrade project.



Setting Validate Project Integrity

To validate a project:

1. Close all active component definitions in the definition workspace.
Otherwise, the validation occurs on the component, rather than the project.
2. Select Tools, Options.
3. Select the Validate tab in the Options dialog box.
4. Select **Validate project integrity**.
5. Click **OK**.
6. Select Tools, Validate Project.

The validate utility runs a series of tests on the project or components and sends its results to the Validate tab in the output window. If errors are found, they are listed on this tab.

CHAPTER 3

Creating Field Definitions

This chapter provides an overview of field definitions and discusses how to:

- Create new field definitions.
- Use multiple labels.
- Open an existing field definition.
- View field properties.
- Change field definitions.
- Set custom field formats.
- Use the Translate Table.
- Configure international format settings.

Understanding Field Definitions

Fields are the basic building blocks in your PeopleSoft system—in database terms, they represent columns in a table or view. Field definitions are standalone development definitions, defined in PeopleSoft Application Designer, and can be shared across multiple record definitions. Changes to field properties affect all records that include that field.

Each field definition includes attributes, such as data type, field name, long name, short name, field length, and various formatting values.

Fields in Record Definitions

By grouping fields that share a common theme, you build a record definition. For example, a department table (record) might include a Department ID field, Department Name field, Location field, and so on.

For each field definition that you add to a record, you define additional characteristics, called record field properties, that are specific to the way the field is used in that particular record. Record field properties are *not* shared with other records in which the field is used.

Creating New Field Definitions

This section assumes that you are already familiar with the general terminology and functions of PeopleSoft Application Designer.

This section discusses how to:

1. Create a new field definition.
2. Specify attributes for a new field definition.

Creating a New Field Definition

To create a new field definition:

1. Click the **New** button on the PeopleSoft Application Designer toolbar.

The New dialog box appears.

2. Select **Field**.
3. Click **OK**.

A new character field opens in the workspace area.

4. Select one of the following field types from the Field Type drop-down list box.

Character (Char)	Alphanumeric field of fixed length.
Long Character (Long)	Alphanumeric field of variable length used for textual entries, such as comments or descriptions.
Number (Nbr)	Positive numeric field of fixed length for which decimals are allowed.
Signed Number (Sign)	Positive or negative numeric field of fixed length for which decimals are allowed.
Date (Date)	Date field of constant length. The system edits dates and prohibits incorrect ones, such as day 42 or month 20. Date fields always store a four-digit year.
Time (Time)	Time field of a constant length. Built-in edits prohibit impossible times, such as hour 26, minute 70, or second 94.
DateTime (DtTm)	Date and time field of constant length. Built-in edits prohibit impossible dates and times, as defined in the individual Date and Time fields. DateTime fields always store a four-digit year.
Image (Img)	Image field to store images in a user-defined format, such as JPEG or GIF.

- ImageReference (Iref)** Use this to change an image dynamically at runtime using PeopleCode.
- Attachment (Att)** Maps to a BLOB database type to hold the contents of a file attachment. However, PeopleSoft recommends using the existing field, FILE_DATA, if a BLOB column is needed. For attachments use the subrecord ATTACH_DETAIL, which contains FILE_DATA.

After you make a choice, the definition workspace displays a field definition window in which you specify attributes to complete your new field definition.

Specifying Attributes for a New Field Definition

Access the field definition window for the new field definition.

	Label ID	Long Name	Short Name	Def
1				<input type="checkbox"/>

Field definition window for a new field

The following property settings are shared by all field types.

Note. Multiple views of this dialog box are available, depending on which field type you select. We document fields that are common to all views first.

- Label ID** Enter a unique identifier for the field that is less than 18 characters, without spaces, and UPPERCASE. Make this

the default label by selecting the Def check box in the last column; otherwise, the first label is the default. You can set only one field label as the default.

Note. You can specify multiple labels for one field and call them at runtime. See Using Multiple Labels.

Long Name

Enter up to 30 characters. The name you enter here appears as the RFT (record field table) Long option for a page field.

Short Name

Enter up to 15 characters as an alternate name to use on pages and reports if you have insufficient space to display the long name. If you leave this field blank, the system automatically copies the first 15 characters of the long name into this field. The name you enter here appears as the RFT (record field table) Short option for a page field.

Note. If you name the field the same as the default label ID, you can identify it more easily when using PeopleCode.

Def (default)

Def stands for default field. When you enter the first label ID, the system automatically selects the Def check box. The system uses this default field if you have multiple labels. You can have only one default field.

Not Used

This check box is always read-only in the field definition properties dialog box. You can change its value using PeopleCode, causing the field to be:

- Skipped as part of the unique index.
- Exposed to PeopleCode for read and write operations.
- Ignored in Query.
- Ignored in nVision.

ChartField

Read-only in the field definition properties dialog box. It is used for character fields and used by financial applications to specify a usage pattern. You can change its value using PeopleCode.

See <Link to PeopleCode doc that describes how to do this>.

Character Field Type

Character fields are used for names, codes, and anything with letter values. You also use them for numbers for which you want to contain formatting attributes and the data itself. Examples of such fields are those in which you enter telephone numbers and ZIP or postal codes. You cannot use Character fields in calculations. You can enter decimal numbers in Character fields, but you cannot use them mathematically until you convert them back to numeric fields.

You can specify Character field attributes at design time, and you can access most of them at runtime with PeopleCode.

Field Length Enter a whole number between 1 and 254 for the length of the field.

Format Type Select one of the following:

Uppercase: Converts the field value to uppercase and signifies that no other formatting options apply to this field. Use this option for code values, such as department ID, for which it doesn't matter whether the user enters the value in uppercase or lowercase. This is the default format.

Mixedcase: Stores uppercase and lowercase characters as entered. Use this option for fields that contain textual data, such as a department or company division name. For example, *Accounting – Receivables* is more readable than *ACCOUNTING – RECEIVABLES*.

Numbers Only: Forces entries to be numeric. This is useful for enforcing numeric values without redefining the field as a Number field. This option automatically populates fields with leading zeros. For example, if the user enters *1* in a three-digit field, the system changes this to *001*.

SSN: Formats the entry in U.S. Social Security Number format (999-99-9999). Define the field length as 9, even though the display length is 11. The system automatically adds dashes when formatting the field for display, but the number is stored in the database without the dashes.

SIN: Formats the entry in Canadian Social Insurance Number format (999-999-999) and performs the standard check-digit verification for SIN. Define the field length as 9, even though the display length is 11. The system automatically adds dashes when formatting the field for display, but the number is stored in the database without the dashes.

Raw Binary: Allows Character fields containing embedded NULLs, such as encrypted values.

Name: Requires that the field entry be in the PeopleSoft standard name format:

[lastname] [suffix],[prefix] [firstname] [middle name/initial]

The entry can contain alphabetic characters, spaces, periods, hyphens, and apostrophes. Uppercase and lowercase characters are preserved as entered—in other words, mixed case formatting is included automatically.

Valid entries might include:

- O'Brien,Michael
- Jones IV,James
- Phillips MD,Deanna Lynn
- Reynolds Jr.,Dr. John Q.
- Phipps-Scott,Adrienne
- Knauft,Günter

Note. If the name contains Japanese characters, the first and last names must be separated by a space instead of a comma. The Japanese name format can contain hankaku katakana, Zenchiku katakana, hiragana, kanji, and romaji characters. It can also include spaces, periods, and hyphens.

Postal Code North America: Formats the entry to U.S. ZIP code format or Canadian postal code format. The following table shows the valid entry formats and how they're stored in the database. Canadian postal codes are edited to ensure that alpha and numeric characters are entered in the correct positions.

The following entry formats apply (stored formats appear in parentheses following the entry format):

- 99999 (99999)
- 99999-9999 (99999-9999)
- 999999999 (99999-9999)
- A9A9A9 (A9A 9A9)
- A9A 9A9 (A9A 9A9)

Postal Code International: Allows the entry of international postal codes. The field length must be at least 7 digits. If 9 digits are entered, the system assumes that the value is a U.S. ZIP code; if the entry is in A9A9A9 format, the system assumes it's a Canadian postal code. Then, the value is formatted accordingly. For all other entries, no formatting is applied.

Phone Num North America (phone number North America): Formats the entry in North American telephone number format.

The following entry formats apply (stored formats appear in parentheses following the entry format):

- 9999999 (999-9999)
- 999-9999 (999-9999)

- 9999999999 (999/999-9999)
- 999/999-9999 (999/999-9999)

Phone Number International: Allows the entry of international telephone numbers. If you enter 7 or 10 digits (and no other characters), the system assumes it's a North American phone number and formats it accordingly. For all other entries, no formatting is applied.

Custom: If you select this value, the **Family Name** and **Display Name** fields become available for entry. These selections enable you to apply additional formatting attributes that affect how the field appears on a page.

Long Character Field Type

Depending on your database environment, the maximum length of a Long Character field ranges from several thousand characters to 64,000 characters. Using a Long Character field instead of a regular Character field enables the user to insert a tab at runtime by typing CTRL+TAB.

Field Type:

Maximum Length: Raw Binary

Field Labels

Label ID	Long Name	Short Name	Def
1			<input checked="" type="checkbox"/>

Long Character field type

Maximum Length

To control the length of a Long Character field, enter the maximum number of bytes that you want the system to write to this field. If you don't specify a maximum length, you can enter an unlimited number of characters, depending on the capacity of your database system. For Oracle databases, if the maximum length of a long field is less than 2000, the field can be stored more efficiently as a VARCHAR2000.

Raw Binary

Converts a Number field value to a full-length 16- or 32-bit integer.

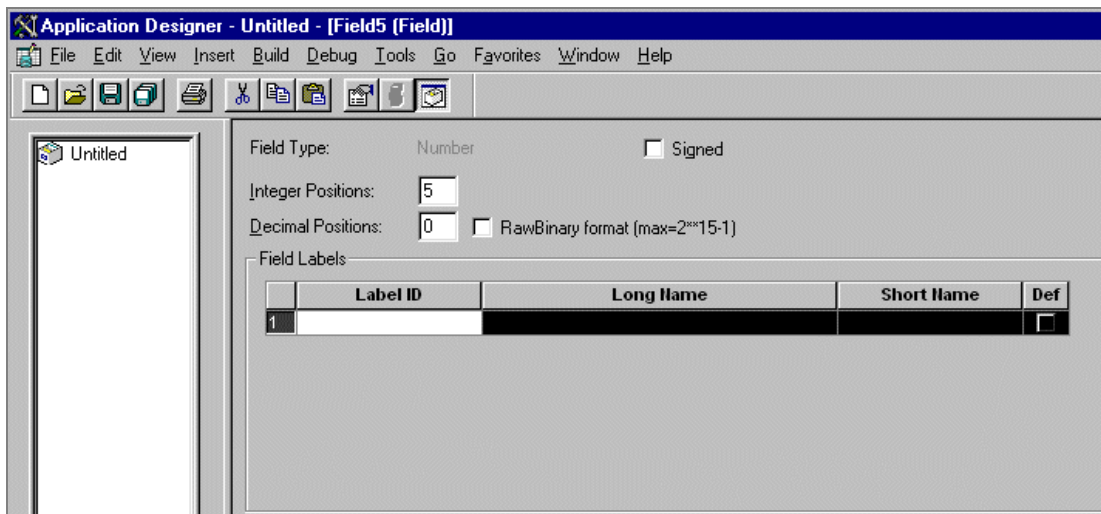
Number Field Type

When you create a new field, you might notice that there are two field types for numbers:

- Number fields.
- Signed Number fields.

Both field types are fixed in field length and allow the entry of positive numbers. Only signed numbers, however, allow the entry of negative numbers. Otherwise, both Number field types are the same.

Unlike Character fields, a Number field can contain decimals but does not contain special formatting, such as the formatting for telephone numbers. Use Number fields for calculations. If you use Number fields for codes, you sacrifice flexibility to change your coding structure to alphanumeric in the future.



Number Field type

Integer Positions

Specify the number of integer positions to the left of the decimal. If the number contains only decimal positions, leave this field blank.

Decimal Positions

Specify the number of decimal positions to the right of the decimal. If a number contains only integer positions, leave this field blank. In calculations, the system rounds up the result to the number of decimal positions defined here.

Note. Number fields cannot exceed 31 positions. Therefore, the sum of integer and decimal positions cannot exceed 31.

Note. The field length notation differs between PeopleSoft Application Designer and SQL. If you specify a field length of 8 integer positions and 3 decimal

positions in PeopleSoft Application Designer, SQL processes that as a length notation of 11.3.

SQL describes field length in terms of *precision* and *scale*. Precision is the total number of integer and decimal positions. Scale is the number of decimal positions. Thus, 11.3 means 8 integer positions and 3 decimal positions; 11.0 means 11 integer positions and 0 decimal positions.

When you set Decimal Positions to 0 and Integer Positions to 5 or 10, the **RawBinary** format option appears. The RawBinary format converts a Number field value to a full-length 16- or 32-bit integer.

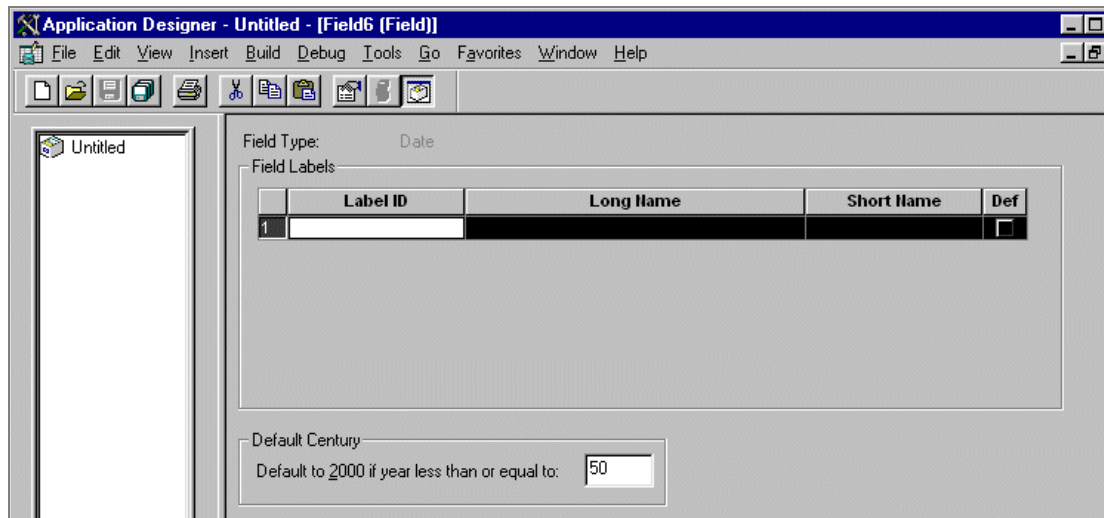
Signed

Select this check box for a field that is used for arithmetic calculations that might contain a negative value.

<i>Integer Position</i>	<i>Maximum Value</i>	<i>Number Stored As</i>
5	65535	16-bit integer
10	4294967295	32-bit integer

Date Field Type

Date fields contain calendar dates. A Date field has a field length of 10 and is maintained by the system. The default format of a date field is defined by the database and can be overridden by your browser settings.



Date field type

Default to 2000 if year less than or equal to

Specify the last two digits of a year, which is typically what users enter in a Date field. If you enter *50*, the default century becomes 2000 when someone enters *0* through *50* as the year in a Date field. If someone enters a number between *51* and *99* in a Date field, the default century becomes 1900. The default for this field is *50*.

Understanding Effective Dates

Effective dates enable you to keep historical, current, and future information in tables. You can use the information to review the past and plan for the future. There are three types of effective dates:

Future	Data rows that have effective dates that are after the system date, which is usually today's date.
Current	Data row with the most recent effective date that is closest to today's (system) date, but not a future date. Only one row is the current row.
History	Data rows that have effective dates before the current data row.

The EFFDT (effective date) field has special properties related to the processing of effective dates on rows and should be used only when needed.

Unlike regular Date fields, which you can use anywhere in the system, use EFFDT only on record definitions for which you want to maintain data history—future, current, and past—to store rows of data in sequence. This enables you to store multiple occurrences of data based on when it goes into effect.

For effective-dated rows, you can have multiple occurrences of future and history, but only one current row of data.

EFFDT is almost always a key and almost never a list item. Activate the Descending Key attribute so that the row with the most recent effective date appears first on pages. You might enter %DATE (current system date) as the default constant for this field.

Note. As an alternative, you can use %CLIENTDATE as the default constant for the Date field. %CLIENTDATE adjusts the date as appropriate to the time zone of the browser.

To enable you to track an accurate history of your effective-dated information, the system invokes special logic when you access a record definition that contains EFFDT. The action that you select dictates whether you can access the row type and what you can do with each type of row.

Action Type	View	Change	Insert New Rows
Update/Display	Current, Future	Future only	Effective Date Greater Than the Current Row
Update/Display All	History, Current, Future	Future only	Effective Date Greater Than the Current Row
Correction	History, Current, Future	All Existing Rows	Add New Rows with No Effective Date Restrictions

Note. For records that do not contain EFFDT, all actions (Update/Display, Update/Display All, and Correction) operate the same way—they retrieve all existing rows for the specified keys.

When you're running a page with effective-dated records and you insert a row, the system copies the contents of the prior row into the new row to save you keying time. On a large effective-dated table, you don't want to re-enter all of the data when only a single field changes. Also, anytime you insert an effective-dated row using PeopleCode, the same copying of the prior row's contents takes place.

Effective Status:

In prompt tables, EFF_STATUS (Effective Date Status) usually accompanies EFFDT. When used with EFFDT, it's part of the mechanism that enables the system to select the appropriate effective-dated rows.

You can also use EFF_STATUS by itself as a simple status field, but don't change the translate values. They must be *A* (active) and *I* (inactive) for EFFDT to work properly. If you need a status field with different values, use or define a different field.

Effective Sequence:

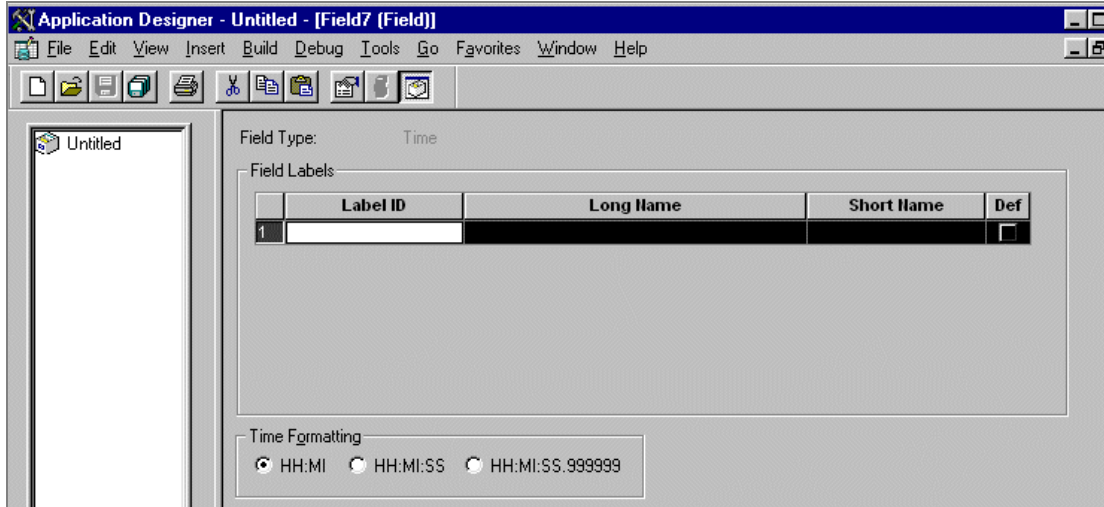
The EFFSEQ (Effective Sequence) field serves different purposes, depending on whether it's paired with EFFDT. If EFFSEQ isn't paired with EFFDT, EFFSEQ has no special function and can be used as a simple sequencing field wherever you need one.

If EFFSEQ is paired with EFFDT, it enables you to enter more than one row with the same effective date. You assign a unique sequence number to each row that has the same effective date. Do not make EFFSEQ a required field—*unrequired* allows the first EFFSEQ to be zero. Select Display Zero in the page definition to have zeros appear on the page.

For example, suppose that you want to enter both a transfer and a pay rate change for an employee, and both actions are effective on the same day. Enter the transfer on the Job Data pages as usual, and leave the Effective Sequence Number field as *0* (zero). Then, insert a row to enter the change in pay rate. This time, the effective date is identical to the previous row, but enter *1* in the Effective Sequence Number field.

Time Field Type

Time fields are fixed-length fields (15 positions, format of HH:MI:SS.999999) that contain the time of day. The maximum time precision varies, depending on your database.



Time field type

Time Formatting

Specify the formatting for this field. HH represents hours, MI represents minutes, SS represents seconds, and 999999 represents microseconds.

Note. You can use %CLIENTDATE as the default constant for the Time field. %CLIENTDATE adjusts the date as appropriate to the time zone of the browser.

DateTime Field Type

The DateTime field is a fixed length field (26 positions, format of YYYY-MM-DD-HH-MI-SS.999999) that holds dates and times. The maximum date and time precision depends on your database.

The screenshot shows the 'Field1 (Field)' dialog box with the following configuration:

- Field Type: Datetime
- Field Labels table:

	Label ID	Long Name	Short Name	Def
1				<input type="checkbox"/>
- Default Century: Default to 2000 if year less than or equal to: 50
- Time Formatting:
 - HH:MI
 - HH:MI:SS
 - HH:MI:SS.999999

Date/Time field type

Note. You can use %CLIENTDATE as the default constant for the Date/Time field. %CLIENTDATE adjusts the date as appropriate to the time zone of the browser.

Image Field Type

Use Image fields to store application data that takes the form of images. Image fields are functionally no different from any other type of field. Just as end-users employ Character fields to store names and addresses, they can employ Image fields to keep track of all types of digital pictures. This field enables you to store pictures of assets, company logos (in SQL tables), or scanned images of employees (as part of their personal data rows).

The screenshot shows the 'Field1 (Field)' dialog box with the following configuration:

- Field Type: Image
- Maximum Length: 0 K bytes
- Image Format: DIB - Bitmaps
- Field Labels table:

	Label ID	Long Name	Short Name	Def
1				<input type="checkbox"/>

Image field type

Maximum Length

Specify the maximum number of bytes available to store an image. If you don't specify a maximum length, the maximum length is determined by your database platform. If a user attempts to cut and paste an image that is larger than the maximum length or database capacity, an error message appears.

The following databases apply (maximum length appears in parentheses following the database):

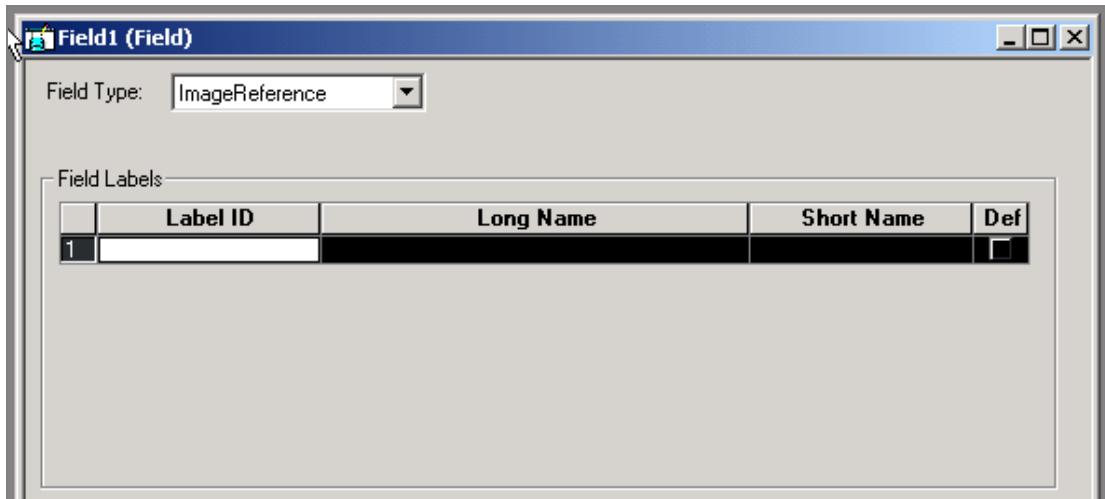
- DB2 (32 Kilobytes)
- Oracle (2 Gigabytes)
- Sybase (2 Gigabytes)
- SQL Base (4 Gigabytes)
- SQL Server (2 Gigabytes)
- Informix (2 Gigabytes)
- DB2/UNIX (31 Kilobytes)
- DB2/400 (30 Kilobytes)

Format

Select an image format. Format determines the type of image that you can select and write to the database for this field. PeopleSoft supports BMP, DIB, GIF, CUT, EPS, JPG, PCX, PCT, RLE, and TGA image types. At runtime, the user can upload BMP, DIB, GIF, and JPG images to the database.

ImageReference Field Type

Use the ImageReference field to store static images that can be changed at runtime with PeopleCode. By associating image definitions with an ImageReference field on a page, you can display images dynamically. For example, to have different images display on an employee profile depending on the status of the employee's current review, use the ImageReference field to reference the "current review" field and display the appropriate image.



ImageReference field type

Using Multiple Labels

You can define additional label pairs and an identifier for any field. Multiple fields are useful when you want different labels displayed on different pages. For example, on one page you can set the label to “Begin Date,” while on another page the label might be “Begin Dte.”

Multiple labels are displayed in alphabetical order and sorted by label ID. You can sort the labels in a field by double-clicking the column header. The sorting is not saved, but it is helpful for quickly viewing the labels.

This section discusses how to:

- Add a new label.
- Delete a label.
- Select record field labels.

Adding a New Label

Open the field definition in the definition workspace.

Field Type:

Field Labels

	Label ID	Long Name	Short Name	Def
1	BEGIN_DT	Begin Date	Begin Date	<input checked="" type="checkbox"/>
2	BEGIN_DT2	Begin Date 2	Begin Date 2	<input type="checkbox"/>
3	BEGIN_DT3	Begin Date 3	Begin Date 3	<input type="checkbox"/>
4				<input type="checkbox"/>

Default Century

Default to 2000 if year less than or equal to:

Not Used
 Chart Field

Multiple label IDs, long names, and short names

To add a new label, enter the label ID, long name, and short name in the last row. Each label can have related language labels. After the multiple labels are defined, you can select appropriate labels when designing a record or page. You can also specify different labels in PeopleCode. To add a line feed for Long Name and Short Name, enter `\n` (back slash and a letter *n*). For example, *work \n month* adds a line feed between the words *work* and *month*.

When you create a new label, the default label is still the first label ID. You can change the default label by selecting **Def** for a different row. There can be only one default label.

Note. The label ID must be unique so that each field definition label can be identified separately, and it must be entered in UPPERCASE with no spaces.

Deleting a Label

Open the field definition in the definition workspace.

To delete a label, right-click a field label row and select *Delete Label* from the pop-up menu. Labels that are currently in use cannot be deleted. To determine where the label is used, select the label and select *Find Definition Reference* from the pop-up menu. The results appear in the Find Definition Reference output window.

Selecting Record Field Labels

Access the Record Field Properties dialog box.

The screenshot shows the 'Record Field Properties' dialog box with the 'Use' tab selected. The 'Field Name' is 'QE_BEGIN_DT'. The 'Keys' section has 'Key' and 'Descending Key' checked. The 'Record Field label ID' dropdown is set to '*** Use Default Label ***'. The 'Default Value' section shows 'Constant: %date'. The 'Default Page Control' is set to 'System Default'. The 'Audit' section has 'Field Add', 'Field Change', and 'Field Delete' unchecked. The 'System Maintained' and 'Auto-Update' checkboxes are also unchecked. The 'OK' and 'Cancel' buttons are at the bottom right.

Record Field label ID drop-down list box

For the record definition, a Record Field Label ID drop-down list box is available on the Use tab of the Record Field Properties dialog box. The drop-down list box displays the label ID, short name, and long name that you set in the field definition. **** Use Default Label **** is the default selection. The record field label changes automatically whenever you change the default label in the field definition.

Opening an Existing Field Definition

There are several ways to open a field definition.

- Select File, Open from the menu.

From this dialog box, you can view all available fields in the database. You can open all fields of a certain type or from a specific project, or you can open a specific field or set of fields.

- Clone an existing definition.

To create a field definition with attributes similar to an existing one:

- Open an existing field definition.
- Select File, Save As.
- Enter a new name.

- Open the field from the project workspace.

Double-clicking a field from the project workspace opens a field definition window in the definition workspace.

- Open the field from the record.

Open an existing record definition. When the record definition window opens, you can:

- Select a field.
- Right-click.
- Select *View Definition*.

Viewing Field Properties

There are several ways to view field properties.

- While in the field definition workspace, click the Properties button.
- Select File, Definition Properties.
- While in a record definition:
 - Select the field.
 - Right-click the field name.
 - Select *View Field Properties* from the pop-up menu.

The Field Properties dialog box, General tab provides a place for you to enter comments documenting the purpose of the field definition. The **Owner ID** drop-down list box enables

you to select a valid owner, as in application project or role. The **Last Updated** group box contains information—date, time, and user ID—about the last time the field definition was modified.

The International Format Settings and Translate Values tabs are available only for character fields, however, the International Format Settings are not in use for PeopleTools 8.4.

See Also

Using the Translate Table

Changing Field Definitions

This section provides an overview of the effects of changing field definitions and discusses how to:

- Change field types.
- Rename field definitions.
- Delete field definitions.

Understanding the Effects of Changing Field Definitions

When you develop new record definitions or modify existing ones, you might need to change characteristics or attributes for a field. If you change attributes in a field definition, the change affects every occurrence of the field in every record definition. So, before you change basic attributes in a field definition, consider how it affects all of the record definitions in which the field occurs. If the change isn't appropriate for every occurrence of this field, consider defining a new field instead.

If you still find that a change is needed, PeopleSoft recommends that you determine the extent of the change by finding out how many records are affected. Do this using the Find Definition References tool. Open the field definition and select Edit, Find Definition References, or right-click and select the option from the pop-up menu. If you're in a record definition window, another method is to select the field, right-click the field name, and select *Find Definition References-Field* from the pop-up menu.

The Find Definition References tab in the Output window displays a list of all record definitions, page definitions, messages, channels, file layouts, and PeopleCode programs in which the field is used. Double-click a line of output to open the corresponding definition in the definition workspace.

Note. Changing the name or length in a field definition requires modification of the underlying SQL table. Do this either by running Build and specifying Create Tables or Alter Tables, or by carrying out an action issued by your system administrator. For example, if you change the length in a field definition and 30 record definitions contain the same field name, you have 30 records that must be created or altered.

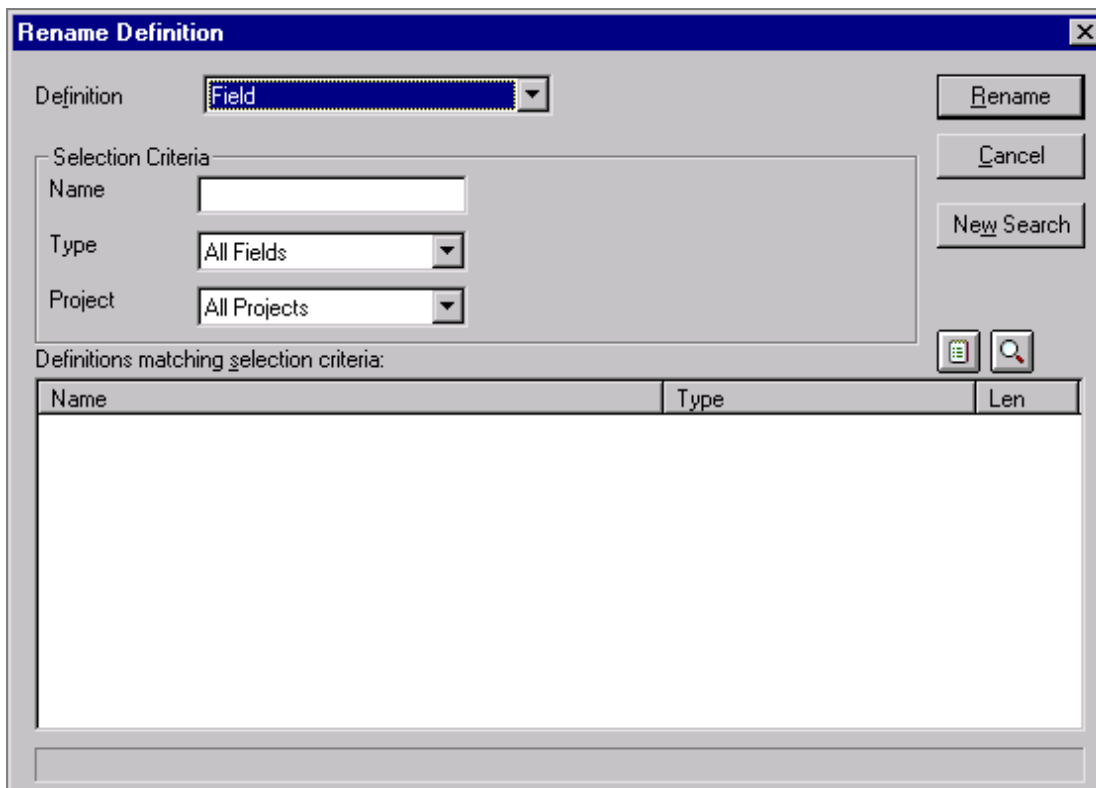
Changing Field Types

Change a field type by opening a field and selecting another field type from the drop-down list box. However, this feature is intended as a design-time change—that is, before your tables have been created in the database. While some field type conversion can be done, results vary, depending on your database platform.

Renaming Field Definitions

There are two ways to rename a field definition:

- Using the Rename Definition dialog box.
- Using the Open Definition dialog box.



Rename Definition dialog box

Using the Rename Definition Dialog Box

To rename a field definition from the Rename Definition dialog box:

1. Select File, Rename to open the Rename Definition dialog box.
2. Select *Field* as the definition type.

3. Enter the name of the field.

If you aren't sure of the name or the correct spelling, use the search criteria fields to locate the field to rename. The list displays field names that match your search criteria.

4. To rename a field in the list, select the field and click **Rename**, or double-click the field.

The field name becomes available for entry, and you can type the new name.

5. When you finish typing the new name, press ENTER or click the **Rename** button.

The Rename Field dialog box appears. Select the records in which you want the field to be renamed. The **De-select All** button toggles to **Select All**.

6. Click **OK**.

Using the Open Definition Dialog Box

To rename a field definition from the Open Definition dialog box:
--

1. To display the Open Definition dialog box, select File, Open.

This dialog box enables you to set up search criteria for locating field names.

2. Select Field as the definition type.

If you have additional information, use the **Name** field. You can further narrow your search criteria by selecting a field type or the name of the project that contains the field to delete.

3. Click the **Open** button or press ENTER when you have completed your search criteria.

4. You can rename a field in the Open Definition dialog box by selecting the field, right-clicking the field name, and selecting *Rename*.

You can also select the field name and click it a second time. The field name becomes available for entry and you can enter a new name.

5. When you finish typing the new name, press ENTER or click the **Rename** button.

Results of Renaming Field Definitions

When you rename a field, the system automatically renames all references to it, including data on tables with columns named FIELDNAME where the data matches the field being renamed.

The only references that are *not* renamed are the text portion of SQL functions, such as SQLExec and Scroll Select. If you have already used SQL Create to create the underlying tables for the record definitions that contain the field that you renamed, you must re-create or alter those tables. If the tables contain data that you want to preserve, use the SQL Alter function to rename the database table fields.

Deleting Field Definitions

This section discusses two ways to delete a field definition:

- Using the Delete Definition dialog box.
- Using the Open Definition dialog box.

Using the Delete Definition Dialog Box

To delete field definitions from the Delete Definition dialog box:

1. Select File, Delete to open the Delete Definition dialog box.
In the Delete Definition dialog box, set up search criteria for locating field names.
2. Select *Field* as the definition type.
3. If you have additional information, use the **Name** field.
4. Select a field type or the name of the project that contains the field that you want to delete.
This further narrows your search criteria.
5. When your search results appear in the output window, delete the field definition by selecting the field and clicking the **Delete** button or double-clicking the field name.

Note. You cannot delete a field that is currently used in any records. Before you delete a field definition, you must first remove it from records in which it appears.

Using the Open Definition Dialog Box

To delete field definitions from the Open Definition dialog box:

1. Select File, Open to display the Open Definition dialog box.
This dialog box enables you to set up search criteria for locating field names.
2. Select *Field* as the definition type.
3. Enter the **Name** field if you have additional information.
4. You can further narrow your search criteria by selecting a field type or the name of the project that contains the field that you want to delete.
5. When you have completed your search criteria, click **Open** or press ENTER.
6. Right-click the field that you want to delete from the list of field names displayed.
7. Select *Delete* from the pop-up menu.

Printing Field Definitions

If you plan to make changes to your field definitions, PeopleSoft recommends viewing your field definition before you proceed. You can view it on your screen or print it to a one-page report that combines information from several resources. This can also serve as a paper audit trail to document your database.

To print a field definition, select File, Print from the field definition window (or click the Print button in the toolbar) to open the Print dialog box, where you specify printing options. You can also print field definitions from the Open Definition dialog box. On the list resulting from your search, right-click the name of the field definition that you want to print, and select *Print* from the pop-up menu to view your printing options.

Setting Custom Field Formats

PeopleTools has formatting provisions at both the field and page levels. The field format specifications affect internal values that are stored in the database, and the page formats affect the visual presentation of values.

There are several formatting options for U.S. Social Security Numbers, Canadian Social Insurance Numbers, postal codes, telephone numbers, and various currencies, dates, and times. Custom field formats extend these formatting provisions to support the same types of data in other countries. They also support other types of formatted information, such as bank codes, credit card numbers, part numbers, or serial numbers.

This section provides an overview of format notation and discusses how to:

- Change format families.
- Edit formats.
- Use family options.
- Test formats.

Understanding Format Notation

Stored and display formats are defined by strings that contain *lexical*, *literal*, and *meta characters*.

- Lexical characters delimit character expressions and designate interpretation rules.
- Literal characters represent only themselves.
- Meta characters represent a class of characters.

Use the format symbols in the following tables to create the format notation for your own custom field formats.

Meta Symbol	Description
#	<p>Digit placeholder.</p> <p>If the number has more digits to the right of the decimal point than there are # symbols to the right in the format, the system <i>truncates</i> the number to as many decimal places as there are # symbols to the right.</p> <p>If the number has more digits to the left of the decimal point than there are # symbols to the left in the format, the system displays the extra digits.</p> <p>If the number has fewer digits to the right of the decimal point than there are # symbols to the right of the decimal point in the format, the system adds spaces.</p> <p>If the number has fewer digits to the left of the decimal point than # symbols to the left of the decimal point in the format, the system also adds spaces.</p> <p>Example format: ###.##</p> <ul style="list-style-type: none"> • Input: 1234.567 - Matches? Yes - Output: 1234.56
0 (Zero)	<p>Digit placeholder.</p> <p>Follows the same rules as for #, except that if the number has fewer digits than there are 0s in the format, the system displays the extra 0s.</p> <p>Example format: 000.00</p> <ul style="list-style-type: none"> • Input: 1.2345 - Matches? Yes - Output: 001.23
Period	<p>Decimal point.</p> <p>This symbol determines how many digits (0 or #) display to the right and left of the decimal point.</p> <p>If the format contains only # symbols to the left of this symbol, numbers less than one appear with a decimal point.</p> <p>This symbol has meaning only in conjunction with the # and 0 symbols.</p> <p>Example format: ###.##</p> <ul style="list-style-type: none"> • Input: .12345 - Matches? Yes - Output: .12
9	<p>Required numeric placeholder.</p> <p>If the number does not have the same number of digits as there are 9s, the system displays an error message.</p> <p>Example format: 999</p> <p>Input: 123 - Matches? Yes - Output: 123</p> <ul style="list-style-type: none"> • Input: 12 - Matches? No

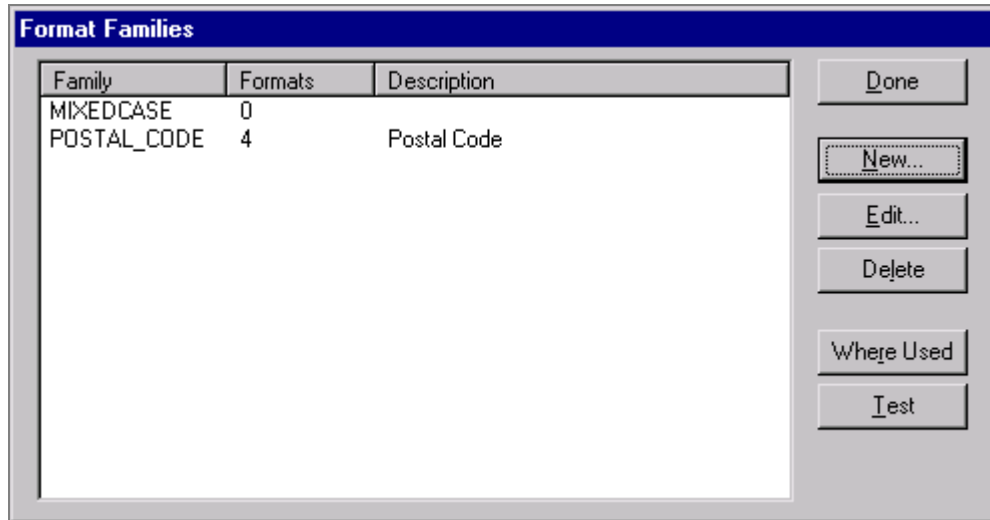
Meta Symbol	Description
A	Matches any alphabetic character <i>A–Z</i> or <i>a–z</i> . Example format: AA Input: <i>Sd</i> - Matches? Yes - Output: <i>Sd</i> Input: <i>4A</i> - Matches? No
Z	Matches any alphabetic or numeric value <i>A–Z</i> , <i>a–z</i> , or <i>0–9</i> . Example format: ZZ Input: <i>3g</i> - Matches? Yes - Output: <i>3g</i> Input: <i>A3C</i> - Matches? No
@	Matches any character. Example format: @@@ Input: <i>1q?</i> - Matches? Yes - Output: <i>1q?</i>

Lexical Symbol	Description
*	Matches zero or more occurrences of the preceding character expression. Example format: a*b Input: <i>b</i> - Matches? Yes - Output: <i>b</i> Input: <i>ab</i> - Matches? Yes - Output: <i>ab</i> Input: <i>aab</i> - Matches? Yes - Output: <i>aab</i>
+	Matches occurrences of the preceding character expression. Example format: a+b Input: <i>b</i> - Matches? No Input: <i>ab</i> - Matches? Yes - Output: <i>ab</i> Input: <i>aab</i> - Matches? Yes - Output: <i>aab</i>
[]	Denotes a character expression that matches the input character if the input character is the same as any character in the list enclosed by the [] pair. If the expression matches, the input character appears. The system interprets all characters enclosed in [] braces as literal characters. Example format: [ab]c Input: <i>ac</i> - Matches? Yes - Output: <i>ac</i> Input: <i>bc</i> - Matches? Yes - Output: <i>bc</i>

Lexical Symbol	Description
{ }	<p>Denotes a character expression that matches the input character if the input character matches any character in the list enclosed by the { } pair.</p> <p>If the expression matches, the first character in the list (not the input character) is copied to output. All characters enclosed in { } braces are interpreted as literal characters.</p> <p>Example format: {ab}c</p> <p>Input: <i>ac</i> - Matches? Yes - Output: <i>ac</i></p> <p>Input: <i>bc</i> - Matches? Yes - Output: <i>ac</i></p>
?	<p>Preceding expression is optional. The preceding expression is copied to output only if it appeared in input.</p> <p>Example format: a?b</p> <p>Input: <i>ab</i> - Matches? Yes - Output: <i>ab</i></p> <p>Input: <i>b</i> - Matches? Yes - Output: <i>b</i></p>
!	<p>Preceding expression is optional. Whether or not the preceding expression is matched, it is copied to output.</p> <p>Example format: a!b</p> <p>Input: <i>ab</i> - Matches? Yes - Output: <i>ab</i></p> <p>Input: <i>b</i> - Matches? Yes - Output: <i>ab</i></p>
~	<p>Preceding expression is optional. Even if the preceding expression is matched, it is not copied to output.</p> <p>Example format: a~b</p> <p>Input: <i>ab</i> - Matches? Yes - Output: <i>b</i></p> <p>Input: <i>b</i> - Matches? Yes - Output: <i>b</i></p>
\	<p>Treat the following character as a literal.</p> <p>Example format: a\b</p> <p>Input: <i>ab</i> - Matches? No</p> <p>Input: <i>a?b</i> - Matches? Yes - Output: <i>a?b</i></p>
()	<p>Groups expressions.</p> <p>Example format: (abc)!99</p> <p>Input: <i>abc12</i> - Matches? Yes - Output: <i>abc12</i></p> <p>Input: <i>12</i> - Matches? Yes - Output: <i>abc12</i></p>

Changing Format Families

Custom field formats enable you to create your own format definitions using format notation and apply them to fields. These formats are organized into format families, which can include one or more unique formats.



Format Families dialog box

To change format families:

1. Select Tools, Miscellaneous Definitions, Field Formats.

The Format Families dialog box lists the defined format families and enables you to edit, delete, or create new families. You can also determine where each family is used in your applications and perform tests.

2. To define a new format family, click the **New** button.

The New Family dialog box appears.

3. Enter a name for your new format family and click **OK**.

The Formats dialog box appears.

4. In the **Stored** group box, enter a name for the stored format.

5. Enter the format notation that you want to use for storing the data in the **Format** field.

Because a stored format cannot exist alone, a display format is always required. If you are adding to a family that has existing stored formats, a display name and format pair is optional. PeopleSoft Application Designer automatically places all of the current display formats in the new stored format. The display format default is the stored format for you to redefine later.

6. In the **Display** group box, enter a name for the format.

7. Enter the format notation that you want to use for displaying the data in the **Format** field.
8. Click the **Add** button to add the new format family, and click **OK** when you are finished.

Max Display Length

Max Display Length enables you to override the default length that PeopleSoft Application Designer uses to determine the length of the edit field in custom format. This is useful when the displayed data is longer than the defined field length. For example, you might stored data as 999 (field length in the database is 3 characters), but the display format of the data is 9-9-9 (5 characters).

PeopleSoft Application Designer uses the field length of 3, by default, for the edit field, which is not long enough to hold the 5 characters of the reformatted data. By entering five in the Max Display Len field, the page uses 5 characters for the edit field without requiring the field length in the database to be 5 characters long.

Editing Formats

The Edit Formats dialog box presents a tree control where you define the stored and display formats for a family and all options and attributes. This dialog box enables you to:

- Add, update, and delete stored and display formats.
- Enter a description for the family.
- Specify options, such as uppercase and smart punctuation, for the family.

Changes are saved when you click **OK**.

Formats dialog box

This section discusses how to:

- Add a new stored format.
- Add a new display format to a stored format.
- Update a display format.
- Delete stored formats.

Adding a New Stored Format

To add a new stored format:

1. Open the format family to which you want to add a format.
2. Select the format family name.
3. Enter the stored and display names and format notation.
4. Click **Add**.

The new format appears in the tree below the existing formats.

Adding a New Display Format to a Stored Format

To add a new display format to a stored format:

1. In the tree, select the stored format name to which you want to add a display format.
2. In the **Display** group box, enter a new name and format notation.
3. Click the **Add** button to add the display format.

The new display format appears in the tree, attached to the stored format to which it belongs.

Updating a Display Format

To update a display format:

1. Select the display format in the tree view.

Note. Clicking the **Update** button applies only to display formats.

2. Select a display format and enter the enabled fields.
3. Click **Update** to update the display.

Deleting Stored Formats

To delete a stored format:

1. Select the display format.
2. Click the **Delete** button.

PeopleSoft Application Designer displays a warning message indicating that deleting a display format might strand stored data. Select **Yes** to continue with the delete.

Note. Stored formats cannot be deleted directly. Therefore, all display formats for a specific stored format must be deleted first. This ensures that data is not stranded in the database under an invalid format. When the last display format is deleted for a stored format, the stored format is automatically deleted.

Using Family Options

Family options include:

- Smart Punctuation

- Make Uppercase

Smart Punctuation

Smart punctuation automatically adds or removes punctuation characters to the data that users enter. For instance, if you type in a phone number like *8005551212* and press TAB to exit the entry field, it is reformatted to *800-555-1212*.

The system uses the punctuation characters specified in the punctuation list to strip out unwanted input and to modify the pattern specified before applying the pattern to the data.

Note. The default is to enable smart punctuation and use the standard set of characters.

The standard set of characters can be modified by selecting *Custom* in the options drop-down list box and typing another set of punctuation characters to use. Smart punctuation processes the characters defined in the standard set or custom set as follows:

- The input has all characters in the punctuation set stripped out—similar to ignoring white spaces.
- The pattern has all characters in the punctuation set expanded if they are not found in the input. This is done by enclosing each punctuation character that is found in the punctuation set with “[*puncchar*]!”
- The formatter is run on the modified data to apply the modified pattern.

Warning! Use meta characters and lexical characters in the punctuation sets with caution. Step two of the transformation process modifies the format pattern so that PeopleSoft Application Designer might sometimes convert special characters to literals (when they’re placed inside the left or right brace).

For example:

- Input: (800)555-1212
- Display pattern: 999-999-9999
- Punctuation set: ()-
- Stored pattern: 999999999
- The “(”, “)”, and “-” are stripped out of the input because they appear in the punctuation set. At this point, the input looks like *8005551212*.

The display pattern is modified to *999[-]/999[-]/9999* because the “-” is in the punctuation set. The transformed data (*8005551212*) is matched against the display pattern of *999[-]/999[-]/9999*. The match is successful, so the raw data is transformed into *800-555-1212*.

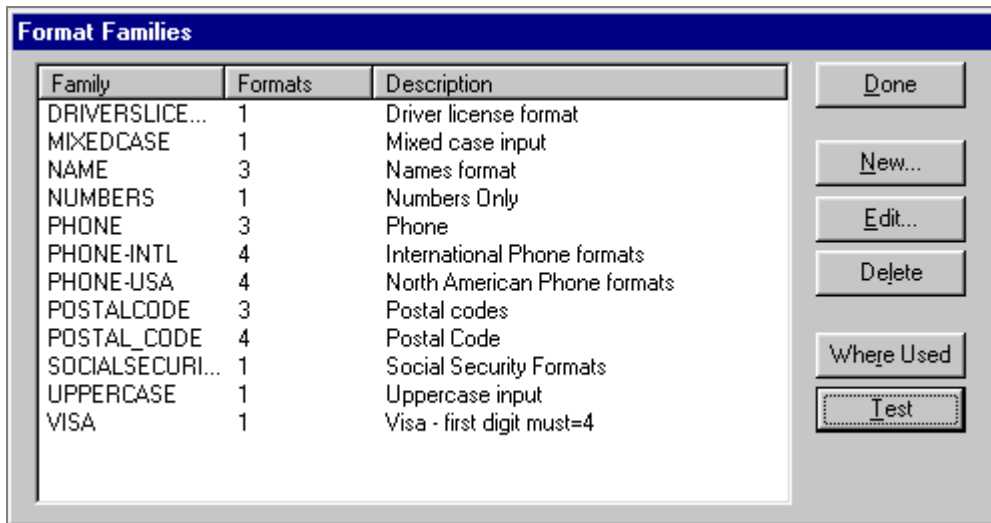
Now, the input data has successfully matched the expected display format. The next step is to transform this data into what we want stored. In this case, the stored format has no dashes, as in 999999999.

The transformed data (800-555-1212) is stripped of the smart punctuation characters (8005551212), and the pattern of the stored format is 999999999. A match is made so that the system stores 8005551212 in the database.

Finally, the stored data is reformatted back to the display using 8005551212 and the display pattern. Output to the display is reformatted to 800-555-1212.

Make Uppercase

Custom format fields support mixed case. With uppercase activated, PeopleSoft Application Designer transforms the data into uppercase when you press TAB to exit the field.



Format Families dialog box

Testing Formats

The Test Format dialog box enables you to test a specific format or unformatted path for a family without having to build a page.

Test Format dialog box

DB->Display

Click this button to process the input field like data from the database. The system applies the stored format pattern to the input, then applies the display format pattern to the result. The output appears in the **Transform** field, which is the same output displayed for a field using this format.

Display->DB

Click this button to process the input field like user input from a page. The system applies the display format pattern to the input, then applies the stored format pattern to the result. The transformed output appears in the Transform field. This output reflects what is stored in the database if the operation is successful. On an actual page, when the user presses TAB to exit the field, the system calls the DB->Display function to reformat the user input for the display.

To test a format family:

1. Use the two drop-down list boxes to select a stored and display format pair to test.
2. Click either DB->Display and Display->DB to process the format.

Using the Translate Table

This section provides an overview of the Translate Table and discusses how to:

- Add values to the Translate Table.
- Change translate values.
- Delete translate values.
- Save the Translate Table.

Understanding the Translate Table

The Translate Table is a prompt table, which is similar to an all-purpose data dictionary, to store values for fields that don't need individual prompt tables of their own. As a general rule, store field values in the Translate Table if the field meets the following criteria:

- Field type is *Character*.
- Field length is 1 to 4 characters.
- Field values consist of a relatively small, static set of values that are not maintained by the user.
- No other fields relate to this field.

Note. If the only values for a field are *Y* (yes) and *N* (no), you don't need to enter them in the Translate Table. The Translate Table comes with a field for Y and N named PSYESNO. When you select the Yes/No Table Edit, the system automatically points to the PSYESNO field in the Translate Table.

Example of When to Use the Translate Table

Consider the relative attributes of a Department ID field and a Gender field in a company database. In the following table, Department ID is not a good case for using the Translate Table, because it requires its own prompt table. However, the Gender field is a good case for using the Translate Table.

Characteristic	Department ID	Gender
Field Type	Character	Character
Field Length	Longer than 3 characters	1 character
Field Values	Could be many values, 20 or more	2 possible values
Other related fields	Related to other fields, like department manager	Not related to other fields
Requires maintenance	Yes, users might have to add departments	No, gender is a static value

Translate Table Attributes

The system maintains the structure of the Translate Table and you supply the data. This table contains the following fields.

Field Name	Description
FIELDNAME	Field name, such as ABSENCE_TYPE
LANGUAGE_CD	Language code
FIELDVALUE	Value for the field
EFFDT	Effective date

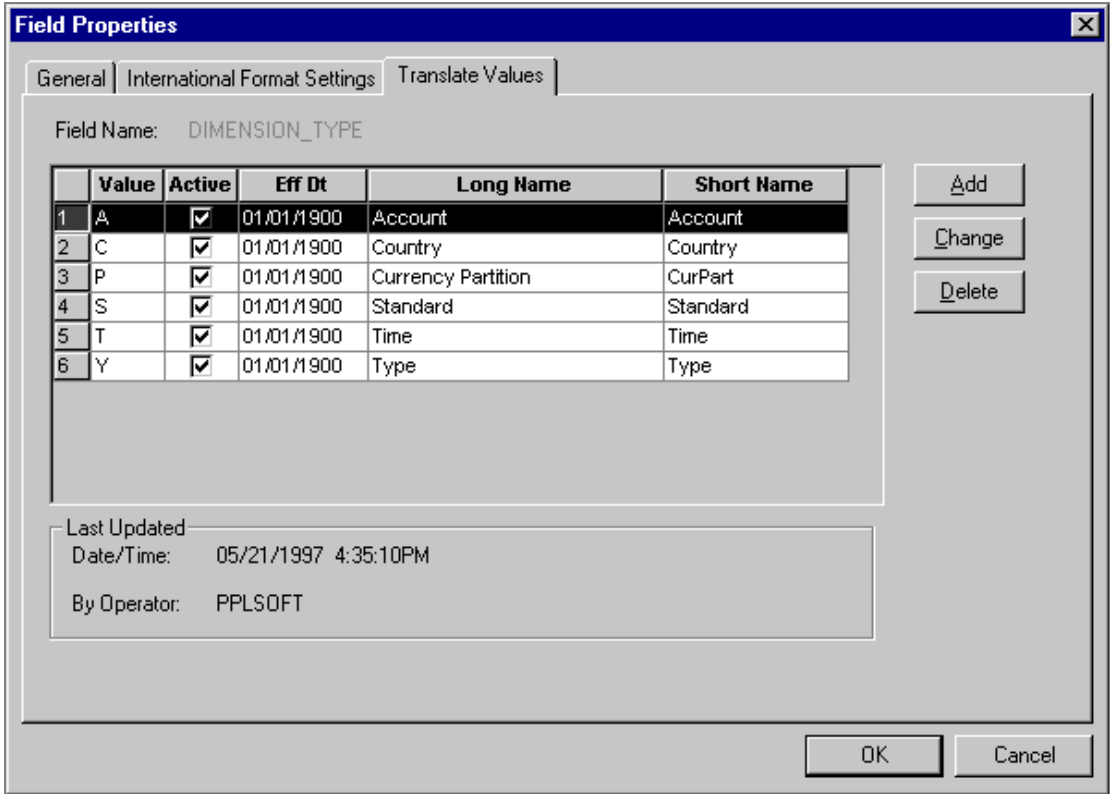
<i>Field Name</i>	<i>Description</i>
VERSION	Internal version number (system-maintained)
EFF_STATUS	Status—active or inactive
XLATLONGNAME	30-character description; used as a label on pages and reports
XLATSHORTNAME	10-character description; used as a label on pages and reports
LASTUPDDTTM	DateTime field showing the last time that a field was updated
LASTUPDOPRID	User ID of the user who most recently updated the field

If you must define more information about a field other than the preceding attributes, create a separate prompt table for the field instead of adding it to the Translate Table.

When the user presses the prompt button to prompt for valid values in a field on a page, the system displays a list of the translate values for a field.

Each value in the Translate Table has an effective date, and the date must be earlier than the effective dates of any rows that reference the value. The translate values delivered by PeopleSoft all have an effective date of January 1, 1900. Remember this if you add new translate values for a field.

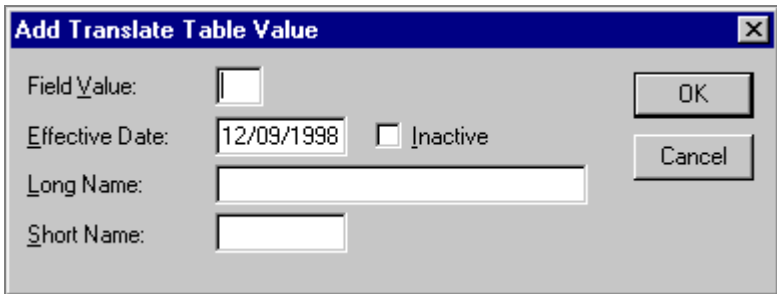
Note. Some languages, like Japanese and Chinese, may require more than one byte to store a single character of information. If you are defining a field that contains values in an Asian language, make the field size at least double the number of characters in the longest string.



Field Properties dialog box: Translate Values tab

Adding Values to the Translate Table

Access the Add Translate Table Value dialog box.



Add Translate Table Value dialog box

Field Value

Enter the translate value for the field. The system automatically sorts values in ascending order as you enter them. If you enter three translate values with field values *A*, *T*, and *C*, they appear in the Translate Values dialog box as *A*, *C*, *T*.

Effective Date

Enter the date on which you want this value to take effect.

The default is today's date. If you want the effective date to predate all rows on your database, enter *01011900* (January 1, 1900).

Inactive

When a value for a field becomes obsolete, PeopleSoft recommends that you select Inactive rather than deleting it. Deactivating a value enables fields in the database that still contain the value to use the correct long and short names. If you delete an obsolete code from the Translate Table and you still have records in the database that contain that value, you must change all of those values to active values.

Long Name

Enter up to 30 characters.

Short Name

Enter up to 10 characters. If you leave Short Name blank, the system automatically copies the first 10 characters of long name into this field. PeopleSoft recommends that you use mixed case to improve readability.

To add translate values to the Translate Table:

1. From a field definition window, select File, Definition Properties.

You can also right-click and select *Field Properties*, or press ALT-ENTER.

2. From a record field definition window, right-click the field, and select *View Translates* from the pop-up menu.

3. Select the Translate Values tab.

The Translate Values dialog box displays existing values for the field and enables you to add, change, or delete values. In the **Last Updated** box, you see information—date, time, and user ID—about the last update for the selected translate value.

4. Click **Add** to define a new value.
5. Enter the field value, effective date, long name, and short name that your users enter on the page.

Changing Translate Values

Sometimes, the meaning of a translate value changes, but you still need to retain both values in the Translate Table. For example, suppose your PROFICIENCY field has a value of *E* (extremely high). You've been in production for five years, when upper management decides to change the meaning of the value to *Exceptional* as of January 1, 1998.

You can accommodate this type of change by creating a second active entry for the same translate value. The first value is valid in the time range between the effective dates of January 1, 1990, and December 31, 1997. The second entry is valid from January 1, 1998 onward. You don't want to delete the old entry because the database might contain rows that

predate January 1, 1997 and contain this value. You might also maintain the old definition for historical reporting.

To change an existing translate value, select the value and click **Change**, or double-click the value. The system displays the Change Translate Table dialog box in which you can make the necessary changes.

Deleting Translate Values

Use caution when deleting a translate value, unless you are removing an invalid value that was entered by mistake. To deactivate a value because it is no longer used or its meaning has changed, either change the long and short names, or change the status to *Inactive*. To delete the value, select it and click the **Delete** button. The row disappears.

Saving the Translate Table

After you have made all of your changes to the Translate Table, you must save the *entire field definition*. There is no save option specifically for translate values. Click **OK** from the Field Properties dialog box and save the field definition by clicking the **Save** button or selecting File, Save.

To save the Translate Table, you must be authorized to modify field definitions. There is a special *Translates Only* security access level for fields that allows translate values to be updated, but not other field attributes.

CHAPTER 4

Planning Records, Control Tables, and TableSets

One of the first things that you must consider as a system designer is how to store, retrieve, manipulate, and process data that is stored in tables in your application database.

This chapter provides an overview of the planning process and discusses how to share tables.

Understanding the Planning Process

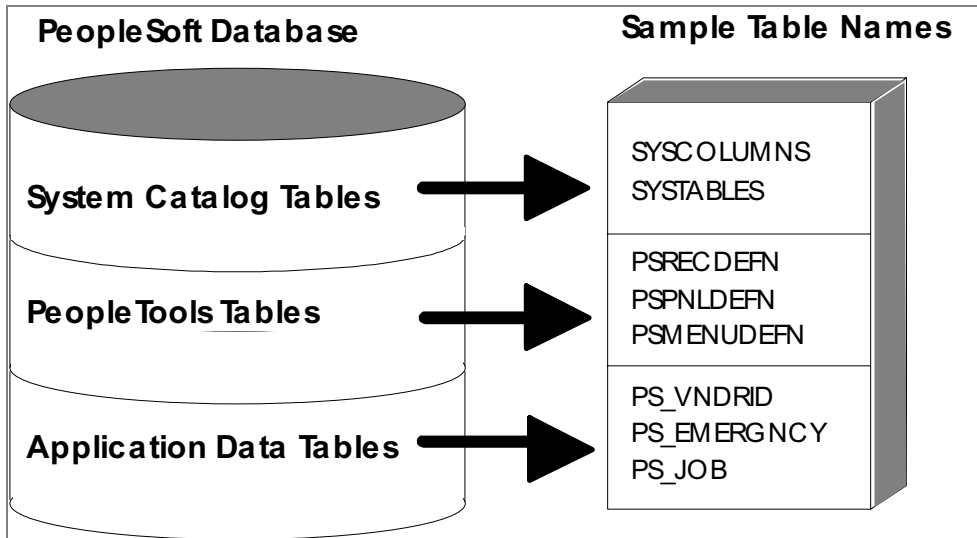
This section discusses:

- Table-based systems.
- Normalized relational databases.
- Record definition planning.
- Control tables.
- TableSets.

Table-Based Systems

PeopleTools-based applications are table-based systems. A database for a PeopleTools application contains three major sets of tables:

- System Catalog tables store physical attributes of tables and views, which your database management system uses to optimize performance.
- PeopleTools tables contain information that you define using PeopleTools.
- Application Data tables house the actual data that your users enter and access through PeopleSoft application windows and pages.



Tables in a PeopleSoft database

Like a spreadsheet, each of these tables contains columns and rows. Columns define the structure of how the data is stored. Rows represent the actual data that is stored in the database.

Every time that you create a new definition using PeopleTools, the system inserts rows of data into various PeopleTools tables. The entries in these tables determine the online processing of the system and what happens during imports. PeopleSoft maintains the structure of these tables. You maintain data in the PeopleTools tables related to definitions that you create or adapt using PeopleTools. The PeopleTools tables can be viewed in the PPLTOOLS project using the PeopleSoft Application Designer.

To create the application data tables that store the rows of data that your *users* will manipulate, you must:

1. Create a record definition, which determines the structure of the table, the characteristics of the fields, and any online processing that you want to occur behind the scenes when a user enters data.
2. Apply the SQL Create option to build the SQL table in which your application data will reside based on a subset of parameters in your record definition.

During this process, the system automatically gives the application data table the same name as your record definition, prefaced with *PS_*.

Normalized Relational Databases

To better understand the structure of your PeopleSoft system, you should be familiar with the concept of a normalized relational database. A *normalized* table adheres to standards that are designed to improve the productivity of the database user. Normalization makes the database more flexible, allowing data to be combined in many different ways.

The standards for a normalized database are called *forms*, such as *first normal form*, *second normal form*, and so on.

First Normal Form

The first normal form requires that a table contain no repeating groups of nonkey fields. In other words, when you're setting up a record definition, if you encounter a field that could have multiple occurrences, put that field in a separate record that is subordinate to the primary record definition (a "child" record). This allows unlimited occurrences of a repeating field rather than a specified number. Each row of data is uniquely identified by a primary key, which can be a single field or a group of fields that, when concatenated together, form a unique key.

For example, look at the record definition structure of the tables that we use to schedule exam times for different locations in our training database. Here are the necessary fields, in order of importance:

- LOCATION
- EXAM_DT
- EXAM_TIME

You know that you have multiple exam dates and times per location. You could set up record definitions to accommodate this data as follows:

Record Definition	Field	Key?
LOCATION	LOCATION	Yes
EXAM	LOCATION	Yes
	EXAM_DT	Yes
EXAM_TIME	LOCATION	Yes
	EXAM_DT	Yes
	EXAM_TIME	Yes

Because multiple exam dates per location might exist, we added exam dates to the second record definition (child record) that is subordinate to the first (*parent*) record. Similarly, because there can be multiple exam times per date, exam times are located in a third record definition that is subordinate to the second.

Second Normal Form

The second normal form dictates that every nonkey field in a table must be completely dependent on the primary key. If two fields make up the key to a table, every nonkey field must be dependent on both keys together. For example, if a table has Employee ID and Department ID as keys, you wouldn't put Department Name in the table because Department Name is dependent only on Department ID and not on Employee ID.

Third Normal Form

The third normal form is a corollary to the second; it requires that a nonkey field not be dependent on another nonkey field. For example, if a table is keyed by Employee ID, and Department ID is a nonkey field in the table, you wouldn't put Department Name in the record because Department Name is dependent on a nonkey field (Department ID). This is why Department Name would be found only on the table that is keyed by Department ID, not on any other that contains Department ID.

With the third normal form, you store shared fields in tables of their own and reference them elsewhere. For example, you wouldn't put Department Name in every record definition in which Department ID appears. Instead, you would create a prompt table of department IDs and department names. Similarly, you would create a prompt table of job codes and job titles instead of putting a job title in every employee's record.

Note. When designing record definitions, adherence to the third normal form is recommended to increase flexibility and reduce data redundancy.

Record Definition Planning

Before you begin to create record definitions, you should have a clear picture of how you plan to use the record definition, the fields that it will contain, special edits that you would like to see performed on the record definition, or specific fields in the definition.

You actually define two layers of information:

- Record level
- Field level

At the record level, you determine the ultimate purpose of the record definition and how it will be used in the system. Is it destined to define an underlying SQL table to hold data? Are you building a view to join or retrieve information from other tables? Do you need a temporary work record where you can store derived data?

You can audit record-level changes, as opposed to individual fields contained in the record definition—an efficient alternative if you plan to audit several fields. More sophisticated use of record definitions, such as sharing information in TableSets and multilanguage controls, are also established at the record level.

At the field level, you plan the details of what types of fields to add. Should they be character fields or number fields? Should automatic formatting be used? What are the keys to the data stored in the database? Which fields should you audit? Do you want to specify prompt tables so that users can select from lists of valid values that are stored elsewhere in the database?

In most cases, if you are creating a record definition for a SQL Table, you don't have to worry about record-level definitions for parameters and conditions. Unless you change how a record definition is used, the system automatically assumes that you are defining a record definition for an underlying SQL Table.

Control Tables

Control tables store information that controls the processing of an application. This type of processing might be consistent throughout an organization (in which case the entire organization shares the same control information), or it might be used only by portions of the organization for more limited sharing of data.

Sharing One Set of Common Values

The first type of sharing is to create one table that everyone shares; it stores common information that is valid for *all* users, such as a country table to store country codes or a department table to store department codes. Such control tables are ordinarily maintained centrally because the data is shared throughout the entire organization.

Sharing Common Values in Overlapping Plans

What do you do if the codes that are stored in a table are valid only for *some* users? Consider benefit plans, for example. Typically, you store information for benefits plans in a plan table. However, not all plans are valid for all employees. It might depend on whether they are full-time or part-time, union or nonunion. Some plans might overlap; some might be appropriate for all employees and others only for some. In a relational database, you don't want to define the same plan value—and associated data—more than once.

In this case, you can easily resolve the problem using two tables. The first is the plan table, which stores the relevant data for each plan. The second table defines which plans are valid for various benefit programs or groups of plans. For example, one benefit program might be valid for nonunion employees, and another benefit program might contain the plans as negotiated with a union.

Benefit Program Table		Benefit Plan Table			
Key	Valid Values	Key	Description	Field	Field
Nonunion Program	Plan 1	Plan 1	Health
	Plan 2	Plan 2	Life
Union Program	Plan 2	Plan 3	Savings
	Plan 3	Plan 4	Health-Union
	Plan 4				

These tables are ordinarily centrally maintained, because the data is being shared by various groups in the organization.

Sharing Multiple Sets of Values

See TableSets.

TableSets

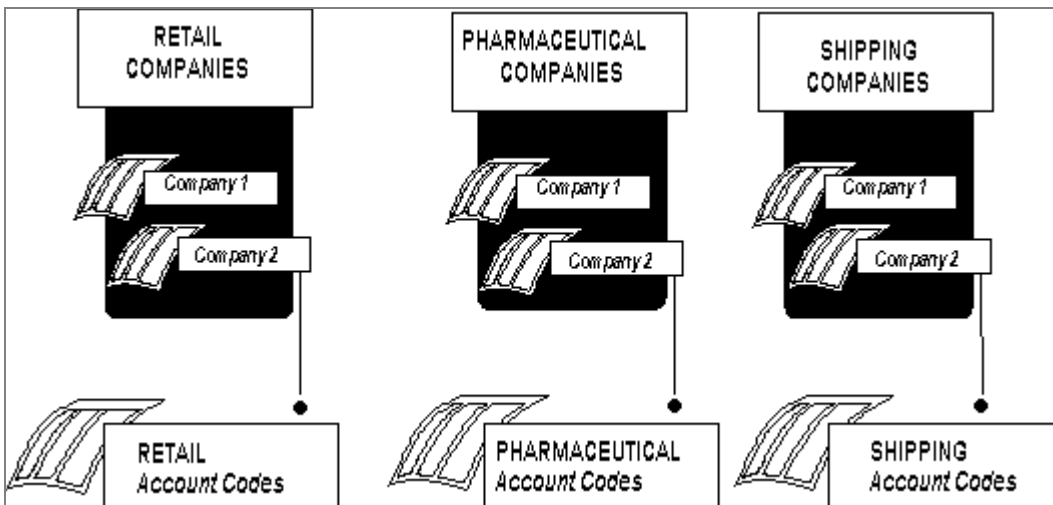
When *none* of the information stored in control tables is valid for all users, but the structure of these common tables is the same, you can set up a way to share multiple sets of values. For example, a multi-company organization must store completely different sets of accounting codes for its various operating entities, and the data for these accounting codes is maintained in a set of relevant control tables. The actual data values differ, but the structure of the control tables remains the same. PeopleTools enables you to share sets of values in a control table through *TableSets*.

To better understand TableSets, consider an organization that has two retail stores with common accounting codes, two pharmaceutical firms with another set of accounting codes, and two shipping firms with yet another set of codes.



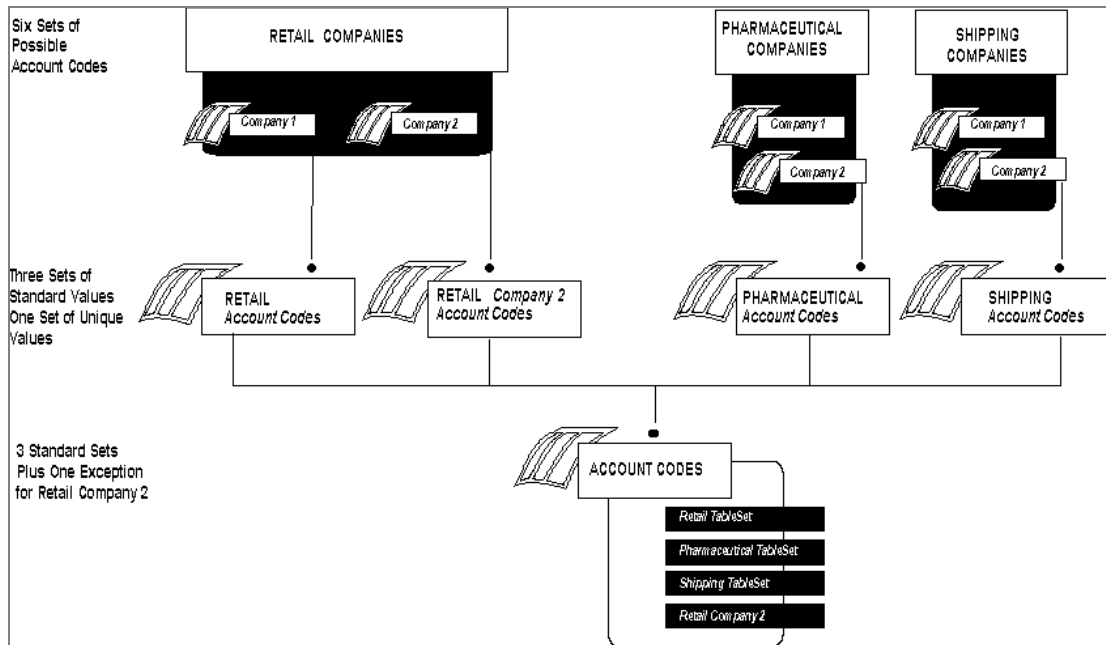
Maintaining multiple account codes for multiple companies

If each of these companies has completely different accounting codes, you can establish six different sets of account codes to be maintained by each company. If they all have exactly the same accounting codes, you can limit them to one set of values. However, the reality is usually somewhere in between. That is, there is one set of account codes for each type of business: retail, pharmaceutical, and shipping. Rather than having six different companies maintaining separate copies of this common data, you can reduce the number to three sets.



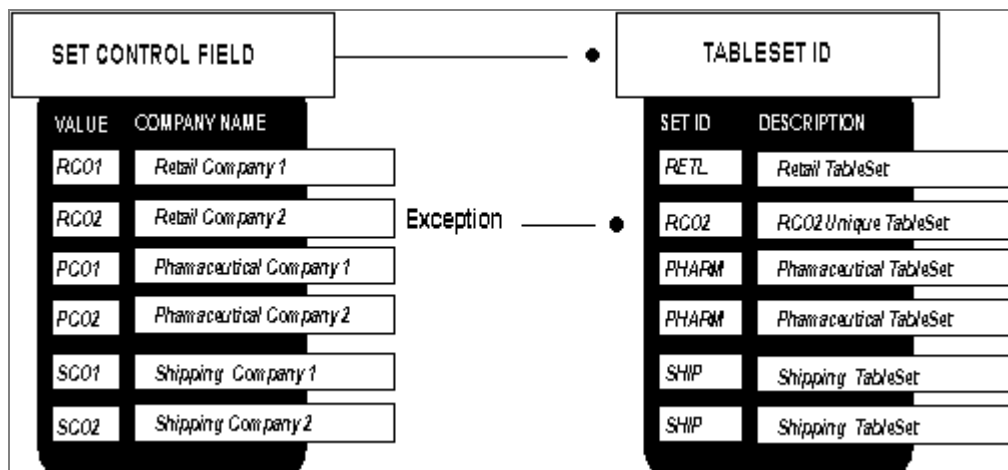
Sharing multiple account codes among companies

You can also handle exceptions. Suppose that Retail Company 2, a recently acquired company, has its own unique set of account codes. A separate set of values should be maintained for this company as an exception to the retail rule.



Sharing account codes among companies with exceptions

When you share tables in PeopleTools applications, you add the SETID field as an additional key or unique identifier to the table that you want to share. This key identifies the sets of information in the table that are shared by multiple companies or business units under your corporate umbrella. You then specify a *set control* field, which identifies which fields map between the original key and the TableSets. You can specify any field that logically identifies the TableSet. In this case, you might assign Company as the set control.



Linking set controls and TableSets

Sharing Groups of Record Definitions

While this example illustrates how you might share data values for a single table—Account Codes—you typically share data that is stored in many tables that are based on the same TableSets. To minimize the overhead of defining TableSets, you can define *record groups* that share table data in a similar manner. For example, rather than use the TableSets that you establish for accounting codes solely for the Accounting Code Table, you can group all accounting-related tables into one record group.

TableSets and PeopleSoft Applications

Some PeopleSoft applications already take full advantage of TableSets and table sharing. Throughout the PeopleSoft Financials and HRMS product lines, TableSets are used extensively, in most cases triggered by Business Unit.

Sharing Tables

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

- Add the SetID field to the record definition for that table as a key field.
- Define a set control field as the field controlling the assignment of TableSets.
- Create setIDs.
- Establish set controls that determine who uses which TableSets.
- Define record groups to identify the tables and subordinate (child) tables that are affected.
- Define TableSet controls.
- Share trees.

Understanding Table Sharing

To share tables, you must modify the record definitions for both the table that you want to share and the one that contains the set control field. Using the online PeopleTools Utilities for TableSets, you define the terms or controls for sharing.

For example, in the PeopleTools database, there are three companies: one U.S.-based parent company (PST) and two sister companies (CCB in the U.S. and VNB in Canada). In this organization, all of the U.S.-based companies share one set of accounting codes, and all of the Canadian-based VNB companies share another.

U.S. Account Codes	Canadian Account Codes	Description
123456789	123456789	Teller

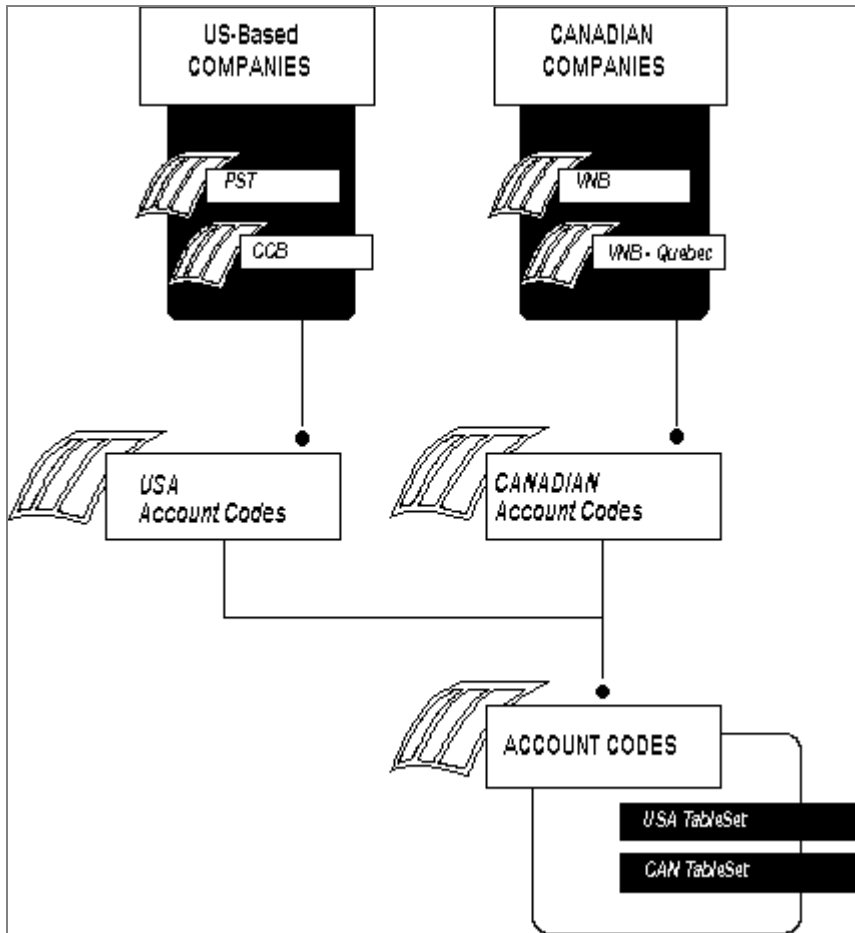
U.S. Account Codes	Canadian Account Codes	Description
987654321	987600000	Customer Service
CCB-4476-EXTSAL-USA	VNB-4476-EXTSAL-CDN	Extraordinary Salary Employees
CCB-4476-REGSAL-USA	VNB-4476-REGSAL-CDN	Regular Salary Employees

These two groups of companies must maintain parallel sets of accounting codes, and in some cases, they use the same code, uniquely identified for U.S. or Canadian companies.

We must set up the Account Code Table so that users who access that page or prompt for valid values see only the values for their respective companies, depending on whether they're located in the U.S. or Canada.

To do this:

1. Modify the Account Code Table, which will be shared, and the Company Table, the values of which (CCB, PST, VNB) control the TableSets that are used.
2. Create two TableSet IDs:
 - USA: For U.S. companies.
 - CAN: For Canadian companies.



TableSets and set control fields

Assigning Set Control Fields

If you plan to use the Table Sharing feature to add an additional high-level key to identify common sets of values and handle exception values, you enter a set control field. The set control field determines which set of values appears, based on how you define Table Sharing.

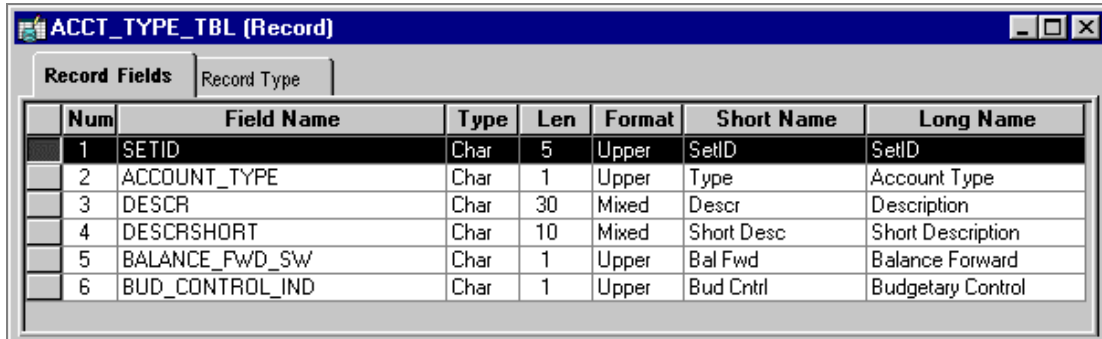
Table Sharing is usually applied in multi-company environments, in which you might want to share certain tables in some operating entities while allowing others to retain control over the contents of their own. Use the feature to maintain a single table in which you can store multiple sets of values to be used by different entities in your organization.

When you create a record definition that will be shared, you add the field setID as a high-level key. The setID value is controlled by the key that is entered in the set control field. These setIDs identify groups of tables to be shared and enable each business entity to identify whether they want to use the corporate-wide table or maintain their own. Enter the name of the key as your set control field for each record definition that will be shared.

For example, if you have several companies in your organization, many of which share the same set of account codes, add a SetID field to the Account Table record definition. In this definition, enter Company as the set control field. This enables different companies to access the account values stored in the same Account Table. As each company defines its set

controls, they have the option to use the shared Account Table or maintain control of their own.

Adding the SetID Field to Record Definitions



Num	Field Name	Type	Len	Format	Short Name	Long Name
1	SETID	Char	5	Upper	SetID	SetID
2	ACCOUNT_TYPE	Char	1	Upper	Type	Account Type
3	DESCR	Char	30	Mixed	Descr	Description
4	DESCRSHORT	Char	10	Mixed	Short Desc	Short Description
5	BALANCE_FWD_SW	Char	1	Upper	Bal Fwd	Balance Forward
6	BUD_CONTROL_IND	Char	1	Upper	Bud Cntrl	Budgetary Control

Adding setIDs to record definitions

To add the setID:

1. Open the record definition for the table that you want to share.
2. Select New, Field, Character.
3. Enter the special field that PeopleTools provides for table sharing:

SETID

SetID is a 5-character field. Add it to the top of your record definition list, and define it as a required key, search and list item, with a prompt table edit against the PeopleTools SETID_TBL.

Defining Set Control Fields

The screenshot shows the 'Record Properties' dialog box with the 'Use' tab selected. The 'Set Control Field' is set to 'BUSINESS_UNIT'. Under 'Record Relationships', 'Parent Record' is 'ACCT_CD_TBL', 'Related Language Record' is 'ACCESS_GRP_TBL', and 'Query Security Record' is empty. Under 'Record Audit', 'Record Name' is empty, and 'Audit Options' are checked for 'Add' and 'Change', and unchecked for 'Selective' and 'Delete'. 'OK' and 'Cancel' buttons are at the bottom right.

Establishing set control fields

To define the set control field:

1. Select Edit, Definition Properties from the menu.
2. Select the Use tab.
3. Select the field that identifies the appropriate setID in the **Set Control Field** drop-down box.

In the example, we specified the set control field as the *value* of the Company field. See Understanding Table Sharing for the example.

4. Click **OK** to save your changes.
5. Use SQLAlter to alter your underlying SQL table.

- When the system prompts you for a default setID, enter the most common setID for your company.

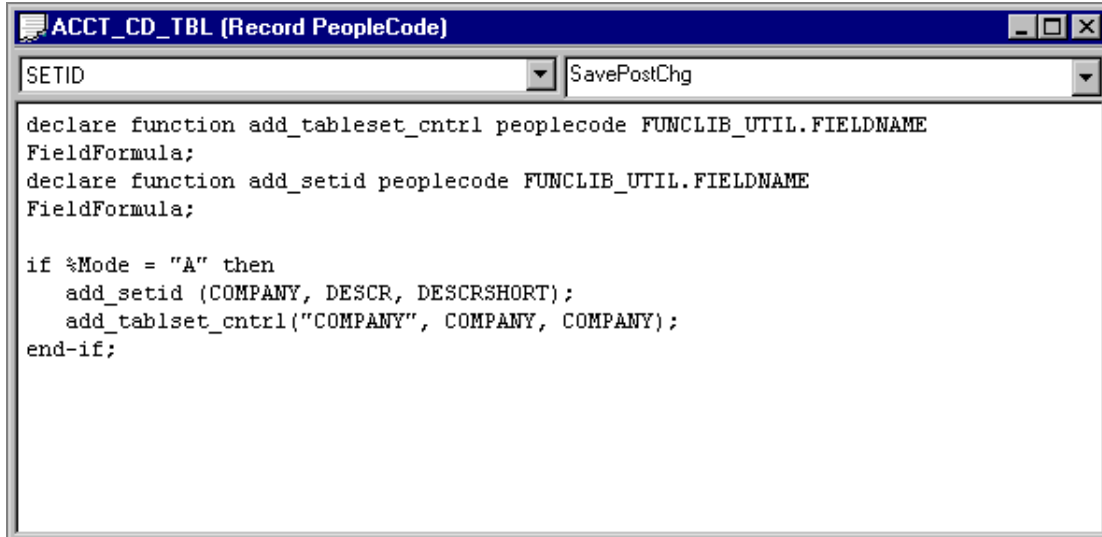
See Also

“Building SQL Tables and Views,” Altering Tables

Modifying the Set Control Field

If you are sharing tables or using a set control field that is not already defined as such in your PeopleSoft application, you must make some modifications to the record definition for the table in which you store values for your specified set control field. For example, all PST company codes are stored in the COMPANY_TBL.

Here, you must add PeopleCode to the set control field so that each time you add a new value, the system populates the set controls in PeopleTools utilities, where you assign the appropriate TableSets.



```

declare function add_tableset_cntrl peoplecode FUNCLIB_UTIL.FIELDNAME
FieldFormula;
declare function add_setid peoplecode FUNCLIB_UTIL.FIELDNAME
FieldFormula;

if %Mode = "A" then
  add_setid (COMPANY, DESCR, DESCRSHORT);
  add_tableset_cntrl("COMPANY", COMPANY, COMPANY);
end-if;

```

Attaching PeopleCode to your set control field

This program assigns a default setID with the same value as the Set Control Field value, for each new COMPANY row that you add to the COMPANY_TBL. For example, when you add a row for CCB in the Company Table, it creates a default setID of CCB. This way, each value that you add is assigned a unique TableSet until you assign shared TableSets in the Utilities window.

You can easily clone and modify this program to change the ADD_SETID and ADD_TABLESET_CNTRL statements to reflect your table sharing objectives. Alternatively, if you're working with existing TableSet functionality, you can point to a model setID that is delivered with your PeopleSoft application.

Creating SetIDs

After you prepare for sharing your table, you define the setIDs that logically group information. When you define setIDs, you create groups that might naturally share more than one table. For example, although CCB and VNB are planning to share only the ACCT_CD_TBL now, the setIDs that you set up might define logical divisions in the organization that serve as the basis for sharing all accounting-related tables. Describe your sets to give them as broad an application as is practical in your organization.

If possible, use descriptions that denote the shared table and set control field. For example, for CCB and VNB, we added two TableSet IDs, identifying them as related to accounting codes for companies.

setID	Description	Short Description
USA	Accounting Codes - USA Co.s	AcctCd USA
CAN	Accounting Codes - CAN Co.s	AcctCd CAN

You create SetIDs on the TableSetID page in PeopleTools, Utilities, Administration, TableSet IDs.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Data Administration, “PeopleTools Utilities,” TableSet IDs

Defining Record Groups

In the record group table, you group the record definitions for the tables that you want to share and any dependent record definitions. If you’re adding a table to a PeopleSoft application, an appropriate record group might already be defined. However, if you’re adding new business functions, you might need to add a new record group for the tables that you’re defining.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Data Administration, “PeopleTools Utilities,” Record Group Table

Defining TableSet Controls

As you add values for your set control, the system automatically populates the TableSet Controls 1 Table with default values. You define TableSet controls in PeopleTools, Utilities, Administration, TableSet Control page via the browser. Here you can enter the set control value for which you want to assign a TableSet.

For example, we use Company as our set control field and PST, CCB, and VNB are values that we’re adding to the Company Table. The system automatically assumes that each new set control value maintains its own set of tables and does not enable Table Sharing. So, the

default values are the same as the set control value. In this case, when we added the value CCB to the Company Table, the system populated the TableSet controls with a default setID of CCB.

Because CCB is a U.S.-based company that should share the same USA Accounting Codes, we must change the defaults to USA.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Data Administration, “PeopleTools Utilities,” TableSet Control

Sharing Trees

To share trees as well as tables and views, complete TableSet Controls 2 the same way as you did TableSet Controls 1. For example, if PST and CCB want to share one Department tree for organizational security and VNB another, you assign the appropriate setID for each value.

Defining TableSet Controls for Trees

To define TableSet controls for trees:

1. Select PeopleTools, Utilities, Administration, TableSet Control from your browser window.
2. Enter the name of the set control value for which you want to assign a TableSet.

For example, we use Company as our set control field and PST, CCB, and VNB are values that we’re adding to the Company Table.

Because you already assigned a default setID in TableSet Controls 1, the system displays the default setID that you assigned to this field value. If you create another TableSet for sharing trees, you can change this value.

4. Specify the tree name.

Click the prompt button next to the Tree Name field for a list of only the tree definitions with the same set control field (which has PostSave PeopleCode that recognizes it as a TableSet control field).

This prompt list comes from a SQL view of tree definitions with that set control field that haven’t already been associated with a tree group.

3. In each tree row, specify the appropriate setID.

Viewing All Record Definitions Associated With a Set Control

You can view all record definitions that are associated with a set control in the Record Group tab of the TableSet Controls page.

Example of Set Controls

After you set up and define all of your set controls, you can see the results by looking at pages on which you reference codes that are stored in a shared table. For example, on Administer Workforce, Use, Job Data 1 and 2 pages, Account Code is an optional field that is edited against the ACCT_CODE_TBL. In this component, the system identifies the company based on the department to which an employee is assigned. For example, Simon Schumacher is in department *10100*, which is associated with the company *CCB*.

Select the Job Data 2 tab and enter *8001* or *Simon Schumacher* in the search record dialog box to retrieve a CCB row, for which the company is defined in the department table. Here, you can see that Simon works in Dept (department) *00001*, which identifies him as a CCB employee. If you click the prompt button next to the Account Code field, the system displays only those rows in the Account Code Table that are associated with USA, the setID for CCB.

Alternatively, if you access the job row for Joan Avery, an employee of VNB, and click the prompt button for the same Job Data 2 Account Code field, you retrieve only valid values that are associated with CAN, the setID for VNB.

CHAPTER 5

Creating Record Definitions

Fields that are grouped together as a unit are *record definitions*. A record definition represents what the underlying SQL database tables look like and how they process data.

This chapter discusses how to:

- View record definitions.
- Save records.
- Name record definitions.
- Create a new record.
- Open an existing record.
- Add fields to record definitions.
- Set record properties.
- Set record field properties.

Viewing Record Definitions

You can see four views of the record by selecting View from the main toolbar: Field Display, Use Display, Edits Display, and PeopleCode Display.

This section lists common elements and discusses how to:

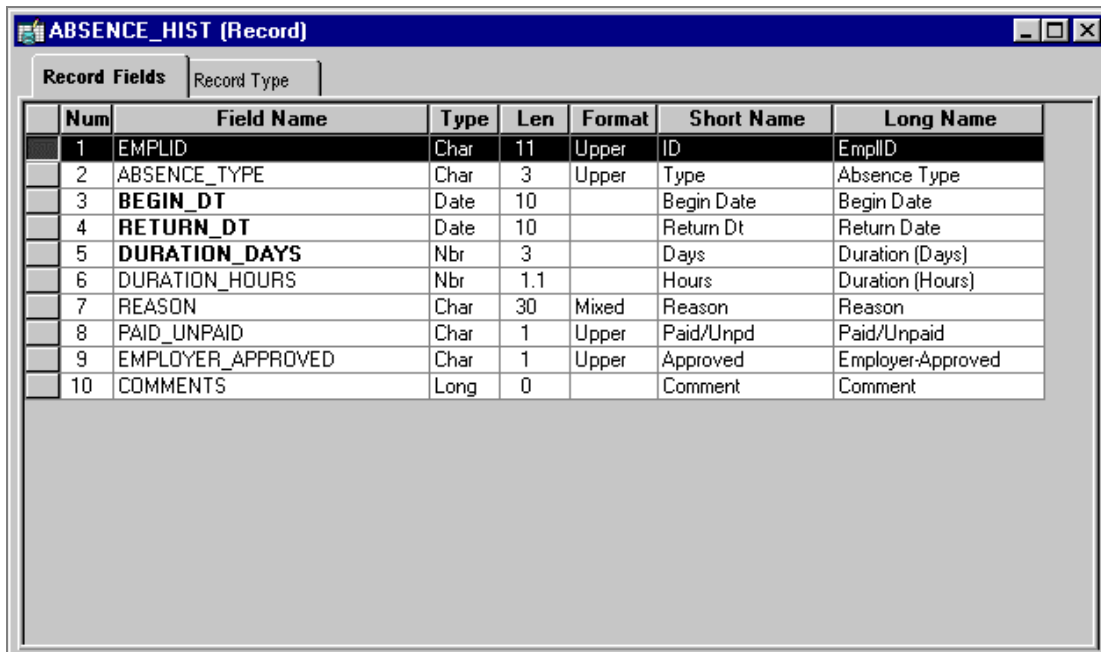
- View basic field definition characteristics.
- View key-related characteristics and default values.
- View editing options.
- View PeopleCode program types.
- Reorder fields.
- Identify PeopleCode that is attached to fields.
- Size and sorting columns.

Common Elements Used in This Section

Num (number)	The number of the field in the order in which it is defined in the record.
Field Name	The name of the field in the SQL database.
Type	The data type of the field, such as character, number, or date.

Viewing Basic Field Definitions

Field Display mode shows the basic field definition characteristics for fields in the record definition. Field definition characteristics are global—they affect all record definitions in which the field is used. To open the associated field definition, right-click while in Field View and select View Definition.



Num	Field Name	Type	Len	Format	Short Name	Long Name
1	EMPLID	Char	11	Upper	ID	EmplID
2	ABSENCE_TYPE	Char	3	Upper	Type	Absence Type
3	BEGIN_DT	Date	10		Begin Date	Begin Date
4	RETURN_DT	Date	10		Return Dt	Return Date
5	DURATION_DAYS	Nbr	3		Days	Duration (Days)
6	DURATION_HOURS	Nbr	1.1		Hours	Duration (Hours)
7	REASON	Char	30	Mixed	Reason	Reason
8	PAID_UNPAID	Char	1	Upper	Paid/Unpd	Paid/Unpaid
9	EMPLOYER_APPROVED	Char	1	Upper	Approved	Employer-Approved
10	COMMENTS	Long	0		Comment	Comment

Field Display mode

Length	Indicates the maximum length of the field, including decimal places.
Format	Notes special formatting for the field, such as mixed case, date, international phone number, or RawBinary.
Short Name and Long Name	Displays the short and long names of the field as users see it on pages.

Viewing Key-Related Characteristics and Default Values

Use Display mode shows key-related characteristics and default values for fields that determine how fields are used in a record. The use characteristics might differ for fields that are used on more than one record definition. Double-click the field to access the Record Field Properties dialog box in which you define these parameters.

Num	Field Name	Type	Key	Ord	Dir	CurC	Srch	List	Sys	Audit	Default
1	EMPLID	Char	Key	1	Asc		Yes	Yes	No		
2	ABSENCE_TYPE	Char	Key	2	Asc		No	No	No		'CNF'
3	BEGIN_DT	Date	Key	3	Desc		No	No	No		%date
4	RETURN_DT	Date					No	No	No		
5	DURATION_DAYS	Nbr					No	No	No		
6	DURATION_HOURS	Nbr					No	No	No		
7	REASON	Char					No	No	No		
8	PAID_UNPAID	Char					No	No	No		'U'
9	EMPLOYER_APPROVED	Char					No	No	No		'N'
10	COMMENTS	Long					No	No	No		

Use Display mode

Key	Indicates whether the field is a key to the record definition. Key fields are included in an index that is automatically created during the Build process.
Ord (order)	Indicates the order of key fields in the index. This order can be configured from the Index dialog box and is reflected in this column.
Dir (direction)	Indicates the order in which the key field indexes are created in the database: ascending or descending.
CurC (currency control)	The currency format for this field is controlled by the currency code in another field.
Srch (search)	Indicates a search key—a field for which one is prompted in a search record dialog box.
List	Indicates a list box item; that is, whether the values for the field appear in the search record list box.
Sys (system)	Indicates that the field is generated and maintained by the system.

Audit Specifies whether additions, changes, or deletions to data in this field are written to the standard PeopleTools Audit Table (PSAUDIT).

Default Represents the default value that is used to initialize the field.

Viewing Editing Options

Edits Display mode shows all editing options (edit as a validation rule) that are available for fields in a record. Edits on a field vary from one record definition to another. To define parameters, access the Record Field Properties dialog box by double-clicking the field.

Num	Field Name	Type	Req	Edit	Prompt Table	Set Control Field	Rs Dt	Event
1	EMPLID	Char	Yes	Prompt	PERSONAL_DATA		No	No
2	ABSENCE_TYPE	Char	Yes	Xlat			No	No
3	BEGIN_DT	Date	Yes				No	Yes
4	RETURN_DT	Date	No				No	Yes
5	DURATION_DAYS	Nbr	No				No	Yes
6	DURATION_HOURS	Nbr	No				No	No
7	REASON	Char	No				No	No
8	PAID_UNPAID	Char	Yes	Xlat			No	No
9	EMPLOYER_APPROVED	Char	Yes	Y/N			No	No
10	COMMENTS	Long	No				No	No

Edits Display mode

Req (required) Indicates whether the field is required. A user must enter a value before the record can be written to the database.

Edit Specifies that the values for this field are validated against a table.

The translate table stores the codes and translate values.

Y/N (yes or no): Only two values, Y or N, are valid.

Prompt: Values reside in a designated prompt table.

Prompt Table Indicates the prompt table for a field. When a user clicks the prompt button or presses the ALT+5 key combination on a page, the values that are stored in this table are retrieved.

Set Control Field If you plan to use the Table Sharing feature to add an additional high-level key to identify common sets of values and handle exception values, add the name of the key here. The set control field determines which set of values appears, based on how you define table sharing.

Rs Dt (reasonable date) Specifies whether a reasonable date test is performed on a date field. All date fields are automatically edited to ensure that you can enter only valid values. The

reasonable date test warns if the date is outside a 30-day range before and after the current date. You can use this, among other things, to guard against entering the wrong year in a date.

Event

Indicates whether any type of PeopleCode has been added for this field. (You can also determine this because the field is bold if PeopleCode has been added.)

Viewing PeopleCode Program Types

PeopleCode Display mode contains a column for each PeopleCode program type and specifies whether a program exists. To access the PeopleCode Editor, double-click a cell (the intersection of an event type column and field row).

Num	Field Name	Type	FDe	FEd	FCh	FFo	RIn	RIs	RDa	RSe	SEd	SPr	SPo	SrI	SrS	Wrk	PPr
1	EMPLID	Char															
2	ABSENCE_TYPE	Char															
3	BEGIN_DT	Date			✓												
4	RETURN_DT	Date			✓						✓						
5	DURATION_DAYS	Nbr															
6	DURATION_HOURS	Nbr															
7	REASON	Char															
8	PAID_UNPAID	Char															
9	EMPLOYER_APPROVED	Char															
10	COMMENTS	Long															

```

RETURN_DT (field) FieldChange
If All(BEGIN_DT, RETURN_DT) And
  BEGIN_DT <= RETURN_DT Then
  &DURATION_DAYS = RETURN_DT - BEGIN_DT;
  If &DURATION_DAYS > 999 Then
    DURATION_DAYS = 999
  Else
    DURATION_DAYS = &DURATION_DAYS
  End-If;
End-If;

```

PeopleCode Display mode with PeopleCode Editor

Reordering Fields

You can reorder the display of fields in the record definition by double-clicking the attribute name. For example, if you double-click Field Name, the fields are displayed in alphabetical order; double-clicking Num returns the fields to their numeric order. This doesn't change the order of the fields in the actual record. The numbers that the fields are originally assigned remain the same. This is important when it comes to key fields.

To actually reorder the fields in the records, you must cut and paste or select the field and move it.

Identifying PeopleCode That is Attached to Fields

Fields that are marked in bold signify that a PeopleCode program is attached to that field. The field appears as bold in all of the record definition views.

Sizing and Sorting Columns

You can change column lengths in any of the displays by dragging them to the appropriate size with your cursor. For example, you might make the short name column smaller so that the entire long name for each field appears. The default sizing of all columns returns after you close the record and reopen it.

You can also sort the rows in columns by double-clicking the column heading. For example, double-clicking the Num column heading returns the list of record fields to the default sort order.

Saving Records

PeopleSoft recommends that you save your work every time that you define a new record definition. As soon as you add or change one element in the new definition, save your work and name the record. You cannot save a record definition until you make at least one change to the record definition by changing record properties, adding or deleting at least one field, or changing the record field properties.

You cannot add PeopleCode to a field until you save the record definition.

Warning! Save early and frequently.

To save a new record definition, select File, Save or File, Save As. If you haven't named the definition, the system prompts you to enter a record name.

Naming Record Definitions

Use these guidelines for record definition names:

- The name length can be up to 15 characters, with the exception of the Temporary Table type, which has a maximum length of 13.
- The name must begin with a letter and can contain underscores to make it more readable.
- Avoid special characters, such as # or \$, which can cause problems in some database environments.

Record Naming Conventions

To help identify the purpose of different types of record definitions, PeopleSoft recommends that you adopt these naming conventions for record definition names, and use these suffixes:

<u>_TBL</u>	Identifies an edit or prompt table that contains data that is used for validation, as opposed to data that is maintained by the application. Prompt tables store commonly used values. They include, but are not limited to, control tables, which store company-wide values. For example, the location table (LOCATION_TBL) stores values for all operating locations in which your company does business; the country table (COUNTRY_TBL) stores values for all valid countries.
<u>_VW</u>	Identifies a record definition that is physically implemented by defining a SQL view.
<u>_DVW</u>	Identifies a dynamic view.
<u>_WRK</u>	Identifies derived work records.
<u>_SBR</u>	Identifies subrecords.
<u>_QVW</u>	Identifies a query view.
<u>_WL</u>	Identifies the record as a worklist record definition.

In some cases, PeopleSoft also uses these prefixes to identify special types of record definitions:

<u>R_</u>	Identifies work record definitions for SQR reports. The remainder of the record name consists of the program or report ID.
<u>AUDIT_</u>	Identifies record definitions that store audit information for other record definitions in the database.
<u>WEBLIB_</u>	Identifies record definitions that store internet scripts. Internet scripts are generally located in FieldFormula PeopleCode events. A WEBLIB record with an internet script must be granted access with Maintain Security component before it can be run in a PeopleCode program.
<u>FUNCLIB_</u>	Identifies record definitions that contain written PeopleCode functions, as opposed to built-in functions. You can include these records in the component and call them as functions. These self-developed functions are generally located in FieldFormula events, and the records are usually derived.
<u>DERIVED_</u>	Identifies shared record definitions (across an application module or group) that have fields for PeopleCode events.

Creating a New Record

This section discusses how to create new record definitions.

To create a new record definition:

1. Select File, New.
2. Select **Record**.
3. Click **OK**.

The object workspace appears so that you can build a list of fields in a record definition.

4. Select the Record Type tab to define the type of record definition.

SQL Table

Select to define a record definition that has a corresponding physical SQL table in the database. Create this table when you run the Build Operation from the Build menu. This is the default setting.

SQL View

Select to define a record definition that corresponds to a SQL view, which is not a physical SQL table in the database, but rather fields from one or more SQL tables that are reorganized into a different sequence. This provides an alternate view of information that is stored in tables.

To create the SQL view, click the **Click to open SQL Editor** button and enter a SQL Select statement and then run the Build process. See “Building SQL Tables and Views,” Creating SQL View and Dynamic View Select Statements.

Dynamic View

Select to define a record definition that can be used like a view in pages and PeopleCode, but is not actually stored as a SQL view in the database. Instead, the system uses the view text as a base for the SQL Select that is performed at runtime. Dynamic views can provide superior performance in some situations, such as search records and in PeopleCode Selects, because they are optimized more efficiently than normal SQL views.

Derived/Work

Select to define the record definition as a temporary workspace to use during online page processing. A derived or work record is not stored in the database, so you do not build it.

SubRecord

Select to define the record definition as a subrecord—a group of fields that are commonly used in multiple record definitions—that you can add to other record definitions. This way, you can change a group of fields in one place, as opposed to changing each record definition in which

the group of fields is used.

Query View

Select to define the record definition as a view that is constructed using the PeopleSoft Query tool. Before you can create the view, PeopleSoft Application Designer prompts you to save the definition.

Temporary Table

Select to define the record definition as a temporary table. Temporary images of the table can be specified on the PeopleTools Options page. Temporary tables are used for running PeopleSoft Application Engine batch processes. Temporary tables can store specific data to update without risking the main application table.

Non Standard SQL Table Name

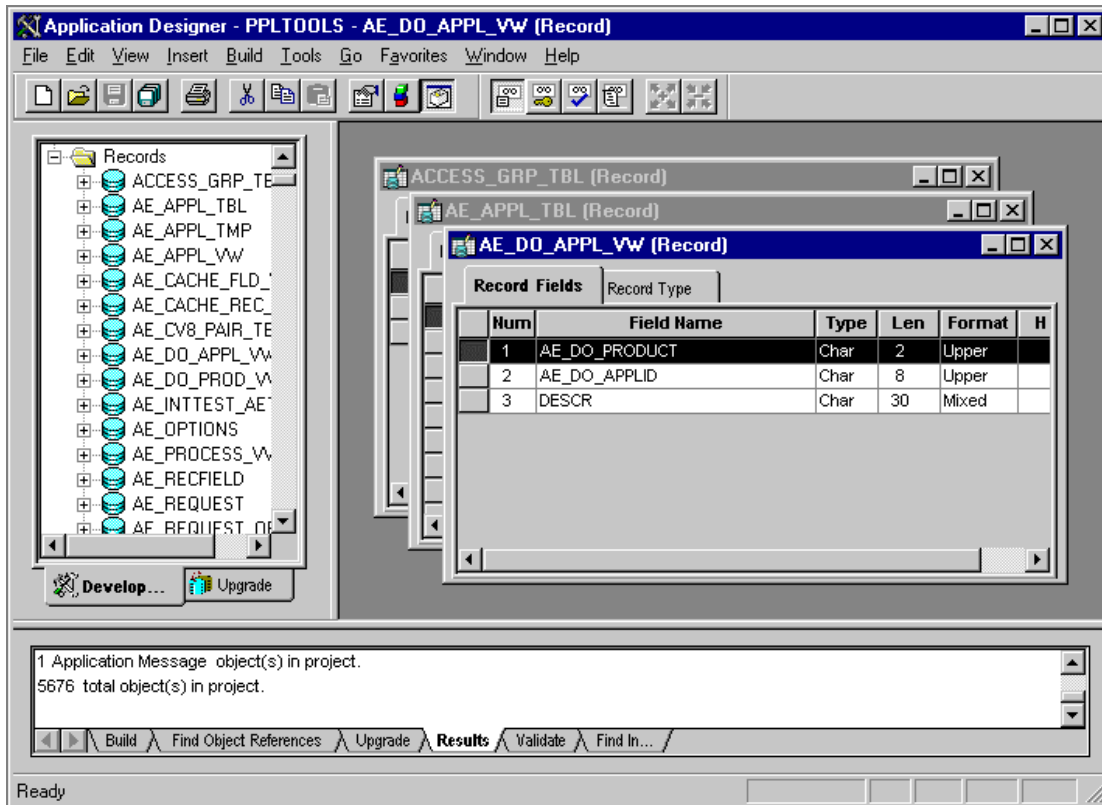
Specify the SQL table name that you are defining if you want to override the standard convention of prefixing "PS_" to the record name.

See Also

Adding Fields to Record Definitions

Opening an Existing Record

This section discusses how to open an existing record definition.



Selecting records from a project

To open an existing record definition:

1. Select File, Open.
2. Select *Record* from the **Definition Type** list.
3. Click **Open**.
4. In the Open Definition dialog box, enter the first letter of the record for which you are searching.
5. Click **Open**.

You can narrow the search criteria by specifying a type or project. You can also open an existing record from the project tree view by double-clicking a record name.

Adding Fields to Record Definitions

This section provides an overview of adding fields to record definitions and discusses how to:

- Insert fields into records.
- Insert subrecords into records.

Understanding Adding Fields to Record Definitions

You create record definitions by adding field definitions to a new record definition, or by cloning and modifying an existing record definition. You can add fields in any order and reorder them at any time. Keys should be located at the top of the record definition, in order of importance.

Each field has basic attributes that are shared across all records that contain the field. They include data type, field name, long name, short name, field length (or integer and decimal positions), formatting, help context number, and translate values. If you change any of these attributes for a field, the change affects *every* occurrence of the field in every record definition. If the change isn't appropriate for every occurrence of this field, consider defining a new field instead.

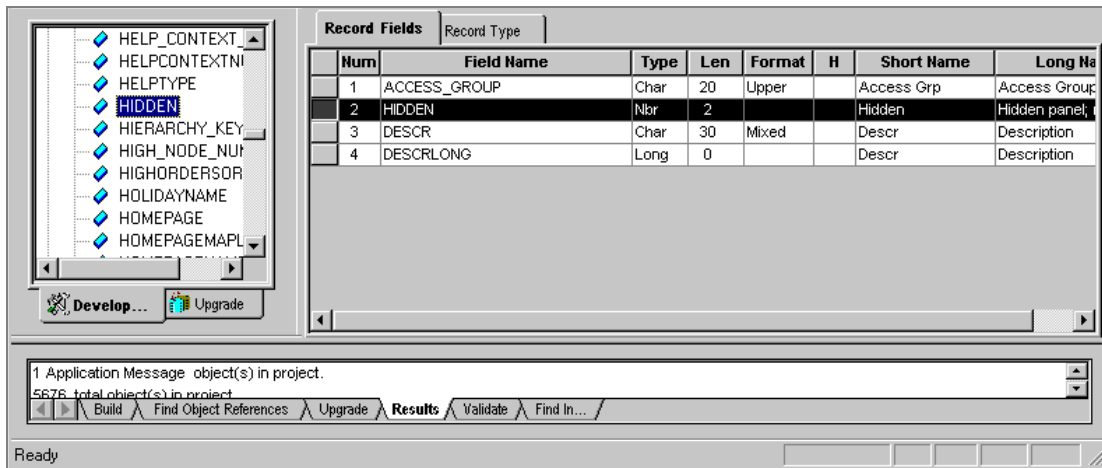
Note. Changing a field name or length requires modification of the underlying SQL table, either by running the SQL Build or SQL Alter menu items or by a system administrator action. For example, if you change a field length on one record definition and 30 other record definitions contain the same field name, you have 31 records that must be built or altered.

Inserting Fields Into Records

You can insert a field into a record in one of these ways:

- Using the project workspace tree.
- Using the Insert menu (Insert, Field).
- Dragging fields from existing records.

Inserting from a Project Workspace Tree



Adding a field to a record definition

To add existing fields to a record definition:

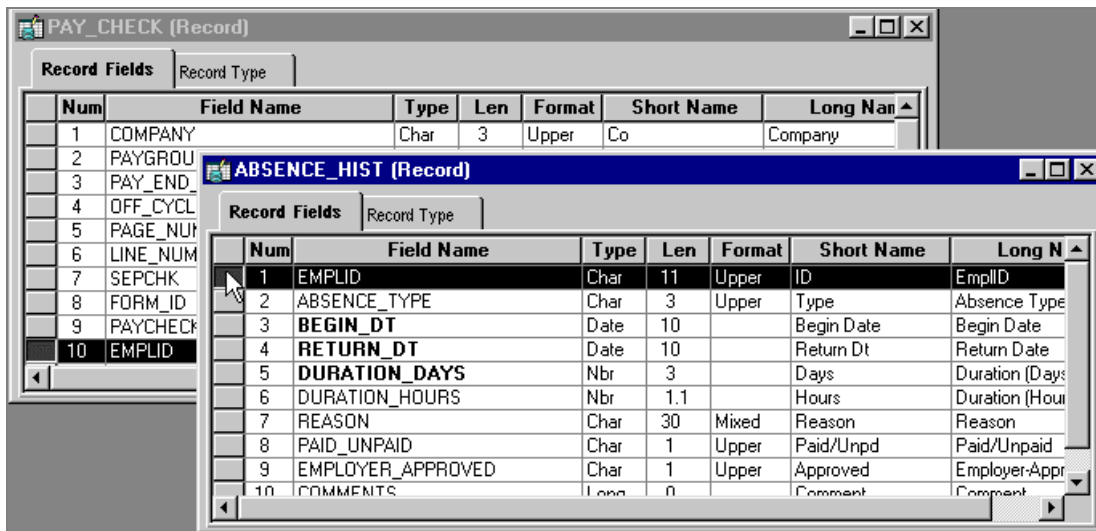
1. Locate a field using the PeopleSoft Application Designer project workspace tree.
2. Drag the field from the project workspace tree to the object workspace.

The field and its attributes are automatically added to the list of fields in the record definition.

Inserting with the Insert Menu

Use the Insert, Field menu selection to search for fields with selection criteria and then add them to the record using the Insert button. You can also double-click a selected field definition and select Insert the Field Definition. Fields are inserted below the selected field in the record definition.

Inserting by Dragging Fields From Existing Records



Inserting a record by dragging

To insert by dragging fields from existing records:

1. Open a record that contains the fields that you need.
2. Select the field.
3. Drag the field to a new record.

Inserting Subrecords in Records

This section discusses how to:

- Insert a subrecord.
- View a subrecord.
- Nest subrecords.
- Edit PeopleCode in subrecords.

Inserting a Subrecord

Select Insert, SubRecord to search, select, and insert subrecords into a record. A subrecord enables you to add a group of fields that are commonly used in multiple record definitions. A subrecord must be defined before it can be inserted into a record definition.

Viewing a Subrecord

Any open record in which a subrecord is inserted can have the subrecord expanded into the same record definition window by selecting View, Expand All Subrecords.

After you select Expand All Subrecords, the parent record definition expands to show the subrecord field relationships (shaded) to the parent record.

Num	Field Name	Type	Len	Format	Short Name	Long Name
1	SETID	Char	5	Upper	SetID	SetID
2	CARRIER_ID	Char	10	Upper	Carrier ID	Carrier ID
3	EFFDT	Date	10		Eff Date	Effective Date
4	DESCR	Char	30	Mixed	Descr	Description
5	EFF_STATUS	Char	1	Upper	Status	Status as of Effective D
6	TAXPAYER_ID	Char	14	Upper	Tax ID	Taxpayer ID
7	NETWORK_ID	Char	18	Upper	Network ID	Network ID
8	FRT_FORWARD_FLG	Char	1	Upper	Frt Forwrd	Freight Forwarder
9	ALT_NAME1	Char	40	Mixed	Alt Name 1	Alternate Name 1
10	ALT_NAME2	Char	40	Mixed	Alt Name 2	Alternate Name 2
11	LANGUAGE_CD	Char	3	Upper	Lang Cd	Language Code
12	ADDRESS_SBR	SRec				
	ADDRESS1	Char	35	Mixed	Address 1	Address Line 1
	ADDRESS2	Char	35	Mixed	Address 2	Address Line 2
	ADDRESS3	Char	35	Mixed	Address 3	Address Line 3
	ADDRESS4	Char	35	Mixed	Address 4	Address Line 4
	CITY	Char	30	Mixed	City	City

Subrecord expanded in parent

When the subrecord is expanded, you cannot insert, cut, delete, paste, reorder, and sort fields. If you reordered the display of the fields, you cannot expand the subrecords.

The expanded subrecord fields are read-only, which means that you cannot see the properties of these fields. To access the properties, first open the subrecord. The shortcut to opening a subrecord is to click the expanded subrecord and select *View Definition*. This opens a subrecord definition from which you can view the properties of the fields.

Collapse the subrecord by selecting View, Collapse All Subrecords.

Nesting Subrecords

Nested subrecords are fully supported to any level. Expanding a record toggles the record field list to show all of the fields from all levels of nesting. Changes to subrecords are immediately reflected in expanded records.

Editing PeopleCode in Subrecords

You can edit PeopleCode that is attached to a subrecord field by double-clicking the appropriate field as it appears in the expanded record. Any PeopleCode changes that you make apply to all records that contain that subrecord.

Setting Record Properties

This section discusses how to:

- Set general and use properties.
- Create user-defined audit record definitions.

Setting General and Use Properties

After you create a record, set the general and use properties. Access the dialog box by selecting Record Properties, then either General or Use tab.

General Tab

Description	Enter a descriptive name for the record.
Record Definition	Enter appropriate comments in this area, including details about the record type, use, parent and child relationships, or other information that is important to other application designers.
Owner ID	Displays a list of applications with which this record is used. This list is helpful to identify the applications with which the record is associated during application development.
Last Updated	Displays the date and time of the last modification that was made to the record and the name of the user who made the modification.

Use Tab

Set Control Field	Specify the field with which the system maps between the original key and the tablesets. See “Planning Records, Control Tables, and TableSets,” Defining Set Control Fields.
Parent Record	If this is a subordinate or child record, specify the parent record.
Related Language Record	Specify a related language record. <ul style="list-style-type: none"> • The master record definition, which contains the appropriate key and nonkey field definitions. • A clone of the master record definition, to which you add an additional key for language code. This is the related language record definition. This definition should contain only those nonkey fields for which contents vary by language. Link the two record definitions by specifying the name of the related

language record definition in this field on the master record definition.

At runtime, the system checks the user's language preference and retrieves the data value from the appropriate related language record definition.

Query Security Record	Specify a query security record if you want secure access to a record using a security view.
Optimization Delete Record	Specify a delete record to use for optimization.
Record Name	Specify the user-defined audit record. See Creating User-Defined Audit Record Definitions.

Audit Options

While you can audit individual fields at the field level, you might find it more efficient to have the system audit the entire row whenever a user adds, changes, or deletes information. With record-level audits, the system focuses on rows of data, instead of specific fields. Consequently, a record-level audit writes a single row of audit data, rather than writing multiple rows for each insert, change, or delete transaction at the field level.

Add	Inserts an audit table row whenever a new row is added to the table underlying this record definition.
Change	Inserts one or two audit table rows whenever a row is changed on the table underlying this record definition.
Selective	Inserts one or two audit table rows whenever a field that is also included in the record definition for the audit table is changed.
Delete	Inserts an audit table row whenever a row is deleted from the table underlying this record definition.

Creating User-Defined Audit Record Definitions

To audit at the record level, you must create a record definition and SQL table in which you store audit information. When you create a new audit record definition, name it with an *AUDIT_* prefix. Some processes, such as the Employee ID Change and Employee ID Delete processes in the PeopleSoft HRMS product line, change fields, such as EMPLID (employee identification). These processes do not affect record definitions that begin with the *AUDIT_* prefix, leaving your audit data secure.

The easiest way to create an audit table is to open the record definition that you want to audit, and save it as a new record definition, prefaced with *AUDIT_*. Audit record definitions can't contain key fields. Therefore, if you clone a record definition to create an audit record definition, you must remove all key attributes.

PeopleSoft recommends that you also use the audit-specific fields that are already defined for the PeopleTools audit table (PSAUDIT), which we use to track field-level audits. Place these audit fields at the top of the audit record definition, as you would keys. If you are creating several user-defined audit record definitions, you might consider creating and using a sub-

record definition with these audit fields instead of adding them individually to each audit record definition.

<i>Audit Field Name</i>	<i>Purpose</i>
AUDIT_OPRID	Identifies the user who caused the system to trigger the audits—either by performing an add, change, or delete to an audited field.
AUDIT_STAMP	Identifies the date and time the audit was triggered.
AUDIT_ACTN	Indicates the type of action that the system audited. Possible actions include: <ul style="list-style-type: none"> • A: Row inserted. • D: Row deleted. • C: Row changed (updated), but no key fields changed. The system writes old values to the audit table. • K: Row changed (updated), and at least one key field changed. The system writes old values to the audit table. • N: Row changed (updated), and at least one key field changed. The system writes new values to the audit table.
AUDIT_RECNAME	Identifies the name of the record definition that was audited.

In most cases you should include AUDIT_OPRID, AUDIT_STAMP, AUDIT_ACTN. The AUDIT_STAMP must be given the attribute AUTOUPDATE. You might also add AUDIT_RECNAME if you are creating an audit table to audit more than one record definition.

Note. Select the Auto-Update check box in the Record Field Properties dialog box—otherwise, the audit record doesn't receive a date and time stamp.

Setting Record Field Properties

This section provides overviews of record field properties and record key considerations, and discusses how to:

- Set record field use properties.
- Add from and through logic to the search dialog box.
- Set record field edit properties.
- Move fields in the same record.
- Move fields to another record definition.
- Delete a field from a record definition.

- Rename record definitions.
- Delete record definitions.
- Print record definitions.
- Create SQL view and dynamic view Select statements.

Understanding Record Field Properties

When you add a field to a record definition, you must define attributes for how the field is used in that record. These include key settings, default values, table edits, and PeopleCode programs.

The properties of record fields are not shared among records—they are specific to a single record definition and are stored with the record. Therefore, even though you might add the same field to multiple records, each record stores a unique set of record field properties while the primary field definition remains the same.

When you access *record* field properties from a *record* definition, you set the *record field* properties—not field definition properties or record definition properties.

To edit record field properties from a record definition, select Edit, Record Field Properties from the PeopleSoft Application Designer menu.

Understanding Record Key Considerations

Records with Multiple Keys

You can specify more than one field as a key to a record definition—that is, a record definition can have a compound key.

Num	Field Name	Type	Key	Ordr	Dir	CurC	Srch	List	Sys	Audt	Default
1	EMPLID	Char	Key	1	Asc		Yes	Yes	No		
2	ABSENCE_TYPE	Char	Key	2	Asc		No	No	No		'CNF'
3	BEGIN_DT	Date	Key	3	Desc		No	No	No		%date
4	RETURN_DT	Date					No	No	No		
5	DURATION_DAYS	Nbr					No	No	No		
6	DURATION_HOURS	Nbr					No	No	No		
7	REASON	Char					No	No	No		
8	PAID_UNPAID	Char					No	No	No		'U'
9	EMPLOYER_APPROVED	Char					No	No	No		'N'
10	COMMENTS	Long					No	No	No		

Defining compound key combinations

For example, the keys to the ABSENCE_HIST record definition are EMPLID, ABSENCE_TYPE, and BEGIN_DT. This means that an absence history can be created only once.

Keys on Parent and Child Tables

In some cases, you have a field in a table for which you want to allow multiple occurrences, in which case you create a subordinate or child table. For example, for employee reviews, an employee can be reviewed for performance in multiple categories—organization skills, interpersonal skills, and so forth. These categories and ratings are stored in a separate child table, EE_REVIEW_RT, which is directly related to REVIEW_DT, the parent table that stores information about employee reviews.

The keys that you establish in a parent record definition determine which keys are required in child record definitions. The child must have the same keys as the parent, plus one or more keys that uniquely identify each row.

<i>Item</i>	<i>Parent Table</i>	<i>Child Table</i>
Record Definition	REVIEW_DT	EE_REVIEW_RT
Key Fields	EMPLID	EMPLID
	REVIEW_DT	REVIEW_DT
		CATEGORY

Most record definitions have either one primary key, multiple keys that comprise independent, or parent and child key combinations. There are, however exceptions, such as record definitions without keys and duplicate order keys.

Records Without Keys

Some record definitions, such as INSTALLATION, don't require keys because only one row of data exists in the table. Whereas a table normally has keys to help distinguish between multiple occurrences of data, in this case there's only one row of data, so there's no need to distinguish one row from another. Another primary use for keys is to build database indexes to rows—because there's only one row for each table, the record doesn't need indexes.

	Num	Field Name	Type	Len	Format	Short Name	Long Name
	1	COMPANY	Char	3	Upper	Co	Company
	2	MIN_STD_HRS	Nbr	2.2		Min Std Hr	Minimum Standard Hour
	3	MAX_STD_HRS	Nbr	2.2		Max Std Hr	Maximum Standard Hour
	4	STD_HRS_DEFAULT	Nbr	2.2		Default Hr	Default Standard Hours
	5	TEMP_SSN_MASK	Char	3	Upper	Temp SSN	'Temporary SSN' Mask
	6	COMMIT_AFTER	Nbr	4		Commit Aft	Commit After Empl Proce
	7	POSITION_MGMT	Char	1	Upper	Posn Mgmt	Position Management O
	8	COUNTRY	Char	3	Upper	Cntry	Country
	9	COMP_FREQUENCY	Char	1	Upper	Comp Freq	Compensation Frequenc
	10	EMPLID_LAST_EMPL	Nbr	10		Last Empl	Last Employee ID Assign
	11	EMPLID_LAST_APPL	Nbr	10		Last Appl	Last Applicant ID Assign
	12	NON_EMPLOYEE_LAST	Nbr	10		Last NonEm	Last Non-Employee ID A
	13	JOB_REQ_NBR_LAST	Nbr	6		Last Req#	Last Job Requisition # U

INSTALLATION Table

Records with Duplicate Order Keys

Occasionally, you might encounter situations in which a unique identifier for each row does not exist. *Duplicate order keys* are a way of ordering data in the table when duplicate values are allowed.

For example, in the EDUCATN Table, PeopleSoft anticipated that an employee can receive two degrees of the same type on the same date. For example, though rare, Simon Schumaker could receive two honorary degrees in computer science on the same day.

Because there is no unique identifier—the employee ID, date earned, and degree are all the same—the user must maintain the data differently. The key, instead of defining a unique row, defines a group of rows. In that group, you must determine the order in which you want to display information.

In the EDUCATN record definition, there are three keys that together determine how information is stored and retrieved. EMPLID identifies the group of rows; the placement of the duplicate order keys, DT_EARNED and DEGREE, instruct the system to order rows in the group first by date, then by degree.

EMPLID	DT_EARNED	DEGREE
8001	June 1, 1992	HON
	June 1, 1992	HON

The system concatenates or joins keys when it checks for uniqueness. In this case, the system accepts duplicate entries in the DEGREE and DT_EARNED fields because they are part of a set that is identified by EMPLID.

Ordering Keys

The position of keys relative to one another is critical in a record definition—always list them in order of importance.

The primary key must be the first field in the record, followed by the next most important key, and so on. Key fields are followed by duplicate order keys, in order of importance, then by fields that are not keys. You can scatter alternate key fields anywhere among regular fields, in any order. They don't need to be grouped.

Key, Duplicate Order Key, and Alternate Search Key are mutually exclusive.

Note. The display of key fields in record definition views does not always match the order in the record. Always check the Num column to see the actual order.

Note. Each alternate search key that you establish creates a database index when you SQL Create the table. While database indexes are important, they consume disk space and, when the system must support the alternate key, processing time. Therefore, don't add alternate search keys unless you really need them.

Setting Record Field Use Properties

As you add fields to a record definition, you must decide which fields uniquely identify each row—these become the record keys. The nature of the data that you are storing should naturally determine the “keys” to the information in the database.

The record field properties options that are available for field types might vary slightly—for example, some of the properties that you assign might be relevant only to a character field in a record and not to a date or time field. However, all of the options are described in this section.

Keys

Key	Select to identify the field as the search criteria that uniquely identifies each row. You cannot have duplicate values for primary keys. For example, EMPLID is the only key to the PERSONAL_DATA record definition. Therefore, EMPLID must be a unique value for each employee and there can be only one PERSONAL_DATA row per employee.
Duplicate Order Key	Select to indicate that duplicate values can occur. The order in which you place duplicate order keys in a field list determines the order in which duplicate keys are retrieved.
Alternate Search Key	Select to identify the field as a key that provides an alternate path into the table data. Duplicate values are allowed in an alternate search key field. If you define a field as an alternate search key in a search record, when you bring up a page, the system prompts you to enter a key or alternate search key values.
Descending Key	Select to identify the field as descending if you want rows of data to be retrieved in reverse alphanumeric order (for example, 3, 2, and 1). If you clear this check box, the key is ascending, meaning that rows are stored and retrieved in alphanumeric order (for example, 1, 2, and 3). This option applies only to a field that is specified as a key, duplicate order key, or alternate search key. PeopleSoft uses descending order primarily for effective date fields; most character keys are ascending.
Search Key	Select to make the field available on the basic and advanced search or lookup pages. A search key is valid only for keys and should be used only in search and prompt records. If you select this check box, the system automatically selects List Box Item.
List Box Item	Select if you want the field to appear in the list box preceding a page. If a field has values in the translate table and you designate it as a list box item, the list box automatically shows the translated value instead of the code.

From Search Field and Through Search Field

Select for fields that are used as search records. If you select From Search Field, the displayed list contains rows in which the field value is greater than or equal to a value that the user enters. If you select Through Search Field, the displayed list contains rows in which the field value is less than or equal to a value that the user enters.

If you do not want these fields to be in a search list box, clear the List Box Item check box, even if the field is an alternate search key.

Default Search Field

Select to control which field name appears in the Search By drop-down list box on the basic search page.

Disable Advanced Search Options

Select to prevent run-time search dialogs from displaying advanced features for this field.

Record Field Label ID

Specify which label, long name or short name, to use for the record. The default is ****Use Default Label****. This enables you to change labels of record fields dynamically anytime that the default label on the field definition is changed.

For example, if a field definition has three labels:

- Label1 (Long Name1, Short Name1), marked as default.
- Label2 (Long Name2, Short Name2).
- Label3 (Long Name3, Short Name3).

When the label ID in a record field is set to *Use Default Label*, initially the long name and short name are Long Name1 and Short Name1. If the default label is changed to Label3 in the field definition, then the long name and short name automatically become Long Name3 and Short Name3.

Default Value

Select the most commonly used value as the default. You can always enter a different value if the default is inappropriate. The more defaults that you provide, the more data entry time you'll save your users.

For a field, you can enter a default value as a system variable or as a combination of record and field names.

Constant

Specify a value as a default field. The value that you specify is case-sensitive. You can specify a system variable (such as %date or %time) if you want the default to be the current date or time. This is a drop-down list box

if this record has translate values for this field.

Record Name and Field Name

Enter the record and field names of the default value.

Default Page Control

Specify the default appearance of a field as it appears on the page that corresponds with the record field that you are creating.

Audit

The audit options apply only to data that is manipulated on a normal PeopleSoft application page through component processing. These options do *not* apply to data that is added using SQLExec in PeopleCode or by some other means. PSAUDIT logs the user ID, the date and time the field was modified, and the old and new values.

If you want to audit certain fields, regardless of the record definitions in which they're included, you want to control when the fields are audited. If you want to audit several fields in a record definition, you might want to consider specifying audits at the record definition level.

Field Add

Audits this field whenever a new row of data is added.

Field Change

Audits this field whenever the contents are changed.

Field Delete

Audits this field whenever a row of data is deleted.

System Maintained

Select to indicate that the field value is system-generated. This option is for documentation purposes only and doesn't affect processing.

Auto-Update

Select to have the field updated with the server's current date and time whenever a user creates or updates a row. Any user entries—even if permitted on a page—are overwritten by the server time.

Currency Control Field

This field enables the user to specify where to find the currency code that is used to display the currency symbol, decimal digits, and scale of a number field. To use this option, the multicurrency option must be set. You might also want to enable the current display when you define the field on the page.

Time Zone and Related Date Fields

These fields are enabled only if the current field is a time or date and time field. They determine whether the field is displayed or entered in a specified time zone. Typically, you

want to make a date field a descending key so that the row with the latest and most current time appears first. If you want the default value to be the current system date, enter the value %date (or %time) as the constant in the Default Values group box.

Specified Time Zone

Times are always stored in a database base time zone, but when you place a time field on a page, you can display the time in the base time zone or another time zone.

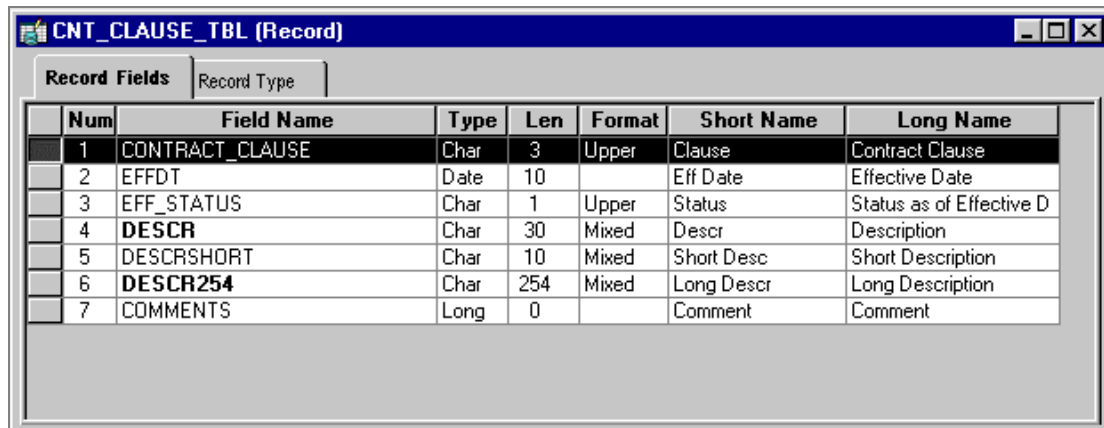
If you clear this check box, the time appears in the database base time zone. If you have users in multiple time zones, you can reduce confusion by showing the time zone along with the time.

If you select this check box, the system converts the time according to the time zone specified in **Time Zone Control Field**. This control field must be a field in the current record. Set an appropriate default value for the time zone control field.

Date Control Field

Select which related date field in the current record stores the calendar date to which this field should be adjusted.

Adding From and Through Logic to the Search Dialog Box



Num	Field Name	Type	Len	Format	Short Name	Long Name
1	CONTRACT_CLAUSE	Char	3	Upper	Clause	Contract Clause
2	EFFDT	Date	10		Eff Date	Effective Date
3	EFF_STATUS	Char	1	Upper	Status	Status as of Effective D
4	DESCR	Char	30	Mixed	Descr	Description
5	DESCRSHORT	Char	10	Mixed	Short Desc	Short Description
6	DESCR254	Char	254	Mixed	Long Descr	Long Description
7	COMMENTS	Long	0		Comment	Comment

CNT_CLAUSE_TBL record

To apply the from and through logic to a search dialog box:

1. Determine which component you want to change.

You must modify the search record for a particular page, so you must first identify the appropriate component.

2. Determine on which field to use the from and through search logic.

Open the component in PeopleSoft Application Designer and examine the search record that is associated with the component. In the preceding screen shot, the search record is

CNT_CLAUSE_TBL, and the field to which you want to apply the from and through search logic is CONTRACT_CLAUSE.

3. Create a new view that contains the same fields as the original search record.

To use the from and through search logic, the search record *must be a view*. If the search record is already based on a view, you can modify the existing view instead of creating a new view.

4. Select the **From Search Field** property for the field.

In the new view, select the from search field and apply the following record field properties: Key, Search Key, and From Search Field (List Box Item is optional).

5. Create a new field with exactly the same attributes as the from field.

For example, if CONTRACT_CLAUSE represents the *field* from which you want to search, create a field called CONTRACT_CLAUSE_TO representing the field *through* which you want to search.

6. Insert the new field directly below the original field.

7. Select the **Through Search Field** property for the field.

Select the new through search field and apply the following record field properties: Key, Search Key, and Through Search Field only.

8. Update the SQL view text.

Update the SQL view Select statement in the new view to reflect the new column. That is, the view text should select the same field twice in a row (as shown in the example that follows this procedure). This is because the same field is used for the from logic and the through logic.

9. Save and build the new view.

10. Update the component properties.

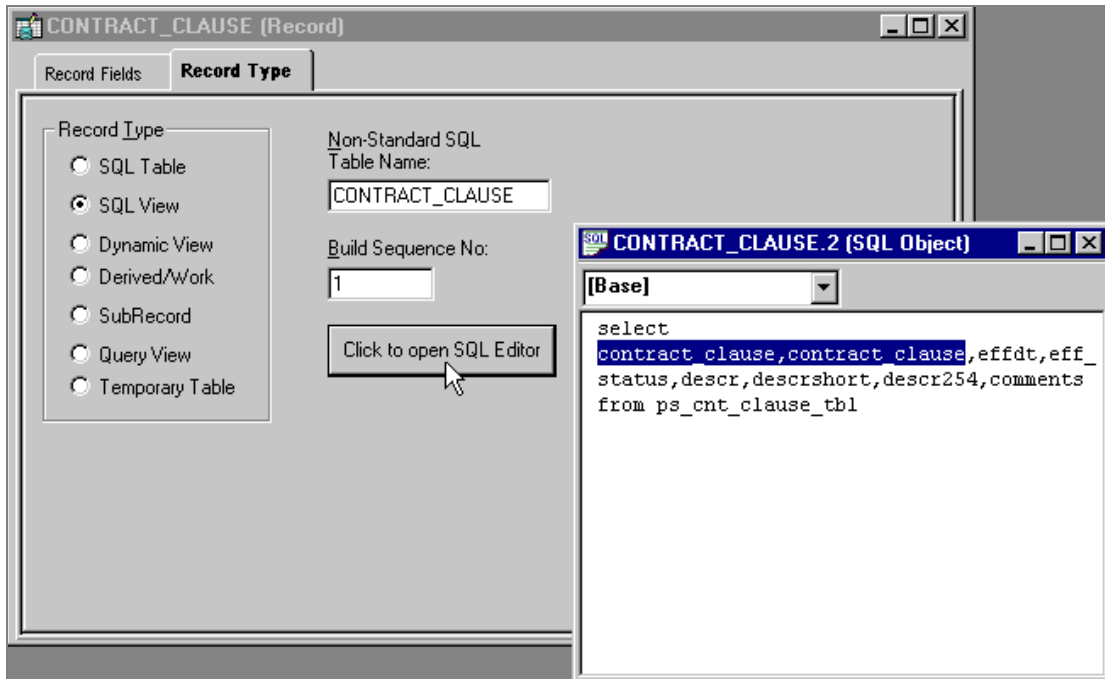
You must update the search record so that the component uses the new view.

11. Test the new search dialog box.

The search dialog box should now include the new through field so that the user can specify a range of values for the field. Because you want to search on both fields, you must use an advanced search.

The results in the list box should reflect a range of values between the from and through fields that are specified. The results are *inclusive*—they include the minimum and maximum values that the user specified.

Example of Updating the SQL View Select Statement



Updating the SQL view Select statement

Setting Record Field Edit Properties

The Edits tab enables you to specify whether the system is to perform special edits or validations on a record field. You also name the record definition for the prompt table that stores values.

Required

Select if you don't want users to skip a field or leave it blank. Users will not be able to save their work until they complete all of the required fields on a page.

Edit Type

No Edit

Select if you don't want to edit the contents of this field against a table. This is the default, which makes the options in the Table Edit group box unavailable.

Table Edit

Select to edit the contents of the field against the values that are maintained in the specified table. When you select Table Edit, the Type field becomes available in the Table Edit group box.

Table Edit

Type

Select from the drop-down:

Note. The list of available table edit types is dependent on the field type.

Prompt Table with No Edit: Provides users with a list of suggested values, but does not edit the contents of the field against the prompt table. Users can enter any value. Selecting this option makes the Prompt Table field available.

Prompt Table Edit: Edits the contents of the field against the values that are maintained in the specified prompt table. Selecting this option activates the Prompt Table field. When you enter a prompt table name and exit the field by pressing TAB, Set Control Field becomes activated.

Translate Table Edit: Edits the contents of the field against the translate table. The translate table stores values for fields that must be validated but don't need individual tables of their own. If you select this option, Prompt Table and Set Control Field become unavailable.

Yes/No Table Edit: Makes the values for this field Y (yes) and N (no) only. If you select this option, Prompt Table and Set Control Field become unavailable.

1/0 Table Edit (1-True,0-False)

Note. If you add a field (other than with the paste action) to a record and the field name is already defined in the database with previously defined translate values, the system automatically selects Table Edit and selects *Translate Table Edit* as the table type. For both *Translate Table Edit* and *Yes/No Table Edit*, PeopleSoft recommends that you follow our design standards, select Required, and specify a default value for the field in the Record Field Properties dialog box.

Prompt Table

Enter the name of the record definition that you want to use as the prompt table for this field.

If you want the prompt table to vary depending on the context of the field, indicate a field in the derived or work record (DERIVED) that contains the name of the prompt table at runtime. Then, in this field enter, *%FieldName*.

The % is required, and indicates that you're referencing a derived or work record definition named DERIVED. *FieldName* is the name of the field in that DERIVED record definition.

Set Control Field

Select a set control field that overrides the set control field of the record definition specified in the prompt table. If you don't specify a name in this field, the default is the set control field of the record definition specified in the

prompt table.

Reasonable Date

Select if you want the system to test the field value to determine whether it is within 30 days of the current date. If the date is out of range, a warning message appears when the user exits the field.

Moving Fields in the Same Record

You can move fields in a record by dragging a field to another place in the open record definition. In addition, you can change the visible order of fields by clicking any of the grid headings.

Num	Field Name	Type	Len	Format	H	Short Name	Long Name
1	DIMENSION	Char	30	Upper		Dimension	Dimension ID
2	SEQUENCE_NBR	Nbr	2			Sequence	Sequence Number
3	DATA_SRC_NUM	Nbr	4			Input Nbr	Input Number
4	QUERYNAME	Char	30	Upper		Query Name	Query Name
5	TREE_NODE	Char	20	Upper		Node	Tree Node
6	LEVELS_FROM_TOP	Nbr	3			Levels From Top	Levels From Top
7	DIM_DATA_SRC_TYPE	Char	1	Upper		Src Type	Dimension Data Source

Moving field to new position

To move a field in the same record definition:

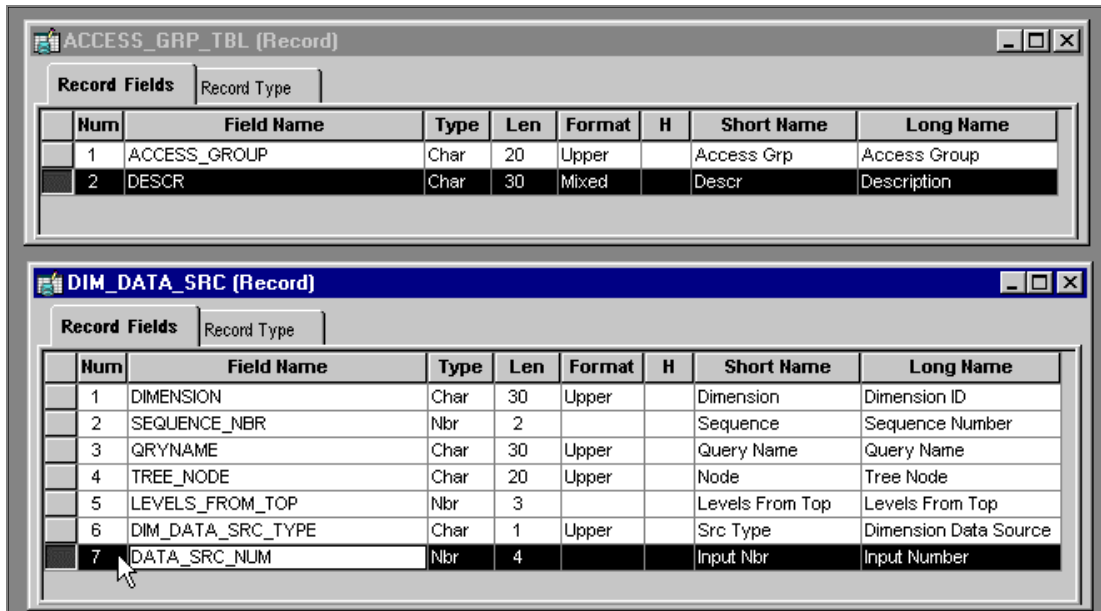
1. Select the field that you want to move.
2. Drag the selected field number to the new position in the record definition window.

The record window automatically renumbers the fields in the new order.

Note. The fields are reordered only in visible display of the record definition, not in the actual table.

Moving Fields to Another Record Definition

To move fields from one record definition to another, you can cut and paste the fields. You can also drag a field from the project workspace into a record definition in the object workspace or between open record definitions.



Selected placement for new field

To move a field from one record definition to another:

1. Open the two records between which you want to move the field.
2. Select the field that you want to move.
3. Select Edit, Cut.

If this is the correct field to cut from the record, click **Yes**.

4. Select the new position for the field in the destination record.
5. Select Edit, Paste to paste field into new record definition.

Note. PeopleCode that is associated with fields is not carried over with cut and paste operations. The same is true for delete and undo with field deletions in records. RecordField attributes, such as key, search key, and so on, *are* retained.

Deleting a Field From a Record Definition

To delete a field from a record definition:

1. Select the field that you want to remove and press the DEL (delete) key.

This deletes the field completely and doesn't copy it to the clipboard, unlike a cut operation, which *does* copy to the clipboard.

2. When the system prompts you to confirm the deletion, click **Yes**.

If you've already SQL Created the underlying table for the record definition from which you are deleting the field, re-create the table, or use the SQL Alter function to alter the table.

Remember, if you delete a field from a record definition, you must also delete it from any pages on which it appears. When you delete a field, the system doesn't automatically delete references to the field in PeopleCode, so you must do this manually. To determine where the field is referenced in PeopleCode, use Find Object References feature. You can also reference the following two reports:

- Fields and Records (XRFFLRC) shows which records contain the field.
- Fields Referenced by PeopleCode Programs (XRFFLPC) shows PeopleCode that refers to the field in the record.

Modify or remove PeopleCode when you find references to the deleted field.

Renaming Record Definitions

To rename a record definition:

1. Select File, Rename.
2. The Rename Definition dialog box appears.
3. Select *Record* from **Definition Type**.
4. Click Rename.
5. Select the record and click **Rename**.
6. A rectangular box appears around the name.
7. Enter the new name and press ENTER.

Results of Renaming Record Definitions

When you rename a record definition, the system automatically renames all references to it, including data on tables with columns named RECNAME where the data matches the record being renamed.

The only references that are *not* renamed are the text portion of SQL functions, such as SQLExec and Scroll Select and the record names in the view text. To find the text portion of SQL functions in PeopleCode or record names in view text, use Edit, Find In to search for the matching text.

If you have already SQL Created the underlying tables for the record definition that you renamed, re-create that table. If you want to preserve data in the tables, use the SQL Alter function to rename the database tables.

Deleting Record Definitions

To delete a record definition:

1. Select File, Delete.
2. Select the record definition to delete.
3. Click **Delete**.

Warning! When you delete a record definition, the system automatically deletes any PeopleCode that is associated with the record.

4. Click **Yes** if you really want to delete the record definition.

Note. Notify your database administrator about which record definition you deleted, so the administrator can drop the underlying SQL table and its contents from the database.

Printing Record Definitions

You can print your record definitions as references identifying all of the fields and their various attributes—any special use, edits, or PeopleCode that you've applied.

To print a record definition, it must be open in the object workspace.

To print a record definition:

1. Select File, Page Setup to change any of the print record defaults.

The system retains your changes until you reset them again. The Page Setup dialog box appears.

2. Select the options for print.

Definition	Prints a picture of what the definition looks like.
PeopleCode	Select if you want the report to include a listing of any PeopleCode programs that are attached to each field, identifying the program type and listing all of the PeopleCode statements. The default is selected.
Graphics	Not used for record definition printing.
Margins(mm)	Set the distance (in millimeters) from the edge of the page to the left, right, top, and bottom edges of the page image or report. The defaults are: 20 (top), 5 (bottom), 5 (left), and 0 (right).

Header	Print a header at the top of the report indicating the date and time at which you printed the report and the database name, record name, version number, and page number. The default is selected.
Footer	Print a footer at the bottom of the report indicating the date and time at which you printed the report and the database name, record name, version number, and page number. The default is cleared.
Border	Print a border or box around a record definition report. To print reports faster, clear this check box so that the printer can print the report in character mode, rather than in graphics mode. The default is cleared.
Border Space(mm)	Insert a set amount of space between a graphical boarder around the record definition report and the margins of the report. The default is 3.

3. Click OK when you are done to close the Print Setup dialog box and save your settings.
4. Select File, Print.

Record Definition Report

The following table lists the columns in the record definition report and their contents.

Column	Contents
Field Name	The name of the field.
Type	The field type.
Length	The length of the field (not specified for long character fields).
Format	The field format.
Long Name	The 30-character name of the field.
Short Name	The 15-character name of the field.
Key	Identifies key attributes (characters defined by position).
Req	<i>Yes</i> indicates that the field is required.
TblEdt (table edit)	<i>Prompt</i> indicates that field values are edited against a specified prompt table. <i>Y/N</i> : The field uses the Yes/No Table. <i>Xlat</i> : The field has values in the translate table. Values (if printed) are listed below the field.
AU (auto-update)	<i>Yes</i> indicates that the auto-update option is enabled.
Dt (date)	<i>Yes</i> indicates that the reasonable date option is enabled.

Column	Contents
PC (PeopleCode)	<i>Yes</i> indicates that the field has PeopleCode. PeopleCode text (if printed) appears below the field.
Aud (audit)	<i>Yes</i> indicates that the field audit flag is enabled. <i>A</i> : Audit add. <i>C</i> : Audit change. <i>D</i> : Audit delete.
Prompt Table	The name of the prompt table.
Default Value	Any default value or constant.

You might also see additional reference lines below each field or at the end of the report.

Reference	Description
SQL View	Shows the SQL view Select statement for view-type record definitions. This appears at the top of the report.
System Maintained	Indicates that the System Maintained check box is selected. Because this option is for documentation purposes only—it doesn't do anything—it doesn't warrant its own column heading.
DbField Help Context: <i>nmn</i>	Indicates that the field has been assigned a field help context number to link it to a help file that describes how the field is used wherever it appears in the database.
RecField Help Context: <i>nmn</i>	Indicates that the field has been assigned to a record field help context number to link it to a help file that describes how the field is used only as it appears in this record definition.
Audit Record	Identifies a user-defined audit record. Lists the audit record name and the type of audit.
Set Control Field	Identifies a set control field that is designated for the record definition.
Related Language Record	Identifies a related language record that is designated for the record definition.
Query Security Record	Identifies views that are used to restrict query access to data that is stored in the table.
Parent Record Name	Identifies the hierarchical relationship of the record for query reporting.

Printing records with subrecords takes into account whether the record view is expanded or collapsed. If the record view is expanded, the subrecord fields are indented to the appropriate level of nesting.

Creating SQL View and Dynamic View Select Statements

If you are creating a SQL view or dynamic view record definition, you must enter a SQL view Select statement, to indicate which field values you want to join from which tables. The only difference between the standard view and dynamic view is that the dynamic view is not defined as a view to the database—it is stored on the client and run as a Select at runtime. Dynamic views avoid some constraints on views on some platforms.

SQL view Select statement of record

Non-Standard SQL Table Name

Override the standard convention of prefixing *PS_* to the record name.

Build Sequence No (build sequence number)

Set the order in which the dynamic view is to be created. The default is *1* when the record or view is initially created. Views that must be created first can be set to *0*, while views that you want created last can be set to *1* or greater. The build sequence number is stored with the other details of the record or view in the database.

Click to open SQL Editor

The view text is saved when the record is saved, by using File, Save. The record must be saved first, before opening the SQL Editor.

Note. The order of the columns in the Select statement must be identical to the field order in the corresponding record definition. Also, only certain types of meta-SQL statements can be used in view text.

See Also

“Building SQL Tables and Views,” Using Cross-Platform Meta-SQL for Dynamic Views

CHAPTER 6

Building SQL Tables and Views

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

- Use the Build menu.
- Create tables.
- Create online views.
- Alter tables.
- Create Triggers.
- Administer data.

Understanding the Build Process

Using PeopleSoft Application Designer, you create several kinds of definitions that represent database components. For instance, field definitions represent table columns, and record definitions represent tables and views. From these field and record definitions, you can create tables, views, and indexes. The important concept to remember is that the definitions are just the blueprints for the actual, physical database components with which they are associated. In the context of the entire application development cycle, using the Build process (creating SQL tables, views, triggers, and indexes) occurs after you define new fields and create the record definitions. After you build the SQL tables, you begin creating page definitions.

After you create and define your field and record definitions, you must create or build the underlying SQL tables that house the application data that your users will enter online in your production environment. This Build process is the centerpiece of the Data Administration features in PeopleSoft Application Designer. The Build process uses Data Definition Language (DDL) to construct a physical database component that is based on the associated record and field definitions that you created. With the Build feature, you can create the following:

- Tables
- Indexes
- Views
- Triggers

You can also use the Build feature to *alter* existing tables if you change the record definition after the table already exists. Altering a table is useful, because it enables you to make changes without losing the application data that is already housed in the table. In general, the results of the Build operation are written to a script file that a database administrator can run later. On some database platforms, you can run the SQL online, if you prefer, so that your changes are immediately reflected in the physical database. However, if you run the SQL immediately, you cannot review it to make sure the table that was built truly meets all of your requirements.

Prerequisites

Before you begin using the data administration tools and the Build process:

- Review what DDL means for PeopleSoft applications.
- Grant build authority.

Reviewing DDL

DDL is the part of SQL that pertains to the creation of tables, indexes, views, triggers, and tablespaces. DDL is also the part of SQL that differs most between the various relational database platforms. Each database vendor provides different syntax and configuration options for creating and organizing tables and for optimizing performance. Because PeopleTools supports multiple database platforms, PeopleSoft has designed a flexible way of specifying DDL that enables you to take advantage of each vendor's features. The basic components of the PeopleSoft DDL support include the following:

- DDL model definition—a complete set of the supported DDL statements for each database platform.

The statements include Create Table, Create Tablespace, and Create Index. Each DDL model statement has substitution parameters that can be specified at the database level, or they can be overridden for individual records.

- Record DDL—where you specify the DDL model substitution parameters for an individual record.
- Index DDL—where you specify the DDL model substitution parameters for a unique index or other index.
- Sizing sets—a way to maintain multiple versions of your DDL model statements for a database platform.

For example, you can use one sizing set during a development phase, when tables have only test data, and another during production, when tables have much more data.

Granting Build Authority

The PeopleSoft Security enables you to specify which users can build scripts, run scripts (Execute SQL now), maintain DDL, and so on. Access Security from the PeopleTools hyperlink in the Menu.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Security, "Working with Permission Lists," Setting PeopleTools Permissions

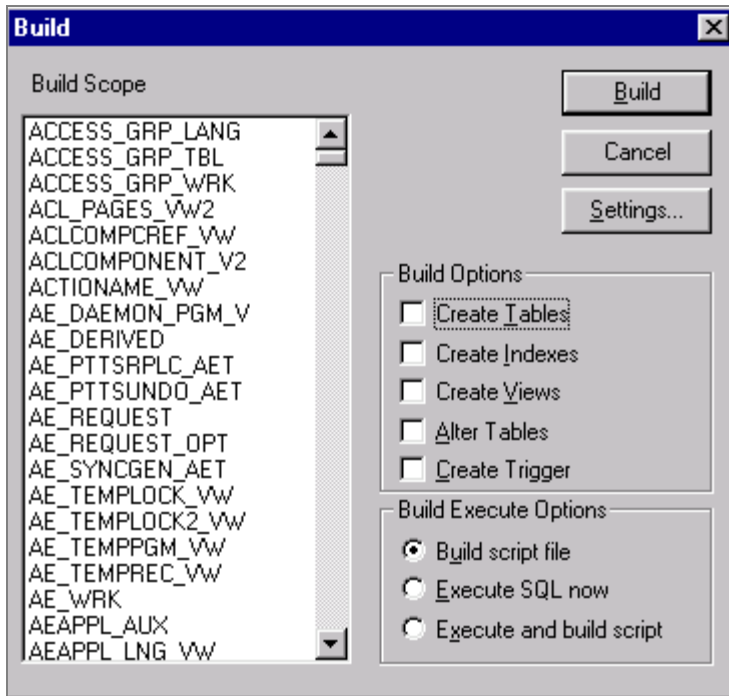
Using the Build Menu

This section provides an overview of the Build menu and discusses how to:

- Select the build scope.
- Select current build options and run the Build process.
- Specify create options.
- Specify alter options.
- Specify logging options.
- Specify script options.

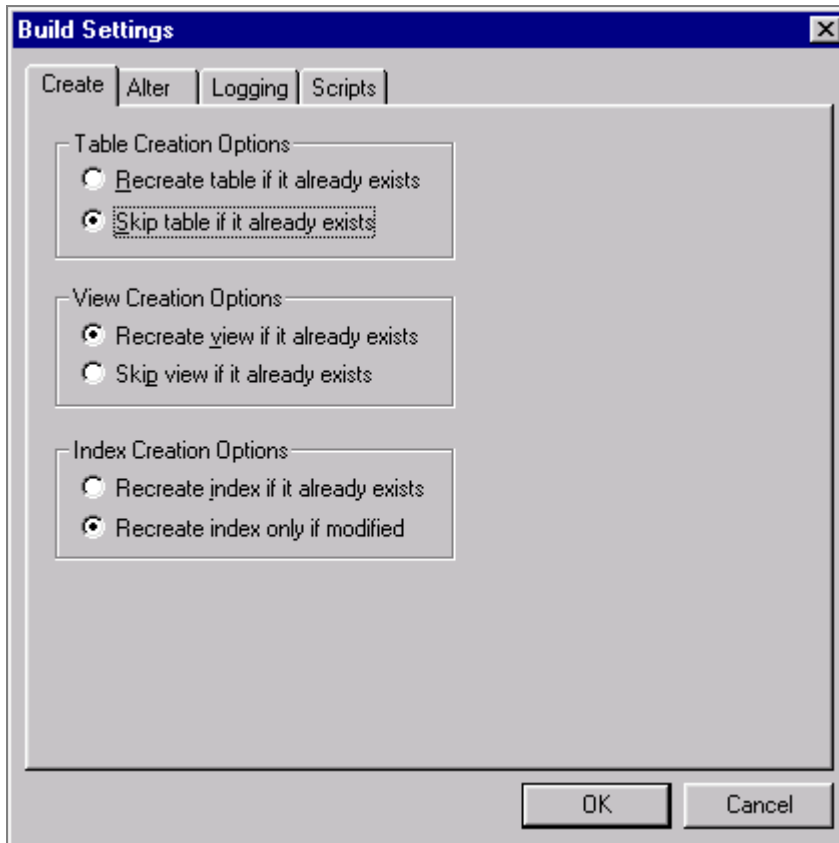
Understanding the Build Menu

Access all of the commands and options that are associated with building tables, views, indexes, triggers, and altering tables from the Build menu. When you choose to build a item from the Build menu, the tasks for creating or running SQL scripts that define the underlying database components are included in the Build dialog box.



Build dialog box

The settings for the Build process, also called Build Settings, enable you to configure various aspects of the process. Depending on which build option you are running, your settings will vary. The settings that you select are stored on your workstation so that they can be reused during future PeopleSoft Application Designer sessions. Access the Build settings by choosing Settings from the Build menu in PeopleSoft Application Designer or click the Settings button in the Build dialog box.



Build settings dialog box

The options that are most likely to change each time you run a Build process appear in the Build dialog box. The options that are most likely to remain the same from run-to-run appear in Build Settings. Because most of the settings that you select remain similar from one build to the next, all of the options in Build Settings and in the Build Execute Options area (on the Build dialog box) are retained between sessions. PeopleTools does not retain the Build Options selections from the Build dialog box.

When you select the Create Tables or Create Views options in the Build dialog box, specify the appropriate options on the Create tab of the Build Settings dialog box. For example, if you need to specify whether an existing table or view is skipped or dropped and re-created.

If you modify your record definitions, the tables in your production database should reflect those changes to maintain your data integrity. When you perform an alter, select the appropriate options. For example, the options in the Drop Column Options area on the Alter tab of the Build Settings dialog box.

You can monitor the build process by reviewing the log files that it automatically generates. Keep in mind that the log file is *entirely* separate from the script file. The amount of information that the log file contains is up to you. You can set up logging so that all status (both good and bad) appears in the log, or you can specify that only the errors or warnings appear in the log. Control the settings for the Build log file (such as the logging level and the location for the output log file) on the Logging tab of the Build Settings dialog box.

If you build a script file, then the Build process generates a script file that contains all of the CREATE and ALTER SQL statements so that you can review them before running the SQL through another SQL command processor. If the generated script file meets your requirements, a DBA can run the script later. The Build process can produce multiple scripts during a single run—one for each build option—depending on the script settings that you specify at runtime. For example, you can specify that the Build process generate a separate script for your tables, views, indexes, triggers, and alters, or you can have all of the SQL for each action contained in one script. Use the Scripts tab of the Build Settings dialog box to specify where the SQL script is written, whether you want multiple scripts generated for each definition type, and whether you want previous scripts overwritten.

Selecting the Build Scope

The Build feature includes three different scopes that determine the size of your build project. Depending on what you actually want to build—one record or an entire project—you can determine this by selecting one of the scopes described in the following sections.

Current Definition

Choose Current Definition from the Build menu to build or alter the active record definition. *Active definition* means the definition that is currently active in the definition workspace.

Project

Choose Project from the Build menu to build or alter all of the records, indexes, and views in the current project—that is, all of the records that appear in the project workspace. You typically find numerous record definitions in the Build Scope list box.

To build all definitions in a database, create a new project and insert all of the appropriate records. For example, insert records of a particular type, such as views. If you create another record after the *all records* project is built, you must manually add the new record to the project.

You may also build a project using the command line and specific parameters. The prerequisites for using the command line to build a project are:

- The project exists with all objects.
- The build settings need to be set in the Windows registry.

Select Definitions into Project

In some situations, you might want to build a subset of the records in the project that is currently open. If you do not want to build an entire project or even the current project, you can build only the definitions that you select in the project workspace pressing the CTRL key and selecting multiple records in the project workspace. After you select the appropriate records, right-click and select *Build* from the pop-up menu. Only the definitions that are selected in the project workspace appear in the Build Scope list box.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Application Designer, "Appendix D: PeopleSoft Application Designer Command Line Parameters"

Note. You must invoke the Build process from the pop-up menu; you cannot build selected definitions from an open project using the Build menu.

Selecting Build Options and Running the Build Process

Access the Build dialog box. The following areas are included in the Build dialog box:

Build Scope	This list box contains all of the definitions that are included in the current Build process. The records that appear in the Build Scope list box cannot be selected or cleared. If you must narrow the scope of your build, do so before arriving at the Build dialog box.
Build	Click this button to start the Build process. While the Build process is running, the Build Progress dialog box appears, showing the current record being processed, the record number being processed in the series, and the total number of records that comprise the build. To stop a running Build process, click the Cancel button. When the Build process completes, the Cancel button is unavailable and the Close button is the only valid button.
Settings	Click this button to open the Build Settings dialog box, where you can view or change your options.

Note After the Build process begins, there are no runtime prompts until the process is complete. All events are written to the Build log.

Build Options

The Build Options group box enables you to specify what action you want to occur: **Create Tables**, **Create Indexes**, **Create Views**, **Alter Tables**, or **Create Trigger**. If you select Create Tables or Alter Tables, Create Indexes will be automatically selected by default. Also, if you select Alter Tables, Create Indexes and Create Trigger are automatically selected by default.

Note. You can select both Alter Tables and Create Tables to run concurrently, as long as the Skip table if it already exists option is enabled on the Create tab in the Build Settings dialog box. Otherwise, there is no way to determine whether you wanted to alter or re-create a table that already exists.

Build Execute Options

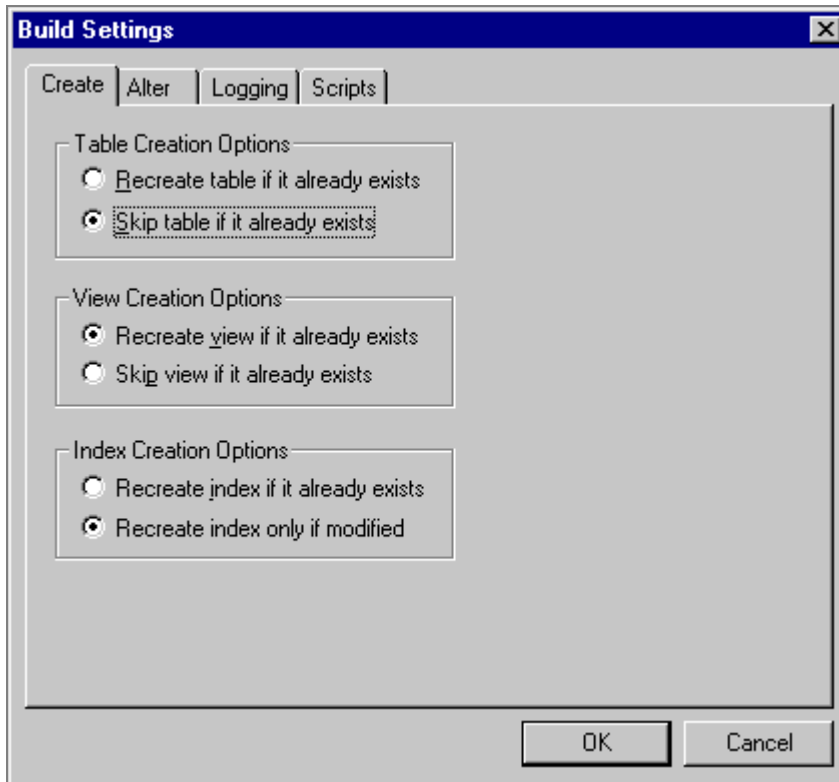
Build script file	Use this option to review and update the SQL before running the script. This is the safest method.
Execute SQL now	Use this option if you don't want to invoke another program to run the SQL; the SQL runs as part of the Build process. The disadvantage with running the SQL immediately is that you have no opportunity to review the SQL before it is committed to the database.
Execute and build script	Use this option to review the SQL that the Build process just ran.

To run the SQL script file that the Build process generates, you must use a third-party SQL interpreter, such as Oracle SQL*Plus or Microsoft ISQL/W. Most database vendors include a native command processor that you can run on the client or the server.

Note. The Execute SQL now option is unavailable if you use the Alter Tables Build option. However, you can use the Execute and build script option when using Alter Tables. Selecting this option will build a script with the entire alter SQL. This script may help if errors are encountered during the alter process. However, if there are multiple tables in an alter process and an error occurs, the errors are reported to a log file and the process continues to the next table.

Specifying Create Options

Access the Build Settings dialog box. Select the Create tab.



Build settings dialog box: Create tab

Table Creation Options

These options determine when a table should and *should not* be created.

Recreate table if it already exists

Drop and re-create a table if it already exists. Use this option with extreme care because if data already exists in the table, it is also dropped. If you select this option, the Build process prompts you to confirm your intention before performing any destructive action. If you don't care about losing the data that resides in the table, then this option is faster than the Alter Tables option.

Skip table if it already exists

Create only those tables that are newly defined. If you want to preserve the data that is already residing in existing tables or you're just interested in creating the tables that do not already exist, select this option.

View Creation Options

Similar settings are available for creating views that you use for creating tables.

Recreate view if it already exists

Because views are just logical views of data, it is safe to use this option; you don't run the risk of losing physical data. Using this option ensures that all views in the project are rebuilt, whether they need to be or not.

Skip view if it already exists If you're concerned only with creating views that do not already exist in the database, select this option. This option is useful if you want to run Build Project on a large project and only a subset of the views in the project must be created. This consumes less time than recreating all of the views in the project.

Index Creation Options

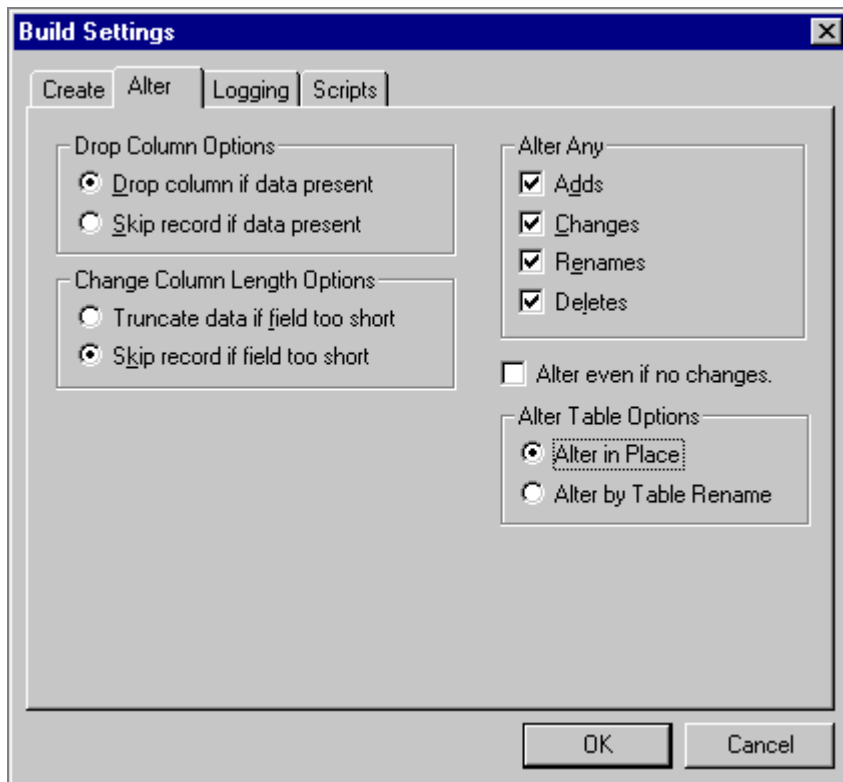
These options determine when an index should be re-created.

Recreate index if it already exists Re-create the index for your tables, even if you already have one in place. It re-creates the index no matter what the situation.

Recreate index only if modified Re-create the index only if the data is being modified in the indexes.

Specifying Alter Options

Access the Build Settings dialog box. Select the Alter tab.



Build settings dialog box: Alter tab

Drop Column Options

These options are referenced whenever a field is deleted from a PeopleTools record definition and data exists in the database for that column.

Drop column if data present	Drop the column and data, and write a warning to the build log.
Skip record if data present	Abort the alter for that record, and write an error message to the log. Processing continues with the next record.

Note. Whenever you select Drop column if data present, you run the risk of losing data, and you are prompted at runtime to confirm your choice of this option.

Change Column Length Options

Use these options whenever the length of a character column is reduced in PeopleTools and an alter could result in data truncation.

Truncate data if field too short	Alter the record and write a warning message to the build log. Note the system will not truncate data for numeric fields because of possible data loss.
Skip record if field too short	Abort the alter for that record and write an error message to the build log. Processing continues with the next record.

Note. Whenever you select Truncate data if field too short, you run the risk of losing data, and you are prompted at runtime to confirm your choice of this option. Also, numeric fields will not be truncated to avoid any loss of data.

Alter Any

PeopleTools assumes that you want to perform alters for any modifications made to tables, so, by default, all of the check boxes in the Alter Any group box are selected. Alter Any allows for custom alter processing regarding adds, changes, renames, and deletes. For example, you have the flexibility to add, change, and rename fields, but not delete any removed columns. When you complete any other custom external conversion processes, you can then enable the delete processing to drop columns that are no longer defined.

Normally, you select all of these options, but during upgrades or operations requiring data conversion steps, you might select a subset of actions. For example:

- Perform alter with **Adds** and **Changes** selected.
- Perform data conversion routines to populate the new and changed columns (perhaps from columns that are ultimately to be dropped).
- Perform alter with **Rename** and **Delete** selected.

Alter Even If No Changes

Select this check box to force an alter, even if no changes are made to the tables. This check box is cleared by default. If this check box is selected, the Alter by Table Rename option in the Alter Table Options group box is automatically selected, and the Alter in Place option is disabled.

Alter Table Options**Alter in Place**

This is the default option. For database platforms in which Alter in Place is not supported, alter is automatically done by Alter by Table Rename (even if that option is not selected).

Alter by Table Rename

By selecting this option, a temporary table (with changes made to the original table or its fields) is created and the data from the original table is imported into the temporary table. The original table is then dropped and the temporary table is renamed to the original table.

If a table is renamed from the old name to a new name, the indexes that were created on the old table are moved to the new table, but the index names remain in the old table's name. With Alter by Table Rename selected, the indexes of the old table are dropped before renaming to the new table name and the indexes are re-created after the table is renamed to the new name. This way, the index is created in the new table's name.

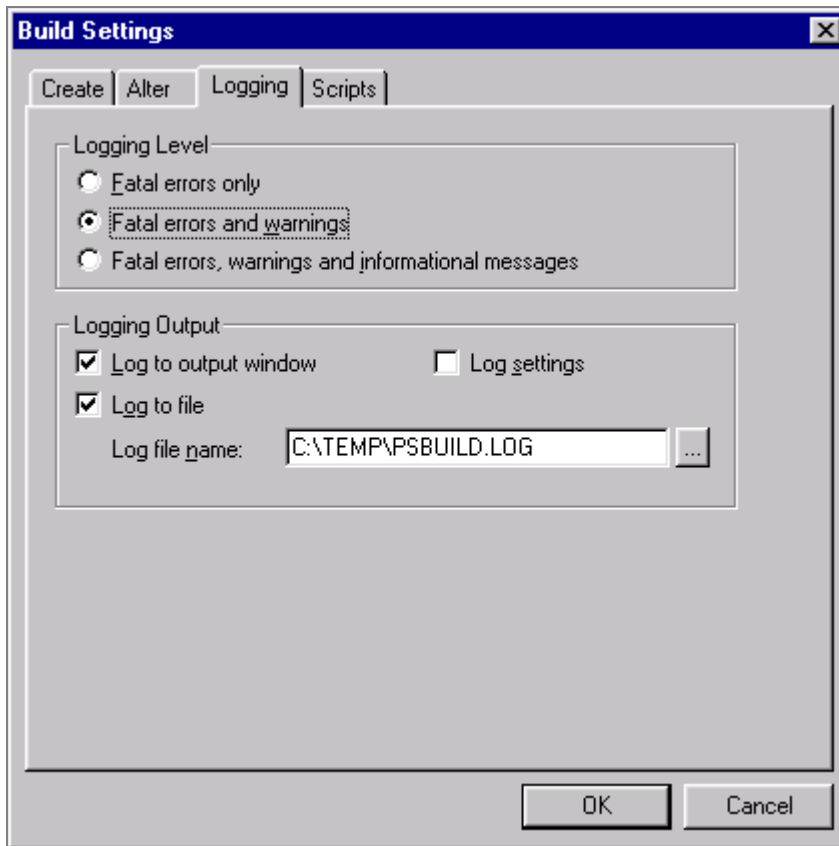
Database platforms vary in the capabilities for Alter in Place table operations. The following table displays the limitations for each operation by platform.

Database Platforms	Add Column	Change Column (data type, size, and so on)	Rename Table	Delete Column
Microsoft SQL Server	Yes *	Yes *	Yes	Yes *
Oracle	Yes *	No	Yes	Yes *
DB2/MVS	Yes *	No	No	No
DB2/Unix	Yes	No	No	No
Sybase	No	No	Yes	No
Informix	Yes	Yes	Yes	Yes

* Certain restrictions might apply to this operation. Refer to the documentation delivered with your specific database platform for more information.

Specifying Logging Options

Access the Build Settings dialog box. Select the Logging tab.



Build settings dialog box: Logging tab

Logging Level

Specify the detail of information that you want in your Build log output.

- | | |
|---|---|
| Fatal errors only | Select this option if you're interested in seeing only the operations that failed. |
| Fatal errors and warnings | Select this option to add warnings to the fatal errors. |
| Fatal errors, warnings and informational | Select this option to see everything that processed successfully <i>and</i> all of the errors and warnings. |

Note. These options are personal preferences and do not affect the actual build of your SQL tables, but they might help you track down potential failures. For example, if you're processing a large number of definitions, you'll only want to see the operations that failed. Whereas, if you're processing a small number of definitions, you'll want to see all of the successful operations too.

Logging Output

Specify where and in what form you want to view your log output.

Log to output window

Write the same information that appears in the log *file* to the PeopleSoft Application Designer output window. Always be aware of the level that you select. If there is a lot of detail (high logging level plus many records to process), it might be easier to copy the logging information to a file and print it later.

Log to file

Write the log to a file. If you select this check box, you can specify a location and name for your log file in the **Log file name** edit box. If you do not select this check box, the edit box is unavailable for entry.

Log settings

Write all of the runtime options to the log. If you select this check box it is not necessary to rerun a test when you have a problem. Should it be necessary to report a problem with the Build process or troubleshoot, it is important to know the settings that were active.

Note. PeopleSoft recommends selecting the Log to file check box *and* Log to output window with a minimum logging level of fatal errors and warnings. In case you run into a problem, you already have the information that is needed to research the problem. Otherwise, you must run the process again with a higher logging level.

Example Log Results

The following sections provide samples of the type of information that you can expect to see in your log output that correspond to the selections you make on the Logging tab.

- Fatal errors:

```
SQL Build process began on 7/30/97 at 8:46:46 PM for database OM51U20
Error: BI_BILL_BY_F_VW - Unable to retrieve current DDL space name. Alter
processed failed. (76,47)
Error: BI_CHARGE_VW - Unable to retrieve current DDL space name. Alter
processed failed. (76,47)
Error: PS_BI_CYCLE_VW - alter failed due to an unknown column type (UNDEFINED)
found for field BILL_CYCLE_ID. (76,22)
Error: PS_BI_IVCLAYOUT_VW - alter failed due to an unknown column type
(UNDEFINED) found for field INVOICE_LAYOUT_ID. (76,22)
Error: CARINA - alter failed because SQL table does not exist. (76,7)
SQL Build process ended on 7/30/97 at 8:54:34 PM.
2487 records processed, 11 errors, 0 warnings
SQL Build script for all processes written to file C:\TEMP\step38.SQL.
SQL Build log file written to C:\TEMP\step38.LOG
```

- Warnings:

```
SQL Build process began on 8/27/97 at 4:00:32 PM for database DXD7L
```

Warning: ABSENCE_HIST2 - data would be truncated by altering REASON. Record processed. (76,24)

- Fatal errors, warnings, and informational:

SQL Build process began on 8/27/97 at 3:58:58 PM for database DXD7L
 Warning: ABSENCE_HIST2 - data would be truncated by altering REASON. Record processed. (76,24)
 Error: ABSENCE_HIST2 - field PAID_UNPAID to be deleted has data present. Record skipped. (76,23)
 Informational: ACCOMPLISHMT_VW - view created and scripted successfully. (76,18)
 Informational: ACCT_AD2_INV_VW - view created and scripted successfully. (76,18)
 Informational: ACCT_ADJ_INV_VW - view created and scripted successfully. (76,18)
 Informational: ACCT_ISS_INV_VW - view created and scripted successfully. (76,18)
 Informational: ACCT_STK_INV_VW - view created and scripted successfully. (76,18)
 Informational: ACCT_TYPE_VW - view created and scripted successfully. (76,18)
 Informational: ACTION_SP_VW - view created and scripted successfully. (76,18)
 Informational: ACTION_XLAT_VW - view created and scripted successfully. (76,18)
 Informational: ADJUST_INV2_VW - view created and scripted successfully. (76,18)
 Informational: ADJUST_INV_VW - view created and scripted successfully. (76,18)
 11 records processed, 1 errors, 1 warnings
 SQL Build script for all processes written to file C:\TEMP\PSBUILD.SQL.
 SQL executed online.
 SQL Build log file written to C:\TEMP\PSBLD.log

- Log settings:

**** Begin Build Settings for this Run
 Create Tables = No
 Create Indexes = No
 Create Views = No
 Alter Tables = Yes
 Log to File = Yes
 Log to Window = Yes
 Write comments to script = Yes
 Always overwrite files = Yes
 Execute SQL Now = No
 Write SQL to script file = Yes
 Logging level = Log fatal errors, warnings and informational messages
 Alter execution option = Alter by table recreation
 Table creation option = Skip table if it exists
 View creation option = Drop and recreate view if it exists

```
Alter Adds = Yes
Alter Changes = Yes
Alter Renames = Yes
Alter Deletes = No
Write script output to: Single file
Log filename = C:\TEMP\psalter32a.LOG
Single script filename = C:\TEMP\psalter32a.sql
Alter drop column option = drop column if data present
Alter truncate column option = truncate column if data present
Target database platform = DB2
Target sizing set = 0
```

Working With the Output Window

You can navigate from error messages in the PeopleSoft Application Designer output window to the corresponding record definition by selecting the appropriate line in the Build log and double-clicking anywhere on that line. PeopleSoft Application Designer opens the corresponding record in the definition workspace.

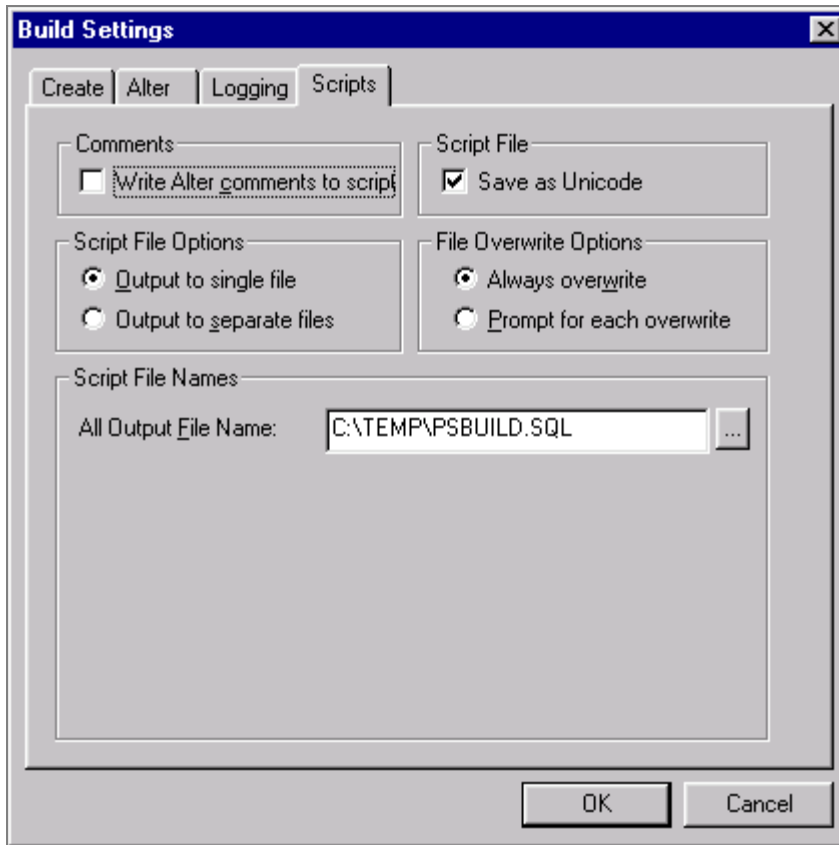
Also, you can double-click any line in the output window that corresponds to a file—not just record—and PeopleSoft Application Designer opens that file with whatever application that you defined to open files with a given extension. For example, if you associated SQL files with your native SQL command utility, your SQL utility opens and loads your PSBUILD.SQL script when you double-click the line that reads:

```
Single script file name = C:\TEMP\PSBUILD.SQL
```

Note. PeopleSoft Application Designer uses the standard Microsoft Windows method for defining which programs are associated with particular file types. To modify the file associations, open My Computer and select View, Folder Options and select the File Types tab.

Specifying Script Options

Access the Build Settings dialog box. Select the Scripts tab.



Build settings dialog box: Scripts tab

Comments

The **Write Alter comments to script** check box enables you to either include or suppress alter comments. The following example reveals the types of comments that you see in your PSALTER.SQL script if you enable this option:

```
-- Alters for record PS_AE_RUN_CONTROL ;
--           AE_THREAD - change ;
--           OPRID - change ;

-- Start the Transaction ;

-- Data Conversion ;

-- Drop Old Indexes ;

DROP INDEX SYSADM.PS_AE_RUN_CONTROL
/
```

```
-- Add Columns ;

ALTER TABLE PS_AE_RUN_CONTROL ADD Z_TMP_ALTER_1 DECIMAL(12,4)
/
ALTER TABLE PS_AE_RUN_CONTROL ADD Z_TMP_ALTER_2 CHAR(12)
/
UPDATE PS_AE_RUN_CONTROL SET
    Z_TMP_ALTER_1 = AE_THREAD,
    Z_TMP_ALTER_2 = OPRID
/
```

If you do not view the alter comments, the script containing the same commands as the previous script looks like this:

```
DROP INDEX SYSADM.PS_AE_RUN_CONTROL
/
ALTER TABLE PS_AE_RUN_CONTROL ADD Z_TMP_ALTER_1 DECIMAL(12,4)
/
ALTER TABLE PS_AE_RUN_CONTROL ADD Z_TMP_ALTER_2 CHAR(12)
/
UPDATE PS_AE_RUN_CONTROL SET
    Z_TMP_ALTER_1 = AE_THREAD,
    Z_TMP_ALTER_2 = OPRID
/
```

Script File

The default for the **Save as Unicode** check box is based on the combination of the UNICODE/ANSI build and the UNICODE/ANSI database. This check box is available only when using MSSQLServer and Oracle databases. For all other platforms (such as Sybase, Informix, DB2, and so on), the check box is permanently unavailable, because the script files are always be ANSI.

The following table explains the default settings for the Save as Unicode check box.

Database Platforms (Unicode as opposed to ANSI)	Default for Save as Unicode check box
Unicode-Build Unicode-Database	Selected
Unicode-Build ANSI-Database	Cleared
ANSI-Build ANSI-Database	Unavailable

The script file option, Save as Unicode, is stored in the registry with the other build settings. Therefore, the previous setting is always the default every time the dialog box is opened.

The type of script file that is generated during the Build process is based on the Save as Unicode check box setting for the UNICODE/ANSI build and UNICODE/ANSI database.

The details are as follows:

	<i>Save as Unicode Option</i>	<i>MSSQL Server</i>	<i>Oracle</i>
UNICODE-Build	Selected	UCS2 script	UTF8 script
UNICODE-Database	Cleared	MSS quoted ANSI script	Oracle quoted ANSI script
UNICODE-Build	Selected	UCS2 script	UTF8 script
ANSI-Database	Cleared	ANSI Script	ANSI script
ANSI-Build	Unavailable	ANSI script	ANSI script
ANSI-Database			

Script File Options

If you want all of your CREATE TABLE statements to be written to one SQL script file and your CREATE INDEX statements to another, then select the **Output to separate files** option. On the other hand, if you prefer to have all of your statements—CREATE, ALTER, and so on—contained in a single file, then select the **Output to single file** option.

Note. Script files can be quite large. To reduce the size of files so that they are easier to manage, select the Output to separate files option. Also, script files are never appended; they are overwritten or the process can be aborted if you've elected to be prompted before a build script file is overwritten.

Depending on which output option you select, the options in the Script File Names group box change to suit one file or multiple files.

File Overwrite Options

These options indicate whether you want to overwrite automatically or be prompted before script files are overwritten. Your personal preference determines which technique you employ.

Always overwrite

Select if you don't mind that your previous build scripts are overwritten.

Prompt for each overwrite

Select if you are more comfortable being alerted when a script is about to be overwritten.

To avoid the possibility of overwriting files altogether, you can use a naming convention that, in itself, prevents any overwrites. For example, you could specify a unique name for each build script, as shown:

- C:\TEMP\PSINDEX1.SQL
- C:\TEMP\PSINDEX2.SQL

Script File Names

The options available to select in this group box depend on your selection in the Script File Options group box.

Output to Single File

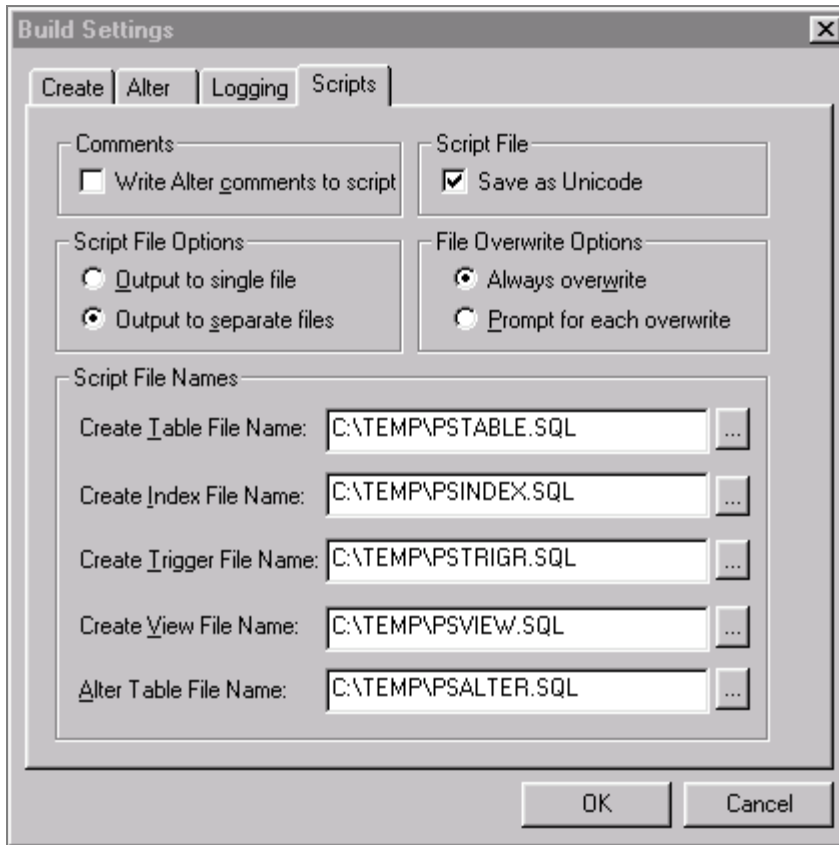
When you select this option, an edit box appears in the Script File Names group box: **All Output File Name**. The default name for the generated script is PSBUILD.SQL.

Note. Script files can be quite large. To reduce the size of files so that they are easier to manage, select the Output to separate files option. Also, script files are never appended; they are overwritten or the process can be aborted if you elected to be prompted before a build script file is overwritten.

Output to Separate Files

If you select this option, the following edit boxes appear—one for each build option:

- **Create Table File Name:** The default name for this script is PSTABLE.SQL.
- **Create Index File Name:** The default name for this script is PSINDEX.SQL.
- **Create Trigger File Name:** The default name for this script is PTRIGR.SQL.
- **Create View File Name:** The default name for this script is PSVIEW.SQL.
- **Alter Table File Name:** The default name for this script is PSALTER.SQL.



Output to separate files

Creating Tables

This section provides an overview of the Create Table process and discusses how to:

- Create a table.
- Confirm the table build.

Understanding the Create Table Process

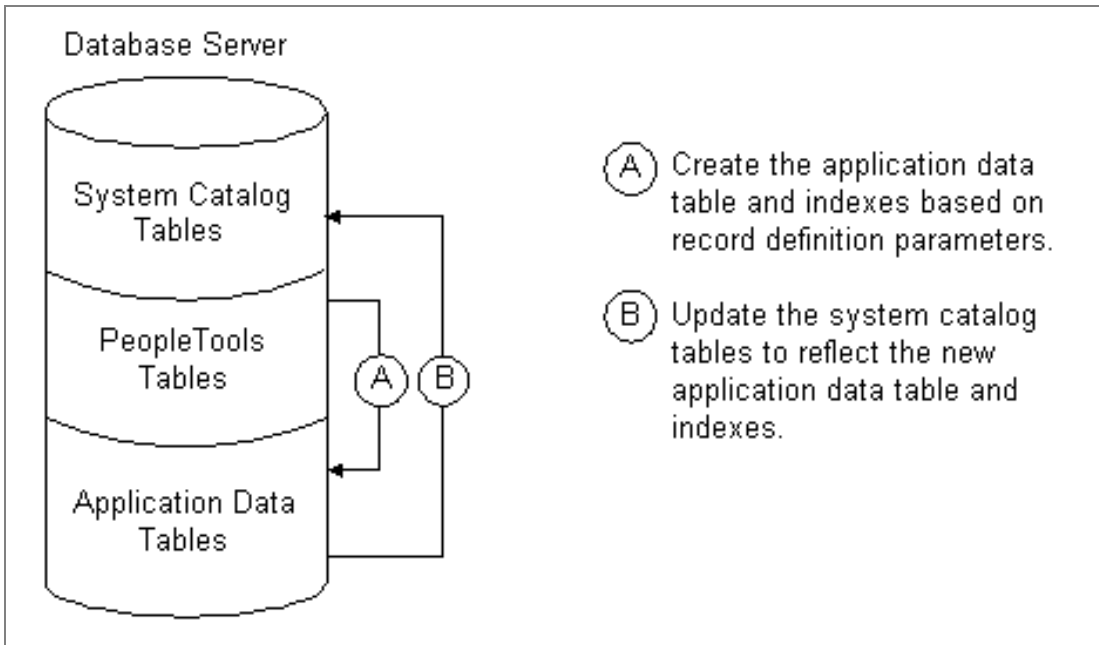
The Build process generates the appropriate SQL Create statements to build tables based on both your record definition and your platform. It prefaces each new application SQL table with *PS_* to identify it as an application that was built using PeopleTools. For example:

```
PS_ABSENCE_HIST
```

Note. PeopleTools does not preface table names with *PS_* if you specified a custom name in the Non-Standard SQL Table Name edit box located on the Type tab of the Record Properties dialog box.

The Build process also creates the appropriate indexes. Because Long Character fields operate more efficiently in some database environments when they're located at the end of the table, the Build process automatically positions Long Character fields at the end of the table for each database environment.

The Create Table process creates a new application table based on parameters defined in the record definition. When a new table is created, the DBMS updates the System Catalog tables to reflect the attributes of the new table.



Create Table process

After you build an updated SQL build script and run it, the PeopleTools tables and the System Catalog tables are synchronized; the record definition and the Application Data table are synchronized. The following table lists the steps of the Create Table process and the associated record definition parameters.

Create Table Process	Record Definition Parameter	Usage
Drop the table if it already exists.		
Create the application data table.	Record definition name Field names Field type Field length	table name (add <i>PS_</i> prefix) column names column type column length
Create Indexes.	Key fields Alternate search key fields Custom indexes	unique index - 1 per table alternate index, 10 (0-9) per table 0 or more per table

The following procedure covers all of the high-level steps that you need to successfully complete the Create Table build process. Steps that involve a variety of options include links to the area where those options appear in the PeopleBooks.

Creating a Table

To create a table:

1. Open the project for which you want to build SQL tables.
2. Select Build, Project.
3. From the Build menu, select the appropriate scope of your build.

See [Selecting the Build Scope](#).

The Build dialog box appears.
4. Select Create Tables in the Build Options group box.

PeopleSoft automatically activates the Create Indexes option. If you're creating tables, the indexes that are used to extract information from those tables must also be updated. Definitions to be built appear in the Build Scope list box, which does not allow you to edit, remove, or add definitions.
5. Select one of the Build Execute options.

The default option builds an SQL script file containing the commands to run the selected build options.
6. Click the Settings button in the Build dialog box to set user-defined defaults.

The Create tab in the Build Settings dialog box appears.
7. Select the appropriate settings on the Create tab.

See [Specifying Create Options](#).

Re-creating an existing table removes all data contained in the table as well as views or grants referencing that table.
8. Select the Logging tab.
9. Set your logging levels and associated options.

See [Specifying Logging Options](#).
10. Select the Scripts tab.
11. Specify your script file options.

If you selected Execute SQL now as your Build option, you can skip the Scripts tab, because you will be running the SQL online. Settings on the Scripts tab are relevant only if you are building a SQL script to run later.

See Specifying Script Options.

12. Click OK to close the Build Settings dialog box.
13. In the Build dialog box, click the Build button to run your build option.

The length of a Build process depends on the number of definitions that require building. Watch the Build Progress dialog box to monitor the build process. When the process completes, check any errors listed in the log file.

Confirming a Table Build

If you are running SQL online, complete steps 1 and 3 (step 2 is not required).

To confirm a table build:

1. Review the SQL script that was generated by the Build process.

Use your native SQL command processor to open the SQL script. The script is located where you specified on the Scripts tab of the Build Settings dialog box.

2. Run the script against your database.
3. Confirm that the tables now exist.

Use your query tool and SQL Select statements to confirm that the Create Table process created an application table that corresponds to your record definition and updated the system catalog tables. The SQL statement that you use to confirm depends on the table that you just created.

Creating Online Views

When you create views to use online, you must keep the views synchronized with the database. Like SQL tables, you must have a record definition for online views because the system checks the record definitions for online processing rules. You must build the view before you can use or reference it online.

If you use a view as the basis for a page, you select *existing* information to display on the page. Therefore, when you create the record definition for your view, you can clone an existing record definition, delete any fields that are *not used* in the view, and proceed to define the view. Query views are processed the same way as view text, which is defined as part of the record.

This section discusses how to:

- Create online views.
- Use joins in views.
- Use cross-platform meta-SQL for dynamic views.

Creating Online Views

If you're already familiar with creating record definitions and writing SQL queries, creating online views is quite similar.

To create online views:

1. Clone a record definition.
 - a. Open an existing record definition.
 - b. Select File, Save As.
 - c. Specify the name of the view that you want to create.

2. Delete and add the appropriate fields.

All columns that are selected in your view should have a corresponding field in the record definition.

3. Set the record type to SQL View.
 - a. Select the Record Type tab for the record definition.
 - b. Select SQL View in the Record Type group box.

4. Click the Click to open SQL Editor button.

The order in which you list the columns in your SQL SELECT statement should match the order that you specified in the record definition.

5. Save the record definition.
6. Select Build, Current Definition to create the view in the database.
7. Select the Create Views check box under Build Options.
8. Click Build.

Using Joins in Views

If you plan to use a join on a regular basis, you can save it as a SQL script, or you can create a view—a single virtual table—using the join as the logical representation of the data. After

you create a view, the users never need to know that the data that they're viewing is stored in multiple tables. To them, the relative complexity of your view is transparent. For example:

```
SELECT A.EMPLID,
       A.NAME,
       B.CONTACT_NAME,
       B.RELATIONSHIP
FROM   PS_PERSONAL_DATA A,
       PS_EMERGENCY_CNTCT B
WHERE  A.EMPLID = B.EMPLID;
```

Using Cross-Platform Meta-SQL for Dynamic Views

PeopleTools includes functionality to produce *meta-SQL* constructs for dynamic views. This means that dynamic SQL views that are created using PeopleSoft Application Designer can be used on any platform that is supported by PeopleSoft. The *PeopleSoft PeopleTools PeopleBook: PeopleCode Developer's Guide* contains a full list of the meta-SQL that is supported in the PeopleSoft Internet Architecture.

See Also

PeopleTools 8.4 PeopleBook: PeopleCode Reference, "Meta-SQL," Meta-SQL Placement Considerations

Altering Tables

This chapter provides an overview of the Alter feature and discusses how to:

- Determine tables to be altered after a field change.
- Alter a table.
- Confirm your table alter.

Understanding the Alter Feature

The Alter feature enables you to make changes to your record definitions at any time without losing the application data that is already housed in the table. To ensure that the Alter process produces the appropriate results, be aware of when to alter an existing table and what types of conversions PeopleSoft Application Designer supports. To preserve data that is stored in tables and also reflect a recent change in the table definition, use the alter tables function to make the appropriate changes.

The alter function simplifies the process of modifying database tables when new data fields are added or when existing data fields are modified. It effectively eliminates the need to write SQL statements to perform the same function.

PeopleSoft specifically designed the alter function to automate the tedious task of writing alter scripts and protect the integrity of your database. In essence, it protects your interests by ensuring that you always control data loss. The alter function performs tests that verify whether data will be lost during the conversion on each column to be altered. Data loss normally occurs when reducing the character width of a column, dropping a column that contains data, or converting a Number field to a Character field that is too small.

The generated statements for this method are sent to a SQL script file—the alter script. After the script has completed, you are responsible for re-applying any SQL table DDL that you applied outside of PeopleTools. Typically, this consists of GRANT and REVOKE statements controlling security.

Alter Settings

The Alter tab in the Build Settings dialog box handles the most common types of data conversions, including:

- Increasing the length of Character fields.
- Changing a Character (CHAR) field to a Long Character (LONG VARCHAR) field.
- Increasing the size of Number or Character fields.
- Reducing the decimal positions in Number fields. If any column of the table has data that will be lost when truncating, the system action is determined by the Change Column Length options.
- Changing integer-only Number fields to Character fields, where the Character field is formatted with leading zeros. If any column of the table has a number that does not fit in the new Character field, system action is determined by the Change Column Length options. This prevents data from being lost.
- Adding columns to SQL tables.
- Dropping columns from SQL tables.
- Renaming columns in SQL tables.
- Renaming SQL tables.
- Moving tables to a new tablespace.

The following sections describe the types of Alter conversions that you can expect to occur during the Build process.

Data Conversions

When altering tables with existing field data, PeopleSoft Application Designer handles conversions as outlined in the following table. A number in the cell following a *Yes* indicates that there are restrictions involved with the conversion. Refer to the corresponding numbered note following the table for additional information.

Old Format	New Format								
	Character	Long	Image	SmallInt (small integer)	Integer	Decimal	Date	Time	DateTime
Character	Yes (1)	Yes	No	No	No	No	No	No	No
Long	Yes (1)(2)	Yes	Yes	No	No	No	No	No	No
Image	No	No	No Action	No	No	No	No	No	No
SmallInt	Yes (5)	No	No	No Action	Yes (4)	Yes (4)	No	No	No
Integer	Yes (5)	No	No	Yes (4)	Yes (4)	Yes (4)	No	No	No
Decimal	Yes (7)	No	No	Yes (3)	Yes (3)	Yes (3)	No	No	No
Date	No	No	No	No	No	No	No Action	No	No
Time	No	No	No	No	No	No	No	No Action	No
DateTime	No	No	No	No	No	No	Yes (6)	Yes (6)	No Action

Note. On Oracle, PL/SQL is required to use the PeopleSoft Application Designer Build operation.

The following table contains additional notes corresponding to the numbers that appear in some cells in the previous table.

Note Number	Restriction
1	If data fits or data truncation is allowed.
2	Not allowed in Oracle.
3	If data fits or data truncation is allowed (for decimals portion only).
4	If data fits. No data truncation can occur, even with the option to allow data truncation.
5	If data fits, except for Informix.
6	If data truncation is allowed.
7	If data fits, except if data has decimal values <i>or</i> for Informix.

Alter Tips

The following sections offer information to keep in mind as you create and run the Alter scripts.

- Temporary tables used during alter:

When you run the Alter process, the script might create a temporary table. Temporary tables are named *PSY%tablename%*, and they are created in the altered table's tablespace—the tablespace currently defined in the record definition.

- Altering tables containing logs on Oracle:

Oracle does not allow an INSERT or SELECT FROM command if the table contains a LONG VARCHAR or LONG RAW. Therefore, PeopleSoft uses an Oracle PL/SQL (procedural language) script to do alters on tables in Oracle that contain any type of LONG data type.

- View dependencies:

PeopleSoft Application Designer does not keep track of view dependencies. When the structure of a table changes, it is a good idea to re-create all views. Many database environments track this information, so you might be able to determine view dependencies by issuing a query directly against the system catalog. However, if you are not the DBA, you might not have the authority to run such a query successfully.

The order in which PeopleTools creates views is based on the build sequence number that you set on the Record Type tab while the record is open. The default for the build sequence number is *1*. For the dependent views to be created first, the build sequence number should be *0*. This way, all of the *0* views are created first, then the *1*s, and finally the views that are greater than *1*. Although the views are sorted in alphabetical order in the project, they are created based on the build sequence number.

- Alter script:

After you invoke the Alter process, the system uses the default value that is defined in the record definition to populate the column on the altered table. The alter script that is generated contains detailed comments (--) to assist you if you must modify the script manually.

- Oracle considerations:

When you alter a SQL View in the Oracle database platform, dependent views are neither dropped nor validated. In other database platforms, dependent views are dropped but not re-created.

Also, renaming or dropping a table, view, or column might invalidate view text, dynamic view text, and possibly other stored queries.

When to Alter Tables

The following record definition changes affect synchronization with the application table and require an Alter process:

- Add or delete a field on the record.
- Modify the length of a field.
- Change the required status of a field that is Date, Time, DateTime, or Long.

The Alter Table process is similar to the Create Table process, except that it does not drop existing application data tables and the data that they contain.

Determining Tables to be Altered After a Field Change

To determine tables to be altered after a field change:
--

1. Create a new project.
2. Open the altered field.
3. Select Edit, Find Definition References.

The referenced definitions appear in the output window.

4. Select all of the rows that appear in the output window.
5. Right-click the selected rows, and select *Insert Into Project* from pop-up menu.

Altering a Table

To alter a table:

1. Open the project for which you must perform an alter.
2. From the Build menu, select the appropriate scope of your build.

The Build dialog box appears.

3. Select Alter Tables from the Build Options group box.

Selecting the Alter Tables option automatically selects and disables the Create Indexes and Create Trigger (only if triggers are needed) option. In the Build Execute Options group box, only the Build script file option is enabled.

4. Click the Settings button in the Build dialog box to set user-defined defaults.

Select the appropriate alter, logging, and scripts settings.

5. In the Build dialog box, click Build to run the Alter Tables process.

The length of a Build process depends on the number of definitions that require building. Watch the Build Progress dialog box to monitor the build process. When the process completes, check any errors listed in the log file.

Confirming Your Table Alter

To confirm your table alter:

1. Review the SQL script that was generated by the Alter process.
Use your native SQL command processor to open the SQL script. The script is located where you specified on the Scripts tab of the Build Settings dialog box.
2. Run the script against your database.
3. Use your query tool and SQL Select statements to confirm that the Alter Tables process has created an application table that corresponds to your record definition and has updated the system catalog tables.

Creating Triggers

A database trigger is a type of stored procedure that executes automatically when a user makes a specific data-modification statement (INSERT, UPDATE, or DELETE) on a specified table. Within PeopleTools, triggers are created in tables related to synchronization for mobile applications and for optimization servers. Triggers are not created for all records, they are only created for records where specific properties have been set.

For example, in a mobile component record, set the required properties for that record so that triggers will be created during the Build process. Using the Build dialog box, create the trigger by selecting the Create Trigger checkbox in Build Options. Using the Build Execute Options, you can either generate the SQL or execute the build online.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Mobile Agent, "Synchronizable Component Interfaces," Using Synchronization ID and Synchronization DateTimeStamp

PeopleTools 8.4 PeopleBook: PeopleSoft Optimization Framework, "Designing your Problem Type Definition," Creating and Building the Optimization Records

Administering Data

Select Data Administration from the Tools menu in Application Designer to access critical dialog boxes that enable you to define the record location and structure and other guidelines for PeopleTools to extract information from your selected database.

This section discusses how to:

- Create indexes.
- Use the record DDL.
- Set the tablespace.
- Use physical data storage.

Creating Indexes

Indexes are an important part of your physical database, because they affect the efficiency and speed with which your application can store and retrieve data. PeopleSoft application indexes are defined in two ways.

Some indexes are defined for you automatically, based on the key, search key, list box items, and alternate search keys that you specified on your record definition. These indexes are used by the application processor for quick access when you use the online system.

However, it is sometimes necessary to define additional indexes to improve the performance of demanding queries, reports, or batch programs. These additional indexes are defined and modified using the data administration tools in PeopleSoft Application Designer.

When you use SQL Create or SQL Alter on a table, the system automatically builds database indexes to the SQL table that are based on the keys and list items that you specify in the record definition. Your database uses indexes to find definitions in the database the same way that you use indexes to find specific information in a book. If an index entry exists for a specific field on a table, the database can search and quickly find what it needs to complete your request; otherwise, it must search through the contents of the entire table.

Indexes enhance system performance by generating key lists that the application processor uses to extract the data that it uses to populate pages and search records. The system automatically creates:

- Standard indexes (key or duplicate order key indexes) if at least one field in the table is a key or duplicate order key. The index contains all key and duplicate order key fields. The system automatically names this index with a prefix of *PS_*.
- Alternate search key indexes for each alternate search key. The system automatically names this index with a prefix of *PSn*, in which *n* is a number between 0 and 9.
- Custom indexes, which can be defined with the Edit Index, Edit DLL, and Add Index dialog box in the PeopleSoft Application Designer administration tools. The system automatically names this index with a prefix of *Psa*, in which *a* can be any letter between *A* and *M*. Custom indexes are not automatically created.

For most database tables (those with unique keys), the key index defines unique keys for a table, but the system also uses it to access high-level keys and orders by all keys. The alternate search key indexes support the search record and field prompts. The purpose of these different indexes is to enable the system to respond to all system prompts through index-only SQL access, minimizing direct database table access.

Most database platforms support indexes with an unlimited number of keys. However, Microsoft SQL Server 2000, DB2 (UNIX), and Informix only support indexes with a maximum of 16 keys. PeopleSoft supports indexes for these databases by creating functional indexes.

Functional Indexes for Microsoft SQL Server 2000

If an index has more than 16 keys, the key fields are concatenated to a functional key. This key field is then added to the table as the last column called MSSCONCATCOL. A unique index is created for MSSXCONCATCOL as well as an additional index called PSW<record name> that is used as a search index.

Functional Indexes for DB2 (UNIX)

Similar to the concatenation that occurs with SQL Server, DB2 (UNIX) also concatenates the key fields to a functional key. The key is then added to the table as the last column called DBXCONCATCOL. A unique index is created for DBXCONCATCOL as well as an additional index called PSW<record name> that is used as a search index.

Functional Indexes for Informix

For Informix, if there are more than 16 keys in an index, a function is created for every 16 keys. The name for this set of 16 keys is PS_<record name>_SP<the incremented number for each function>. The functions are used to create a unique index. An additional index called PSW<record name> is also created.

Note. If you are using Create Table or Alter, the Create Index option is automatically selected. With the Create Table or Alter options, you can't clear the Create Index option.

The following record definition modifications require the creation of new indexes:

- Add, delete, or modify keys, duplicate order keys, alternate search keys, or descending keys.
- Change the order of keys (ascending, as opposed to descending).

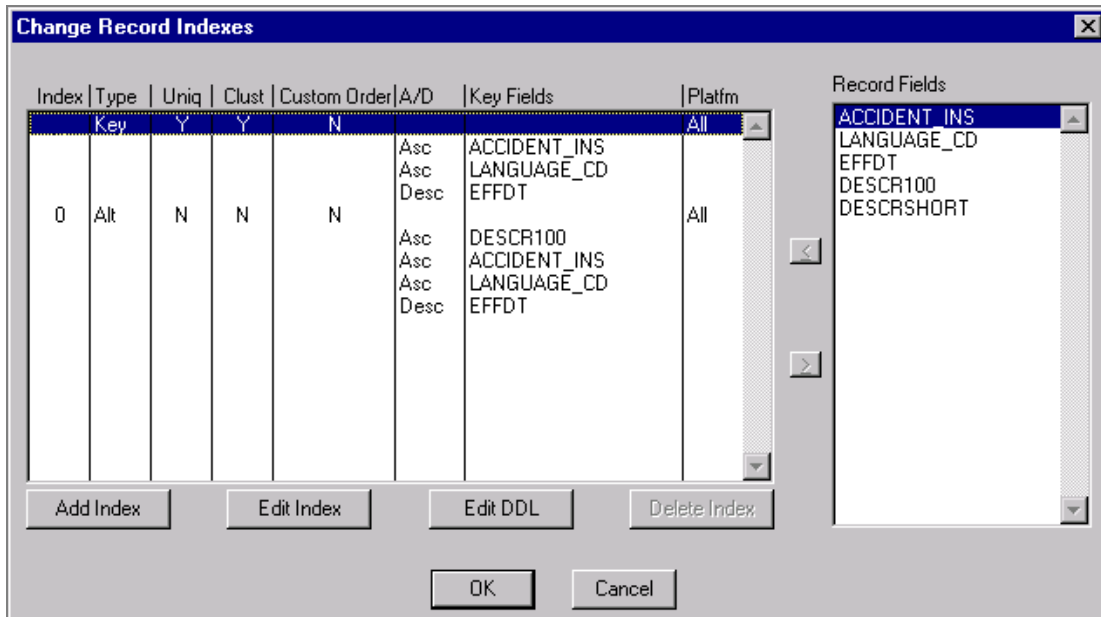
This section discusses how to:

- Configure indexes.
- Add a custom index.
- Edit the DDL.

Configuring Indexes

For performance tuning, you might want to change the order of your index keys. PeopleSoft Application Designer provides direct control over all of the indexes created by PeopleTools. You can inspect, add, or change all defined indexes or delete custom indexes for any record in the system through the Change Record Indexes dialog box.

Standard indexes are based on the key, duplicate order key, or alternate search key only. However, with the Change Record Indexes dialog box, you can modify those indexes and create additional indexes, which might be required if you do custom processing. Any of the indexes that you entered can be maintained for all database platforms or for a list of specific platforms. All indexes and keys created by PeopleTools are stored in PeopleSoft system tables.



Change Record Indexes dialog box

To edit the index key order:

1. Open the record definition for which you want to make the custom index.
2. Select Tools, Data Administration, Indexes.

The Change Record Indexes dialog box appears. The **Custom Order** column indicates whether the index keys have been configured. The default selection is *N*, indicating that no configurations have been made.
3. Double-click the *N* or *Y* in the Custom Order column for the index that you want to alter, or click **Edit Index**.
4. Select the **Custom Key Order** check box.
5. Click **OK**.

The Custom Order entry changes from *N* to *Y*.

6. Drag and drop the field that you want to move into the appropriate order.

After configuring the key order, to reset the key order of the index to the original order as defined in the record definition, clear the Custom Order entry (*Y* to *N*), and click OK.

The orders of the key fields reset to the original position in the Change Record Indexes dialog box.

7. Check the key order in the Use Display mode of your record definition.

The Num (number) column represents the original order of the keys in your record and the OrdR (order) column reflects the key order in the index.

8. Create the indexes.

- a. Select Build, Current Project.

- b. Select Create Indexes in the Build Options group box.

Make sure that you select the appropriate build settings.

2. Run the Build process to either generate a script or run the SQL online.
9. Confirm the construction of the new index with your native SQL command processor.

Note. Users might also configure indexes for “parent” records that contain one or more subrecords without key fields, such as the subrecord ADDRESS_SBR. However, if the subrecords contains key fields, index key order changes are restricted. The Custom Key Order option is deactivated and cannot be changed from *N* to *Y*. Change the index key order for the parent before inserting the subrecord.

Adding a Custom Index

To add an index:

1. Open the record.
2. Select Tools, Data Administration, Indexes.

The Change Record Indexes dialog box appears.

3. Click Add Index.

The Add Index dialog box enables you to determine for which database platforms you want to define the index if you selected the Some option for Platform. The Custom Key Order check box has been selected for you to ensure that the underlying record definition is not adversely impacted by the change to your index.

For all user-defined indexes, you must enter a description of the index in the **Comments** section. It is useful to know the purpose of the index, the transactions and processes that use this index, and other relevant information. This information assists you when you want to remove unused indexes. An error message appears if you do not do so.

4. Indicate the database platforms for which you want to create the index.
5. Click OK.

A row is added to the Change Record Indexes dialog box, and the arrow buttons are enabled.

6. Move the field under the new index row.
 - a. In the **Record Fields** list box, select the field that you want indexed.
 - b. Click the arrow button, or double-click the field.
 - c. Repeat this step for each field that you want to add.
7. Click OK.
8. Save the record definition.
9. Select Build, Current Project.
10. Select Create Indexes under Build Options.

Make sure that you select the appropriate build settings.

11. Run the Build process to either generate a script or run SQL online.
12. Run the generated SQL script if you opted to generate one.
13. Confirm the construction of the new index with your native SQL command processor.

Editing the DDL

In the Change Record Indexes dialog box, you can view the DDL for the index and override DDL parameters that are defined in the DDL model for this index.

To edit the DDL:

1. In the Change Record Indexes dialog box, select the index that you want to edit.
2. Click the **Edit DDL** button.

The Maintain Index DDL dialog box opens.

The upper list box in this dialog box lists the platform and DDL parameter, and the lower list box shows the DDL templates for the various platforms. Your database might have fewer platforms enabled. The sizing set enables different collections of tables to have different model statements and parameters.

3. Select the platform and sizing set.
4. Click **View DDL**.

The dialog box that appears shows the index DDL for the platform and sizing set that you selected. Review this DDL statement.

5. Click the **Close** button when you're finished.

6. Select the parameter that you want to edit in the upper list box.

The default value is set in the DDL Model Defaults dialog box. You can change this setting by selecting Go, PeopleTools, Utilities, Use, DDL Model Defaults in PeopleSoft Application Designer, or by selecting PeopleTools, Utilities, Use, DDL Model Defaults in the browser.

Click the **Edit Parm** (edit parameter) button.

The Edit Override Parm Value dialog box appears.

7. Enter the override value for the parameter that you selected.
8. Select **OK** for both open dialog boxes.

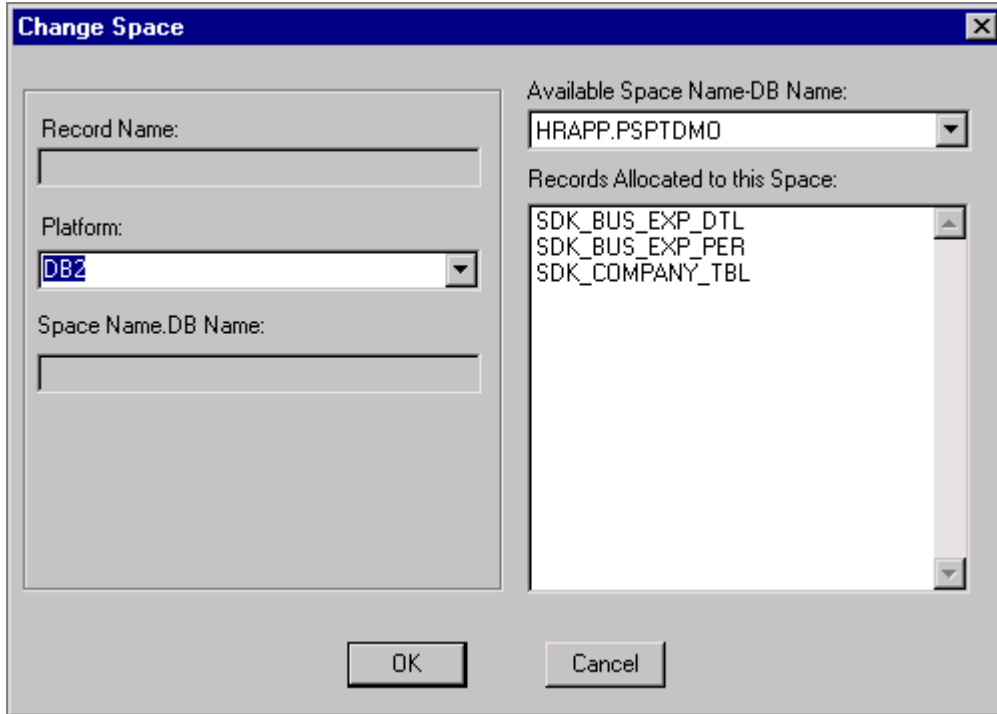
Using the Record DDL

Use the record DDL to define parameters and default values for the tables in your database. PeopleSoft provides templates for each database platform that PeopleSoft supports. The templates contain the typical parameters for each database platform. The mechanics of editing and viewing record, index, and unique index DDL is the same as space DDL.

Setting the Tablespace

The Change Space dialog box is an editing tool with which you can select the space name and view the records attributed to the named space in the database.

Access this dialog by selecting Tools, Data Administration, Set Tablespace. This dialog box also appears automatically when you attempt to save a new record definition. For each new record definition that is created in PeopleSoft Application Designer, a tablespace name must be allocated. For the Change Space dialog box to appear upon saving a new record definition, the Platform Compatibility Mode check box under PeopleTools, Utilities, PeopleTools Options must be selected.



Change Space dialog box

Record Name	Displays the name of the current record definition. This field is display-only.
Platform	Select from the available database platforms to which you can assign the designated space name.
Space Name.DB Name (tablespace name.database name)	Displays the available space name that is assigned to the current record. This field is display-only.
Available Space Name-DB Name (available tablespace name-database name)	Select the space name and database name to assign to the record.
Records Allocated to this Space	Displays all of the records that have already been allocated to the space that you selected from the Available Space Name-DB Name drop-down list box. This field is display-only.

Using Physical Data Storage

You have control over the physical storage of your data. The DDL for creating tablespaces, indexes, and tables can be viewed and edited in the browser.

[New Window](#) | [Help](#)

DDL Model Defaults

Platform ID: 4 DB2/Unix Copy...

Sizing Set: 0

DDL Find | View All First 1 of 3 Last

Statement Type: Table + -

Model SQL: CREATE TABLE [TBNAME] ([TBCOLLIST]) IN [TBSPCNAME] INDEX IN [TBSPCNAME] IDX NOT LOGGED INITIALLY;

Parameter Count: 0

Parameters Customize | Find | View All First 1 of 1 Last

DDL Parm	DDL Parameter Value

+ -

Save Return to Search Notify Refresh

DDL Model Defaults page

To view or edit the DDL parameters for creating tablespaces, indexes, and tables:

1. From the homepage of your application, select PeopleTools, Utilities, Administration, DDL Model Defaults.
2. At the DDL Model Defaults Search page, press ENTER to view platform names.
3. Select a platform name.

The DDL Model Defaults page appears.

The Model SQL edit box shows the DDL template for the specified platform and sizing set. The items in [] brackets are special parameters that are populated when instances of SQL are generated. For example, the preceding screen shot shows an index model statement for ALLBASE. In this example,

- [TBNAME] is the name of the table.
- [TBCOLLIST] is replaced by the columns that are specified in the index definition.

The model statements also contain parameter names enclosed in pairs of ** characters. A parameter name is replaced by a value when instances of the SQL are generated. In the preceding example, there is one parameter, ****FILESET****. When DDL is generated using this model, the FILESET parameter is replaced by FILE, unless it is overridden for the specific record or tablespace. The other text in the model statement is copied to the generated SQL.

See Also

PeopleTools 8.4 PeopleBook: Data Management, "PeopleTools Utilities," Administration Utilities

Guidelines for Designing Pages

Developing pages for internet applications require different design techniques than for building panels in a client/server Windows environment. This section discusses how to:

- Improve online performance.
- Design accessible pages.

Improving Online Performance

To improve online performance of internet applications, optimize transmissions to the server. Optimizing transmissions improves overall processing speed and reduces the user's data entry time.

Transactions that are designed using deferred mode reduce traffic to the application server but do not operate interactively.

This section provides an overview of processing modes and discusses how to:

- Refresh a page.
- Trigger server processing.
- Use PeopleCode in deferred mode.
- Using page controls in deferred mode.
- Using error and warning messages.

Understanding Processing Modes

PeopleSoft applications can run in two different processing modes: *interactive* and *deferred*.

Interactive Mode

In interactive mode (formerly called standard), when the user exits a field that has a field-level event (for example, FieldChange, FieldEdit, RowInsert PeopleCode, prompt validation, related display, and so on):

1. A transmission to the application server is performed to run that field-level event.

2. The page is redisplayed.

Deferred Mode

Deferred mode enables you to defer many of the conditions that need server processing until running them on the application server is required or requested. For example, when a user exits a field that has a field-level event (like FieldChange or FieldEdit PeopleCode, prompt validation, related display, and so on) that event is not run until the next transmission to the application server. When the next transmission to the server occurs, PeopleTools determines which fields have changed since the last transmission. Logic on the application server runs the appropriate system edits and PeopleCode events (in field layout order).

You can select deferred mode processing at the field, page, and component levels. For a field in the component to run in deferred mode, you must select deferred mode at each of those levels. Deferred processing is the default mode at the field, page, and component levels.

Refreshing a Page

Pressing the Refresh button on a page forces processing on the application server to determine which fields have changed since the last transmission and to run processing logic that is associated with those changes.

Users can also refresh by pressing the ALT-0 hot key, which keeps the cursor in the same field when the page is redisplayed. You can refresh any time during data entry to enable an expert user to do the following:

- Update related display field values for the data that is already entered.
- Recalculate totals and balances.
- Provide defaults that are based on prior data that was entered on the page.
- Validate the data that has been entered on the page so far.
- Invoke any hide, unhide, gray, or ungray code that is associated with specific fields.

Triggering Server Processing

The following table shows the events that cause the PeopleTools runtime environment to run logic on the application server when operating in deferred or interactive processing mode.

Deferred Processing	Interactive Processing	Event
	X	Entering data in fields with PeopleCode (for example FieldEdit and FieldChange) associated with them
	X	Entering data in fields that have prompt table edits
	X	Entering data in fields that have related displays

<i>Deferred Processing</i>	<i>Interactive Processing</i>	<i>Event</i>
X	X	Inserting a row or series of rows in a grid or scroll area
X	X	Deleting a row from a grid or scroll area
X	X	Using the grid or scroll area controls to move forward or back
X	X	Selecting another page tab
X	X	Selecting another grid tab
X	X	Expanding or collapsing a collapsible section
X	X	Clicking any button or icon on the page
X	X	Clicking any hyperlink on the page
X	X	Clicking the Refresh toolbar button
X	X	Using the Refresh hot key

Using PeopleCode in Deferred Mode

When designing transactions to run in deferred mode, note the following:

- Code field edits in FieldEdit PeopleCode; it is not necessary to move field edits to SaveEdit PeopleCode.
- Code field change logic in FieldChange PeopleCode.
- Set all fields, including those that have FieldEdit or FieldChange PeopleCode to deferred processing.
- Do not use gray and hide fields on the same page to achieve a form of progressive disclosure on the page.

Specifically, do not include hide or unhide and gray or ungray FieldEdit and FieldChange PeopleCode for definitions on the same page, unless it is triggered by a separate push button. Instead, use either page Activate PeopleCode or FieldChange PeopleCode for definitions that are on another page in the component. The page display should be static as the user enters values and moves between fields on the page.

PeopleSoft recommends that you hide or unhide definitions or set them to display-only in page Activate PeopleCode before the page is initially displayed based on setup data, configuration options, or personalization settings. Set fields to display-only in PeopleCode by setting the DisplayOnly property in the Field class to true.

- Show all fields as a static form, and perform cross-validation edits to prevent invalid data combinations from being written to the database.
- Cross-validation edits should always assume that the controlling field (for example, a radio button, check box, drop down list and so on) is correct when editing for invalid combinations.

Use SaveEdit to code cross-validation edits. If the transaction requires that the edits be performed before the user can select another folder tab, code the edits in a function that is called from the page Activate PeopleCode for every other visible page in the component. If the transaction is a sequential step-by-step process, add the cross-validation edits to the Next and Previous buttons that navigate the user through the process. Code cross-validation edits at the record level if the cross-validation edits apply to all components and at the component level if they apply to only one component.

Publishing Messages in PeopleCode

Use SavePostChange event, either from record-field or component PeopleCode, to publish messages online. PeopleTools has special logic in SavePostChange PeopleCode that defers publishing until just before the commit for the transaction. This minimizes the time that the system locks single-threaded PeopleSoft Integration Broker tables.

Using Page Controls in Deferred Mode

Consider the following when designing transactions to run in deferred mode.

Edit Tables ,

Fields that have edit tables should be set to deferred. The user can click the Refresh button for immediate validation of the field; otherwise, the prompt validation is deferred until the next required transmission to the application server.

Prompt Tables

Use deferred processing on prompt table edits that use %EditTable to set the prompt keys based on the values of other fields on the page. Deferred processing still results in the appropriate behavior being run. For example, if the user clicks the prompt icon, the system:

1. Determines which fields have changed since the prior server transmission.
2. Runs the appropriate PeopleCode events.
3. Applies the values from the page to the buffer.

This results in setting the correct values before resolving the %EditTable function, provided that any controlling fields come before the prompt table edit based on the page layout order.

3. Runs the prompt table edit lookup logic for the corresponding field.

Drop-Down List Boxes

Do not use drop-down list boxes when the high-order key values are set on the same page. If you do, it requires the server to transmit the correct drop-down list box values based on the high-order key values. Therefore, set the high-order keys on an another page, if possible, or use a prompt lookup instead.

For pages that have an effective-dated scroll area and a drop-down list box based on the PSXLATITEM translate table, the drop-down list box does not refresh when the effective date is changed on the page. However, the drop-down list box does accurately reflect the new effective date the next time that the page is displayed. Evaluate whether this is a problem for the transaction, based on whether customers typically enter effective-dated XLAT rows for the field and on how often changes to the XLAT values are made. If this is an issue, either replace the drop-down list box with an edit box and a prompt, or use the refresh icon after the effective date field.

Drop-down list boxes are a good design choice because they present users with a small number of selections from which they must select one. They are typically more appropriate than prompts for transactions that are targeted at casual, untrained users. Prompts are more appropriate when a power user is entering the transaction from a paper form or document that contains the necessary codes.

Check Boxes and Radio Buttons

Remove any FieldChange PeopleCode associated with check boxes in a grid that are mutually exclusive (meaning only one row can be checked). Instead, implement cross-validation edits in SavePreChange PeopleCode. When you design cross-validation edits between a radio button or check box and any associated edit box fields, assume that the controlling field (in this case the radio button or check box) is correct.

Related Displays

When you include related displays on your pages, make sure that they are set to deferred mode and that the standard Refresh button is enabled. Then, users can press the Refresh hot key to display related displays when they want to see them. Self-service transactions should not display the code and corresponding related display, but rather use descriptive prompts.

Adding Multiple Rows

This feature enables the user to specify the number of blank rows to be added by clicking the InsertRow icon.

The number of blank lines that are specified by the user is included on the page when it is redisplayed, so application server processing is no longer required for each row that is added.

Do not use this for effective-dated grids or scroll areas.

Multi-row inserts might not apply if the entire row is populated using PeopleCode, especially if the data is copied from prior rows. If a multi-row insert does apply, the default value of the ChangeOnInit property can be used. (The default value is True, which means that any PeopleCode updates done in the RowInit or RowInsert events set the IsChanged and IsNew properties to True).

Once a transaction is saved, empty rows are discarded before the page is redisplayed to the user. An *empty* row means that the user did not access the data and that PeopleCode or record defaults might have been used to initialize the row for the initial display.

PeopleCode Save processing (that is, SaveEdit and SavePreChange PeopleCode) runs for all rows that are in the buffer (including the empty ones). Therefore, SaveEdit and

SavePreChange PeopleCode should be coded so that it runs only if the field contains data or if the row properties IsNew and IsChanged are both True.

An alternative method is adding PeopleCode in the first save program in the component to explicitly delete any row based on the IsNew and IsChanged properties. If you choose this method, then rows should be deleted from the bottom of the data buffer to the top (last row first).

To implement multi-row insert:

1. Ensure that deferred processing is set.

Open PeopleSoft Application Designer and ensure that deferred mode is set for the component, all pages in the component, and all fields on each page.

2. Navigate to the Page Properties dialog box of the appropriate control.
3. Enable multi-row insert.

For each grid or scroll area where appropriate, select the Allow Multi-row Insert check box under the Use tab in the grid or scroll area property sheet.

4. Add ChangeOnInit PeopleCode.

Setting the ChangeOnInit property for a rowset to FALSE enables PeopleCode to modify data in the rowset during RowInit and RowInsert events without flagging the rows as changed. This ensures that only changes entered by the user cause the affected row to be saved.

Note. Each rowset that is referenced by a grid or scroll area with multi-row insert enabled should have the ChangeOnInit property for the rowset set to *FALSE*. This includes child, or lower level rowsets. In addition, this property must be set before any RowInsert or RowInit PeopleCode for the affected row.

Using Error and Warning Messages

When components, pages, and fields are set to deferred mode, FieldEdit PeopleCode errors and warnings are not displayed when the user exits the field, but rather after the next application server transmission. Therefore, users might not receive an error message until they enter all of the data and click the Save button.

For FieldEdit error messages running in deferred mode, the system changes the field to red and positions the cursor to the field in error when it displays the message. This allows the user to associate the error message with a specific field. However, for warning messages, the system does not display fields, nor re-position the cursor. Consequently, create warning messages that clearly describe to which fields they apply. For example, if a page contained a "Date out of range" warning, it would be confusing to users if there were multiple date fields on the page.

See Also

PeopleTools 8.4 PeopleBook: Using PeopleSoft Applications

Designing Accessible Pages

This section describes how to design an application page that will be useful to the user and support assistive technologies. The guidelines address:

- The use of labels for functional images, data-entry fields, and grid columns.
- The use of color to convey meaning.
- Titles for grids and scroll areas.
- Unique labels.
- Adornment images.
- Tab order.
- Deferred processing.
- Foreground and background colors.
- Instructional text for self-service pages.
- Abbreviations used in labels and column headers.
- HTML-specific standards.

Understanding Accessibility Issues

PeopleSoft is committed to designing transactions that are accessible to all users. When you create or modify PeopleSoft Internet Architecture pages for your system, consider the needs of all users who might access these pages. Make sure that users with disabilities can navigate quickly and cleanly through your transactions when using screen reader software. Before you design your page, use the following checklist to create a properly designed application page that also addresses important usability issues.

- Do all functional images have labels? Do these labels effectively communicate the purpose of the image?
- Do all data entry fields have labels near the entry field?
- Do all grid columns have labels (excluding columns with buttons or links)?
- Do all grids and scroll areas have titles?
- Do all buttons and links have unique labels?

- Do adornment images have labels deactivated?
- Is the tab order correct?
- Is deferred processing activated? If not, is field processing kept to a minimum?
- Do foreground and background colors provide sufficient contrast?
- Do your self-service pages have instructional text?
- Did you remove abbreviations used in labels and column headers?
- If your page contains HTML not generated by PeopleTools (such as code in an HTML area) or an applet, first check that the code follows the Section 508 accessibility standards. Section 508 standards can be found at <http://www.access-board.gov/sec508/508standards.htm>. The applicable standards are in Subpart B, *Technical Standards*, Section 1194.22 *Web-based Intranet and Internet Information and Applications*.

Some of these features are set in design time and can be activated or deactivated by the system administrator and the end user. The system administrator controls the availability of functions to the user from PeopleTools Security. The end user can then activate the options on the My Personalizations page.

See Also

PeopleTools 8.4 PeopleBook: Security, "Managing PeopleSoft Personalizations," Working with the My Personalizations Interface

PeopleTools 8.4 PeopleBook: Using PeopleSoft Applications, "Working with Browser-Based Applications," Using Accessibility Features

Using Labels

Consider the use of labels for functional images, data-entry fields, and grid columns in your application page.

Labels for Functional Images

All functional images need a good label. Functional images are image buttons, image links, and static and dynamic images that convey meaningful information. Images that do not require labels are spacer GIFs (invisible GIFs) and adornments (images that do not serve a functional purpose other than to provide visual interest). A good label is vital for blind users to understand the meaning of an image. Labels also clarify the meaning of images for sighted users, because the labels appear as mouse-over text.

Assign labels to images using alternate text, or the ALT HTML tag. You can set alternate text for static images, dynamic images, push buttons and link images, and control buttons in scroll areas and grids. Assign alternate text on the Label tab of the Properties dialog box for the control that you specify. You can use the Message Catalog, custom label text, or the RFT long or RFT short label, if one has already been designated in the record field. There are

alternative text entries in the Message Catalog for the following page field elements: folder tabs, scroll left and right buttons, hide and show grid tabs, prompt buttons, expand and collapse buttons for grids, group boxes, and scroll areas.

Note. Any alternate text that you select is visible to all users as mouse-over text regardless of whether the system administrator makes the accessibility features available to users in PeopleTools Security.

<p>To specify a label for an image pushbutton or hyperlink:</p>
--

1. For a pushbutton or hyperlink associated with a record field, open the Page Field Properties dialog box for the object.
2. Select Image as the Type.
3. Determine whether the RFT names.
 - a. If the RFT name is descriptive, set the label type to that RFT name.
 - b. If the RFT name is not adequate, edit the RFT name or write a message using the Message Catalog.

Note. Image pushbuttons and hyperlinks not associated with record fields should use messages exclusively.

The steps to specify a label for other types of images is the same as for image pushbuttons and hyperlinks with the following differences:

- For dynamic images, you can choose to use RFT names or messages.
- For static images, you can only use messages or static text. PeopleSoft recommends using the Message Catalog.

Labels for Data-Entry Fields

All edit boxes, check boxes, radio buttons, and long edit boxes should have labels near the entry field. The label should be the actual label for the field, or the label from a hidden field, and so on.

Do not use a second independent field as the label for an edit field. This causes the field, that is serving as a label, and the edit field to be disassociated by a screen reader and it is confusing to blind users. It also results in a page that contains a field without label, and a label without a field.










Labels for Grid Columns

All grid columns need a label. The only grid columns that do not have labels include those that contain button or hyperlinks.

Using Color to Convey Meaning

Do not use color as your only way to convey information. Include a redundant clue so users who are blind or color-blind are aware that there is something special or different about a field or process. A common misuse of the color red is to change the background or text color to indicate an error. Another common mistake is to use an icon that changes color based on status but is otherwise the same. Color-blind users cannot distinguish between certain colors, nor can screen readers. In addition, if a user prints a page on a black and white printer, color-dependent items on the page become indistinguishable.

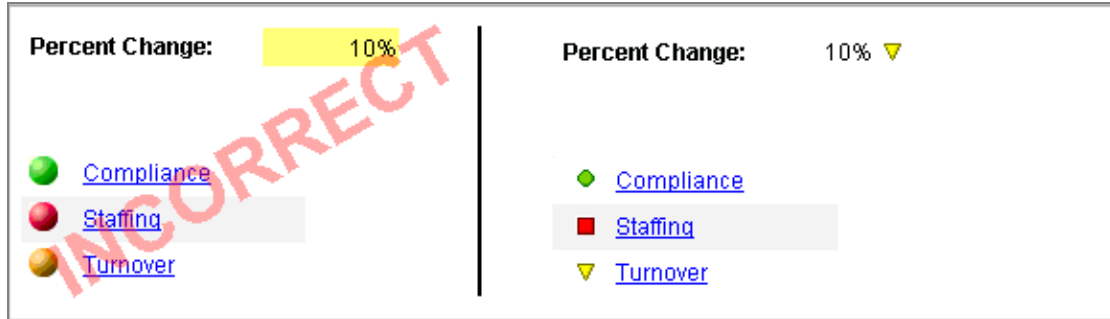
Use the approved set of icons in the table and see the following example on how to show status:

Status Description	Picture of icon	File Name
OK, Normal, Good		PS_STATUS_OK_ICN.GIF or .JPG
Warning, Caution, At Risk		PS_STATUS_CAUTION_ICN.GIF or .JPG
Error, Critical		PS_STATUS_ERROR_ICN.GIF or .JPG
Completed		PS_STATUS_CLOSED_ICN.GIF or .JPG
Cancelled		PS_STATUS_CANCELLED_ICN.GIF or .JPG
No status, status unchanged		PS_STATUS_UNCHANGED_ICN.GIF or .JPG
Trend up		PS_STATUS_TREND_UP_ICN.GIF or .JPG
Trend unchanged		PS_STATUS_TREND_STABLE_ICN.GIF or .JPG
Trend down		PS_STATUS_TREND_DOWN_ICN.GIF or .JPG

Use a text field that describes the status. For example:

Status: Error

Use icons of different shape *and* color to represent each status. The icons should also have descriptive mouse-over text so that screen readers for blind users can interpret the meaning of the icons.



An example of using icons of different shapes, colors to denote status

Verifying Titles for Grids and Scroll Areas

All grids and scroll areas need to have meaningful titles. Sometimes titles are turned off due to redundancy because the label repeats the name of the page. However, while the grid may be visually close in proximity to a page title, it may not be close when read aloud by a screen reader. This may cause a loss of associated between the page and the grid and the contents of the grid may become ambiguous.

Adding Unique Labels for Push Buttons and Hyperlinks

Buttons and links need unique names on a page. While you might visually associate a link with an area, the association might not be apparent to a screen reader. Also, screen readers have the ability to list all links on the page. If there are two links with the same label, no distinction can be made to the user.

Deactivating Adornment Images

Adornment images serve no functional purpose other than to provide visual interest. If the images have no information to convey to users and do not serve as navigation, then they should not have a label. Images used as spacers, such as invisible GIFs, should not have labels.

To deactivate the label for an image:

1. Access the Image Properties dialog box.
2. Select the Label tab.
3. Set Label Text Type to Static Text.
4. Delete any characters from the Text field, if it is present.

It is not necessary to enter a space. Leave the Text field blank.

Maintaining Logical Tab Order

Maintaining a logical tab order on your page is critical because blind users cannot see the groupings or field proximity. Tab order is also important for sighted users because it can be confusing if the cursor moves to fields in an order different from how they appear on the screen.

Deferred Processing

Every time there is a trip to the server, your current page is refreshed. This "refresh" can make the screen reader lose focus of the field that the user was on and it will start reading the page from the beginning. This includes navigation links and all other items on the page. It will be difficult for users using a screen reader to find their place as well. Using deferred processing will allow you to determine when the transmission to the server needs to be made.

Foreground and Background Colors

Text and background colors must have sufficient contrast to be viewed by someone with low vision or color-blindness. The PeopleSoft standard corporate style sheet is designed with this in mind. You might consider using the provided style sheets instead of custom ones.

Using Instructional Text

Instructional text provides a brief overview of the page and a summary of the page contents for blind users. By providing instructional text, you save users from having to hear the contents of an entire page read aloud by the screen reader. All self-service pages should contain at least a minimum of one or two lines of instructional text.

When writing instructions, labels, or any other text for transaction pages, follow these general guidelines:

- Know your audience and write to their level of expertise.
- Do not make assumptions based on your expertise.
- Avoid highly specialized technical slang that is unique to an occupational group.
- Understand the task you are describing.
- Write clearly and concisely.
- Use the fewest words required for clarity.
- Use short sentences; avoid paragraphs.
- Choose precise, imperative verbs. For example, reword "Please fill out all the fields below" to "Complete all fields."

- Do not construct sentences that merge variable information into a sentence, as these sentences are difficult to translate. Reword "OK to delete dependent John Smith?" to "OK to delete John Smith?"
- Correctly reference graphical user interface (GUI) elements.
 - You click buttons, you do not click on a button.
 - You select options, check boxes, and items in list boxes. You do not choose them.
 - You press keyboard keys.
 - You clear options and check boxes (not uncheck, unmark, deselect, or other such variation). You can cancel a selection as well.
- You delete items (not remove them).
- Use written English, not verbal English (the English you speak is not necessarily the English you write).
- Avoid contractions.

Poor	Better
Won't	Will not
Didn't	Did not
Shouldn't	Should not
Can't	Cannot

- Use short, simple, non-threatening words.

Poor	Better
Abort	Cancel, Stop
Execute	Complete, Done
Implement	Do, Use, Put Into
Invalid	Not Correct, Not Good, Not Valid
Terminate	End, Exit

- Avoid hyphenation.
- Eliminate unnecessary words.

Poor	Better
in order to	to
so that	so
in regards to	regarding

Text for Labels

When writing labels, use the following guidelines:

- Write short, concise, yet descriptive labels.
- Do not capitalize all letters in the words included in your label; use sentence case.
- Use abbreviations only when there is limited space.
- Follow field labels with a colon (:).
- Do not use repetitive words. Reword "Copy the overall definition for the following: Rules definition, Rates definition, and Offerings definition" to "Copy the overall definition for the following: Rules, Rates, Offerings."

Text for Titles

When writing the text for titles, use the following guidelines:

- Write titles that are short and descriptive.
- Use verbs. For example, Create Expense Report .
- When writing titles that will appear in the blue bars, do not repeat the transaction title or the page title. Instead, use a similar but more descriptive phrase or a slightly longer description. For example, the title in blue bar repeats the page title but adds more description.

Direct Deposit

Antonio Santos

Direct Deposit Detail

Account Type	Transit Number	Account Number	Deposit Type	Amt/Pct		
Checking	235842	224673232	Percent	50%	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

General Guidelines for Instructional Text

When writing instructions, use the following guidelines:

- Do not use quotations around reference words.
- To reference a word, capitalize the first letter of the word. In the following example, see the instructional text with a reference to an object (Primary Phone check box):

Phone Numbers

Antonio Santos

Enter your phone numbers below and indicate your primary contact phone number by checking the Primary Phone checkbox.

*Phone Type	Telephone	Primary Phone	
Business	805/222-3333	<input checked="" type="checkbox"/>	Delete

Add a Phone Number

Save

* Required Field

- Use short sentences; avoid paragraphs. Reword "The following competencies listed have been populated based on your job. Please complete the information below (where applicable) for your perceived proficiency, your interest in developing this competency further, year acquired, year last used, and years of experience. If you need to add additional competencies, please click the Add button below" to, "The listed competencies are based on your job. Complete the information where applicable. To enter additional competencies, click Add. When completed, click Save."
- Write sentences in an active voice. Reword "The part numbers should be entered" to "Enter the part numbers."

Page Instructional Text

Page instructional text provides users with instructions on how to complete a task on the page. Use this text when pages have unique requirements or are particularly complex. When writing page instructional text, follow these guidelines:

- Place instructional text after level 0 identifying data.
- Set the style of the instructional text to PAPAGEINSTRUCTIONS.
- Derive instructional text from the Message Catalog. Use a unique Message Set for each product.

Use Static Text to provide instructional text for a page.

- When you need to create a dynamic phrase, embed bind variables in a message catalog entry.

Additional Instructional Text

Additional instructional text is used within a page and it helps users understand a specific section or field on the page. Additional text can also be used as a footnote at the bottom of a section or page. Use this text when a page or sections of the page have unique requirements or are particularly complex.

CHAPTER 8

Creating Page Definitions

This chapter provides an overview of page development and discusses how to:

- Change page layout grid settings.
- Create new page definitions.
- Add page controls.
- Manipulate page controls.
- Set page field properties for controls.
- Create display control and related fields.
- Order and space page controls.
- Design inquiry pages.
- Align page controls.
- Maximize performance.
- View pages in the browser.
- Access PeopleCode in page definitions.
- Produce pages.

Understanding Page Development

This section provides overviews of:

- Page development tools.
- Level-based controls.
- Keys for accessing pages.
- Multiple occurrences of data.
- Derived work fields.

- Sensitive data.
- Hidden pages.

Page Development Tools

Pages are the graphical interface between your users and your application database. As a system designer, you configure or build pages that meet the data requirements of the application and are easy to use and understand. Using PeopleSoft Application Designer, you can create, modify, and delete page definitions in your PeopleSoft system.

Menus

As you build pages, use the tools and options in the following menus.

- File Menu:

In addition to the standard options for opening, deleting, and renaming pages, use this menu to access the definition (page) properties and the properties for the selected control.

- Edit Menu:

Access the page field properties from this menu. To find out what other definitions reference the active page, select Find Definition References. You can also search for a text string in types of PeopleCode or SQL objects.

- View Menu:

- Select View Definition to view the underlying definition, such as the subpage or record, for the selected control.

You can view the PeopleCode for the page or the underlying record definition.

- View Internet Options provides additional options for many of the controls to function or appear more appropriately in an internet browser.

The default is activated. To change the default setting, clear the View Internet Options Only check box on the General tab in the Tools - Options dialog box.

- Edit Fill Display, Edit Fill All, and Edit Fill None refer to how controls appear only during design time.

They do not affect the page during runtime.

- Use the Show Definition Inspector tool to position and size controls precisely on your page.
- Use Show Grid to display or hide a layout grid on the page that you are designing to help you place controls more accurately.

- Insert Menu:

Use this menu to insert different types of controls on your page. You can also insert the page on which you are working into a project.

- **Tools Menu:**

This menu provides access to various utilities, such as data administration, change control, upgrade, and translate.

- **Layout Menu:**

Use this menu to modify the number of pixels between points on the layout grid. Options on this menu also enable you to align page controls, view the processing order of the controls on the page, and test the tab order between fields on your page.

- The View in Browser function enables you to see the page as your users will in the selected browser.
- The Generate HTML function creates a text file containing the HTML for your page and places it in the TEMP directory of your local drive.

Toolbars

The toolbars in PeopleSoft Application Designer change, depending on the active window. When a page window is active, you see the page definition toolbar and the page controls toolbar.

- **Page definition toolbar:**



Click the Properties button to open the Page Properties dialog box (ALT+ENTER).



Click the Project Workspace button to display or hide the project workspace (View, Project Workspace or ALT+0).



Click the Select Group button to select several controls at once (Edit, Select Group menu item or CTRL+P).



Click the Default Ordering button to reorder all of the fields on the page based on their relative locations on the page (Layout, Default Ordering).



Click the Test Page button to test the tab order of your page design (Layout, Test Mode or CTRL+T).



Click the View Page in Browser button frequently throughout the design process (Layout, View Page in Browser).



Click the Toggle Inspector button to display or hide the floating Definition Inspector window (View, Show Definition Inspector).



Click the Auto Size button to size a subpage or secondary page to fit around page controls.



Click the Toggle Grid button to display or hide the page grid (View, Show Grid or CTRL+G).



Click the Default Label Position button to place page control labels immediately to the left as the default (Layout, Default Label Position or CTRL+D).



Click the Align Left button to align the left-hand edge of a selected field to the last field that is selected on the page.



Click the Align Center button to center a selected field horizontally and align it to the center of the last field on the page.



Click the Align Right button to align the right-hand edge of a selected field to the last field on the page.



Click the Align Top button to align the top edge of a selected field to the last field on the page.



Click the Align Middle button to center the selected fields vertically and align the middle in relation to the last field on the page.



Click the Align Bottom button to align the bottom edge of a selected field to the last field on the page.



Click the Show Help button to view the page definition help.

- Page control toolbar:

The page control toolbar contains a button for each type of page control that you insert. The buttons display images that look like the controls that they insert. You can move this toolbar on your workspace independently of the system toolbar or the other half of the page definition toolbar.



Frame.



Group box.



Horizontal rule.



Static text.



Static image.















Tab separator.



Check box.



Drop-down list box.

	Edit box.
	HTML area.
	Image.
	Long edit box
	Push button or link.
	Radio button.
	Grid.
	Scroll area.
	Scroll bar.
	Secondary page.
	Subpage.
	Chart.

Page Layout Grid

When you open a page definition, evenly spaced dots appear in the workspace. This is the page layout grid that you use to align controls. When you're running applications, the grid doesn't appear on pages. It appears only as a design aid in the page definition.

The default grid spacing is 4×4 , which means that each row has one dot per 4 pixels and that the rows are 4 pixels apart on the vertical axis. PeopleSoft builds most of the pages in the standard applications using this grid.

Level-Based Controls

Page design hinges on the type of data that you plan to access and maintain. In some cases, a page references a single record definition; in others, you might want to reference multiple records. To accommodate a variety of page designs, PeopleSoft created *level-based controls*. The three level-based controls are:

- Grids
- Scroll areas
- Scroll bars

There are four levels in level-based controls: Level 0, Level 1, Level 2, and Level 3. These levels are referenced as *occurs levels* on the Record tab in the properties dialog box for the level-based control that you are setting.

- Level 0

This is the nonscrolling area that directly relates to the key information of the underlying record. Level 0 information is usually display-only with data that the user entered on the initial search page.

- Levels 1–3

These levels include the scrolling data that is related to the Level 0, nonscrolling data. Level 1 is subordinate to Level 0; Level 2 is subordinate to and nested in Level 1; and Level 3 is subordinate to and nested in Level 2. You can nest level-based controls up to 3 levels.

The first occurs level on a page is Level 0. In general, this level is reserved for the primary key fields that are used to search for pages. It is possible to have a page that contains no level-based controls, making all fields set to Level 0. This is particularly true for secondary or subpages that contain few data entry fields, as shown in the following example. The first column, Lvl (level), of the Order grid indicates that all fields on the page are at Level 0.

	Lvl	Label	Type	Field	Record	Display I
1	0	SubPage			NOSEARCH_VW	<input type="checkbox"/>
2	0	Activity Name	Group Box	ACTIVITYNAME	PSACTIVITYGUI	<input type="checkbox"/>
3	0	Step 1 Link	Push Btn/Link	STEP_1_URL	PSACTIVITYGUI	<input type="checkbox"/>
4	0	Image 1	Image	STEP_2_IMAGE	PSACTIVITYGUI	<input type="checkbox"/>
5	0	Image 1	Image	STEP_1_IMAGE	PSACTIVITYGUI	<input type="checkbox"/>
6	0	Step 2 Link	Push Btn/Link	STEP_2_URL	PSACTIVITYGUI	<input type="checkbox"/>
7	0	Image 1	Image	STEP_3_IMAGE	PSACTIVITYGUI	<input type="checkbox"/>
8	0	Step 3 Link	Push Btn/Link	STEP_3_URL	PSACTIVITYGUI	<input type="checkbox"/>
9	0	Image 1	Image	STEP_4_IMAGE	PSACTIVITYGUI	<input type="checkbox"/>

Order grid

After you add a level-based control to your page, such as a scroll area, the default occurs level for that control is set to one in the properties dialog box. If you place a field in or below that scroll area, it is also set to Level 1 in the Order grid, even if it is another level-based control. If necessary, you can use the Set to Level 0 feature of the horizontal rule control to restart the occurs level count on your page.

You can also add any number of level-based controls at the same level. For example, the Benefit Program Participation page contains a scroll area and a grid, both at Level 1.

Benefit Program Participation		Employee		ID: TC015
Smith, Mary				
Benefit Record Number:	<input type="text" value="0"/>	Deductions Taken:	Deduction	
Benefit Eligibility View All First 1 of 1 Last				
Effective Date:	02/01/1990	Effective Sequence:	0	Job Indicator: Primary Job
Action / Reason:	Hire Current			
*Benefits System:	<input type="text" value="Benefits Administration"/>	Benefits Employee Status: Active		
BAS Group ID:	<input type="text"/>			
Elig Fld 1:	<input type="text"/>	Elig Fld 2:	<input type="text"/>	Elig Fld 3:
Elig Fld 4:	<input type="text"/>	Elig Fld 5:	<input type="text"/>	Elig Fld 6:
Elig Fld 7:	<input type="text"/>	Elig Fld 8:	<input type="text"/>	Elig Fld 9:
Benefit Program Participation View All First 1 of 1 Last				
*Effective Date	Benefit Program	Currency Code <input type="button" value="+"/> <input type="button" value="-"/>		
02/01/1990	TCW Total Comp Warehouse	USD		
Job Data		Employment Data		Earnings Distribution
Benefits Program Participation				
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Next in List"/> <input type="button" value="Previous in List"/>				

Benefit Program Participation page

Nesting Level-Based Controls

Nesting controls involves two or more level-based controls on a page, such as two scroll areas, when the second scroll area has an occurs level of 2. You nest controls when the new data that you want to add is a repeating set of data for each entry in your first level-based control. In doing so, you create a hierarchical, or “parent and child” relationship between the controls and the processing of the record definitions. The Level 2 control is the child of, and is subordinate to, the Level 1 control.

For example, on the Compensation page, the Level 2 grid is nested in the Level 1 scroll area. On the Amounts tab of the grid, there are two rate codes for each compensation action in the Level 1 scroll area.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Albion, Charles Employee ID: Z1000 Empl Rcd#: 0

Compensation View All First 1 of 1 Last

Effective Date: 12/01/1997 Effective Sequence: 0 Job Indicator: Primary Job
 Action / Reason: Hire Current

Compensation Rate: 6,176.78 USD
 *Compensation Frequency: M Monthly
 Change Amount:
 Change Percent:
 Compa-Ratio:
 Annual Benefits Base Rate:

Pay Rates

Hourly Rate:	35.64	USD
Daily Rate:	285.08	USD
Monthly Rate:	6,176.78	USD
Annual Rate:	74,121.39	USD

Pay Components First 1-2 of 2 Last

Amounts Changes

*Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 NAANNL	0	Details	6000.000000	USD	M			+ -
2 BLMAL1	0	Details	1316.000000	BEF	W			+ -

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Save | Return to Search | Next in List | Previous in List | Previous tab | Next tab | Update/Display | Include History | Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Compensation page

You can nest up to three levels of scrolls or grids on your page. For example, the Additional Pay 1 page shows three levels of data that can be entered, two of which are nesting scroll areas in the Earnings scroll area.

Additional Pay 1 page

In this case, we want to maintain information about the compensation history for a single employee, and, for each change or override in compensation status, enter the details about that change. The first scroll area, Earnings, associates the earning code with the second, subordinate scroll area, Eff Date (effective date) and Default Job Data, which enables the user to enter the effective date for the status change. The third scroll area, Or Overrides to Job Data, which is subordinate to the second, enables the user to enter the overrides to the default job data that appears in the second scroll area.

For each of the three scroll areas, you can have several rows of data. While you don't see actual scroll bars on your page, the navigation buttons and links in the navigation bars for each scroll area enable you to navigate or scroll through the rows.

Nesting Grids in Scrolls

As shown previously, you can nest a grid in a scroll or scroll area. The rather following page shows the Other Earnings grid at Level 3, which is nested in the Earnings scroll area at Level 2, which is nested in the Paysheet Details scroll area at Level 1. A nested grid serves the same function as a nested scroll area. It can offer a more compact way of viewing many fields of data, particularly if you use a tabbed grid.

Note. While you can nest a grid in a scroll area, you cannot nest a scroll area in a grid or a grid in another grid.

The screenshot shows a 'Paysheet' page with the following details:

- Company:** SCA, **Pay Group:** FLS, **Pay Period End Date:** 03/12/1997, **Page:** 1
- Paysheet Details:** Line 1, *ID G017, Empl Rcd# 0, Ben Rcd# 0, Name CAres,FLSAempndtaxper. Includes fields for Check #, Check Date, Total Gross, and Net Pay.
- Earnings:** Includes checkboxes for OK to Pay, Override Hourly Rate, No Direct Deposit, and Gross-Up. Fields for Reg Rt Cd, Reg Hrs (40.00), OT Rt Cd, OT Hrs, Hourly Rate (19.355769), and Regular Salary.
- Other Earnings:** A table with columns for *Code, Seq #, Rate Code, Hours, Rate, and Amount.
- Navigation:** Save, Return to Search, Next in List, Previous in List, Add, and Update/Display buttons.

Paysheet page

Levels and Runtime Processing

Levels play an important role in runtime processing. The component processor relies on the level at which you place a field on a page to determine how to process any PeopleCode attached to the field in the record definition.

Effective Dates and Level-Based Controls

EFFDT (effective date) must be the *only* key field that is controlled by level-based controls that you create to help users maintain multiple occurrences of data that is keyed by effective date. Otherwise, the effective date processing for update actions does not function correctly.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, Referencing Data in the Component Buffer

Keys for Accessing Pages

No matter how much time and effort you invest in defining and refining your page, it's useless unless the user can access it. This means adding it to a component, then adding that component to a menu. When you add a page to a component, you determine what actions the user must perform to access the page and the keys that are required to retrieve rows of information.

The search record that you define for a component determines the key list; that is, keys for which users are prompted when they select a page and an action. A search record can be either a view that concatenates information stored in several tables or the underlying table itself. Select the search record that contains all of the key items for the primary record underlying the page.

The keys for which the search dialog box prompts should populate the high-level (Level 0 in the page definition) key controls on a page. These key controls always appear above any level-based control on the page and are typically display-only. A search record might differ from a primary record definition, but it must contain all of the Level 0 keys that you have placed on the page.

Using Keys for Views

When you create a view that should use key values from a page, each of those keys must be:

- Listed as output columns from the view (not just referenced in the WHERE clause of the view).
- Marked as key fields of the view.

For example, suppose that a page has PERSON.PERSONID as a Level 0 field. PERSONID is the key of the PERSON record. A grid on the page uses the PERSON_ADDRESS_VW view to display addresses for the current person. The SQL statement for the view cannot just mention PERSON.PERSONID in the WHERE clause; PERSONID must be both an output column of the view and a key field of the view.

See Also

Creating Record Definitions

Creating Component Definitions

Multiple Occurrences of Data

On some pages, you might want a few of the field controls to display multiple rows or occurrences of data. To do this, you can add a level-based control—a scroll area, a grid, or a scroll bar. Users can then add, edit, delete, find, and scroll through multiple occurrences of data in a page control or group of controls using action buttons, links, or the browser's scroll bar, depending on how you set the occurs count. Using a scroll area or a grid, rather than a scroll bar, is the preferred page design to show multiple occurrences of data.

For example, the following Checklist Table page contains the Assignment Checklist Item grid with an occurs count of 5. The Checklist Item scroll area in which it is nested contains an occurs count of 1, because we can see only one row of data in the scroll area. If the occurs count is set to a higher number, we see the first scroll area with the grid inside, followed by a second scroll area with another grid inside of it.

Checklist Table

Checklist Code: K00001

Checklist Item View All First 1 of 2 Last

*Effective Date: 07/27/2000 *Status: Active Checklist Type: Transfer + -

*Description: Foreign Loan Departure Chcklst Short Description: FLA Depart

Assignment Checklist Item View All First 1-5 of 10 Last

*Sequence	*Item Code		
1	K00014	Briefing with Human Resources	+ -
2	K00029	Apply for Visas/Work Permits	+ -
3	K00008	Reconfirm Relocation Package	+ -
4	K00001	Select moving/storage company	+ -
5	K00010	Confirm move date with movers	+ -

Save Return to Search Next in List Previous in List Add Update/Display Include History Correct History

Checklist Table page

To see the next set of five rows in the Assignment Checklist Item grid, a user can click the right arrow button. To see all rows of data at once, in either the grid or scroll area, the user can select the **View All** link in the navigation bar.

In PeopleSoft Application Designer, you set the occurs count for a level-based control on the General tab in the properties dialog box. You can set the occurs count to any number. You also have the option of selecting Unlimited Occurs Count so that the user sees all rows of data. If there are more options than can be seen in the window at runtime, the browser displays a scroll bar enabling the user to scroll to the bottom of the page.

Prompt Fields

At runtime, you might want to enable your users to look up the valid values that they can enter in a field. For this, PeopleSoft provides prompts. There are three types of prompts:

- Drop-down list box.

This is a small list that opens below a field in the current page, such as the Job Indicator field on the Work Location page. To use a drop-down list box, the user clicks the down arrow inside the field. One does not have to exit the page. The drop-down list box is a predefined control that you place on your page.

- Calendar drop-down prompt.

A calendar drop-down prompt opens a small calendar next to a date field to enable the user to easily scan for the correct date. The Work Location page contains calendar prompts for the Effective Date, Position Entry Date, and Department Entry Date fields. Place a calendar prompt on a page by associating any date field with an edit box control and selecting the Show Prompt Button in the Display Options of the Record properties of the edit box.

Note. The calendar prompt feature is not supported on all browsers. See Customer Connection for specific browser-related information regarding this feature.

- Prompt button.

A prompt button, unlike a calendar prompt or drop-down list box, opens a separate lookup page in the user's browser. From this page, the user can search the database for a value, select the value, and then return to the main page. In PeopleSoft Application Designer, associate a prompt with a page control by selecting the Show Prompt Button check box from the Display Options on the Record tab of the properties dialog box. The record field with which you associate the page control must list values in the Translate Table or prompt table for the system to display the prompt button.

The screenshot displays the 'Work Location' page for employee Smith, John. The page is divided into several sections: 'Work Location' (Employee ID: G050, Empl Rcd#: 0), 'Employee Information' (Active status, Hire action, Date Created: 03/23/1998), and 'Job Information' (Job Indicator dropdown, Position Entry Date, Department Entry Date: 06/11/1998). A calendar prompt is overlaid on the Effective Date field (06/11/1998), showing the month of June 1998. A dropdown menu for Job Indicator is also open, showing options: Primary Job, Not Applicable, Primary Job, and Secondary Job. The page includes various fields for Regulatory Region (USA), Company (CCB), Business Unit (USSVC), Department (10200), and Location (001). Navigation buttons like Save, Return to Search, and Next in List are visible at the bottom.

Work Location page

See Also

“Using Page Controls,” Using Drop-Down List Boxes

“Creating Field Definitions,” Date Field Type and Using the Translate Table

Derived and Work Fields

You can use a field definition from a derived or work record to store a temporary value that PeopleCode uses to determine the values of other field controls on the page.

For example, for a budgeting transaction in PeopleSoft General Ledger, assume that you have an annual amount that you must spread to multiple accounting periods. You can create a page that includes both a field control from a derived record for the annual amount and an amount control for each accounting period. You then write PeopleCode to derive the amount per accounting period from the annual amount. When a user enters the annual amount in the derived field control, PeopleCode calculates the amount per accounting period and inserts it into each accounting period field control. The annual amount isn't stored in the database, but the period amounts are.

See Also

“Creating Record Definitions,” Creating a New Record

Sensitive Data

You can allocate sensitive data to a single page and limit access to that page to the users who need to update it. Alternatively, you can enter PeopleCode to hide certain fields on pages based on whatever criteria are appropriate. The page approach is simpler, however, and can be used in most situations.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, “PeopleCode Built-In Functions and Language Constructs H-R,” Hide

Hidden Pages

Hidden pages are work pages that are associated with derived or work records and are often used in work groups. You can store all of your work field controls there. Create these pages when you want calculations to be performed in the background by PeopleCode that the user does not need to see. As a convention, PeopleSoft assigns work pages that are delivered with your application names that end with the suffix, *_WRK*. PeopleSoft recommends that you follow the same naming convention. For example, *MC_TYPE_WRK*.

Hide a page by selecting the Hidden check box in the component grid as you set up the component definition.

See Also

“Creating Component Definitions,” Setting Page Attributes

Upgrade Considerations

If you adapt a PeopleSoft application, you might affect your use of future PeopleSoft releases. The closer your PeopleSoft system is to the standard product, the easier your upgrades will be. Avoid superfluous or cosmetic changes to data structures in the standard product. Document all of your changes in the comment area on the General tab in the Page Properties dialog box.

Changing Page Layout Grid Settings

To change the grid spacing:

1. Select Layout , Grid Settings.
2. Enter values for the width and the height, which is the spacing of the dots in pixels.

The smaller the value, the finer the grid. The finer the grid, the more difficult it is to align fields precisely without using the align functionality.

Select a **Show Grid** option to activate or deactivate the page grid.

If you copy an existing page and save it under another name, you also copy the grid settings that were used to create the original page. For example, if the original page was built with a 5 × 5 grid, your new page also has a 5 × 5 grid, by default. You can change the grid settings anytime while working on a page. Doing so has no effect on the position of a field.

Creating New Page Definitions

To create a new page definition, either clone an existing page or begin with a blank page. Cloning is more efficient, because you don't have to re-create controls that are common to all pages. You can also create a template that contains only the controls that you need.

This section discusses how to:

- Clone page definitions.
- Create a blank page.

Cloning Page Definitions

To clone a page definition:

1. Select File, Open.

The Open Definition dialog box appears.

1. Specify *Page* for the definition and locate the page that you want to clone.
2. When the system retrieves the page definition, select File, Save As.

If you save after you make modifications, you might accidentally overwrite the old page definition.

3. Enter the new page name.

To create a new page template, name the page so that it appears at the top of your page list.

4. Click **OK**.

Note. Record definition names are restricted to a maximum of 15 characters, while page names can have up to 18 characters.

See Also

“Using PeopleSoft Application Designer,” Opening Definitions

Creating a Blank Page

To create a new page without copying an existing page, select File, New, Page.

Adding Page Controls

To add controls to your page definition, you can:

- Drag field definitions from a record onto a page.
- Drag record fields from the project workspace onto a page.
- Drag record definitions onto a page.
- Use the page definition toolbar.
- Use the Insert menu.

Dragging Field Definitions From a Record Onto a Page

To drag field definitions from a record onto a page:

1. Open an existing record definition by selecting File, Open, Record.
2. Open a new page by selecting File, New, Page.
3. Drag field definitions from the record to the page.

The system selects the page definition control type based on the record field attributes. In the preceding page, the EMPLID (employee identification) field was defined as a prompt table edit in the record, so a Prompt button was added for EmplID when it was dragged onto the page.

4. Double-click the new page field to set the properties.

When you drag field definitions, the properties from the record definition are used to set page field default properties. You can alter the properties using the Properties dialog box.

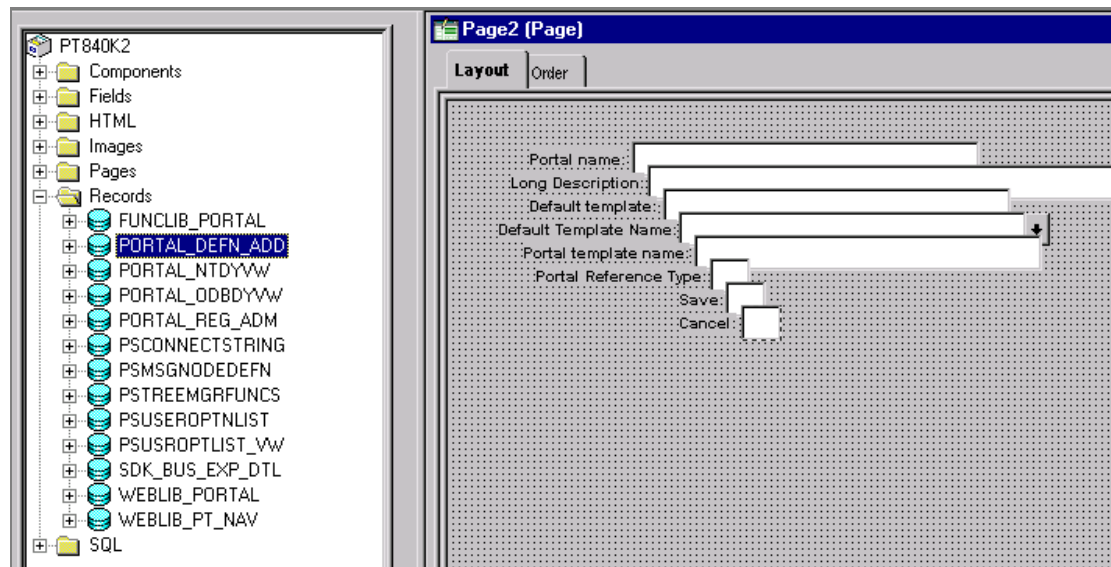
Dragging Record Fields From the Project Workspace Onto a Page

To drag record fields from the project workspace onto a page:

1. Open the project that you want to drag from and an existing or new page.
2. Drag *record* fields from the project workspace to the page.
3. Double-click the new page field to set the properties.

Note. When you drag fields from the project workspace, use fields that are contained in records (as in record.fieldname), not field definitions.

Dragging Record Definitions Onto a Page



Dragging a record definition to a page

To drag record definitions onto a page:

1. Open the project that you want to drag from an existing or new page.
2. Drag the record definition onto the page.

PeopleSoft Application Designer positions the record fields on the page as page fields in a cascading manner. Fields are in the order that they appear in the record with the appropriate control value assigned to each one.

3. Reposition the fields as necessary on your page.
4. Double-click each new page field to set the properties.

Using the Page Control Toolbar

You can insert page controls by using the page control portion of the page definition toolbar. When you click the button, your cursor changes to a cross-shaped icon or hand, depending on which control type you select. You can then move the cursor to where you want to position the control and click once.

If the control is a fixed size during insertion, the cursor changes to a cross-shaped icon. If you must define the size of the control at the time of insertion, the cursor changes to the monogrammed hand icon. When a hand-shaped icon appears, press and hold the left mouse button as you drag the hand diagonally downward to where you want the lower, right-hand corner of the frame. Release the mouse button.

If the control isn't correct the first time that you draw it, you can easily adjust it. The dotted box and black or blue handles surrounding the control indicate that it is selected. Use any of the four directional arrow keys on the keyboard to move the frame one page grid unit in the indicated direction.

Using the Insert Menu

Select the control you want to add to your page from the Insert menu. Your cursor changes to a cross-shaped icon or a hand, depending on which control type you select. Move the cursor to where you want to position the control and click once.

Manipulating Controls

After you place a control on the page, you have several choices for manipulating it. This section discusses how to:

- Select controls.
- Resize controls.
- Reposition and resize controls precisely with the Page Control Inspector.
- Delete controls.
- Move controls on the same page.
- Copy and move controls to another page.

- Move labels.

Selecting Controls

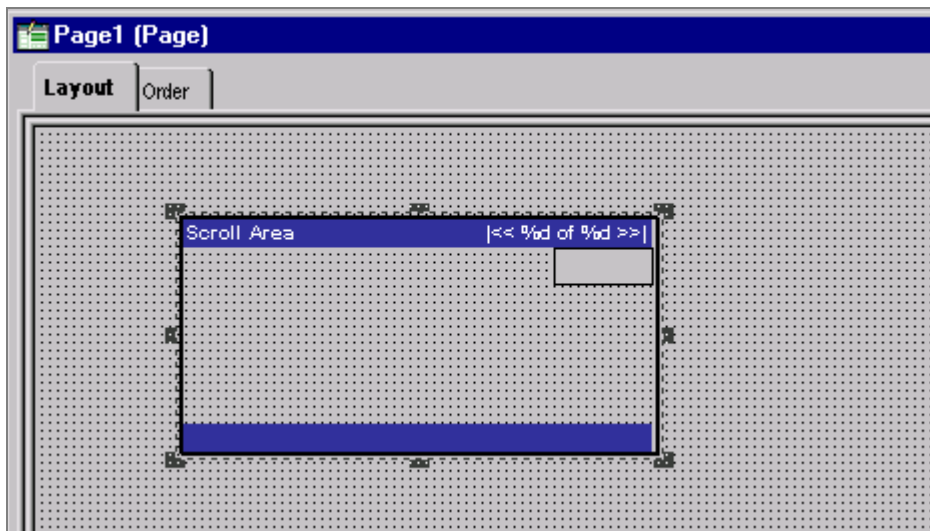
Before you do anything to a control, you must select it. You can do this by clicking the control or by using the Edit menu. A check mark beside the option in the menu indicates which mode you're in:

- | | |
|---------------------|---|
| Select Field | Select one control on the page. To deselect a control, click once outside the dotted box. This is the default mode. |
| Select Group | Select a group of controls by drawing a box around the controls that you want to select. You can also activate this option by clicking and dragging over the target fields.

Note. You are in Select Group mode when the cursor changes to a pointing finger. If the cursor does not change when you select Edit, Select Group, try first selecting an individual control on the page and then selecting Edit, Select Group again. |
| Select All | Select all of the controls on the active page. The result is the same as using the Select Group option to draw a box around the controls. |

Resizing Controls

You can adjust the size or shape of any page control that displays selection handles when it is selected.



Resizing a control with selection handles

Note. Some browsers do not support the resizing of certain control types. See Customer Connection for more specific information about this feature.

To resize a control, use one of the following methods:

- Select the control and drag a handle to adjust the height or width.

Note. Some control types can be adjusted only in width.

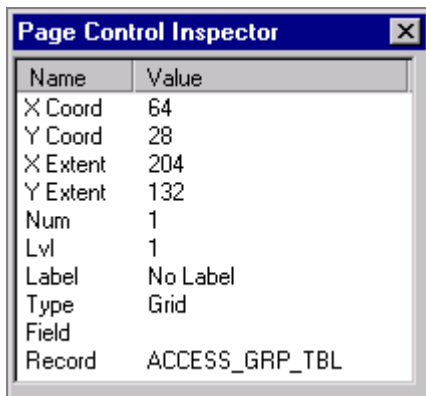
- Hold down the Shift key while pressing the Up Arrow, Down Arrow, Left Arrow, or Right Arrow key.

The frame size is adjusted one grid unit in the indicated direction.

Note. The position of the top, left-hand corner of the frame does not change; resizing with the keyboard occurs by adjusting the position of the bottom, right-hand corner.

Repositioning and Resizing a Control Precisely With the Page Control Inspector

Access the Page Control Inspector by clicking the Toggle Inspector button on the page definition toolbar.



Page Control Inspector

X Coord (X coordinate) and
Y Coord (Y coordinate)

X and Y coordinates of the upper, left-hand corner of the control. As you move a control around on the page, the X and Y coordinates change to reflect the new position.

X Extent and **Y Extent**

Right-hand coordinates for sizable controls (such as frames, group boxes, and long edit boxes). Use these to gauge the height and width of your control. When you resize a control, these coordinates adjust to display the exact pixel size of the control.

Num (Number)	Number of the control. This corresponds to the tab order for the page.
Lvl	Occurs level on which the control is located.
Label	Label for the control (designated in the properties dialog box for that control).
Type	Type of control.
Field	Field name with which the control is associated.
Record	Record name with which the control is associated.

Note. The HTML that is generated for your page uses table layout, rather than pixel layout.

Deleting Controls

If you remove a control from a page, look for other controls that are related to it, such as display controls or invisible controls used by PeopleCode. You might need to delete them as well, or alter their attributes so that they can be stand-alone fields.

Check for PeopleCode that references this control on the page by opening the field definition and selecting View, Find Definition References. If any references exist, modify or delete them because the control no longer exists on the page.

To delete controls from a page:
--

1. Select the controls.
2. Select Edit, Clear.

Moving Controls on the Same Page

To move controls to another position on the same page, use one of the following methods:

- Select a control and drag it to the new position.
- Select a control and press the Up Arrow, Down Arrow, Left Arrow, or Right Arrow key.

The control moves one grid unit in the indicated direction.

- Select a group of controls and drag them to the new location.

Copying and Moving Controls to Another Page

To copy a single control to another page, drag the control from one page to the other.

To move a group of controls to another page, cut and paste the group onto the new page.

Moving Labels

On the page definition in PeopleSoft Application Designer, you can move the label that you just assigned independent of the control.

To move a label, use one of the following methods:

- Select the label and drag it to the new position on the page.
- Use a directional arrow key on the keyboard to move the label one grid unit in the indicated direction.

To return the label to its default position, select Use default position on the Label tab in the properties dialog box.

Setting Page Field Properties for Controls

In most cases, you define attributes by double-clicking a control to access the properties dialog box.

This section provides an overview of page field properties and discusses how to:

- Set record properties.
- Set label properties.
- Set use properties.
- Set general properties.

Understanding Page Field Properties

Most of the properties dialog boxes have the following tabs:

Record	Associates the page control with a field in a record definition.
Label	Sets the label that appears on the control. This can be the long or short name that is specified on the record definition or other text. Use this tab to verify the label ID that is used as the internal reference.

Use	Defines how to use the control on the page. You can make controls display-only, invisible, or hidden. You can also use them to manipulate other controls on multiple level pages—those with scroll bars. Use this tab to define the display and related control fields and the processing of the control.
General	Specifies an optional internal page field name that is referenced by the page.

Setting Record Properties

For most controls, you must set record properties to assign the control to a specific field in a record definition. There's a distinct correlation between the field types in a record definition and controls in a page definition.

Use the following table to select the appropriate page control type to associate with the corresponding field in your record definition.

<i>Record Definition Field Type</i>	<i>Page Definition Control Type</i>
Character	Edit box
Character (Yes or No Table Edit)	Check box Edit box
Character (Translate Table Edit)	Radio button Edit box Drop-down list box
Long Character	Long edit box, HTML area
Number	Edit box
Signed Number	Edit box
Date	Edit box
Time	Edit box
DateTime	Edit box
Subrecord	Not applicable; no direct association to subrecords
Image	Image

To set the record properties for a page control, access the properties dialog box. Select the Record tab.

The screenshot shows the 'Edit Box Properties' dialog box with the 'Record' tab selected. The 'Record Name' dropdown is set to 'EMPL_INFO'. The 'Field Name' dropdown is empty. The 'Style' dropdown is set to '*** Use Default Style ***'. Under 'Size', 'Average' is selected. Under 'Alignment', 'Auto' is selected. The 'Family Name' and 'Display Name' fields are empty. In the 'Display Options' section, 'Show Prompt Button' is checked, while all other options are unchecked. The 'Fill Character' field is empty. 'OK' and 'Cancel' buttons are at the bottom.

Edit Box Properties dialog box: Record tab

Note. This section applies to both edit boxes and long edit boxes. Other controls do not contain all the properties outlined in this procedure, though the terminology used is often similar.

Record Name

Select the record name of the record definition where the field is located. If you already added a field to your page and associated it with a record definition, the system uses the last record definition name that you entered.

Field Name

If the field is a related display field that contains a long name or short name from the translate table, use PSXLATDEFN as the record definition name. The field name is either long name (30 characters) or short name (10 characters), depending on whether you want to use the long or short name.

Style Set the font and color attributes of your control data. The default style class for an edit box is PSEDITBOX, which controls how the data portion of the edit box appears. Control the color, font, and other characteristics of an edit box by specifying a different style class.

Note. Certain browsers always display the background of an edit box as white. See Customer Connection for more specific information on how your page might display differently at runtime.

Size

After you link the control with a record name and field, the system automatically calculates the page control size. The size is based on the length of the field that is defined in your record definition, the font metrics of the field style, and any formatting options (currency symbol, 1000 separators, and so on) that apply. Because many fonts have variable width characters (for example, a *W* character is much wider than an *l* character) three size options are available.

Note. Some browsers do not support custom sizing for edit boxes, long edit boxes, drop-down list boxes, and push buttons. See Customer Connection for more specific information about this limitation.

Average	Provides sufficient space to display the field control length in average-width characters.
Maximum	Provides enough space to display the field control length in maximum-width characters.
Custom	Enables you to define a custom size for edit boxes that are not display-only. If you set a display-only edit box to Custom, it appears as its defined length. If your edit box is in a grid, this field wraps.

Alignment

Auto	Left-justifies the contents of character fields and right-justifies the contents of number and signed number fields. This is the default.
Left	Left-justifies the contents of the field. Note. If the field is not display-only, the alignment is always left-justified. If the field is display-only, the system uses the alignment that you specify.
Right	Right-justifies the contents of the field. Do not use this option in the PIA for fields that are not display-only.

Family Name	If it's applicable to your control, this display-only field displays the current family name, which was set when the field was created.
Display Name	Select an option to override the display format that is associated with a field.
Display Options	
Display Zero	Select if the contents of the page control are numeric and you want to display a zero value instead of a blank field. Sometimes it helps users if they see a zero to remind them that the page control isn't blank. For example, in a tax table, you might show the lowest tax bracket as starting at zero instead of leaving it blank.
Display Century	Select for date fields to enable users to enter a date with a 4-digit century, as in 1999. Dates are always stored with the 4-digit century in the database, but only the last 2 digits are displayed unless you activate Display Century. If this option is not activated, the century is automatically set to the century of your system date.
Password	Select to hide the value that is entered in a page control. This option causes characters in this control to appear online as asterisks (*). The component processor still sees the actual value. Use this option for pages that capture sensitive information, such as personal identification numbers (PINs).
Currency Symbol	Select to display a currency symbol in the field. This expands the display length of the field by the length of the currency symbol.
Show Prompt Button	Select to display a prompt button next to the edit box, which enables the user to look up valid values for that field.
1000 Separator	Select if the contents of the page control are numeric and you want to insert thousand separators to make the numbers easier to read. The system automatically calculates the number of thousand separators to insert and determines where they should be positioned. This expands the display length of the edit box by one character for each separator.
Auto Fill	Select to have the system automatically populate the page control with the character specified in the Fill Character field. The direction in which it populates depends on the alignment that you select. If a field is left-aligned, then it populates from left to right. If a field is right-aligned, it populates from right to left.

For example, suppose that you define a 6-character control as left-aligned, specify a fill character of 0, and activate Auto Fill. When you type 123 in the control online, the system displays 123000. Similarly, if you changed the alignment to right, the system displays 000123.

Note. Auto Fill can affect the actual value of the control, not just its visual representation.

Auto Decimal

Select to insert a decimal point automatically if none is provided in the data that is entered into the control. Where the system inserts the decimal point depends on how you define the control.

For example, in a record definition, if you define a numeric field with a length of 4.2 (allowing 4 characters to the left of the decimal, 2 to the right) and activate Auto Decimal, the system inserts a decimal at the 2nd digit from the right. This option applies only to numeric field controls and affects the actual value of the field control, not just its visual representation.

Display Time Zone

Select if you are setting the properties for a Time or a DateTime field and you want to display the related time zone. This helps users understand whether the time reflects the database's base time zone or some other time zone. This setting does not determine which time zone is actually used, only whether the time zone is displayed. The record field properties determine which time zone is used.

Fill Character

Enter a character to replace blank spaces in an edit box when the contents of the field are displayed. For instance, if the length of a Net Pay field is 8.3 and you specify a fill character of *, then a value of \$1,250 is displayed as:

*****\$1,250.000

You can use any character as a fill character.

Example: Auto Decimal

The following table shows how Auto Decimal affects a numeric field control with a length of 4.2, depending on what you enter online.

<i>Entered</i>	<i>Displayed</i>
100	1.00
100.	100.00
1	0.01

Setting Label Properties

Access the properties dialog box. Select the Label tab.

Edit Box Properties dialog box: Label tab

Note. This section applies to the following controls: edit boxes, long edit boxes, check boxes, drop-down list boxes, group boxes, radio buttons, and static text.

Type

Select the type of label. If you want the label to remain blank, you must first set up a blank label in the field definition that you are using. The blank label then appears as an option in the **Label ID** drop-down list box.

None

Select to display no control label on the page. Use this option for controls such as related displays and invisible controls.

Text	Select to display text that you enter in the Text field. The default text is the long name for the field from the associated record definition.
RFT Short (Record Field Table short)	Select to display the RFT short name for the field from the associated record definition.
RFT Long	Select to display the RFT long name for the field from the associated record definition. This is the default.
Label Text	
None	Enter the control name. This label is informational only—it isn't displayed on the page. The label is useful when you're reordering page controls in the control order list.
Text	Enter the text exactly as it should appear on the page. The default is <i>Dummy Name</i> until you assign a record and field to the control.
RFT Short or RFT Long	Do not use this field. The system automatically inserts the long name or short name from the record definition after you specify the record and field name. If you enter text, the system automatically changes the type to text.
Insert Line Feed	Click to split your control label into multiple lines at the position of the cursor in the Text field. A thick vertical bar character appears in the Text field. When you close the properties dialog box, the label is split into multiple lines. Inserting a line feed into label text has the side effect of changing the label type from RFT Short or RFT Long to Text.
Style	Select an option to control the color, font, and other characteristics of a label.
Alignment	
Left	Select to align the label to the left-of-center horizontally. This is the default.
Centered	Select to center the label horizontally.
Right	Select to align the label to the right-of-center horizontally.
Display Options	
Use default position	Select to move the label to its default position immediately to the left of the field.
First occurs only	Select to display the label only with the first occurrence of a scroll area.
No colon	No colon appears at the end of the label text.

Special Label Considerations

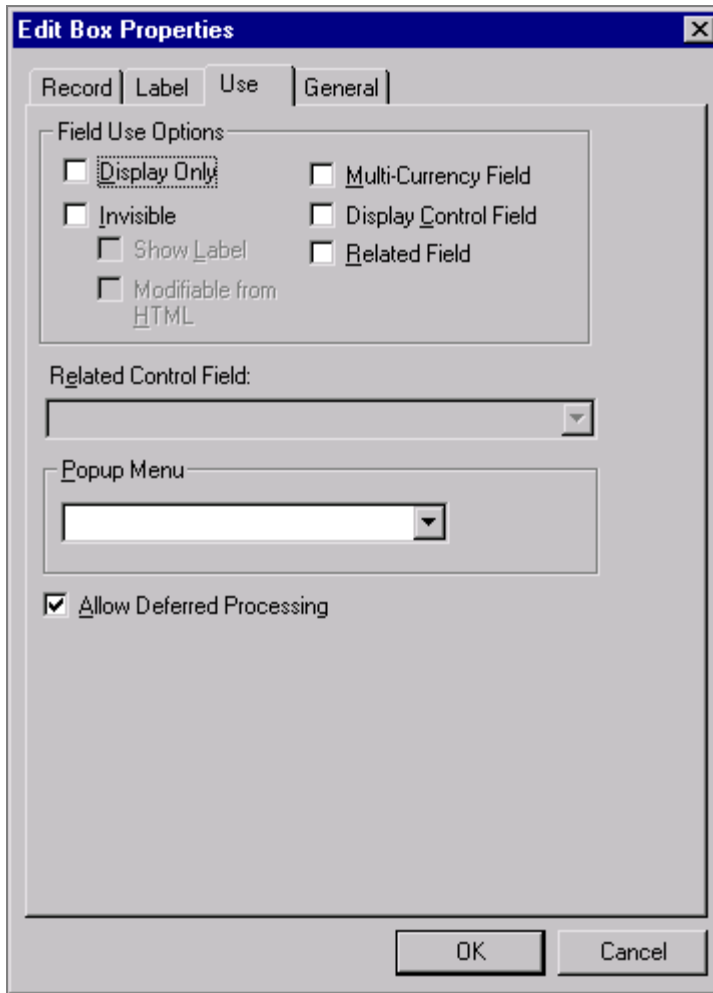
If you're adding a related display page control with a label type of None, enter an information-only label that identifies the related field but isn't identical to the label on the control field. A little documentation now can save you time in the future, should you modify this page again. For example:

<i>Control Label</i>	<i>Related Field Label (Information-Only)</i>
Department	Department Description
Jobcode	Jobcode Description
Regular/Temporary	Regular/Temporary XLAT (XLAT is from the Translate Table)

When defining labels for columnar controls in a multi-occurrence scroll, you can apply several techniques. The first technique is to select First Occurs Only. This limits the display of the label to the control's first scroll occurrence, allowing the label to be used as a column heading. The second technique is to select No Colon to omit the colon from the label, because column headings typically do not need a colon.

Setting Use Properties

Access the properties dialog box. Select the Use tab.



Edit Box Properties dialog box: Use tab

Note. The following controls contain the same or very similar use properties: edit boxes, drop-down list boxes, check boxes, images, long edit boxes, and radio buttons.

Field Use Options

Note. Long edit boxes have slightly different field use options.

Display Only

Select to prevent users from modifying the contents of the control during application data entry. The system automatically selects Display Only when you select Related Field. You can't clear it until you clear Related Field.

Multi-Currency Field	Select to identify the control as associated with multicurrency processing. This causes the field to appear at runtime only if Multi-Currency is selected on the PeopleTools Options page.
Invisible	Select to make the control physically present on a page but invisible to users. Typically, you add an invisible control because it's required for a PeopleCode program that is associated with the page. An invisible control can also be used as a display control field.
Display Control Field	Select to indicate that the field controls another field on the same page level. The controlled field is a related field. For example, on many pages, Department ID is the display control field and Department Name is the related field. The system uses Department ID to retrieve Department Name from the Department Table to display on the page.
Show Label	Select to make the control label visible while the control itself is invisible. This option is useful if you add an invisible display control field to a page to show its related description. Show Label is selected only if Invisible is selected.
Related Field	<p>Select to specify that the contents of this control are ruled by another control on the same page level—one that you selected as a display control field. When you select this check box, the system automatically selects the Display Only option. It also makes the Related Control Field drop-down list box available for you to select the related control field.</p> <p>When you select Related Field, Display Only is automatically selected. If the related field is located on a record definition with multiple keys, relate the display field to the lowest-order key field that both record definitions have in common—with the exception of EFFDT and EFFSEQ—on the control record definition. The system searches for the higher order keys by matching field control names on the current level and all higher levels for the other keys.</p> <p>If the related display field contains a long name or short name from the Translate Table, use PSXLATDEFN as the record definition name.</p>
Modifiable from HTML	This is a security-related feature and should <i>always</i> be cleared unless you are familiar with modifying an invisible field using JavaScript in an HTML area. If the Invisible check box is cleared, Modifiable from HTML is cleared and unavailable for entry. If the Invisible check box is selected, this check box is cleared, by default.

Expand Field when Display Only Select to make a long edit box display-only at runtime. The field automatically expands to accommodate text. This is available for long edit boxes only. This check box is cleared, by default.

Related Control Field When you select Related Field, a list of all controls on the page that are marked as display control fields appears in this drop-down list box. Select the field to which this control is related. You must define the use of the initial control field before it appears as an option in the Related Control Field drop-down list box. For example, after the Pay Group field is designated as a display control field, it appears in the Related Control Field drop-down list box for the control that you set as the related field.

Pop-up Menu

Pop-up menus are lists of menu items that you can associate with a field on a page. At runtime, the menu appears on a separate page as a list of links to related pages. Designate these links when creating a pop-up menu definition. You can then associate the newly created pop-up menu with a field on your page on the Use tab in the properties dialog box for most controls.

A pop-up menu can be identified by either of these two icons:



This page field icon appears if the pop-up menu contains only one menu item. In this case, the user goes directly to the assigned transaction page.



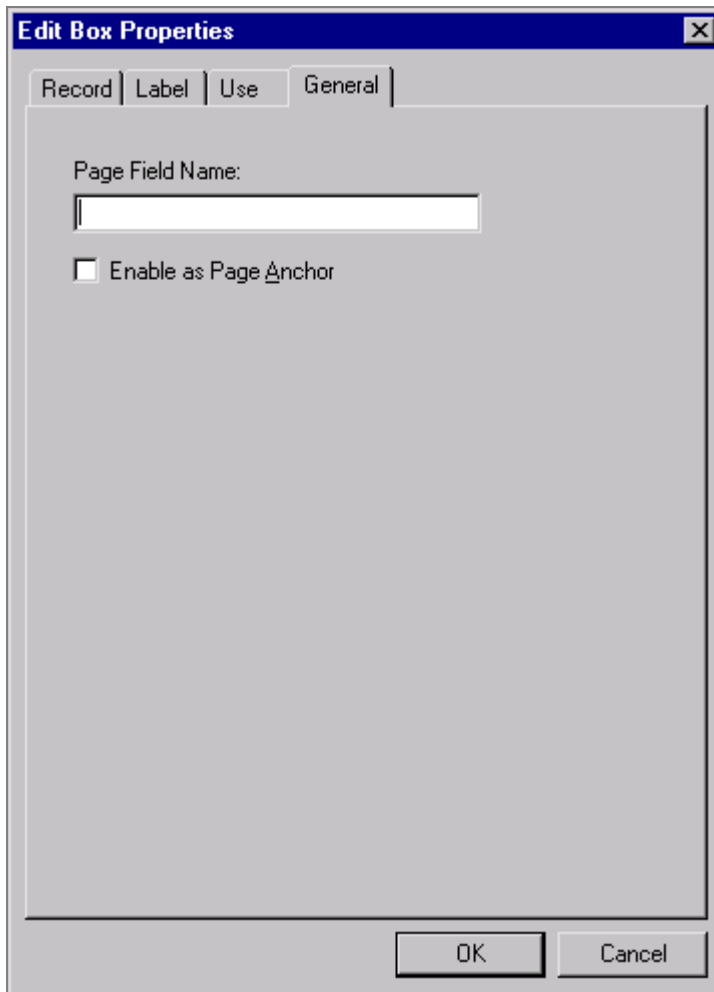
This page field icon appears if the pop-up menu contains more than one item. The user goes to a new page to select among the menu items listed.

Note. This icon also appears if PrePopup PeopleCode is associated with the pop-up menu and there is only one item remaining in the list after the PeopleCode has run. The transaction page opens automatically.

Allow Deferred Processing A transaction can run in two modes: deferred and interactive.

Setting General Properties

Access the properties dialog box. Select the General tab.



Edit Box Properties dialog box: General tab

Note. For most controls, the General tab contains only the Page Field Name and Enable as Page Anchor settings. Grids and scroll areas have additional settings on the General tab that are described later. The Enable as Page Anchor check box is available for all controls that have a page field name.

- Page Field Name** Enter a name for the page field that you are creating. This is a system-only setting. It does not appear as the label for the page field. This setting is optional unless you select the Enable as Page Anchor check box.
- Enable as Page Anchor** Select to apply an anchor tag to the current page field on the page. If you select this check box, you must add a page field name to identify this field when setting the related control for the link. This check box is cleared, by default.

Creating Display Control and Related Fields

This section provides an overview of display control and related fields and discusses how to:

- Create related edit fields.
- Create invisible control fields.

Understanding Display Control and Related Fields

A related display field is for display purposes only—it always references a row that's not being updated from the current page. The display control and related display fields must both be at the same level. In the Payroll page, Pay Group, Employee Type, Tax Location Code, and Holiday Schedule all show related display fields to their right. Search level fields, such as those shown above the horizontal rule, are display-only fields.

The screenshot shows the Payroll page with the following details:

- Tabs:** Work Location, Job Information, Job Labor, Payroll (selected), Salary Plan, Compensation
- Employee Info:** Sawyer, Tom; Employee; ID: TZ173; Empl Rcd#: 0
- Navigation:** View All, First, 1 of 1, Last
- Effective Date:** 05/03/1995
- Effective Sequence:** 0
- Job Indicator:** Primary
- Action / Reason:** Hire
- Payroll System:** North American Payroll
- Pay Group Section:**
 - Pay Group:** T1B (Bi-weekly all employees)
 - Employee Type:** H (Hourly)
 - Tax Location Code:** TCA1 (Tst CA)
 - GL Pay Type:** [Empty]
 - Account Code:** [Empty]
 - Holiday Schedule:** NONE (No Holiday)
 - FICA Status:** Subject

Payroll page

Because of the nature of control fields and related fields, PeopleSoft recommends that you:

- Place them side-by-side on a page to indicate their relationship.
- Provide adequate space between the fields.
- Do not overlap them; otherwise, they appear skewed when viewed through the browser.
- Change the label type for the related field to None so that it doesn't appear on the page.
- Enter a text description to document the purpose of the field.

Note. The display control and related fields must be in the correct order on the order page. The display control field must be positioned before the associated related field; otherwise, a warning dialog box appears when you save the page. Also, fetching the related field after the control field is entered requires a transmission to the server at runtime.

Creating Related Edit Fields

Related edit fields are slightly different from related display fields. Related edits enable users to enter descriptive values instead of code values and enable prompting on those descriptive values. Changing the value in the control field updates the related edit field, and changing the value in the related edit field updates the value in the control field. If appropriate, the control field can be display-only or even invisible to hide code values from the user.

At runtime, when a user edits a related edit field, it is treated as if the user changed the control field directly. Edits, including any assigned PeopleCode, are run on the control field. PeopleCode is not run for the related edit field.

The following partial screen shot is an example of a related edit field with a control field that is available for entry. When entering company information, the data-entry clerk might not have all company codes memorized, but instead knows just the name of the company. By entering the more descriptive company name in the Description field, (the related edit field) the company code (display control field) is automatically populated in the Company field.

The user can even enter a partial value in the related edit field. If the user enters *Payroll* in the Description field and exits that field, the system searches for a match to this value and populates the field if only one is found. The field reads *Payroll Services Technology*. If more than one match is found, a warning appears, but the first match is used. If the first match is not the intended value, then the user can click the prompt button to select the appropriate value directly from the prompt page.

Related edit field

At design time, you set up a related edit field in the same way that you create a related display field, except that clear the Display Only check box in the Field Use Options group box so that the field is active at runtime. The control field's prompt table is used. You do not need to define a prompt table for the related edit field, just the control field. The related edit field must be an alternate key in the prompt table. PeopleSoft recommends that the related values in your prompt table be unique so that there is a one-to-one mapping to the control values. This prevents the user from receiving a warning and having to access the prompt page to select the proper value.

In some instances, you might not want the control field to be apparent to the user. PeopleSoft Global Payroll, for example, relies heavily on PINs. While PINs are key values, and therefore very important for tracking and storing information in the database, you might not want to distract the user with such a number. However, you still want this data to be entered into the database with the transaction. Related edit fields are particularly helpful in these situations. You can associate the PIN field with a descriptive field and have only the descriptive, related edit field appear on your page. To do so, hide the control field using PeopleCode.

Note. If the hidden control field that you select is a required field, PIA changes the related edit field into a required field as well. At runtime, an asterisk appears next to the field label, marking the field as required. If the user does not enter information in the related edit field, the system displays an error message.

See Also

PeopleTools 8.4 PeopleBook: PeopleCode Reference, "PeopleCode Built-In Functions and Language Constructs E-M," Hide

Creating Invisible Control Fields

Your page design might require an invisible control field. For example, if users are interested only in the contents of the related display field, then make the control field invisible. Unlike visible control fields, you *can* overlap an invisible control field and its related display field.

Note. If you specify a field as invisible in PeopleSoft Application Designer, you cannot make it visible using the UnHide property in PeopleCode.

To add an invisible control field:

1. Access the properties dialog box for the invisible control for which you want the label to appear.
2. Select the Use tab.
3. Set the appropriate field use options:
 - Select **Display Only**, **Invisible**, and **Show Label** to make the field invisible and its label visible.

- Select Display Control Field.
4. Select **OK**.
 5. Add an edit box to your page.
Place this edit box directly to the right of the display control field that you just set.
 6. Access the properties dialog box for the new edit box.
 7. Select the Use tab.
 8. Select **Related Field**.
 9. Select the appropriate control field from the **Related Control Field** drop-down list box.
 10. Select **OK**.

Ordering and Spacing Page Controls

The order of the controls on your new page is important to both how your users interacts with the page and how the component processor interprets the underlying record and field relationships.

Two types of control order are important on pages:

- The order in which you visually arrange controls on the page.
- The logical processing order—governed by levels—that the system requires to correctly process the page data.

As you add controls to a page, the system automatically builds a processing control order list that can be viewed on the Order tab of the page definition. Usually, you don't want to preserve this order for processing, so you can reorder your controls on the order tab to indicate how the system should process your page.

This section discusses how to:

- Order controls visually.
- Order controls logically.
- Test page control order.
- Apply control order rules.
- Change control order using the order list.
- Find a field on a page.
- Use default order.
- Space controls on pages.

Ordering Controls Visually

Organize fields from top left to bottom right in a page. Include most important information at top. Use group boxes to group related fields and indicate the hierarchy of information on a page. Following are some guidelines for grouping information.

- Keys

Group all key fields at the top of a page (such as Business Unit, Employee ID, and SetID).

- Level 1–3

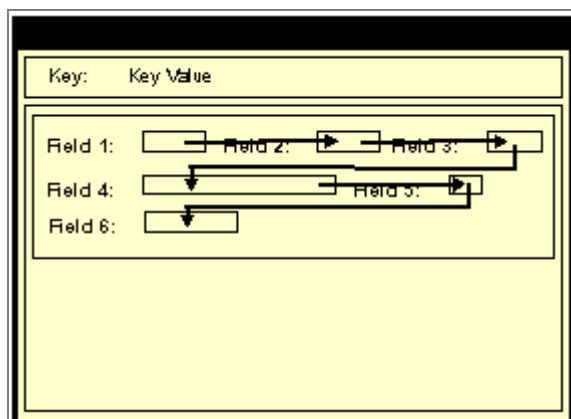
Controls at these levels must be enclosed by a scroll area or grid. At design time, these levels can be stacked. At runtime, they appear nested.

Ordering Controls Logically

Tab ordering through a page at runtime is strictly defined by page field ordering. When you add a control to a page, PeopleSoft Application Designer automatically inserts it in the order list based on where you position it on the page. You can manipulate the ordering of fields on your page by moving them up or down on the Order tab in the page definition. In doing so, you also change the tab order that users follow as they move through fields on the page.

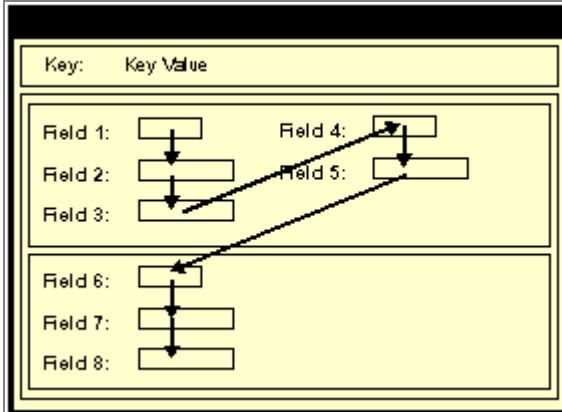
In general, field tab order should flow from top left to bottom right on a page. The flow should reflect the way that the eye naturally scans information.

- On a page with multiple scroll levels, the tab order should follow the scroll level order, from Level 0 to Level 1, and so on.
- In a noncolumnar page, the tab order should go from left to right on each line from top to bottom.



Example flow of noncolumnar page

- In a columnar page, the tab order should go from the top to the bottom of the first column, then from the top to the bottom of the second column, and so on.



Example flow of columnar page

- Fields that share the same label should follow consecutively in the tab order from left to right.

Testing Page Control Order

After you have placed all of the controls on your page, you should test the tab order. You can do this using either the test mode or by viewing the page in the browser. Using the View Page in Browser mode is more useful because you can also check the placement of controls and subfields on your page. In these testing modes, you can enter data into edit boxes and select radio buttons and check boxes. However, you cannot save data that you enter, and push buttons and links do not function.

Note. The tab order that you establish at design-time might not apply for all browsers. For more specific information about browser differences, see Customer Connection.

To test tab flow using View Page in Browser mode:

1. Open the page in PeopleSoft Application Designer that you want to test.
2. Select Layout, View in Browser.
3. Select the appropriate browser from the drop-down list box.
4. Press the TAB key to move from one field to the next.

Press SHIFT+TAB to move to the previous field.

Applying Control Order Rules

If you're working with a complex page or you're new to order lists, you might print out a page definition and work on hard copy. The sequence number of each control is reflected in the

Num column on the page report. You can easily mark where you need to move a control to make your page function properly, or you can look at the Lvl column on the Order tab of the page definition. Use the following rules to order your controls.

Radio Buttons

For radio buttons to function in a single group, they must be associated with the same record field and be listed together on the Order tab of the page definition. The only control you can place between related radio buttons is the static text control to extend radio button labels. Put the text immediately after the radio button to which it relates.

Level-Based Controls

List level-based controls (scroll areas, grids, and scroll bars) immediately before the first control that they govern, followed by the controls that are directly governed by that control. Level-based controls directly govern all controls listed below them on the order list until they encounter another level-based control at the same or lower level (higher occurs level number).

Display Controls

Place display controls before related displays that they govern. The related display controls don't have to immediately follow the display controls, but they must be inside the same scroll area or scroll. However, if you have more than one related display control, placing each immediately following its display control makes the order page easier to read and understand.

Changing Control Order Using the Order List

The Order view displays the page fields in their field order and is displayed by selecting the Order tab. In the Order view, you can reorder page fields by dragging them in the same view. Changing the order list doesn't change the physical location of controls on the page. It changes only the logical order or tab order in which controls are processed. When you've added and arranged all of your controls, you might want to print your page definition to see how you might need to reorder your controls.

The order list also governs processing rules for scrolls and record or field relationships. Consider which controls are associated with which scroll area or scroll bar and which secondary relationships are important to page processing.

<p>To change the order list:</p>

1. Open the page.
2. Select the Order tab on the open page.

The Order page appears. Use this page to change the logical processing order of fields on your page.

3. To move a control to another position in the control order list, select the control that you want to move.

Press the SHIFT key to select multiple controls.

4. Drag the selected control to the new position on the order page.

The system moves the control to the new location and automatically resequences the control numbers. The visual display of the page still looks the same—changing the order list doesn't move the control on the page, only the logical processing order of the control.

Finding a Field on a Page

Use the Order view to locate a field on a page definition. Using this method of locating fields is useful when you are working with detailed page definitions that contain many fields.

To find a field on a page:

1. Access the Order tab of your page definition.
2. Select the field that you want to locate on the page.
3. Select the Layout tab.

The field that you selected on the Order tab is selected in the Layout view.

Using Default Order

You can rearrange the order list on the Order tab so that the logical control order reflects the physical control order as shown on the Layout tab. Do so by selecting Layout, Default Page Field Ordering. You can use this tool in either the Layout or Order view for your page definition. The system creates the default order by reading the page as though it was on a pixel-by-pixel grid, from top to bottom and left to right.

Note. Use the default ordering option sparingly on existing pages. It might offset any previous order that was created. However, on new pages, you might find default ordering a useful starting point for your control order list.

Spacing Controls on Pages

Provide adequate space between controls on a page so that fields and their labels don't touch or overlap other controls or labels in PeopleSoft Application Designer. If they do, then when your page appears in the browser, the label is offset automatically and the overlapped control might shrink.

Overlapping Fields

You can layer or overlap fields only if the one that you are overlapping is set to Invisible on the Use tab of the properties dialog box for that control. When you move through the data entry controls on a page, the component processor recognizes only visible, unhidden fields as available for entry.

You can layer multiple invisible fields. However, you must set up your “stacks” of edit boxes so that all but one field in the stack are invisible or hidden at RowInit time.

Designing Inquiry Pages

You can design pages for inquiry purposes only. Inquiry pages are usually based on search records that extract specific information from different tables to display different views of your database, such as a summary of expenses by department.

To create an effective inquiry page:

- Make all of the fields display-only.
- Build in sufficient display control and related field relationships to show relevant descriptions.
- When using level-based controls, disable the row action buttons so that the user cannot add or delete rows.

Eff Date	Sequence	Jobcode	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
01/01/1990	0	Bfts Mgr	Salaried	Active	Full-Time	Regular	40.00	Weekly

Job Summary inquiry page

Aligning Page Controls

Page design mode in PeopleSoft Application Designer provides alignment tools in the page definition toolbar to help you ensure that your controls are aligned evenly, both horizontally and vertically. After you place all controls on the page, use the six alignment buttons on the page definition toolbar to properly align your controls with one another. The toolbar is enabled when two or more controls on the page are selected.

To align controls on a page:

1. Select the controls that you want to align.
2. Click the appropriate control alignment button.

See Also

Selecting Controls

Page Definition Toolbar

Maximizing Performance

Page definitions permit controlled access to application data. The system can validate the data, write it to the database, and then retrieve and display it upon request. Behind the scenes, the component processor—the PeopleTools runtime processor—builds SQL statements that are based on the actions that you perform on pages. The component processor:

- Manages the flow of data processing as users enter information on pages.
- Issues INSERT, DELETE, and UPDATE statements to maintain data in the database and SELECT statements to retrieve data.

As you design your pages, some features can adversely affect page performance. There's always a tradeoff between eliminating a useful feature and speeding up page processing. Following are guidelines for improving page performance.

- Be judicious about references to record definitions other than the primary record definition under each scroll area.

References to other record definitions can include:

- Related display controls.
- PeopleCode references (such as edits and defaults) to other records.
- Defaults to fields on other record definitions.
- Field controls on derived or work records.
- Put the field control on the appropriate derived or work record, rather than on a regular data record definition to derive its value.

For example, FTE (full-time equivalent) on the JOB record definition would be moved to the DERIVED_HR derived or work record because its value is derived by the system.

- Use as few record definitions as possible in a component.

When you open a page in a component, the system loads all record buffers from the entire component into buffers.

- Do not remove table edits to improve performance, even though an edit against another table causes a short pause.

Eliminating them might compromise data integrity.

- Frames, scroll areas, scroll bars, grids, and group boxes all create HTML tables, which, in some browsers, might slightly degrade the performance of your system.

Be judicious about the number of these types of controls that you use on a page.

- Apply deferred processing when possible to fields, pages, and components.

See Also

Guidelines for Designing Pages

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, PeopleCode and the Component Processor

Accessing PeopleCode in Page Definitions

Page fields are associated with a specific record field. You can access the PeopleCode for that record field from the page field in the page definition. You might add PeopleCode to a field to achieve a variety of tasks, ranging from real-time editing of fields to altering the appearance of fields on a page. You can also associate PeopleCode with a component, component record, and component record field.

```

EMPL_CHECKLIST.CHECKLIST_CD.FieldChange (Record PeopleCode)
CHECKLIST_CD (field) FieldChange
&CURRENT_ROW_L1 = CurrentRowNumber(1);
&ACTIVE_ROW_L2 = ActiveRowCount(Record.EMPL_CHECKLIST, &CURRENT_ROW_L1,
Record.EMPL_CHKLIST_ITM);
If All(CHECKLIST_CD) Then
  ScrollFlush(Record.CHECKLIST_ITEM);
  ScrollSelect(1, Record.CHECKLIST_ITEM, Record.CHECKLIST_ITEM, "Where
Checklist_Cd = :1 and EffDt = (Select Max(EffDt) From PS_Checklist_Item Where
Checklist_Cd = :2)", CHECKLIST_CD, CHECKLIST_CD);
  &FOUNDDOC = FetchValue(CHECKLIST_ITEM.CKLIST_ITEM_CD, 1);
  &SELECT_ROW = ActiveRowCount(Record.CHECKLIST_ITEM);
  For &I = 1 To &ACTIVE_ROW_L2
    DeleteRow(Record.EMPL_CHECKLIST, &CURRENT_ROW_L1, Record.EMPL_CHKLIST_ITM,
1);
  End-For;
  If All(&FOUNDDOC) Then
    For &I = 1 To &SELECT_ROW
      CopyFields(1, Record.CHECKLIST_ITEM, &I, 2, Record.EMPL_CHECKLIST,
&CURRENT_ROW_L1, Record.EMPL_CHKLIST_ITM, &I);
    End-For;
  End-If;
End-If;

```

Editing PeopleCode

To edit or add record field PeopleCode through a page definition:

1. Select File, Open to open the page definition through which you want to access PeopleCode.
2. Select View, View Record PeopleCode.

The PeopleCode editor appears, providing access to all of the PeopleCode for the record that owns that field.

3. Select the PeopleCode event type from the drop-down list box in the PeopleCode editor.

You can also select other fields in the primary record from that drop-down list box.

4. Select File, Save to save your changes.

The PeopleCode editor closes and you return to the page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, Understanding PeopleCode and Events and Using the PeopleCode Editor.

Viewing Pages in the Browser

This section provides an overview of the View in Browser feature and discusses how to:

- Change the default browser.
- Generate HTML.
- View the HTML for a page.
- Identify page definitions online.

Understanding the View in Browser Feature

During the page design process, you should periodically view how your page looks in the browser. How you design your page in PeopleSoft Application Designer might look different when viewed online, particularly if you are using subpages that contain multiple fields.

To do this, select Layout, View in Browser. This feature is helpful if you are changing any of the style characteristics of the page or aligning and spacing controls, such as scroll areas.

Sample page in PeopleSoft Application Designer

Same sample page viewed in Microsoft Internet Explorer

The View in Browser feature provides only a rough idea of how your page might look. For a more complete view of the page at runtime, complete with “breadcrumbs” and the navigation

header, assign your page to a component and add it to the existing menu structure. After you assign your page to a component and menu, you can open the URL for that page in the browser window.

Changing the Default Browser

You can test your page in any browser by changing the default browser to one other than Microsoft Internet Explorer. After you set up a new browser, you can select in which browser you want to view your pages.

To change the default browser:

1. Open a page in PeopleSoft Application Designer.
2. Select Layout, View in Browser, Edit Browser List.

The Browsers dialog box appears.

3. Click the **Add** button.
4. Click the Browse button to locate the browser to add.

You must select the correct path and browser application for the new browser to function properly.

5. Enter the name, type, and version of the browser.

The name that you enter appears in the Layout, View in Browser menu.

Generating HTML

The PIA system automatically writes HTML forms or tags for all of the page controls that you add to a page. You do not need to know how to write HTML code to create pages in PeopleSoft Application Designer and then view them in the browser. The following table shows this conversion.

Page Controls as HTML

<i>Page Controls</i>	<i>HTML Forms</i>	<i>Static HTML Tags</i>
Edit Box (editable)	<INPUT TYPE=TEXT>	
Long Edit Box	<TEXTAREA>	
Drop-down List Box	<SELECT><OPTION><OPTION >.....</SELECT>	
Radio Button	<INPUT TYPE=RADIO>	
Check Box	<INPUT TYPE=CHECKBOX>	

Page Controls	HTML Forms	Static HTML Tags
Push Button or Link	<INPUT TYPE=BUTTON> <INPUT TYPE=HYPERLINK>	
Static Text		HTML text
Static Image		
Grid		HTML <TABLE>

You can view the HTML that is created for your page by using the Generate HTML feature. Like the View in Browser feature, the Generate HTML feature writes the HTML code to a file on the local drive. This feature is mainly used for debugging purposes and is not needed for the creation of pages.

To generate HTML for a page:

1. Open the page for which you want to generate the HTML.
2. Select Layout, Generate HTML.
3. Select the browser type and version.

PeopleSoft Application Designer generates the HTML to the c:\TEMP\pshtml directory. The file is named according to the page name and the browser that you select. For example, the Absence History page is named ABSENCE_HISTORY IE5.00.html.

Viewing the HTML for a Page

To view the HTML for your page:

1. Open the generated HTML file.

The selected browser appears, displaying how your page appears at runtime.

2. Select View, Source in your browser window.

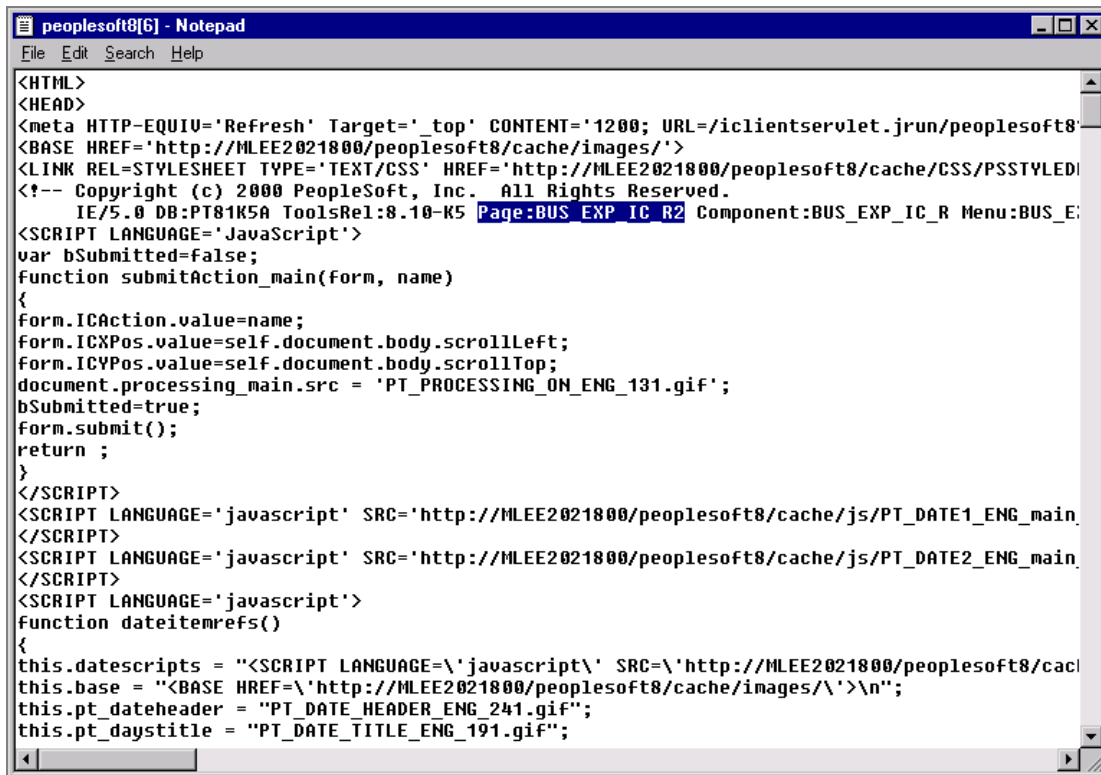
Notepad or another text-based application appears with the HTML that was used to create your page.

Note. Different browsers might have different methods for viewing the HTML for your page.

Note. To adjust the look or function of how your page looks in the browser, do so in PeopleSoft Application Designer. If you make changes directly to the HTML in Notepad, your changes are *not* saved to the system. Each time that you open the page in the browser, it reverts to the settings of the original page definition.

Identifying Page Definitions Online

In some cases, the page name online differs from the actual name of the page definition in PeopleSoft Application Designer. While viewing a page in the browser, locate the page definition name by right-clicking the page and selecting *View Source* from the drop-down menu. The HTML code appears for your page in a text application, such as Notepad. In most cases, the page name is in the sixth or so line of code after *Page:*. You can also identify the component and menu definitions for your page next to the page definition name.



```

peoplesoft8[6] - Notepad
File Edit Search Help
<HTML>
<HEAD>
<meta HTTP-EQUIV='Refresh' Target='_top' CONTENT='1200; URL=/iclientervlet.jrun/peoplesoft8
<BASE HREF='http://MLEE2021800/peoplesoft8/cache/images/'>
<LINK REL=STYLESHEET TYPE='TEXT/CSS' HREF='http://MLEE2021800/peoplesoft8/cache/CSS/PSSTYLEDI
<!-- Copyright (c) 2000 PeopleSoft, Inc. All Rights Reserved.
      IE/5.0 DB:PT81K5A ToolsRel:8.10-K5 Page:BUS_EXP_IC_R2 Component:BUS_EXP_IC_R Menu:BUS_E
<SCRIPT LANGUAGE='JavaScript'>
var bSubmitted=false;
function submitAction_main(form, name)
{
  Form.ICAction.value=name;
  Form.ICXPos.value=self.document.body.scrollTop;
  Form.ICYPos.value=self.document.body.scrollLeft;
  document.processing_main.src = 'PT_PROCESSING_ON_ENG_131.gif';
  bSubmitted=true;
  Form.submit();
  return ;
}
</SCRIPT>
<SCRIPT LANGUAGE='javascript' SRC='http://MLEE2021800/peoplesoft8/cache/js/PT_DATE1_ENG_main
</SCRIPT>
<SCRIPT LANGUAGE='javascript' SRC='http://MLEE2021800/peoplesoft8/cache/js/PT_DATE2_ENG_main
</SCRIPT>
<SCRIPT LANGUAGE='javascript'>
function dateitemrefs()
{
  this.datescripts = "<SCRIPT LANGUAGE='\"javascript\"' SRC='\"http://MLEE2021800/peoplesoft8/cac
  this.base = "<BASE HREF='\"http://MLEE2021800/peoplesoft8/cache/images/'>\n";
  this.pt_dateheader = "PT_DATE_HEADER_ENG_241.gif";
  this.pt_daystyle = "PT_DATE_TITLE_ENG_191.gif";
}

```

Page definition name identified in HTML code

Producing Pages

If you are changing pages or deleting controls in the page definition, use the tools in the Edit and File menus. To avoid making changes that might adversely affect your application database, review your plans with your database administrator. Together, you can evaluate the impact that your actions might have on your system database as a whole.

There are several additional steps in the page design process that help make future editing of page definitions easier.

After you design your page, you must set the attributes for how your page should function and make sure that you have the proper documentation to assist you when performing upgrades. Access the Page Properties dialog box by selecting File, Definition Properties in page definition mode.

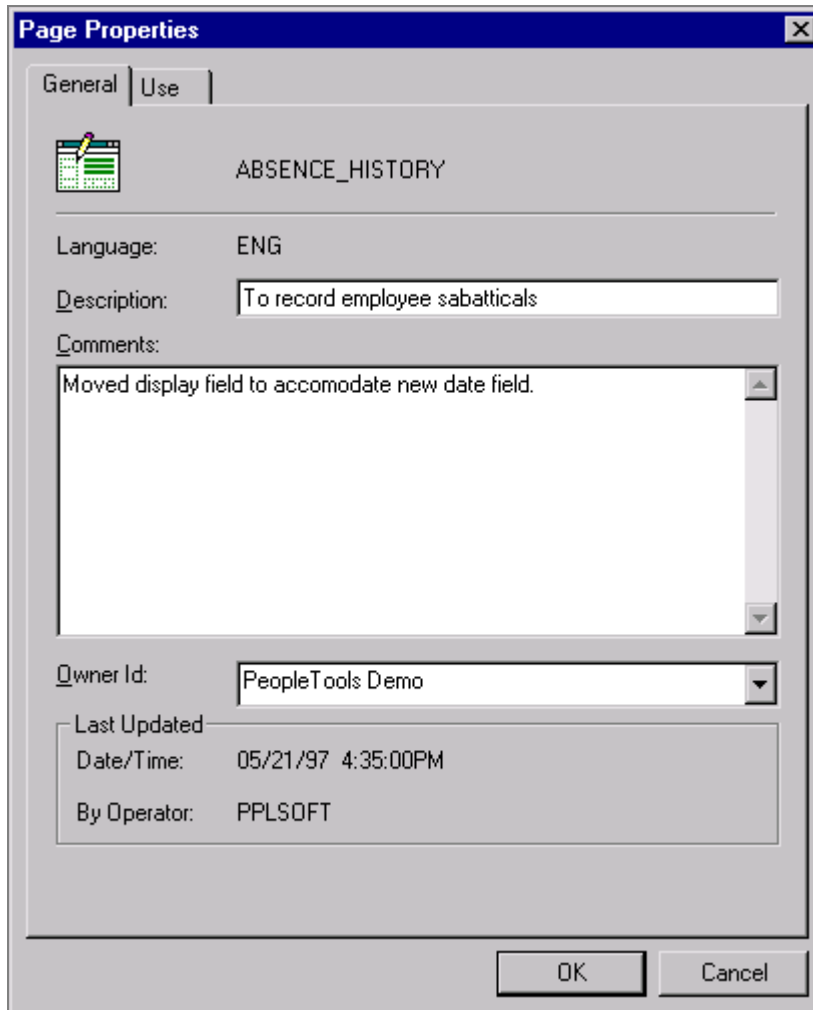
Use the General tab in the Page Properties dialog box to document the page. Enter both short and long descriptions of the page here. You can also document what changes have been made, or must be made, to a page.

This section discusses how to:

- Change general page information.
- Change page use information.
- Save pages.
- Rename and delete pages.
- Print page definitions.
- Alter page setup.
- Read your page definition report.

Changing General Page Information

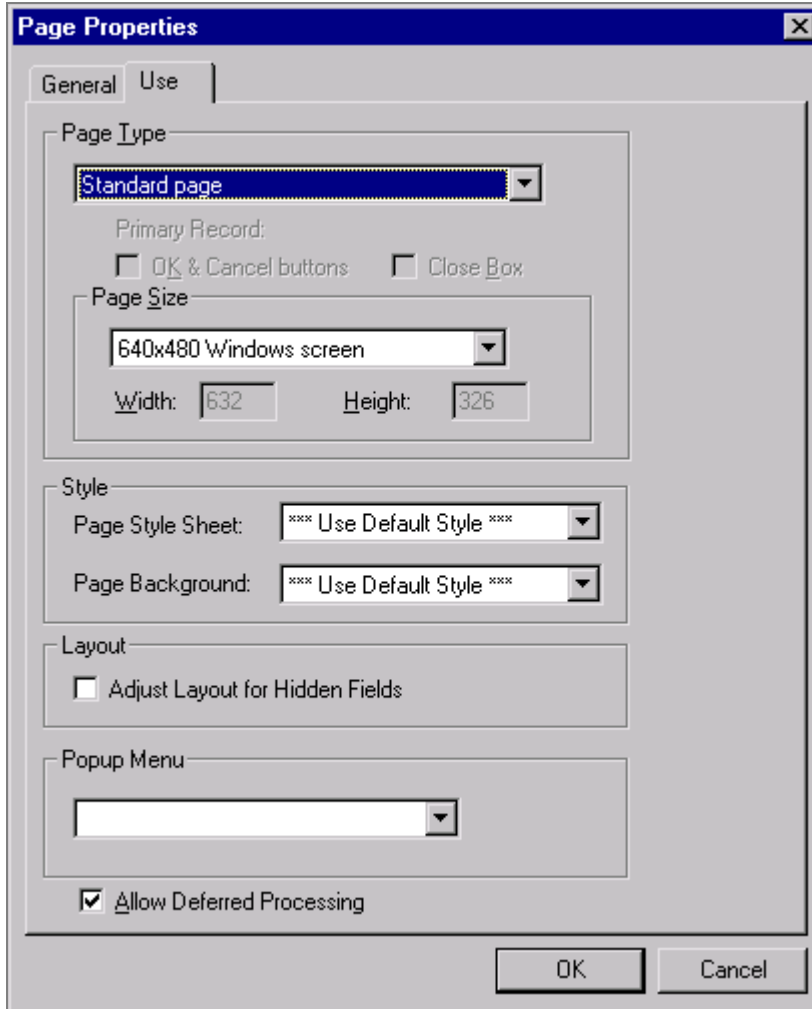
Access the Page Properties dialog box. Select the General tab. Enter a description and any comments about the page and assign an Owner Id (identification).



Page Properties dialog box: General tab

Changing Page Use Information

Access the Page Properties dialog box. Select the Use tab.



Page Properties dialog box: Use tab

Page Type Use the standard page, or select a subpage or a secondary page from the drop-down list box.

Page Size

To accommodate different types of workstation monitors, you can adjust the page size.

Note. As a licensee of PeopleTools, you are licensed to use the base portal technology, which is limited to navigation to licensed PeopleSoft applications. If you want to register additional non-PeopleSoft content, customize your homepage, or create any pagelets, you must license PeopleSoft Enterprise Portal.

800x600 page inside portal This is the standard option for viewing pages in the portal, making room for the universal navigation header and the breadcrumbs. It provides a default page size of 570 × 330 in PeopleSoft Application Designer.

<i>800x600 page without portal</i>	This is the standard option for viewing pages in menu navigation mode, making room for the navigation header and the breadcrumbs. This option provides a default page size of 760 × 330 in PeopleSoft Application Designer.
<i>1024x768 page without portal</i>	For the power user, this is a high-resolution option. It provides a default page size of 984 × 498 in PeopleSoft Application Designer.
<i>240xVar portal home page comp (component)</i>	Use only for creating pagelets for the portal. This size is most usable because it can be viewed in both the narrow area and the wide area of the portal. While the width is set to 240, you can set the height.
<i>490xVar portal home page comp.</i>	Use only for creating pagelets for the portal. This size can be displayed only in the wide area of the portal. While the width is set to 490, you can set the height.
<i>640x480 Windows screen</i>	Use only for Windows client users. This is designed for VGA resolution. The pages are actually less than 640 × 480 pixels in size in PeopleSoft Application Designer, because they provide space for various windows items, such as the window title, menu bar, and toolbar.
<i>800x600 Windows screen</i>	Use only for Windows client users. This is designed for Super VGA resolution. These pages provide space for the window title, menu bar, toolbar, folder tabs, and status line, as well as space at the bottom for the taskbar.
<i>Custom size</i>	Select to set a specific page size other than those listed previously. Set the width and height manually.

Style

Page Style Sheet Select a different style sheet for a specific page to override the style sheet that is selected for the application. If you do not select a different page style sheet (keeping ******Use Default Style******), the system uses the style sheet that is specified on the PeopleTools Options page.

Page Background Select a different page background style class for a specific page to override the background style of the page style sheet that you specified. If you keep the ******Use Default Style******, the background of this page is determined by the default background of the page style sheet.

Layout

Adjust Layout for Hidden Fields Select to set the page to resize automatically when hidden fields are present.

Pop-Up Menu

See “Creating Menu Definitions,” Defining Pop-up Menus.

Allow Deferred Processing Clear if you want the page and all of its fields to follow standard processing. Deferred processing is the default.

Saving Pages

To save your work, select File, Save or File, Save As.

In the Save As dialog box, you can change the language setting to help you keep track of pages that are developed in multiple language. Changing this setting from the English default alters the suffix of your page name. For example, English pages end in *ENG* while Spanish pages end in *ESP*.

When you save your page, the system performs various edits and issues warning messages as appropriate. The warning explains any errors that are associated with each control. You can disregard these messages and save your work anyway, but you cannot view the page in the browser until all errors are corrected.

Access the explanation of an error message by clicking the **Explain** button in the warning message box. You can fix the problem immediately or save the page and return later to correct it.

Renaming and Deleting Pages

If you rename a page, the change ripples throughout the system, including PeopleCode, so you don't have to change the name anywhere else.

To delete a page, particularly a subpage or a secondary page, first use the Find Definition References option to determine which page, component, and menu definitions refer to or use the page you want to delete. You must adjust those definitions accordingly.

See Also

“Using PeopleSoft Application Designer,” Renaming Definitions, Deleting Definitions, and Finding Definitions.

Printing Page Definitions

To keep track of your application definitions and refinements, print your page definitions and keep a log or binder with your new and revised pages as you reconfigure your applications. You might want a reference for each page that includes both the onscreen image and the page control information (the record definitions and special uses or edits that you've applied), as well as the information for any subpages that are included in the page definition.

Printing page definitions also helps you debug during testing. Each report includes a unique identifier that's automatically incremented by the system each time that you change the page.

To print a page definition:

1. Open the appropriate page.
2. Select File, Print.

Altering Page Setup

Access the Print Setup dialog box by selecting File, Print Setup.

Print

All print options are selected, by default.

Definition	Select to print the list of fields on the page and all of the parameters that you've set for each one.
PeopleCode	Select if you used PeopleCode to design your page
Graphics	Select to provide a snapshot of your page design. Graphics generally take longer to print than page descriptions or PeopleCode reports.

Borders

Header	Select to print a header at the top of the report indicating the date and time that you printed the report and the database name, page name, version number, and page number. The default is selected.
Footer	Select to print a footer at the bottom of the report indicating the date and time that you printed the report and the database name, page name, version number, and page number. The default is cleared.
Border	Select to print a border or box around a page report. The default is cleared.
Border Space (mm)	Select to insert a set amount of space between a graphical border around the page report and the margins of the report. Clear this option to print in character mode (faster), rather than in graphics mode (slower). The default space is 3 mm, but can be changed.

Margins (mm)

Set the distance from the edge of the page to the left, right, top, and bottom edges of the page image or report. The defaults are:

- Top: 20.
- Bottom: 5.

- Left: 10.
- Right: 0.

Note. PeopleSoft has selected the HP LaserJet as the default printer.

Reading Your Page Definition Report

The following table lists the columns on the page definition report and describes their contents.

Column	Contents
Num	Sequential number that shows the relative position of the field in the field order list for the page.
Field Type	Field type, such as <i>edit box</i> .
Label Text	Label that's associated with the field, regardless of whether the label is actually displayed on the page.
Label Type	<ul style="list-style-type: none"> • <i>None</i>: Label is not displayed on the page. • <i>Text</i>: Text label. • <i>RFT Long</i>: Long name for the field (from record definition). • <i>RFT Short</i>: Short name for the field (from record definition). • <i>XLAT Long</i>: Long name for the value (from the Translate Table). • <i>XLAT Short</i>: Short name for the value (from the Translate Table). • <i>Bitmap</i>: Bitmap displays on button face.
Record Name	Record name where the field is located.
Field Name	Field name on the record definition with which the page field is associated.
Siz (size)	Field size (<i>custom</i> , <i>minimum</i> , or <i>maximum</i>).
Alg (alignment)	Alignment (<i>left</i> or <i>right</i>).
On	Value of the radio button or the <i>on</i> value of the check box (typically <i>Y</i>).
Off	The value of the radio button or the <i>off</i> value of the check box (typically <i>N</i>).
DSP (display)	<i>Yes</i> indicates a display-only field.
INV (invisible)	<i>Yes</i> indicates an invisible field.

Column	Contents
CTL (control)	<i>Yes</i> indicates a display control field.
REL (related)	<i>Yes</i> indicates a related display field.
RelNum (related number)	Number (Num column) of the display control field for this related display field.
CUR (currency)	<i>Yes</i> indicates a multicurrency field that does not display unless the user is operating in multicurrency mode.
DER (derived)	<i>Yes</i> indicates a field from a derived or work record.
OccLvl (occurs level)	Occurs level of scroll bar that governs this field.

You might see additional reference lines below each field or at the end of the report:

Reference	Description
Page Help Context: nnn	Indicates that the page has been assigned a page help context number, linking it to a help file that describes how the field is used wherever it appears in the database.
Field Help Context: nnn	Indicates that this field, as used on this page, has been assigned a record field help context number, linking it to a help file that describes how the field is used only as it appears in this record definition.

CHAPTER 9

Using Page Controls

This chapter provides an overview of page controls and discusses how to use these controls:

- Charts.
- Frames.
- Group boxes.
- Horizontal rules.
- Images.
- Static text.
- Check boxes.
- Drop-down list boxes.
- Edit boxes.
- Long edit boxes.
- Radio buttons.
- Subpages.
- Grids.
- HTML areas.
- Push buttons or links.
- Scroll areas and bars.
- Secondary pages.

Understanding Page Controls

There are three categories of controls that you use in page design and development. You determine which types of controls you want to add to your page definition by considering how you want to organize information on a page as well as how your users will enter data.

This section provides overviews of the following types of controls:

- Aesthetic.
- Data entry.
- Function and data processing.

Aesthetic Controls

Use aesthetic controls to help organize, display, or emphasize information on the page. In most cases, aesthetic controls are not associated with a particular record field that is defined in a record definition and maintained in the database. With the exception of the image control, these controls never update data in the database. Aesthetic controls include:

Chart Draws a frame that serves as a placeholder for a chart that you construct using the GetChart field type in PeopleCode. Using the chart control, you draw a box in which the chart appears to the user at runtime. Associate the chart control with a record field in a record definition.

Frame Draws a display-only box of variable size to visually group a set of controls on a page. You can drag a frame around almost any control. You can isolate controls, such as HTML areas, from other controls on the page and then hide the frame.

Group box Draws a display-only box of variable size with a text label to visually group and identify related controls, such as radio buttons. Like a frame, you can resize a group box to any length or width. However, with a group box you can assign a visible label. Like frames, group boxes generate HTML tables for viewing in the browser.

Horizontal rule Draws a horizontal line to separate parts of a page. Use the horizontal rule control as a visual break between controls.

Image Draws a frame that you can associate with a variable image from a record field in the database. The record field stores a graphic, such as a scanned image of an employee or a picture of an asset, in the format that you defined in the record definition. Because an image can change at runtime and is associated with a record and field definition, it is considered a data entry control and an aesthetic control.

The field that you associate with your image can be either a standard Image type field or an ImageReference type field, where images might be associated with it depending on user input. The ImageReference field type is a pointer to an image definition, which enables you to display

images dynamically. An example of this is referencing a red, yellow, or green light image definition on a page, depending on the context when the page runs. See “Creating Field Definitions,” Image Field Type and ImageReference Field Type or *PeopleTools 8.4 PeopleBook: PeopleCode Developer’s Guide*.

Static image

Draws a frame that you can associate with an image definition. It can help organize or identify information that is displayed on a page. A static image is different from an image because it does not change at runtime and it is not associated with a record field, but instead with a predefined image definition.

For example, you might select a static image, such as the yellow Clear button, from the image catalog and place it on top of a push button control so that the user knows to click that button to clear the contents of the page. See “Creating Image Definitions,” Using the Catalog of Image Definitions.

Static text

Adds a static text item—a display-only alphanumeric field with a maximum length of 60 characters to describe a page, control, or group of controls.

You might use text for a static note, an extension of a control label, and occasionally a control label itself. Try to avoid using text items because they make it more difficult to translate pages to other languages. Instead you can reference message catalog text to facilitate translation and other maintenance issues. Other methods of displaying text on a page are display-only edit boxes, field labels, or display-only long edit boxes.

Data Entry Controls

Use data entry controls to offer different ways to enter and maintain information. These types of controls are always associated with a record field that is defined in a record definition and maintained in the database.

Check Box

Adds a small square box that operates as a toggle switch—on and off—for data controls that can have one of two values (yes or no, or 1 or 0).

During data entry, when the page is saved, the enabled or disabled value (whichever represents the current state of the check box) is written to the database. If values are specified in the page definition, the fields are left blank in the database, but you can still select or clear the check box on the page. You won’t know that the database fields are blank until you run a query or report on the field.

Drop-Down List Box

Adds a drop-down list box from which one selects a single value from a list of valid values. Use drop-down list boxes to enable data selection from a list of three or more possible choices. In its closed state, the control displays the current value for the control. The user opens the list to change the value.

Drop-down list boxes are a good design choice when presenting users with a small number of selections from which they must select one. However, when designing for grids and scroll areas, prompts will give you better performance.

Edit Box

Adds an edit box, which is used for data entry. Edit boxes are also used for displaying fields and translatable text. Use an edit box for text data entry—for example, a record field that is defined as character, number, signed number, or date. Also use edit boxes for displaying fields and translatable text.

Long Edit Box

Adds a long edit box, which is a variable-length, alphanumeric control that is used for entering long, textual items, such as comments. The length of the control is determined by its contents, rather than the physical size of the box on the page.

Use long edit boxes to display long, translatable text. Each long edit box has a built-in scroll bar to enable users to enter and display more data than can be shown at one time on the page. The scroll bar on the long edit box is used only to scroll through the text in the long edit box.

Unlike edit boxes, which are limited to the field size that is defined in your record definition, long edit boxes can contain a relatively unlimited number of characters, up to a theoretical maximum of 64K. This space, however, is shared by a number of other programming elements, so the true size might be closer to 15–25K, depending on the location of the field in your application and the state of the application. Typically, long edit boxes are used for comments or descriptions.

Radio Button

Adds a small, round button that represents one value for a control with multiple defined values. Add radio buttons in groups. Only one radio button in a group can be selected at one time, like station buttons on a radio—hence the name. Use radio buttons to enable selection of one out of two possible choices. If you have three or more choices, PeopleSoft recommends using a drop-down list box.

Subpage

Adds a predefined, presized group of controls, such as address controls, that are defined on a separate subpage definition. During design time, you add only the subpage

control to represent all of the controls in the subpage. You maintain those controls in only one place—the subpage definition. At runtime, you see all of the controls that are defined in the subpage on the page.

Function and Data Processing Controls

Use function and data processing controls to provide a mechanism for running commands and to maintain levels of information on a page.

Grid	Adds a grid that looks and behaves like a spreadsheet that is embedded in a page. It has column headings and cells and uses push buttons, links, and tabs to navigate through the data. It is similar to a scroll area on a page. Each row in the grid corresponds to a set of controls in a scroll occurrence. Navigation links and push buttons replace the actual visual scroll bar, and add and delete push buttons enable a user to insert and delete rows. Use instead of a single-level scroll area or scroll bar to manage multi-row sets of data.
HTML Area	Adds an area where you can write your own HTML. With other controls, the PeopleSoft system automatically generates the HTML code. The HTML code is then inserted into the dynamically generated code at runtime.
Push Button or Link	Adds a push button or link that represents an internal or external link, PeopleCode command, process through PeopleSoft Process Scheduler, prompt action, scroll action, secondary page, or toolbar action. You can specify whether the control appears as a traditional push button, or as a link (highlighted, underlined text).
Scroll Area	<p>Provides an easy way for you to group or repeat multiple fields of data in a defined area. Like a grid, users can easily navigate through the rows using links and buttons in a navigation bar, and they can add or delete rows using push buttons. These features are automatically placed in the navigation bar. The navigation bar also provides several other settings, such as a Find feature that enables the user to search all fields and rows for specific data and a View All option so that the user can see all rows of data at once.</p> <p>The fields in the scroll area can be placed randomly, one on top of the other, or side by side. Unlike a grid, you are not limited to the type of controls that you can place in your scroll area. You can even place a grid inside a scroll area.</p>

Scroll Bar

Like the scroll area, scroll bars also contain push buttons and links for navigation, but not in the form of navigation bars. Developers must manually position all navigation items.

Like grids and scroll areas, the actual scroll control that you see in PeopleSoft Application Designer when working with scroll bars in page definitions does not appear at runtime. Instead, the scroll bar control has scroll action buttons to replace the visual rendering of the scroll bar as push buttons and links on the web.

Secondary Page

Adds an invisible control that associates a secondary page with the primary page. You then associate the secondary page with a command push button or link or a pop-up menu. Secondary pages gather or display supplemental information that is related to the data in a primary page but less frequently referenced or updated. Secondary pages are displayed using the DoModal PeopleCode function.

Using Charts

Use the Chart Properties dialog box to:

- Associate your chart with a record definition and record field.
- Assign a page field name.
- Set label attributes.
- Set the chart as a page anchor.

On the Label tab, add an information-only name for your chart. This label does not appear at runtime, but does appear on the control order list on the order tab of the page definition and any page definition report that you print. Assigning a label is helpful if you have multiple charts on your page.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference Guide, “PeopleCode Built-In Functions and Language Constructs D-G,” GetChart

Using Frames

Setting Frame Label Properties

To change frame labels and display options:

1. Double-click a frame to open the Frame Properties dialog box.
2. On the Label tab, enter a brief text description of the function of the controls in the frame.

The default frame label is *Frame*. Any label that you attach to a frame is for information only—it doesn't appear on your page, but it does appear on the page definition printout and in the control order list. Use labels to differentiate among multiple frames on your page.

For example, if you're enclosing address controls, you might use the label *Address Frame*.
3. Select the style for the frame.

You can control the line color and thickness and background color of a frame by specifying a style. See "Creating Style Sheet Definitions."
4. Select the **Hide Border** check box to hide the border of the frame.

Use this option to use the style to shade only the background of the framed area or to apply other styles. If you select **Hide Border**, it overrides the border options that are specified in a style.

A frame with a hidden border might also be used to facilitate HTML generation. When a frame is inserted in a page section, the system knows to generate that section as a table in HTML. This is useful to ensure the correct layout. However, in some browsers, adding more HTML tables can result in performance degradation. See "Creating Page Definitions," Maximizing Performance.
5. Select the **Adjust Layout for Hidden Fields** check box to enable automatic vertical adjustments to the frame size when hidden fields are present.

If visible fields are not present to the right or left of the hidden field in a frame, the frame collapses to surround the remaining fields.
6. If the field is associated with multicurrency processing, select the **Multi-Currency Field** option on the Use tab in the Frame Properties dialog box.

This causes the field to appear at runtime only if the Multi-Currency option on the PeopleTools Options page is selected.

Using Group Boxes

This section discusses how to:

- Insert and move a group box.
- Link group boxes to record definitions.
- Change the group box label.
- Set group box use properties.

Inserting and Moving a Group Box

To insert and move a group box:

1. Select Insert, Group Box.
2. Move the group box to the appropriate location.
3. Adjust the group box size and shape.
See “Creating Page Definitions,” Resizing Controls.
4. Deselect the group box by clicking anywhere outside of the group box on your page workspace.

Linking Group Boxes to Record Definitions

To link group boxes to record definitions:

1. Open the Group Box Properties dialog box.
2. On the Record tab, select record and field names.

Linking a record field with your group box enables you to control hiding and unhiding of the group box.

Changing the Group Box Label

To change the group box label:

1. Open the Group Box Properties dialog box.
2. Select the Label tab.

The label of your group box should reflect how the fields are related. However, if for visual reasons, the group box surrounds a variety of disparate controls, you might change the label, rather than associate it with one record definition and field.

If you are organizing a group of radio buttons with translate values, you can label your group box by associating it with the record definition and field and selecting either the long or short name as the label. If neither the long or short name is appropriate, create a text label.

3. Under Display Options, select the body style for the group box border.

You can control the color, line thickness, and background of the body section of a group box by specifying a style. See “Creating Style Sheet Definitions.”

4. Select the Hide Border check box to hide the border.

This overrides border options that are specified in a style.

5. Select Adjust Layout for Hidden Fields.

If there are hidden fields, the group box adjusts its borders to accommodate them if this feature is selected.

Note. For the group box to adjust automatically, the hidden fields inside the group box must be surrounded by open space or have other hidden fields to the right or left.

6. Set the remaining group box label properties.

See “Creating Page Definitions,” Setting Label Properties.

Setting Group Box Use Properties

Access the Group Box Properties dialog box. Select the Use tab.

Multi-Currency Field	Select if the field is associated with multicurrency processing. If the Multi-Currency option on the PeopleTools Options page is selected, the field displays at runtime only.
Hide all Fields when Group Box Hidden	Select to hide all visible and hidden fields when the group box is hidden. Hide a group box by associating it with a record or field and invoking the PeopleCode field class Visible property. See <i>PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference</i> , “Field Class,” Visible.
Collapsible Data Area	Select to collapse the group box into a small image that the user must click to expand. This enables the Default Initial View to Expanded State check box and enables you to select label images for both the expanded and collapsed states, typically small triangles. Each time that a user opens or closes a collapsible section, a transmission to the application server is required. Therefore, the initial state of whether the collapsible section is open or closed is important. You should

carefully evaluate the performance and usability aspects of using collapsible sections versus designing a long page that displays all of the data using deferred processing mode instead.

Example of Collapsible Group Boxes

In the following example, the first group box, Spain, is expanded while the group boxes for France, Italy, and USA are collapsed.

The screenshot shows a web form with four collapsible group boxes. The first group box, labeled 'Spain' with a Spanish flag icon, is expanded and contains a sub-section titled 'Union Membership/Representative Data'. This sub-section includes the following fields: 'Union Code' (text input with a search icon), 'Union Date' (calendar icon), 'Union Fee Amt.' (text input), 'Fee Start Dt' (calendar icon), 'Fee End Dt' (calendar icon), 'WrkCncl Funct.' (dropdown menu), 'InterCtr Funct.' (dropdown menu), 'Pay Union Fee' (checkbox), and 'Exempted' (checkbox). Below the expanded group box are three collapsed group boxes: 'France' (French flag icon), 'Italy' (Italian flag icon), and 'USA' (USA flag icon). Each collapsed group box has a right-pointing arrow next to its label.

Collapsible group boxes

Using Horizontal Rules

This section discusses how to:

- Draw a horizontal rule and set label properties.
- Set horizontal rule use.

Drawing a Horizontal Rule and Setting Label Properties

To draw a horizontal rule and set label properties:

1. Select Insert, Horizontal Rule.
2. Draw a horizontal line to the appropriate length on the page.
3. Open the Horizontal Rule Properties dialog box.
4. On the Label tab, enter an information-only label to differentiate the line from other frames and lines on your field order list.
5. Select the style for the line.

You can control the color and line thickness of a horizontal rule by specifying a style. See “Creating Style Sheet Definitions.”

Setting Horizontal Rule Use

Access the Horizontal Rule Properties dialog box. Select the Use tab.

Multi-Currency Field

See Setting Group Box Use Properties.

Set to Level 0

Manipulate the occurs level of your controls on the page while still preserving the physical tab order at runtime. If you adjust the sequence of fields on the Order tab of the page definition, the tab order for the user at runtime is adjusted to that new order. See “Creating Page Definitions,” Level-Based Controls .

Use this setting to specify a scroll level organization that differs from the order of page fields on the Order tab. For example, you might want to create a page that contains multiple collapsing group boxes with each containing level-based controls. By placing a horizontal rule between each of the collapsing sections and selecting Set to Level 0, you return the occurs level to 0 so that you can add additional levels without having to alter the order of controls on the Order tab. In doing so, you can maintain a consistent tab order.

Using Images

This section discusses how to:

- Adjust static image size and shape.
- Associate a static image with an image definition.
- Set image record properties.
- Set image label properties.
- Set image use properties.

Adjusting Static Image Size and Shape

Adjust the size and shape of static images like frames or group boxes. You can also adjust the size in the Static Image Properties dialog box on the Label tab by changing the width and height in pixels.

Associating a Static Image With an Image Definition

To associate a static image with an image definition:
--

1. Open the Static Image Properties dialog box.
2. On the Label tab, select the label type:
 - None
 - Text
 - Message Catalog
3. If you select *Text*, enter a label to identify your static image.

The label does not appear on your page at runtime. Use it to track your images in your scroll order list box and on page definition reports.

4. Select an image ID using one of the following methods:
 - Select a predefined image definition from the **Image ID** drop-down list box.
 - Click the **Browse** button next to Image ID to preview the list of available images.

The Select Image dialog box appears with a list of the image components available. To the right of the list is a preview of the selected image.

Note. If an image definition is stored as a *.GIF* file, with no alternate format selected, it does not appear on the Layout tab of the page definition. A warning dialog box appears, telling you to convert the image. If you are not concerned about viewing the image during the design process, you can ignore the message because the image will appear as intended on your page in the browser at runtime.

5. Click **OK** to return to the Static Image Properties dialog box.

The image that you selected appears in the image area with its width and height displayed in pixels in the fields that are unavailable for entry.

6. Set the image format and size.

Scale Select to scale the image to the size of the frame that you set using the control selection handles when you view your page in the browser or by the width and height that you enter.

Size Select to display the image as is, regardless of the control size on the page.

7. Click **OK**.

You can now position the static image anywhere on the page.

Note. You can define your own static images, such as your company logo, by creating a new image definition. After you create the image definition, you can then add your logo to a page using a static image control. See *Creating Image Definitions*.

Setting Image Record Properties

To change the record definition that is associated with an image:

1. Open the Image Properties dialog box.
2. On the Record tab, select the record and field names with which this image field is associated.
3. Set the image format and size attributes.

Scale	Select to scale the image to the size of the frame that you set using the control selection handles when you view your page in the browser or by the width and height that you enter.
Scroll and Clip	These options are enabled only if View Internet Options from the View menu in PeopleSoft Application Designer is cleared.
Size	Select to display the image as is, regardless of the control size on the page.

4. Specify the alignment of your image.
5. Select a style for the image.

Setting Image Label Properties

To document an image control with an informational label:

1. Enter a text description in the **Alt tag for image** region.
2. Select one of the following settings from the **Type** drop-down list box:

<i>None</i>	Select if you do not want a label. The Text field becomes unavailable for entry.
<i>Text</i>	Select to enter a custom label. This is the default setting.
<i>Message Catalog</i>	Select to use a preset message from the message catalog.

The **Message Set** and **Msg Number** (message number) fields become available for entry.

RFT Long (record field table long) and **RFT Short** (record field table short) Select to use a preset label from the record field set on the Record tab. The **Label ID** drop-down list box becomes available for entry.

Setting Image Use Properties

See “Creating Page Definitions,” Setting Use Properties.

Using Static Text

Access the Static Text Properties dialog box.

Label Text

Text If you select **Text**, you can use either uppercase or lowercase characters. The text label is limited to 60 characters long. You can also split your text item into multiple lines. To do this, position the cursor in the **Text** field where you want the split to occur and click the **Insert Line Feed** button. A thick vertical bar character appears in the Text field, and when you close the dialog box, your text item is split into multiple lines.

Message Catalog If you select **Message Catalog**, enter the appropriate message set and number. As with a text label, you are limited to message catalog text of 60 characters.

Style

You can control the color, font, size, and other characteristics of the text by specifying a style. See “Creating Style Sheet Definitions.”

Alignment

Set the horizontal alignment of your text control, as determined by the left-hand edge of the field.

Left Aligns the control to the left-of-center, horizontally.

Centered Centers the control, horizontally.

Right Aligns the control to the right-of-center, horizontally.

Use Tab

If a text item is associated with multicurrency processing, select the Multi-Currency Field option. This causes the text item to appear at runtime only if the Multi-Currency option on the PeopleTools Options page is selected.

Using Check Boxes

When you insert a check box on a page, it appears with a default label, *Dummy Name*, until you specify a record definition name and field name, or a text label.

This section discusses how to:

- Set check box record properties.
- Set check box label properties.
- Set check box use properties.

Setting Check Box Record Properties

To link check boxes with associated record definitions:
--

1. Open the Check Box Properties dialog box.
2. On the Record tab, select the record and field names from the drop-down list boxes.
3. Enter the enabled and disabled values for the check box.

For example, if the enabled value of the check box is *Y* for *yes*, and the check box is selected when the user saves the row, the *Y* value is written to the database. If the disabled value of the check box is *N* for *no*, and the check box is cleared when the user saves, the *N* value is written to the database.

The enabled and disabled values that you enter validate against the Translate Table. If a value isn't found, the system displays a warning message but allows the value to remain. You might find this useful when prototyping pages before defining record definitions.

Setting Check Box Label Properties

After you link the check box to a record definition and field, the default check box label is the field long name. See "Creating Page Definitions," Setting Label Properties.

Note. The location of the label is always to the right of the check box.

Setting Check Box Use Properties

See "Creating Page Definitions," Setting Use Properties.

Using Drop-Down List Boxes

This section discusses how to:

- Set drop-down list box record properties.
- Set drop-down list box label and use properties.

Setting Drop-Down List Box Record Properties

To set drop-down list box record properties:

1. Open the Drop-Down List Box Properties dialog box.
2. On the Record tab, associate the drop-down list box with a field.
3. Select a style.

Set the font and color attributes of your drop-down list box *data*. See “Creating Style Sheet Definitions.”

4. Select a displayed text option:
 - Xlat Short
 - Xlat Long
 - Prompt Table Field
5. If you selected **Prompt Table Field**, enter the field name in the **Prompt Table Field** area.
4. Set the field size for the drop-down list box.

Setting Drop-Down List Label and Use Properties

After you link the drop-down list box to a record definition and field, the label default is the long field name. See “Creating Page Definitions,” Setting Label Properties.

You might want to change the way that a drop-down list box is used on a page. See “Creating Page Definitions,” Setting Use Properties.

Using Edit Boxes

When you insert an edit box on a page, it appears with the default label, *Dummy Name*, until you specify a record and field for the edit box or until you specify a text type field label. There is more space than required between your edit box label and the control. PeopleSoft provides 20 percent extra space for the edit box label for translation purposes.

The following Address page shows edit boxes in the Home Address group box.

The screenshot displays the 'Address' page for an employee named Sawyer, Tom (ID: TZ173). The page is divided into several sections:

- Navigation:** Tabs for Name, Address, Personal Profile, and Eligibility/Identity.
- Employee Info:** Sawyer, Tom, Employee, ID: TZ173.
- Personal Data:** Effective Date: 05/03/1995. Navigation: View All, First, 1 of 1, Last.
- Home Address Group Box:**
 - Country: USA (dropdown), United States (text)
 - Address 1: 9802 White Wash
 - Address 2: (empty)
 - Address 3: (empty)
 - City: Markham
 - County: (empty)
 - Postal: 94098
 - State: CA (dropdown), California (text)
- Other Links:** Mailing Address, Email, Phone.
- Actions:** Save, Return to Search, Previous tab, Next tab, Update/Display, Include History, Correct History.
- Footer:** Name | Address | Personal Profile | Eligibility/Identity

Edit boxes

To set edit box properties:

1. Link the edit box to the appropriate field on a record definition by entering the record on the Record tab in the Edit Box Properties dialog box.

The system retrieves the default label text, *RFT Long*, for you. The edit box label default is the field long name. See “Creating Page Definitions,” Setting Record Properties.

2. Change the label text or how it appears by adjusting the properties on the Label tab in the Properties dialog box.

See “Creating Page Definitions,” Setting Label Properties.

3. Change the way in which the edit box is used on a page.

Some edit boxes should be display-only. You might want a page control to govern what is displayed in another control. In some cases, you might want the control to be invisible because it is required by PeopleCode, but is not a field that is accessible by a user. See “Creating Page Definitions,” Setting Use Properties.

Using Long Edit Boxes

To set long edit box properties:

1. Link the long edit box to the appropriate field in a record definition.

See “Creating Page Definitions,” Setting Record Properties.

2. Set or change the label for a long edit box.

See “Creating Page Definitions,” Setting Label Properties.

3. Set the use properties for long edit boxes.

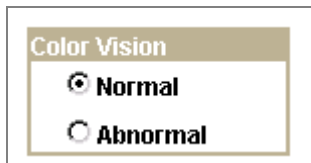
See “Creating Page Definitions,” Setting Use Properties.

If you designate the long edit box as display-only, select the **Expand Field When Display Only** check box to hide the scroll and automatically expand the size of the edit box as necessary.

Using Radio Buttons

When you insert a radio button on a page, it appears with the default label, *Dummy Name*, until you specify a record definition name and value for the radio button. Like edit box labels, radio button labels have a dotted box around the 20 percent of extra space that is required for translation purposes in addition to the box around the radio button label itself.

For radio buttons to function as a single group, they must be associated with the same record field and they must be adjacent fields on the order tab of the page definition. To save time, add all radio buttons in a set, one after the other. After you add the first radio button, the system remembers the record definition name and field name for all subsequent radio buttons—you must enter only the database value for each. Then, place a group box around all of your radio buttons to keep them together and labeled as in the following example.



Radio buttons

This section discusses how to set the following types of properties for a radio button:

- Record
- Label
- Use

Setting Radio Button Record Properties

To link a record with radio buttons:

1. Open the Radio Button Properties dialog box.

2. On the Record tab, select the record and field names to link the radio button to the appropriate field on your record definition.

The system retrieves the default label text if you enter the record or field.

3. Enter the database translate value for this radio button.

In the preceding radio button example, *N* is for *Normal*. If you select the drop-down list box for the value, you see the translate value and the long name that was assigned to the field. When the user selects this radio button, it indicates a *Normal* value.

Setting Radio Button Label Properties

To change the label of a radio button:

1. Open the Radio Button Properties dialog box.
2. On the Label tab, select the type of label if it is other than the default of *XLAT Long*.
3. Select the location of the label for your radio button: to the left or right.

See “Creating Page Definitions,” Setting Label Properties.

Setting Radio Button Use Properties

You might want to change the way that a radio button is used on a page. For example, you might want the selected value of a radio button to control what appears in another control. See “Creating Page Definitions,” Setting Use Properties.

Using Subpages

Create subpages like other page definitions, linking them with the record fields in a corresponding subrecord or record definition. Add the page controls that make up the group, ordering them physically and logically as you want them to work on page definitions, or copy the controls from an existing page definition.

This section discusses how to:

- Define a subpage.
- Insert a subpage on a page.
- Specify informational subpage labels.

Defining a Subpage

To define a subpage:

1. Select File, New, Page.
2. Select File, Definition Properties to access the Page Properties dialog box.
Use this dialog box to define the type, size, and layout of the page.
3. Select *SubPage* in the **Page Type** drop-down list box.
4. Select the size of the page.
See “Creating Page Definitions,” Changing Page Use Information.
5. Select **Adjust Layout for Hidden Fields**, if necessary.
6. Select **Allow Deferred Processing**, if appropriate.
See “Guidelines for Designing Pages,” Understanding Processing Modes.

Inserting a Subpage on a Page

After you create the subpage definition, insert it on your primary page to access it.

To insert a subpage into a page:

1. Open the page on which you want to insert the subpage.
2. Select Insert, SubPage.
The Insert Subpage dialog box appears.
3. Select a subpage definition.
Specify the name of the subpage that you want to insert into the open page definition.
4. Select a record definition in **SubPage Record Name Substitution** group box.
The subpage writes its fields to a generic record. Specify the application-specific record name to which you want the information in the subpage written.

Note. All of the fields in a subpage must be associated with fields of a subrecord in the specified record definition.

4. Click **OK**.

The subpage appears on the page. Its size reflects the size of the page control group, and it is identified by the subpage definition name.

Specifying Informational Subpage Labels

Document the purpose of the subpage by changing the informational label of the subpage. The default subpage label is *Subpage*. Any label that you attach to a subpage is for information only—it doesn't appear on the page, but it does appear on the page definition printout and in the control order list. Use labels to differentiate among multiple subpages on a page.

To change informational subpage labels:
--

1. Open the Subpage Properties dialog box.

Note that the Subpage tab displays the information you entered on the Insert Subpage dialog box.

2. On the Label tab, enter your informational text label.
3. Enter the Page Field Name in the General tab.

Using Grids

This section provides overviews of the scope of grid controls and grid properties and discusses how to:

- Insert and resize grid controls.
- Insert and manipulate grid columns.
- Set column properties.
- Create a tabbed grid.
- Freeze grid columns.
- Use multiple grids on a page.
- Enable grid personalization.
- Set grid general properties.
- Set header area properties.
- Set body area properties.
- Set column heading properties.
- Set footer area properties.

- Set grid use properties.

Understanding the Scope of Grid Controls

You can insert the following page controls into a grid:

- Check box.
- Drop-down list box.
- Edit box.
- Long edit box.
- Push button or link.
- Image.
- HTML area.
- Secondary page.
- Tab separator.

Note. When designing grids, use prompts in place of drop-down list boxes for better performance.

Understanding Grid Properties

The default grid displays the following:

- A data navigation bar at the top of the table that enables the user to page through additional rows of data.
- Delete and Add buttons at the end of each row that enable the user to insert and delete rows in the grid.

The inserted row appears under the current row. These buttons appear automatically as determined by the grid properties (display-only, no row insert, and no row delete).

- An occurs count of *1*.

You can set the grid to be any size at design time and then set the occurs count to control the maximum number of rows to display at runtime.

There are three areas on a grid to which you can apply labels or image buttons to help the user navigate through the data in the grid. Set properties for the following areas:

- Header

- Body
- Footer

Inserting and Resizing Grid Controls

To insert a grid on a page:

1. Select Insert, Grid.
2. To adjust the grid width, drag the horizontal or vertical control handles.

The horizontal grid width should be roughly equivalent to the columns that you insert into the grid. Otherwise, your grid might appear wider than necessary at runtime.

Inserting and Manipulating Grid Columns

This section discusses how to:

- Insert grid columns.
- Delete grid columns.
- Move grid columns on the layout tab.
- Move grid columns on the order tab.
- Resize grid columns.

Inserting Grid Columns

To insert a grid column:

1. Use one of the following methods to insert a column:
 - Select a page control from the Insert menu or the page control toolbar and click the grid.
 - Drag a page field from inside the current page or from another page.
 - Copy and paste a page field or record field.
 - Drag a definition (such as a record field, a page field, or an entire record definition) from the project workspace.

The new location of the definition or control is determined by the location of the upper-left-hand corner of the drag rectangle, or by the mouse cursor if no drag rectangle appears.

PeopleSoft Application Designer automatically places the first column on the left-hand side of the grid.

2. Click your mouse or release the field in the gray area of the grid.

Place new columns to the right of existing columns by clicking or releasing the control in the gray area of the grid where no columns are present. To place a column between two grid columns, release the new column in the first column.

Deleting Grid Columns

To delete a grid column:

1. Select a column by right-clicking the column heading.

Be sure that you select only the column and not the grid as a whole; otherwise, you might delete the entire grid instead of just the column. The grid is selected when control boxes appear around the edges of the grid. The column is selected when it turns black.

2. Select *Delete* from the pop-up menu.

Moving Grid Columns on the Layout Tab

To move grid columns on the Layout tab:

1. Select a column by clicking the column heading.
2. Drag the column to its new location.
3. Release the mouse button over the column that is to the left of the new location.

Moving Grid Columns on the Order Tab

To move columns on the Order tab:

1. Select the column row by clicking the row number.

The grid and grid columns are clearly distinguished from other page fields on your page. The grid is identified by the Type column. All columns in the grid are directly below in a lighter green. Nongrid page field rows are white.

2. Drag the row to the new position in the grid.

A red line indicates the new position of the column before you release it. You cannot move a column outside the grid when working on the Order tab. Likewise, you cannot move an existing page field from elsewhere on the page into the grid. Both of these operations can be performed on the Layout tab.

Resizing Grid Columns

You can resize grid columns by dragging the right border of the column heading.

Setting Column Properties

After you insert the page control or field into your grid, you can set the properties for that field like any other page control. Access the field properties by double-clicking the column heading.

For column headings, use the following guidelines for label alignment. Column headings are derived from the label text that you select on the Label tab of the properties dialog box for the control. Do not use colons in column labels.

<i>Type of Field</i>	<i>Label Alignment</i>
Push button	Center Align
Link	Left Align
Character	Left Align
Numeric	Right Align
Check box	Center Align
Field data	Auto (automatic)

Creating a Tabbed Grid

PeopleSoft recommends using a tabbed grid design if your grid contains many columns running off the right side of the page. Do this by adding tab separator controls to your grid.

Defined Personalizations					
User Option	Description	Field Format	Format Length	Record (Table) Name	Field Name
ADBTN	Tab over Add/Del Buttons (+/-)			XLATTABLE	PSYESNO
ADES	Afternoon designator (PM, pm)	Uppercase	5		
CALBTN	Tab over Calendar Button			XLATTABLE	PSYESNO
CSYM	Currency Symbol	Mixedcase	1		
CSYMP	Currency Symbol Position			XLATTABLE	CUR_SYMBOL_POS
DCSP	Decimal Separator	Mixedcase	1		
DFRMT	Date Format			XLATTABLE	PT_DATE_FORMAT

Tabbed grid

You can give users the option of expanding all of the columns to the right so they are visible when using the browser's horizontal scroll bar. This is particularly useful to power-users who do a great deal of intensive data entry. The Enable View All Columns check box on the Use tab in the Grid Properties dialog box controls this feature and is selected by default. The Expand All button appears to the right of the grid tabs, as shown in the preceding screen shot.

After the grid is expanded, the Show Tabs button appears to enable the user to collapse the grid so that the tabs appear again.

Note. Each time the user moves to a new tab results in a transmission to the web server to display the next page.

<p>To create a tabbed grid:</p>
--

1. Insert a grid control on the page.
2. Insert the columns to appear on the first tab.
3. Insert a tab separator control after the last column.
4. Set the tab separator properties.
 - a. Double-click on the tab separator to access the Tab Separator Properties dialog box.
 - b. Specify the label properties on the Label tab.
 - c. Specify the general properties on the General tab. See Setting General Properties.
5. Insert the next set of columns to appear on the second tab.

Alternatively, you can place all of the columns in your grid first and then insert the tab separator between the two columns that you want separated.

6. Repeat steps 3 and 4 if necessary.
7. Set the tab separator properties by double-clicking the column heading of the tab separator.
 - On the Label tab, specify the label type.

Select *None*, *Text*, or *Message Catalog*. If you select *Text*, enter the label text and select the label alignment. The label text that you select appears on the tab in the grid.

- On the General tab, determine whether you want to enable the tab separator as a page anchor.

If so, select the Enable as Page Anchor check box and enter a page field name.

Freezing Grid Columns

You can freeze the first column or the first several columns in a tabbed grid so that they appear on subsequent tabs. To freeze more than one column, select the freeze option for each column that you want to appear on the following tab.

Freezing grid columns impacts the horizontal scrolling ability of the grid at design time. If you freeze a grid column that is not visible inside the boundaries of the grid at design time,

you are not able to view all columns in your grid. Lengthen the width of your grid to accommodate all columns.

Freeze a grid column by selecting the Freeze Grid Column check box on the Use tab of the properties dialog box for that column.

Using Multiple Grids on a Page

You can place as many grids on a page as you like, provided that they are at the same occurs level. They can be one above the other or they can be side-by-side, such as those in the following example. This is helpful when you must transfer data from one grid to another without switching between pages.

In the following example, the user can transfer data from the Source Competencies grid on the right to the Assigned Competencies grid on the left by using the double left arrow button. The push button is associated with a PeopleCode program, enabling it to transfer the data between the two grids.

The screenshot displays a PeopleSoft application interface for competency management. At the top, there are tabs for 'Competency Evaluation', 'Competency Assignment', 'Competency Rating', and 'Competency Verification'. Below the tabs, the user's name 'Smith, John' and employee ID 'FG7025' are shown, along with a 'Link to Career Planning' button. The main area contains two side-by-side grids. The left grid, titled 'Assigned Competencies', shows a list of competencies with columns for 'Description' and 'Category'. The right grid, titled 'Source Competencies', shows a list of competencies with checkboxes for selection. A double left arrow button is positioned between the two grids, indicating a data transfer function. At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct History'. Navigation links for the tabs are also present at the bottom.

Grids side-by-side on a page

Like other level-based controls, you can nest a grid in a scroll area or scroll bar. However, you cannot nest a grid in another grid.

Enabling Grid Personalization

PeopleSoft Application Designer enables the user to customize a grid at runtime. This feature is enabled by default as a Customize link on the Personalize tab of the Header Navigation Bar Properties.

Note. If you do not display the grid header bar, the Customize option is not available to the user unless you enable it for the footer area.

When the user clicks the Customize link for a grid on a transaction page, the system opens the grid personalization page, where custom parameters can be set for that grid. The grid personalization page contains a sample grid that displays a few rows of real data from the buffer in display-only format. If there is no data in the buffer for that grid, only the column headings appear. Tabs in the grid are active so that the user can view all sample data.

Personalize Column and Sort Order

Personalize Find View All			
Sport	League	Team	City
1 FOOTBALL	NFL	Raiders	OAKLAND
2 FOOTBALL	NFL	49ers	SAN FRANCISCO
3 FOOTBALL	NFL	Cowboys	DALLAS
4 FOOTBALL	NFL	Steelers	PITTSBURGH

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

Sport
League
Team
City

Hidden
 Frozen

Sort Order

City

Descending

OK Cancel Restore Defaults Preview

Grid Personalization page

The grid personalization page also contains two tables that control the column and sort order.

The Column Order grid displays the columns in their current order, including tab separators. The list of fields is driven by the page definition but excludes columns that are hidden by PeopleCode. The user can hide columns and change their sort order. Users can also freeze grid columns. Columns that you freeze at design time automatically appear to the user as already frozen. However, the user has the option of overriding this setting.

The Sort Order grid enables the user to control the ascending and descending sort of each column, with the exception of tab separators, images, push buttons, links, and HTML areas. Users can sort hidden fields, however. The default setting is ascending for each column.

After making changes, the user can accept, preview, restore defaults, or cancel selections. If the user saves the new settings by selecting OK, the system stores the new settings as persistent values for that user based on a key structure. Therefore, each time the user accesses this grid, the system uses all personalization options that were set previously. The user can restore all default settings by selecting Restore Defaults to remove all stored personalization settings from the database.

The user can override the persistent sort order directly on the transaction page by clicking the hyperlinked field label to affect the sort. Clicking the link repeatedly toggles between ascending and descending sort order for that column. This type of sorting directly in the transaction page is *not* persistent.

Note. You can continue to implement SortScrolls PeopleCode command, but the user can override the defined sort with this feature.

To disable grid personalization:

1. Open the Grid Properties dialog box.
2. Select the Label tab.
3. Select the Properties button for the header navigation bar.

This opens the Header Navigation Bar Properties dialog box.

4. Select the Personalize tab.
5. Select the Invisible check box.
6. Click the OK button.

To enable grid personalization in the navigation footer:

1. Open the Grid Properties dialog box.
2. Select the Label tab.
3. Select the Display Navigation Bar check box in the Footer Area group box.
4. Select the Properties button for the footer navigation bar.

This opens the Footer Navigation Bar Properties dialog box.

5. Select the Personalize tab.
6. Clear the Invisible check box.
7. Click the OK button.

Setting Grid General Properties

Access the Grid Properties dialog box.

Main Record

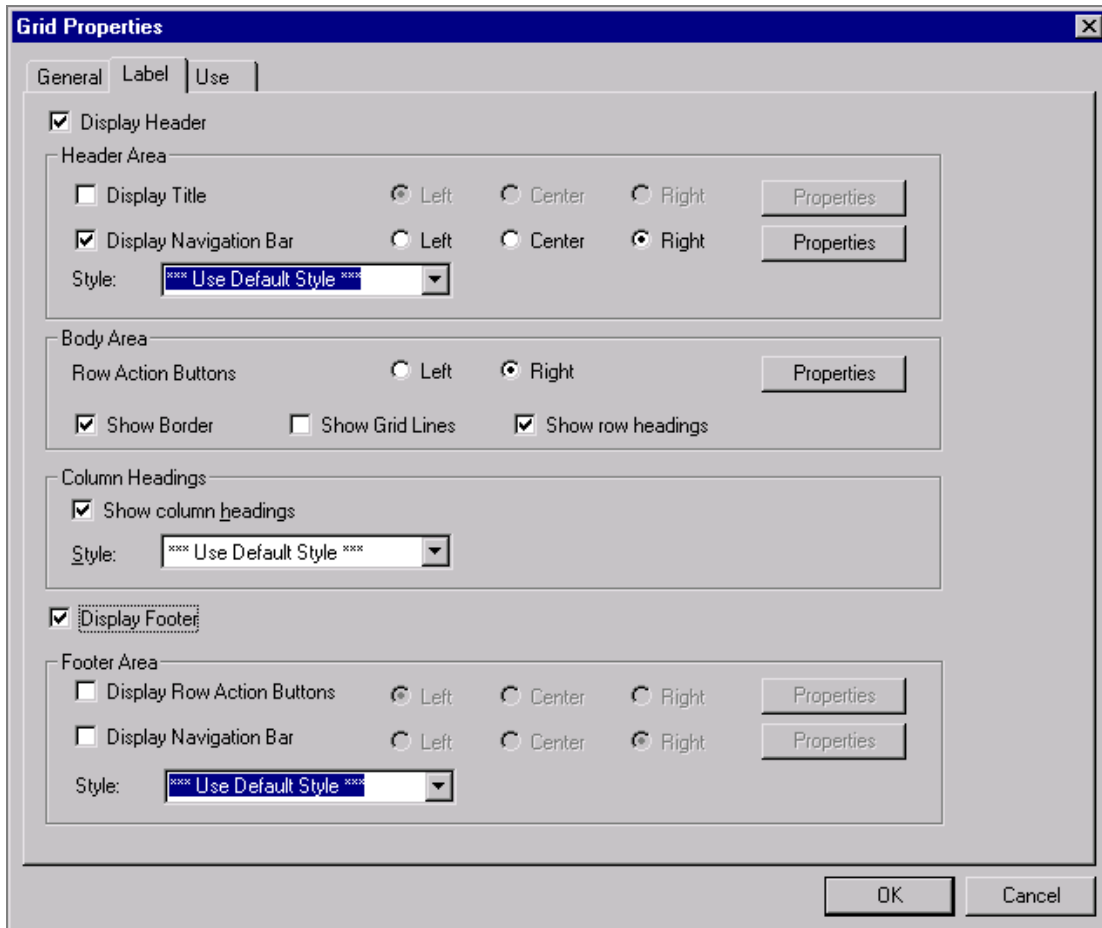
Select the record that contains most of the fields that you want to use in the grid. Fields that you display in the grid that are not from the main record should be display-only

or related fields, which you can set on the Use tab of the properties dialog box for that column.

Page Field Name	The default is the main record for the grid. You can rename the grid as long as it is a <i>unique</i> name for the page or component. This name is used by the PeopleCode GetGrid function to create a grid definition. See PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, “File Class,” File Class and GetGrid.
Occurs Level	Having an occurs level for the grid enables you to designate the hierarchical parent-child relationship. Entering <i>1</i> specifies that the grid is at the first level. Entering <i>2</i> specifies that a grid is at the second level and is a child of, or nested in, the first level of data, and so on up to <i>3</i> . A grid can be nested in another level-based control, but it cannot be nested in another grid. See “Creating Page Definitions,” Ordering and Spacing Page Controls .
Occurs Count	Enter the number of rows to display initially at runtime. See “Creating Page Definitions,” Ordering and Spacing Page Controls .
Unlimited Occurs Count	Select instead of setting an occurs count if you want the system to display all rows of data in the buffer for this grid. Navigation links do not appear at runtime and the size of the grid depends on the number of rows in the buffer.
Enable as Page Anchor	Select to apply an anchor tag to which a page anchor link can jump.

Setting Grid Label Properties

Access the Grid Properties dialog box. Select the Label tab.



Grid Properties dialog box: Label tab

The Grid Properties, Label tab provides four main grid setting areas in which you can define settings:

- Header Area.
- Body Area.
- Column Headings.
- Footer Area.

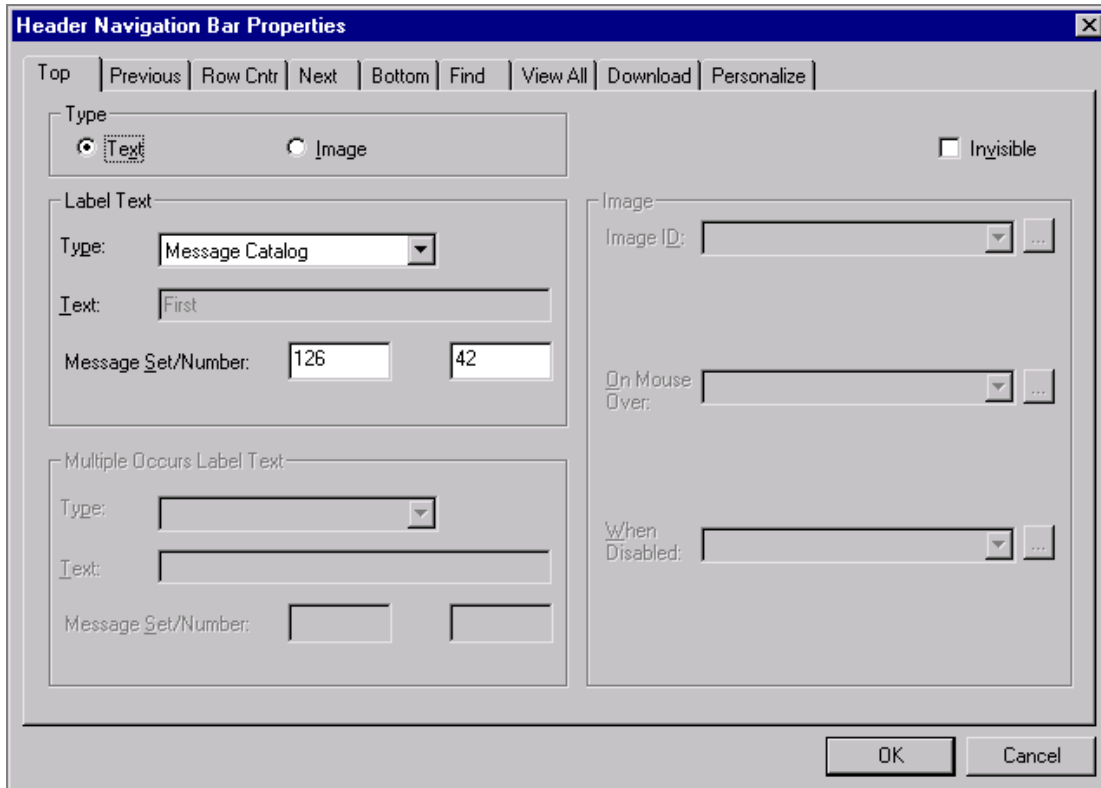
Setting Header Area Properties

Display the title of the grid and a navigation bar, where users can access controls for viewing the previous, next, top, or bottom row. You also control the settings for the Find, Personalize, Download, and View All features.

Display Header is selected by default. You can then configure the specific properties for each setting in the header area. In the previous example, the grid title appears in the navigation bar. You can select the alignment of each header element and the style in which they appear to the user. To disable the header, clear the Display Header check box.

To display a title for your grid, select the **Display Title** check box and click the **Properties** button in that row to open the Title Properties dialog box. Select the type of label text you want to display for your grid title: *Static* or *Message Catalog*. If you select *Static*, enter the exact title to appear in the navigation bar. If you select *Message Catalog*, enter the message set and number of the message to appear as the title.

The next step in setting up the header area is to define the navigation bar. Select the **Properties** button next to Display Navigation Bar. The Header Navigation Bar Properties dialog box that appears contains seven tabs, each pertaining to different settings on the navigation bar.



Header Navigation Bar Properties

Each of these tabs has the same settings. For each setting, you can decide to display it as text or an image. All settings, with the exception of the Download link, are set to display by default. However, you can make the settings invisible by selecting the Invisible check box in the top right corner of each tab so that that option doesn't appear in the header bar.

Top

Controls the attributes for how a user returns focus to the top of the grid or the first row of data in the grid. *Text* is the default setting, using *First* from the message catalog. You can also enter static text.

Previous




Controls how a user can move to a previous row in the grid. *Image* is the default setting, with the Show Previous Row button as the default image.

Row Cntr (row counter)	Tracks the number of rows in the grid and in which row the cursor holds focus. <i>Text</i> is the default setting with, for example, <i>1-6 of 6</i> appearing in the navigation bar if there are six rows in the grid. Note. The row count that appears is controlled by the occurs count that you set on the General tab in the Grid Properties dialog box (unless the user displays all). Using the previous example, if the occurs count is set to 5, then the row counter is <i>1-5 of 6</i> .
Next	Brings focus to the next row in the grid. <i>Image</i> is the default setting with the Show Next Row button appearing to the right of the row counter.
Bottom	Controls the attributes for how a user moves focus to the last row of the grid. <i>Text</i> is the default setting, using <i>Last</i> from the message catalog. You can also enter static text.
Find	Displays a link that enables the user to search any field in the grid or scroll area. The Find link appears to the right of the Previous/Next and View All links. You can select either text or an image to represent the find feature. The Find feature searches for matches in edit boxes, display-only fields, disabled fields, dynamic links, and text in long edit boxes. It does not find column headings, field labels, text values in icons, static links, and hidden fields, nor does it search outside the grid.
View All	Enables the user to view all rows of data at once. <i>Text</i> is the default setting using <i>View All</i> as the message catalog entry.
Download	Available for grids only. Displays a Download link in the header or footer bar that enables users to download the grid contents to a Microsoft Excel spreadsheet. The default for this setting in the header area is <i>Invisible</i> . For the footer area of a grid, the download link appears by default when you select the Display Navigation Bar check box in the Footer Area group box of the Label tab in the Grid Properties dialog box.
Customize	Available for grids only. Displays a Customize link in the header bar that enables the user to access all grid customization options. See Enabling Grid Personalization.

Setting Body Area Properties

Access the Grid Properties dialog box. Select the Label tab.

You can display Insert and Delete action buttons on each row of data. You can also show a grid border, grid lines, and row headings. The body of your grid might look something like the following at runtime:

	*Absence Type	*Begin Date	Duration (Days)		
1	<input type="text"/> 	<input type="text"/> 	<input type="text"/>		

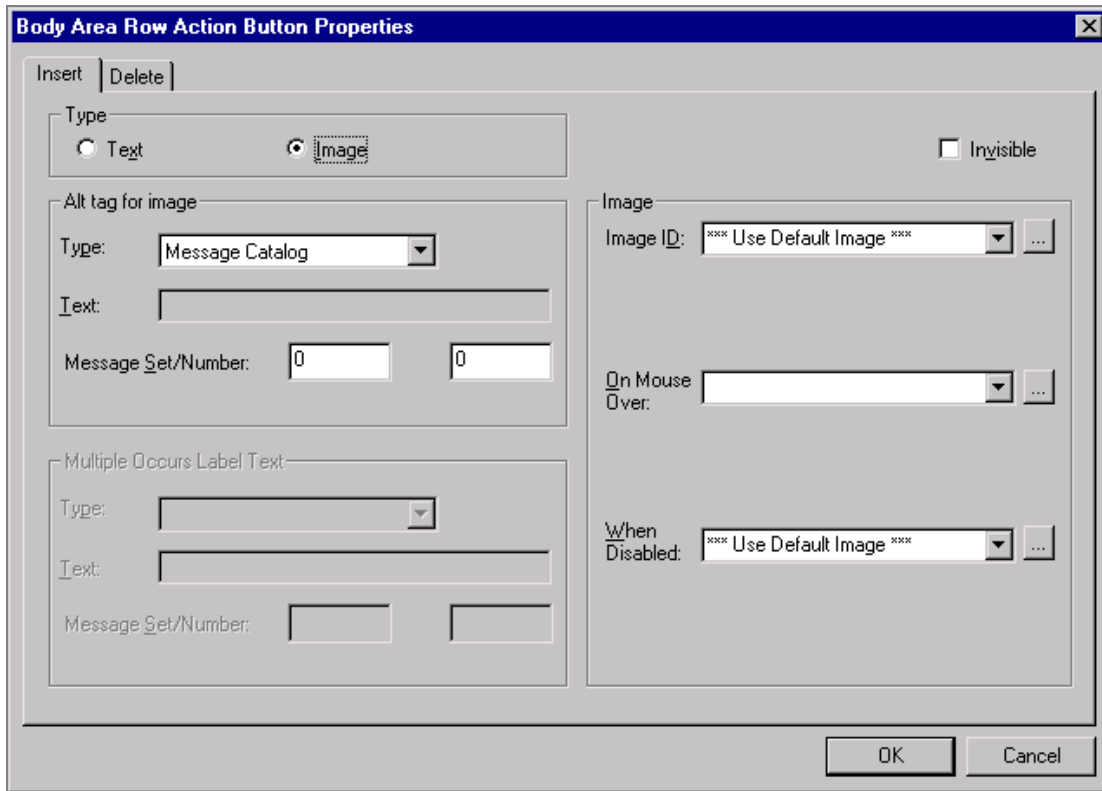
Body area of grid

In the Body Area group box on the Label tab in the Grid Properties dialog box, configure the row action buttons and set display properties for the body of your grid.

- Show Border** Select to display a standard border around your grid. The default is selected.
- Show Grid Lines** Select to show grid lines on the grid. The default is to *not* display grid lines (cleared).
- Show Row Headings** Select to number rows at runtime. If Show Row Headings is not selected, The default is selected.

Note. The row headings column will still appear at design-time even if Show Row Headings is selected. This allows you to select the grid if necessary.

Click the Properties button in the Body Area group box of the Grid Properties, Label tab to open the Body Area Row Action Button Properties dialog box. It contains two tabs: Insert and Delete. The default settings for these buttons is to display the Add and the Delete buttons. Alternatively, you can select static or message catalog text, or you can make these items invisible so that they do not appear.



Body Area Row Action Button Properties

Setting Column Heading Properties

Access the Grid Properties dialog box. Select the Label tab.

You can set the grid to display column headings, and you can select the style in which to display them. Select a predefined column heading style from the drop-down list box or use the default. Changing styles alters the foreground, background, and font in the column headings, making it different from the data rows. The default for **Show Column Headings** is selected.

Setting Footer Area Properties

Access the Grid Properties dialog box. Select the Label tab.

In the footer of your grid, you can display row action buttons and a navigation bar. To enable either of these features, select the appropriate check box, **Display Row Action Buttons** or **Display Navigation Bar**, and click the **Properties** button to configure the settings. Clicking the **Properties** button opens a separate dialog box: **Footer Row Action Button Properties** or **Footer Navigation Bar Properties** respectively.

The row action buttons are the same for the footer area as those described for the body area. The navigation bar property options are the same as those described for the header area. However, for the footer, the only item that is set to display by default in the navigation bar is the Download link. To disable this setting, select the Invisible check box on the Download tab.

of the **Footer Navigation Bar Properties** dialog box. All other navigation bar settings for the footer are invisible by default.

Setting Grid Use Properties

On the Use tab in the Grid Properties dialog box, you control data entry, input, row style, and display options, as well as whether your grid has a popup menu in the navigation bar at runtime. Both the grid and scroll area share many of the same attributes. Refer to the following tables for information about these shared settings.

National ID					View All	First	1 of 1	Last
Country	National ID Type	Description	National ID	Primary ID				
USA	PR	Social Security Number	434-55-6666	<input checked="" type="checkbox"/>	+	-		

National ID

Expanded and collapsed grid

Grid Properties – Use tab

Data Options

No Auto Select	Suppresses the system from retrieving data from the database automatically. Select to populate the grid or scroll area with data using the ScrollSelect PeopleCode functions. See PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Referenc, “PeopleCode Built-In Functions and Language Constructs H-R,” RowScrollSelectNew.
No Auto Update	Suppresses the system from automatically updating data based on the existing key list. Select when the grid or scroll contains “work” field controls that should affect only a page and not the underlying database.
No Row Insert	Suppresses the Add button in the body area so that the user cannot insert rows. If this option is selected, PeopleSoft Application Designer automatically selects and disables the Invisible check box on the Insert tab of the properties dialog box for the body area.
No Row Delete	Suppresses the Delete button in the body area so that the user cannot delete rows. If this option is selected, PeopleSoft Application Designer automatically selects and disables the Invisible check box on the Delete tab of the properties dialog box for the body area.
Allow Deferred Processing	Set by default, this option ensures that the grid or scroll area processes in deferred mode. This setting overrides any individual field-level settings in your level-based control.
Allow Multi-Row Insert	Enables the user to add multiple blank rows at once to a grid after a page is displayed. This feature is available only in Add and Update modes. When the user clicks the Add Multiple Blank Rows button, a JavaScript prompt appears so that the user can specify the number of rows to insert between 1 and 99.
Allow Column Sorting	Enables the end user to perform nonpersistent sorts in a grid at runtime by clicking the column headings. The default is selected to allow column sorting automatically.

Using the Multirow Insert Option

Each time a user adds a row to a grid or scroll area requires a transmission to the application server. With the multirow insert option, this transmission occurs only once when the user wants to add multiple blank rows. This can significantly enhance the user’s experience when doing data entry and also meets the developer’s goal of limiting page processing.

At design time in PeopleSoft Application Designer, the default for this feature is disabled. If the No Row Insert check box is selected, the Allow Multi-Row Insert check box is cleared and disabled. Where the multirow insert button appears, in the row or in the footer, depends on how you define your grid or scroll area properties on the Label tab.

You can set any occurs count for your grid. When the end user inserts n rows, the occurs count for the grid or scroll area is temporarily increased to $n + 1$ (if necessary), showing one row of context plus the new rows. If you select an unlimited occurs count for the grid, this temporary adjustment is not necessary.

Note. This feature should not be enabled for grids and scroll areas with effective-dated rows.

At runtime, the system administrator controls the display and the default of this setting, as well as whether the end user has the option of overriding the default. The system administrator can disable multirow insert by clearing the Enable Option for Multiple Row Insert on the Administer Personalizations page in Security. If the option is not disabled by the system administrator, the user can disable this setting on the Personalization page by selecting PeopleTools, Security, Use, My Profile. Here, the user can override the default of *Yes* by entering *No* in the Override Value edit box. When the user disables this feature, the multirow Add button is replaced with the standard Add button in all grids and scroll areas.

When the user saves the page, normal save processing runs, including save-edits on all rows. New, unchanged rows are *not* saved. *After* save processing, new, unchanged (and hence unsaved) rows are *deleted* from the buffer. The only exception is when there is only one row and it is new and unchanged. This row remains in the buffer, even though it has not been saved, because there must always be one row in any rowset.

For the end user pressing ALT+7 works the same with the multirow Add button as it does with the standard Add button.

Row Selection Indicator

These options enable the user to select one or more rows in the grid and scroll area. At runtime, indicators appear to the left of row numbers for grids and in the upper left corner for scroll areas. A transmission to the server triggers the selection of the row or rows that the user designates.

No Selection

This is the default selection. Prevents the user from selecting rows in PeopleSoft Internet Architecture (PIA).

Single Row

Enables the user to select a single row in a grid or scroll area. Inserts a radio button to the left of each row that the user can select.

Multiple Row

Enables the user to select multiple rows in a grid or scroll area. Inserts a check box to the left of each row that the user can select. Users can select as many rows as needed.

Note. PeopleCode can change the selected property, which affects which boxes are selected when the page is regenerated.

Pop-up Menu

Select a preset pop-up menu from the drop-down list box. The pop-up menu button appears in the left-hand corner of the navigation header at runtime. See “Creating Component Definitions,” Defining Pop-up Menus.

Row Styles

You can control the color, font, and other characteristics of a row, active tab, inactive tab, and navigation bar by specifying a style in the drop-down list box for each of the row style options.

Display Options**Invisible**

Select to make the grid or scroll area and its associated fields and records invisible. Invisible is used for work grids or scrolls where you want the underlying processing to be transparent to users. Typically, you associate invisible work grids and scrolls with PeopleCode Scroll functions that enable you to further control application processing.

Display Only

In some cases, you might design grids that enable users to view but not change information. Select this check box if you do not want the user to enter data into the fields in any of the rows.

Odd/Even Row Style

Selected by default, this attribute displays the grid with contrasting colors by row. The Odd and Even Row Style drop-down list box options appear instead of the single Row Style option in the Row Styles group box.

Show Column When Cells Hidden

Select if you want the columns to appear even if all of the cells in a column are hidden. Columns do not collapse. PeopleCode changes to remove empty rows. See *PeopleTools 8.4 PeopleBook: PeopleCode Reference*, Grid Classes.

Fixed Height (number of rows)

Select to set the grid to a height corresponding to the number of rows in the occurs count attribute. The grid remains fixed at that height even if the actual number of data rows varies from that number. If the fixed height property is not used, the size of the grid dynamically changes based on the occurs count and the number of data rows retrieved.

Enable View All Columns

Displays an expand all button to the right of a tabbed grid, enabling the user to view all columns of the grid by scrolling to the right using the browser’s horizontal scroll bar instead of selecting the grid tabs. The show grid tab button appears when columns are expanded to enable the user to view the tabs again.

Collapsible Data Area

Select to collapse the data area for your grid or scroll area into a header bar with a small image that the user must click to activate or expand it. This enables the **Default Initial View to Expanded State** check box. You can then select the label image to represent the collapsed and expanded states. See the example at the beginning of this section.

Using HTML Areas

This section provides an overview of HTML area controls and discusses how to:

- Insert an HTML area.
- Populate an HTML area.
- Change an HTML area label.

Understanding HTML Area Controls

You can insert an HTML area control on any PeopleSoft page. It can be inserted at any level on a page and can even be placed in a grid control. This control is rectangular shaped and can be resized easily.

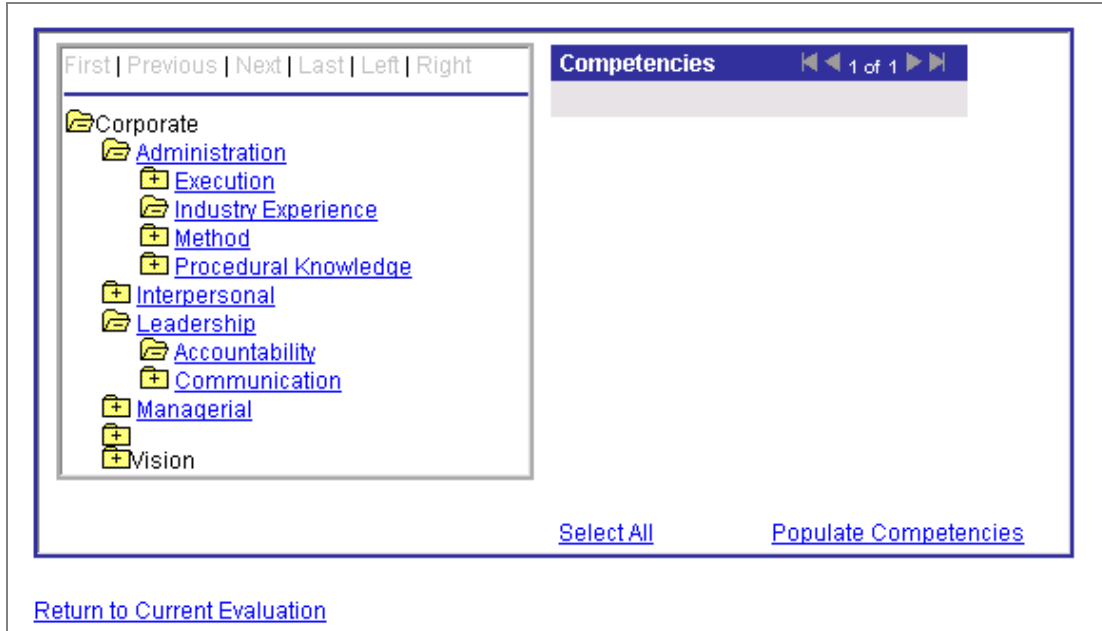
Populate the HTML area control in one of the following ways:

- Statically, in the page field property sheet.
- Dynamically, by associating the control with a record field or HTML definition.

If the control is linked to a record field, the value of the record field is displayed in the HTML area. Use PeopleCode to associate the HTML area control with a predefined HTML definition.

Generating Trees in HTML Areas

You can use the Generate Tree PeopleCode function with HTML areas. In the PIA, this is the only way to display data in a tree format on your page. The following example shows the tree that is created by the Generate Tree PeopleCode function next to a grid in a frame.



Tree in an HTML area

See also

PeopleTools 8.4 PeopleBook: PeopleCode Developer's Guide, "Using Methods and Built-In Functions," Using the GenerateTree Function

Inserting an HTML Area

To insert an HTML area on a page:

1. Select Insert, HTML Area.
2. Draw the HTML area on your page.
3. Move the HTML area control by dragging it with the mouse or by pressing the arrow keys.

Populating an HTML Area

You can populate an HTML area either statically, using the HTML Area Properties dialog box, or dynamically, by associating the control with a record field. Because the HTML that you write is included in the HTML that is dynamically generated by the system at runtime, consider the following:

- The HTML that you include can affect the layout of the page.

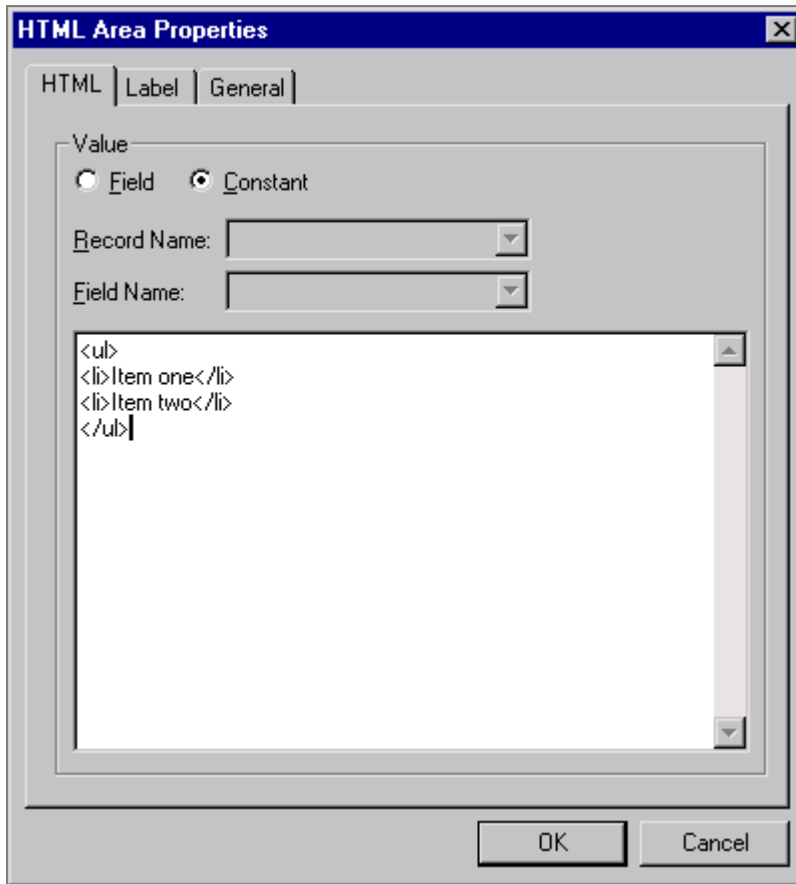
Being true to the design-time sizing of the HTML area is the best way to ensure that you do not affect the layout of the other page field controls. Adding an invisible frame around the HTML area control can help ensure that you don't affect other page fields.

- You can use only certain types of HTML tags. The following tags are *not* supported by the HTML area control:
 - <body>
 - <frame>
 - <frameset>
 - <form>
 - <head>
 - <html>
 - <meta>
 - <title>

This section discusses how to:

- Populate an HTML area statically.
- Populate an HTML area dynamically.

Populating an HTML Area Statically



HTML area with constant text

To populate an HTML area statically:

1. Access the HTML Area Properties dialog box.
2. On the HTML tab, select **Constant** as the value type.
3. In the long edit box, enter the HTML code that you want display in the HTML area.

Populating an HTML Area Dynamically

To populate an HTML area dynamically:

1. Access the HTML Area Properties dialog box.
2. On the HTML tab, select **Field** as the value type.
3. Specify the record and field to which you want to associate the HTML area control.

The value of the record field generates the HTML code that is included at runtime in the HTML area.

Note. When you associate an HTML area control with a field, make sure that the field is long enough to contain the data that you want to pass to it. For example, if you associate an HTML area control with a field that is only 10 characters long, only the first 10 characters of your text are displayed. PeopleSoft recommends using long character fields for record fields that are associated with an HTML area control.

Changing an HTML Area Label

To change an HTML area label:

1. Access the HTML Area Properties dialog box.
2. Select the Label tab.
3. Enter a brief text description of the HTML area.

This label does not display at runtime; however, it appears on the Order tab of the page definition.

Using Push Buttons and Links

This section provides an overview of push buttons and links and discusses how to:

- Insert a push button or link.
- Specify destination types.
- Specify a label for the push button or link.

Understanding Push Buttons and Links

PIA supports the following features for this control:

- Selecting link style.
- Selecting the following types of push buttons and links:
 - External link.
 - Internal link.
 - Prompt action.

- Scroll action.
- Toolbar action.
- Selecting the following image options:
 - On mouse over.
 - When disabled.

Inserting a Push Button or Link

To insert a push button or link:

1. Select Insert, Push Button/Hyperlink.
2. Click where you want the upper, left-hand corner of the control to begin.
A push button of *small image* size appears.
3. Double-click the push button to access the Push Button/Hyperlink Properties dialog box.
4. On the Type tab, select whether the control appears as a push button or link.
5. Select a destination type from the **Destination** drop-down list box.
6. Select the record and field names with which you want to associate the push button or link.
7. (Optional) Select **Enable When Page is Display Only** to make the push button or link available to users who have display-only access to this page.
Display-only access is set per user and user class in Security.
8. (Optional) Select Open in New Window.
If you want the page that is displayed by the URL to appear in a new window, as opposed to replacing the existing window, select this option.

Specifying Destination Types

Access the Push Button/Hyperlink Properties dialog box.

The screenshot shows the 'Push Button/Hyperlink Properties' dialog box with the 'Type' tab selected. The 'Type' section has 'Hyperlink' selected. The 'External Link' section has 'Static' selected. The 'Internal Link' section has 'Use Current' for Portal, 'LOCAL' for Node, and empty fields for Menu, Component, Market, Page, and Action. The 'Alignment' section has 'Left' selected. The 'Actions' section has empty fields for Action Type and Related Control. The 'Process' section has empty fields for Type and Name. The 'Secondary Page' section has an empty field for Page. The 'OK' and 'Cancel' buttons are at the bottom right.

Push Button/Hyperlink Properties dialog box: Type tab

Type

Each destination type that you select enables a different region on the Type tab, enabling you to further define your push button or link. Select one of the following values from the **Destination** drop-down list box:

External Link

Accesses a Uniform Resource Locator (URL). You can select a value from the URL table or use the value of a record field to define the destination.

This applies an external link to your page in the form of a push button or link that accesses a new page, taking the user to the external website that you designate. To return to the primary page, the user closes the new page. When setting the record and field name consider the following:

- If you specify a dynamic external link, you must enter a record name and field name. The system uses the value of the record and field specified as the value of the link.
- Whether the external link is static or dynamic, you can use the specified record and field names to control the page field in PeopleCode when you want to, for example, hide the link dynamically with PeopleCode.

Selecting this option enables the External Link group box. You can choose to have the URL encoded or not by selecting the Encoded by Application check box.

Internal Link

Accesses a PeopleSoft page. Parameters include the menu path to the page and a check box to specify whether data from the current page should be used in the search dialog box.

This adds an internal link in the form of a push button or link that you can use to access another component or page from within the system or to another PeopleSoft database or node. You can even specify the type of action mode to open in for that page. To control the push button or link in PeopleCode, enter the record and names.

Selecting this option enables the Internal Link group box.

Page Anchor

Enables the user to jump to the anchor tag that you designate for a page field on the General tab of the properties dialog box for that field.

This enables the user to jump from one destination (the link that you assign as the page anchor) to another (the field that you enable as the page anchor) in your page. When you select this option, the page fields that you previously set as page anchors on the General tab of the properties dialog box appear in the **Related Control** drop-down list box in the Actions group box. You can place as many page anchor buttons or links on the page as necessary.

PeopleCode Command

Associates with a field in a record, so when the user clicks the push button or link, the system runs any FieldChange PeopleCode that is associated with that page control. Enter the record and field names. The field should have PeopleCode in the FieldChange event.

You can designate a PeopleCode command, such as FileAttach. When users click the button on the page, they see a replacement page that provides the option to download a file from the system, such as a resume. See FileAttach in the PeopleCode Reference.

Process

Runs processes that you set up previously with PeopleSoft Process Scheduler. Associate process push buttons with a specific process definition; the process is run each time that a user clicks the button. See *PeopleTools 8.4 PeopleBook: PeopleSoft Process Scheduler*, “Defining PeopleSoft Process Scheduler Support Information.”

Selecting this value enables the Process group box, where you can specify the type and name of the process that you want to run.

Prompt Action

Displays a prompt dialog box for a specific control field. Adds a custom prompt button or link next to a field on the page in place of the standard prompt that is associated with that field. For example, you might want the prompt to read *Find an Airport Code*.

Selecting this value enables the Actions group box. In the Related Control drop-down list box, select the field that you want to associate with the prompt. The Action Type, *Prompt*, is set automatically. Set the text label properties for the link on the Label tab.

Scroll Action

Represents certain actions that a user can perform on a grid, scroll area, and scroll bar, such as bottom, top, insert row, and so on.

Use to provide action buttons for the grid, scroll area, or scroll bar in areas outside of that control, such as at the bottom of the page or outside the borders of the control.

Selecting this value enables the Actions group box, where you can specify the action type and related control. The **Action Type** field enables you to select the action to be performed in the specific level. The level is specified in the Related Control field. Specify one of the following scroll actions: Bottom, Next, Previous, Row Delete, Row Insert, and Top.

For example, if you want a user to be able to move through a page at runtime, set the action type to *Next* or *Previous* and specify which scroll area you want those actions to control.

Secondary Page

Access an existing secondary page. After you have designed a secondary page, you must associate it with a control on the primary page. The secondary page push button or link is the starting point for the user for that secondary page. Selecting this option enables the Secondary Page group box, where you can select the name of the secondary page that you want to associate with the push button or link.

Toolbar Action

Represents the various toolbar actions to the user. A user can perform several actions on a page, such as save, display the next page in a group, correction mode, and so on. These normally reside on the toolbar at the bottom of each PIA page. Use this type of push button or link for placing save, next in list, or other toolbar functions on the page.

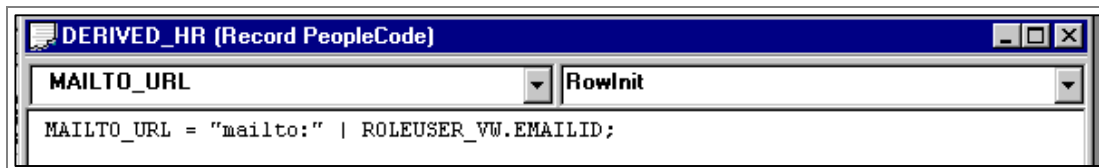
Selecting this value enables the Actions group box, where you can specify the action type: *Add*, *Correction*, *Next in List*, *Next in Worklist*, *Next Page*, *Previous in List*, *Previous in Worklist*, *Previous Page*, *Refresh*, *Return to List*, *Save*, *Update/Display*, *Update/Display All*, or *View Worklist*.

Attachment

Enables the user to attach a file to the database. Selecting this destination type enables the Actions group box of the properties dialog box, enabling you to set the action type for each button to *Attach*, *Detach*, or *View*.

External Link

In this group box, specify **Dynamic** or **Static**, and enter the URL ID, if necessary. Select a value from the URL Maintenance table of a record field to define the destination. For example, a derived record field might be used to set the destination value dynamically at runtime. The value of the derived record field is placed in the HREF tag of the HTML. See *PeopleTools 8.4 PeopleBook: PeopleSoft Data Management*, "PeopleTools Utilities," "URL Maintenance.



URL value in a derived record field

Internal Link**Portal**

Select the portal to which you want the internal link to point. *Use Current* is the default. Valid values include all of the values in the PORTAL_NAME column of the PSPRDMDEFN table.

Node

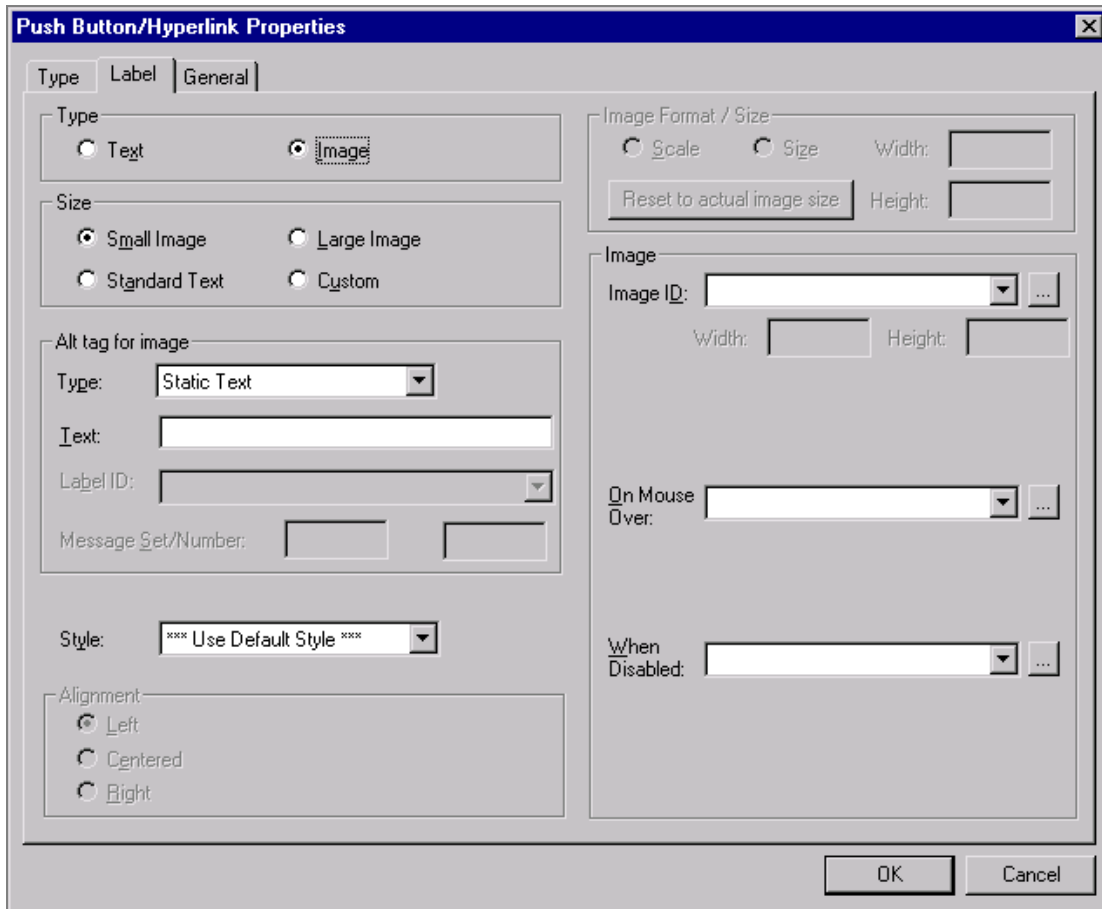
Select the PeopleSoft database to which you want the internal link to point. *Local* is the default. Valid values include all of the values in the MSGNODENAME column of the PSMMSGNODEDEFN table. If you select a node other than *Local*, the **Use data from current page in search** check box is cleared.

Menu	Select the menu name in which the destination page is contained.
Component	Select the component in which the destination page is contained. These values depend on the menu that you select.
Market	Select the market of the destination component. See “Creating Component Definitions,” Specifying Market-Specific Components.
Page	Select the page on which you want the user to land. These values depend on the component that you select.
Action	Select the action mode in which you want the page to begin.
Use data from current page in search	<p>Select if you want data from the current page to be used in the search dialog box. This option ensures that the new page inherits the proper keys from the context of the current page. The process is almost identical to the Transfer() PeopleCode function, and it performs a similar function.</p> <p>If this check box is selected, the system discards the existing keylist. A new keylist is built from the current component buffer using the field's context (when there is a choice between rows in a scroll area). This keylist is then used to start the new component.</p> <p>If this option is cleared, the system uses the existing keylist in the normal manner.</p>

Specifying a Label for the Push Button or Link

This section discusses how to:

- Specify a text label.
- Specify an image label.



Push Button/Hyperlink Properties dialog box: Label tab

Specifying a Text Label for the Push Button or Link

To specify a text label for a push button or link:

1. Access the Push Button/Hyperlink Properties dialog box.
2. Select the Label tab.
3. Select Text in the Type group box.
4. Specify the type of label text.

Depending on the destination type that you selected, the values in the Type drop-down list box differ.

Message Catalog

Select to reference a message that exists in the message catalog. Enter the message set and number. Message catalog items are all translatable.

RFT Short

Select to label the push button with the short name for the field from a record definition. RFT is an abbreviation of

Record Field Table, which stores attributes for fields in a record definition. Use this option only if you specified a record definition and field name on the Type tab in the Push Button/Hyperlink Properties dialog box. The RFT short name appears on the push button when you click OK and return to the page. Select the label ID if you do not want the default label.

RFT Long

Select to label the push button with the long name for the field from a record definition. Use this option only if you specified a record definition and field name on Type tab in the Push Button/Hyperlink Properties dialog box. The RFT long name appears on the push button when you click OK and return to the page. Select the label ID if you do not want the default label.

Static Text

Select to enter the text to appear on the label.

URL Description

Select if you selected *External Link* as the destination on the Type tab. Select the style from the drop-down list box. See “Creating Style Sheet Definitions.”

5. Select the alignment.

This option is available only if you select link for the push button type. Push button text is automatically centered for controls that appear as push buttons.

4. Select the size.

There are three standard push button sizes, depending on what kind of text or image you want to display on the button face.

Small image

Creates toolbar-sized buttons that handle small 16×16 pixel images.

Large image

Handles 32×32 pixel images.

Standard Text

Matches the Microsoft standard dimensions for text push buttons.

Custom

Select if none of these sizes meets your needs. When you click **OK**, the push button displays selection handles that you can use to resize it.

Note. Some browsers do not support custom push buttons. See Customer Connection for more specific and current browser information that is related to this feature.

Specifying an Image Label for a Push Button or Link

To specify an image label for your push button or link:

1. Access the Push Button/Hyperlink Properties dialog box.

2. Select the Label tab.
3. Select **Image** for the type.
4. Specify the size.

If you select **Custom**, the **Image/Format Size** group box becomes available.

Size	Select to set the image size by altering the width and height in pixels.
Scale	Select to adjust the width and height as percentages.

5. Specify the image ID.

Select one of the predefined image definitions or click the **Browse** button to view push button images. See Using Images.

6. (Optional) Select the image to appear on a mouse over.

For example, you might want to highlight an image so that users can easily see which option they're selecting.

7. (Optional) Select an image to appear when the button is disabled.

Using Scroll Areas and Scroll Bars

This section provides an overview of scroll areas and bars and discusses how to:

- Set scroll area general attributes.
- Manipulate fields after the occurs count is set.
- Set scroll area label properties.
- Set scroll area use properties.
- Specify scroll bar labels.
- Specify scroll bar use.
- Control scrollable data.
- Convert scroll bars to grids.

Understanding Scroll Areas and Scroll Bars

Scroll areas, rather than scroll bars, are the preferred control for representing multiple rows of data from a table, because they are easier to use during design time and offer a wider array of features. The final product at runtime appears more contained because the default setting places a border around the data.

- The navigation tools that you select for a scroll area are automatically positioned on the navigation bar or footer bar.

With scroll bars, you must place these buttons and links on the page manually.

- Scroll areas provide the option of showing or hiding a border around the data.
- Scroll areas provide the option of a View All button and a Find feature.
- Scroll areas enable you to determine the text or image that appears for the action items in the navigation bars.
- Scroll areas provide a row separator when you select multiple occurrences of data.

Scrolls, Record Relationships, and Page Processing

A page must reflect the underlying table structures so that the system knows where to store data in the database. When you have more than one underlying record definition on a page, the role of scroll areas and scroll bars in page processing is very important. Scroll controls define parent and child record definition relationships on a page.

You assign an occurs level to each scroll control on the page to indicate the relationship between the record definitions and the controls and to determine how the data is processed. The primary record on a page at level 0 has no scroll area or occurs level associated with it. If the page contains a record that is subordinate to the primary table, it has a scroll area with an occurs level of 1. A table that is subordinate to the level 2 record has a scroll area with an occurs level of 2. PeopleTools does not support nesting beyond three levels.

PeopleSoft Application Designer automatically nests the scroll area after you set the occurs levels sequentially. Each field that you place on the page after each scroll area is automatically placed inside the scroll area preceding it until the next level-based control is placed on the page.

See Also

Level-Based Controls

Scroll Areas

A scroll area looks like a group box with various controls. The title bar in a scroll area, however, can also serve as a navigation bar. The following example shows mainly edit boxes with prompts and related display fields that are spaced vertically throughout. There is also a horizontal rule dividing the top and bottom sections of the scroll area that identifies the data below it as current. The plus and minus buttons enable the user to add and delete rows of data.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Smith, Mary Employee ID: TC015 Empl Rcd#: 0

Work Location View All First 1 of 2 Last

Employee Status: Active Date Created: 07/27/2000

*Effective Date: 07/27/2000 Effective Sequence: 0 *Job Indicator: Primary Job

Action / Reason: Hire

Position Number: Position Entry Date: Current

Position Data Override Position Management Record

*Regulatory Region: USA United States

*Company: RCB ST - Test Company 1

*Business Unit: BNGEN Benefit Administration

*Department: T001 ST - HR Department Department Entry Date: 02/01/1990

Location: 001 Corp HQ

Supervisor ID:

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Next in List Previous in List Previous tab Next tab Update/Display Include History Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Scroll area

The default scroll area contains a navigation bar with navigation buttons to move between rows and a View All link. The scroll area contains push buttons that enable the user to insert or delete rows. Without setting any specific properties, the default scroll area looks like the following example after fields have been added.

Scroll Area 1 of 1 View All

+ -

*Absence Type: [] []

*Begin Date: [] []

Comment: [] []

Default scroll area

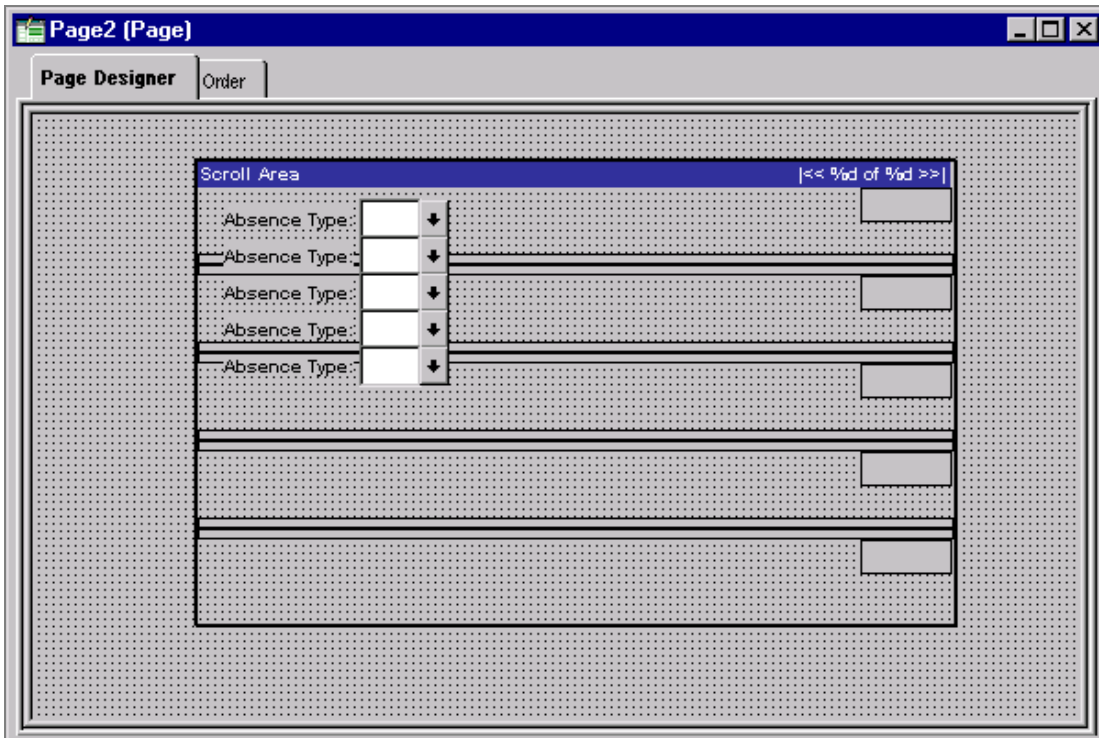
Setting Scroll Area General Attributes

Assign the general attributes of the scroll area. These settings are the same for the scroll area as they are for the grid control. See Setting Grid General Properties.

Manipulating Fields After the Occurs Count is Set

If you set the occurs count to a number that is greater than one, you must reposition the fields in the scroll area. If you changed the occurs count after placing fields in the scroll area, they might appear one on top of the other, very close together. Unless you indicate otherwise (in the body area of the Label tab), row separator lines might appear to distinguish one row from the next.

In the following example, the occurs count was set to 5 after placing one field, Absence Type, in the scroll area. You must reposition the fields so that they are evenly spaced in the row separator lines.



Multiple occurs count in a scroll area

Before you do so, it is helpful to know a few rules about how you can move these fields in relationship to one another. For example, you do not need to move each individual field to its proper destination. For this example, we call the first field in the column of fields, or the original field that you placed in the scroll area, the *head* field. The fields following the head field are other occurrences.

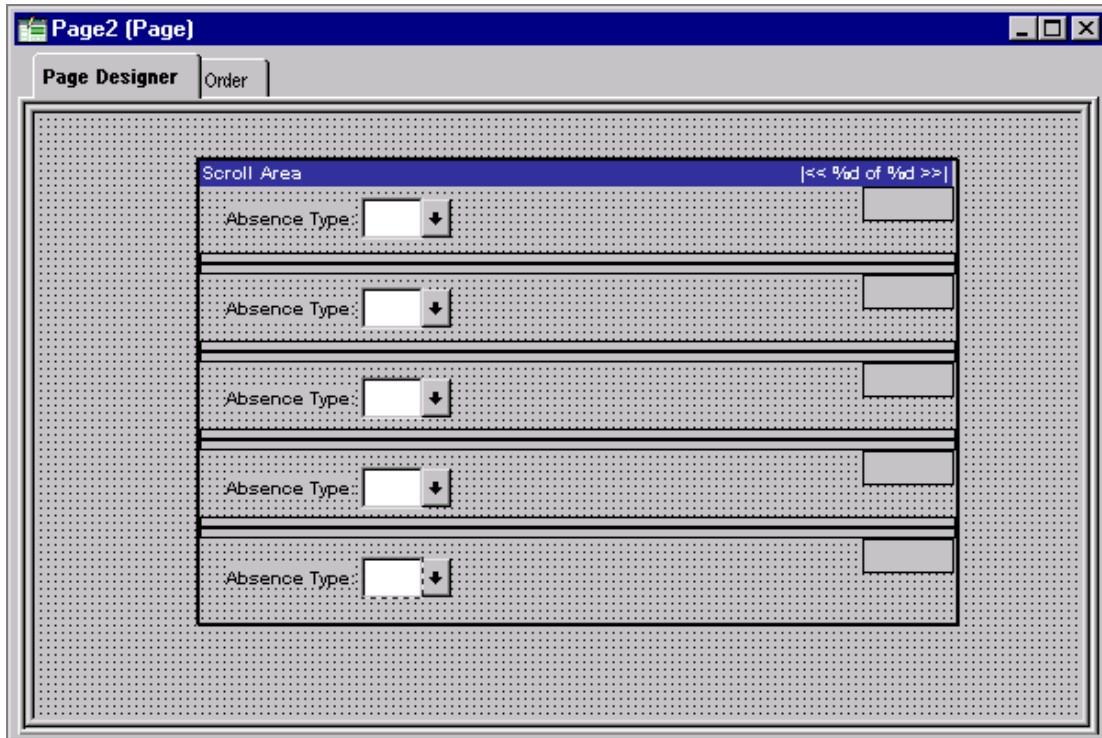
- The head field controls the horizontal movement of all other occurrences that are below it.
- You cannot move the other occurrences horizontally.
- To evenly space the occurrences vertically, drag the last occurrence in the column to the appropriate position between the bottom edge of the scroll area and the last row separator.

All occurrences above it reposition themselves equidistant from the others.

- You cannot move the add and delete push buttons (represented by the gray boxes on the right side of the scroll area) horizontally on the page.

You can move them only vertically in the same manner as the fields.

After you move the lowest field, the scroll area should appear as follows:



Fields moved to accommodate multiple occurs count

Setting Scroll Area Label Properties

There are three places on a scroll area to which you can apply links or push buttons to help the user navigate through multiple rows of data in the scroll area. These options and the associated settings are the same as those for grids. This section references the setting definitions for grid controls that are described earlier in this chapter.

Header Area Properties

You can display the title of the scroll area and a navigation bar where users can access links for viewing the previous, next, top or bottom row. The Find feature appears by default and you can select a View All feature in the navigation bar of the scroll area.

Body Area Properties

You can:

- Display Insert and Delete action buttons on each row of data.
- Control the display of the scroll area border.
- Add a row separator when more than one row is showing at a time.
- Adjust the layout of the scroll area when hidden fields are present.

The settings for the body area of a scroll area are identical to those for a grid, with one exception. For a scroll area, you can control the background color, border, and other style attributes.

Specifying Footer Area Properties

If you display a footer row in your the area, you can add:

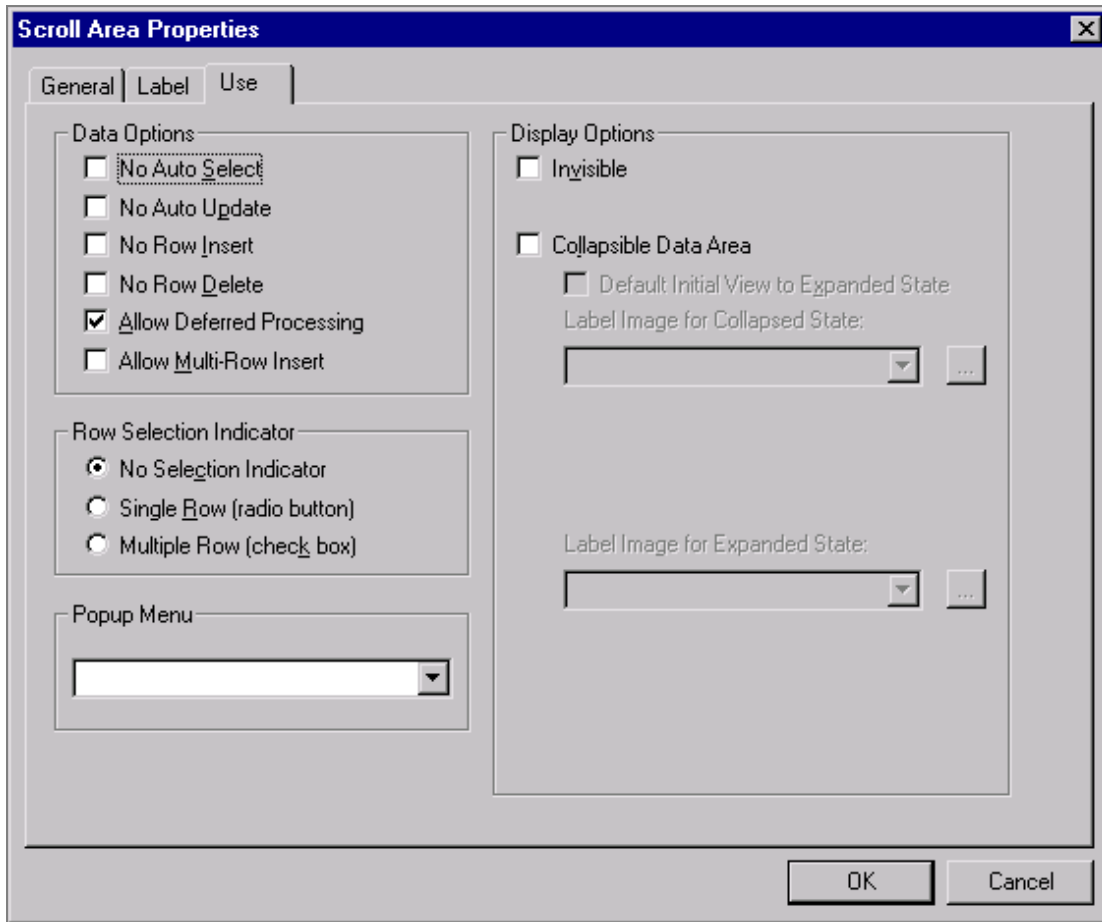
- Insert and Delete row action buttons.
- A navigation bar, where users can access controls for viewing the previous, next, top or bottom row.
- A Find and View All option.

See Also

Setting Grid Label Properties

Setting Scroll Area Use Properties

You can select several options to determine how one uses the scroll area. As with the label properties, the on the Use tab of the Scroll Area Properties dialog box are the same as those on the Use tab of the Grid Properties dialog box, except that the scroll area contains fewer attributes than a grid.

See Also

Scroll Area Properties – Use tab

See Also

Setting Grid Use Properties.

Setting Scroll Bar Label Properties

To help identify scroll bars on the page definition, document the purpose of each as an informational field label.

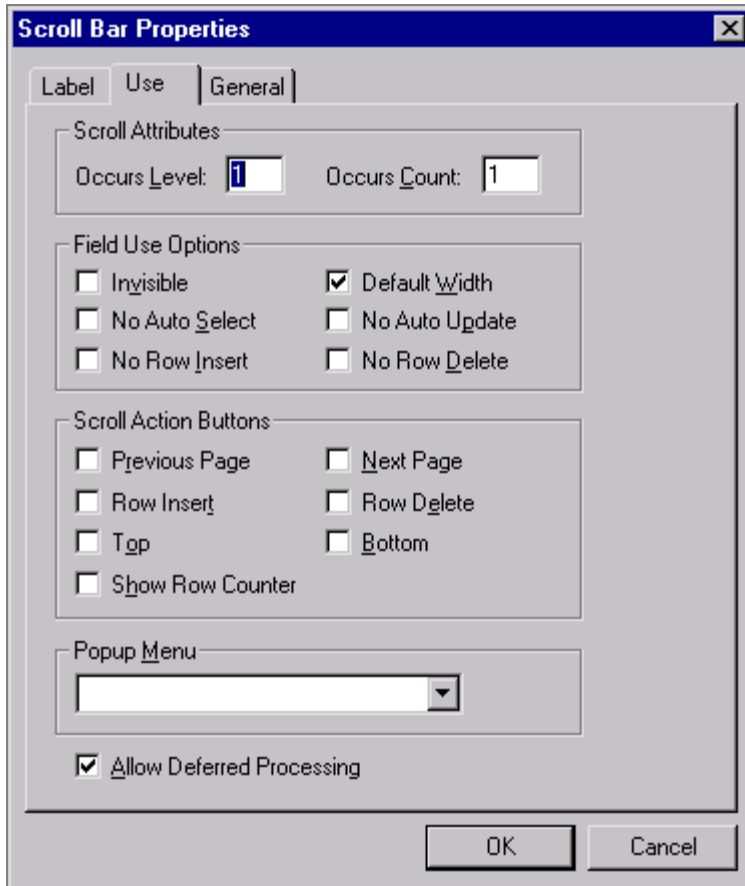
To specify a scroll bar label:

1. Access the Scroll Bar Properties dialog box.
2. Select the Label tab.
3. Enter the text label in the **Text** field.

This label is for your information only—it doesn't appear on the page. This label is useful for reordering page controls in the order list if you include a meaningful identifier in the label, such as the primary record definition for the scroll bar. For example, you might want to label it *ABSENCE_HIST_SCROLL*.

Setting Scroll Bar Use Properties

You set the scroll action buttons on the Use tab of the Scroll Bar Properties, as shown below:



Specifying scroll bar Use

Access the Scroll Bar Properties dialog box. Select the Use tab.

Scroll Attributes

Occurs Level

Having an occurs level for the scroll bar enables you to designate the hierarchical parent and child relationship. Entering 1 specifies that the scroll bar is at the first level. Entering 2 specifies that a scroll is at the second level and is a child of, or nested in, the first level of data, and so on up to 3. A scroll can be nested in another scroll or scroll

area, but it cannot be nested in a grid. See “Creating Page Definitions,” Level-Based Controls .

Occurs Count

Enter the number of rows to appear at one time in the grid at runtime. See “Creating Page Definitions,” Level-Based Controls .

Note. Always reorder your controls, if necessary, before you enter an occurs count.

Field Use Options

Invisible

Select to make the scroll bar invisible.

Default Width

This does not apply because the scroll bar does not appear on the PIA page.

No Auto Select

Select to prevent the system from retrieving data automatically from the database. Select to populate the scroll bar with data using the ScrollSelect PeopleCode functions.

No Auto Update

Select to prevent the system from updating data automatically based on the existing key list. Select when the scroll bar contains work field controls that should affect only a page and not the underlying database.

No Row Insert

Select to prevent the row insert function so that the user cannot insert new rows.

No Row Delete

Select to prevent the delete function so that the user cannot delete rows.

Scroll Action Buttons

When you select a scroll action button, it appears on the page next to the scroll bar. You must move them to the appropriate location on the page definition.

Previous Page

Select to display a link that enables the user to move to the previous row or set of rows in the scroll buffer.

Row Insert

Select to display a button that enables the user to add a row.

Top

Select to display a link that enables the user to go to the first row of the scroll.

Show Row Counter

Select to display a counter to show users what rows they are viewing and the total number of rows in the scroll bar, for example: <1 of 3>.

Next Page

Select to display a link that enables the user to move to the next row or set of rows in the scroll buffer.

Row Delete

Select to display a button that enables the user to delete a row.

Bottom Select to display a link that enables the user to go to the last row of the scroll bar.

Controlling Scrollable Data

You can control scrollable data using the PeopleCode Data Buffer Access Classes.

The rowset class is the equivalent of a scroll area or bar at runtime. In addition to rowset, there are the row, record, and field classes. Read multiple rows of data from the database in one of the following ways:

- SQLExec function to read a single row of data.
- SelectByKey record class to select into a record.
- Select or SelectNew method to select into a rowset.
- SQL definition to select into a record or rowset.

PeopleSoft recommends that you use the data buffer access classes to manage data in scroll areas and bars. See *PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developers Guide*, Data Buffer Access.

Converting Scroll Bars to Grids

You can convert a single-level scroll bar to a grid control. PeopleSoft Application Designer provides a utility to automate this task. The Convert Scroll to Grid function does the following:

- Designates the size and position of the grid as set to the area covered by the left-most label to the scroll bar.
- Issues warnings before deleting controls that are not supported by the grid.
- Converts radio buttons to drop-down list boxes.
- Sets label alignment of check boxes to center.

The conversion utility provides warnings for scroll bars that can't be converted to grids due to grid control limitations. The conversion utility validates to the following limitations:

- No more than one grid can exist on a page.
- The scroll bar to be converted must not have any nested scroll areas or bars under it.
- The grid control must be the last control on the page.
- Radio buttons are not supported in grids and must be replaced with drop-down list boxes.

To convert a scroll to a grid:

1. Select the scroll bar.
2. Right-click and select *Convert Scroll To Grid* from the pop-up menu.

This menu option is available only for scroll bars that can be converted. This utility searches for all page fields that are defined in the field order after the selected scroll bar control, up until the next scroll bar or scroll area control. It does the following for each field:

- Confirms that the scroll control type can be displayed in a grid control.
- Creates a grid column of the appropriate type.
- Populates in the attributes.

If any of the page fields cannot be displayed in a grid or if other problems are found, the utility displays an error message explaining why the scroll bar cannot be converted to a grid. If no problems are found, the Grid Properties dialog box appears, listing all of the fields that will be converted to columns. You can change any grid or field properties at this time.

3. Click **OK** to display the new grid.

Using Secondary Pages

This section provides an overview of secondary pages and discusses how to:

- Define secondary pages.
- Insert a secondary page control.

Understanding Secondary Pages

While a secondary page is just another page to the user at runtime, they look and behave differently than the primary pages. For example:

- You can view a secondary page from its primary page only.
- A secondary page should have OK and Cancel buttons so that the user can dismiss the page (accepting or canceling input) and return to the primary page.

To offer the user alternative buttons to dismiss the page, disable the default OK and Cancel buttons in the Page Properties dialog box.

Secondary Page or a Push Button?

There are two ways to associate a secondary page with a primary page:

- Insert a push button or link and associate it with your secondary page.

This automatically displays the secondary page when the user presses the button or clicks the link and is the preferred method. Use this method when:

- No procedural PeopleCode logic is necessary before the secondary page is displayed (PeopleCode can be used on the secondary page just like any other page).
 - You want to control the formatting of the information (therefore you want to use a page, and not use the Prompt function).
 - The secondary page is used more than once.
- Insert a secondary page control.

This control looks like a command push button, but it is invisible at runtime. When you use a secondary page control, you must also insert a command push button on the page and call the DoModal PeopleCode function from the FieldChange event for the push button to display the secondary page.

Example

In the following example, the Address page contains an Email link at the bottom of the scroll area. This link opens the Email Addresses page, enabling the user to enter email address information.

The screenshot displays a PeopleSoft application window with a tabbed interface. The active tab is 'Address', with other tabs being 'Name', 'Personal Profile', and 'Eligibility/Identity'. The user's name is 'Sartre, Paul' and the employee ID is 'GXEERT004'. The 'Personal Data' section shows an 'Effective Date' of 12/15/1999. The 'Home Address' section contains several input fields: 'Country' (set to FRA France), 'Address 1', 'Address 2', 'Address 3', 'Post Office', 'City', 'Postal', and 'Department'. Below the address fields are links for 'Mailing Address', 'Email', and 'Phone'. At the bottom of the form, there are several utility buttons: 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct History'. A breadcrumb trail at the bottom reads 'Name | Address | Personal Profile | Eligibility/Identity'.

Primary page

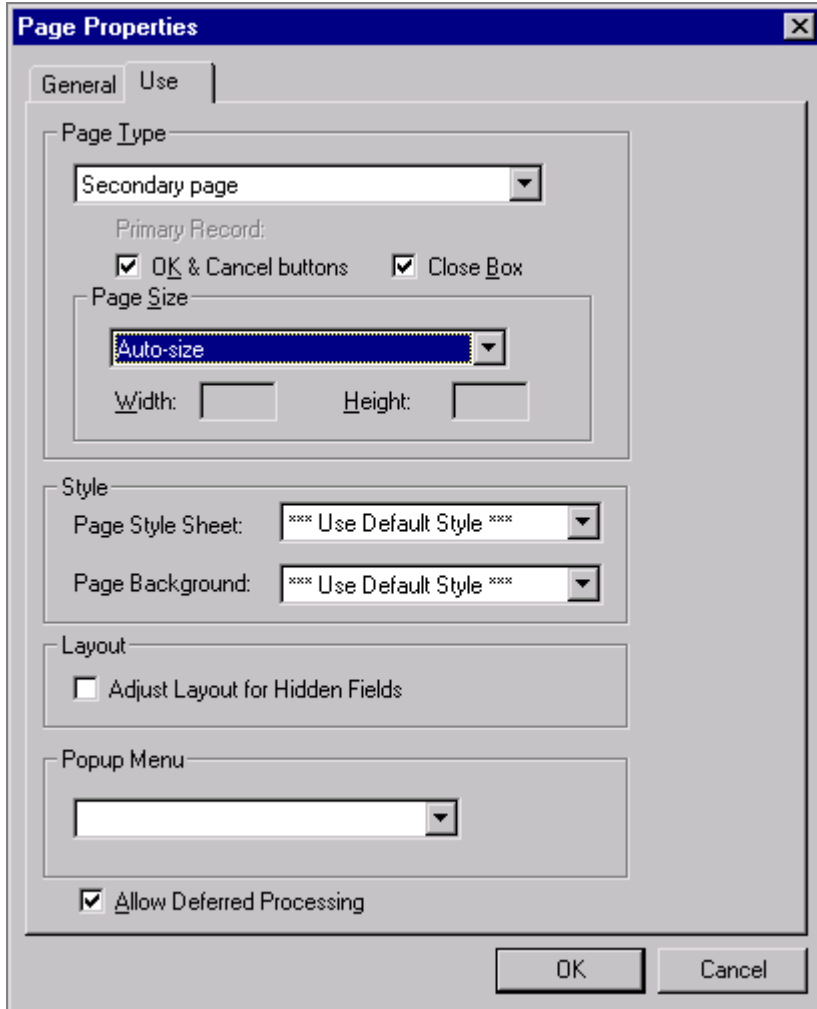
The screenshot shows a dialog box titled "Email Addresses". At the top, it displays the name "Sartre, Paul", the job "Employee", and the ID "GXEERT004". Below this is a section titled "Email" which contains a grid with one row. The grid has two columns: "Email Type" (a dropdown menu) and "Email Address" (a text field). To the right of the grid are "+" and "-" buttons. At the bottom of the dialog are "OK" and "Cancel" buttons.

Secondary page

After the user enters the email information in the Email grid, the user can return to the Address page by clicking **OK**.

Defining Secondary Pages

Determine which data in the primary component is appropriate for a secondary page. Typically, this is supplemental information or information that is accessed from more than one main page.



Page Properties dialog box

To create a secondary page:

1. Select File, New and select Page from the New Definition dialog box.
2. Open the Page Properties dialog box.
3. Click the Use tab.
4. Select *Secondary Page* from the drop-down list box in the Page Type group box.
5. Select the page size:

Auto-Size

Select to size the page automatically to fit the fields that are defined on it.

Custom Size

Select to size the secondary page by dragging the edge or by enter in the width and height in pixels.

6. Select the page style sheet to associate with the secondary page.

To override the default style sheet that is associated with the application, select a different style sheet from the drop-down list box. The style sheet that you select is available only for the controls on the secondary page.

7. Select the page background.

You can control the background of the page and any controls that don't have a style sheet associated with them by specifying a style in the page style. You can use this option only if you also specify a style sheet for the secondary page.

8. (Optional) Select **Adjust Layout for Hidden Fields**.

9. (Optional) Deselect **Allow Deferred Processing** if you want processing to occur each time the user presses TAB to move through a field.

10. Click **OK** and save your secondary page.

If you selected **Auto-Size**, the page is sized automatically to fit the fields that defined on it when you save.

Inserting a Secondary Page Control

After you define the secondary page, you can place a secondary page control on your primary page and associate it with the secondary page you just created.

To insert a secondary page control on a primary page:
--

1. Select Insert, Secondary Page.
2. Select the primary page on which you want to display the secondary page control.

The secondary page control appears like a small push button with the secondary page icon on it. This control is invisible at runtime.
3. Double-click the control to access the Secondary Page Properties dialog box: Secondary Page tab.
4. Select the name of the secondary page to associate with the secondary page control on the active page.

Only secondary pages can be associated with secondary page controls. You cannot associate a standard page or subpage with the secondary page control.

5. Select the Label tab.

This label is for informational purposes only. It appears in the Order tab of the page definition and in the page description printout.

6. Position the secondary page control at the proper scroll level on the Order tab.

You can also insert a secondary page using a regular push button and associating it with a secondary page. See [Specifying Destination Types](#).

CHAPTER 10

Creating Component Definitions

This chapter provides an overview of component definitions and discusses how to:

- Define components.
- Specify market-specific components.
- Determine where a component is used.
- Set component properties.
- Override the search record.
- Access the message catalog.
- Enable Expert Entry feature in Security component.

Understanding Component Definitions

A component represents a complete business transaction. It comprises either a single page or a set of pages that are meant to be processed as one. After you create pages, add them to one or more components to access them through menus or in business processes.

What Component Definitions Manage

Component definitions manage:

- Grouping of pages and their associated tab labels.
- Search records that are used to retrieve data for the page.
- Access keys for folder tab navigation.
- Links at the bottom of a page.
- The toolbar at the bottom of a page.

The screenshot shows a web-based form with four tabs at the top: 'Name', 'Address', 'Personal Profile', and 'Eligibility/Identity'. The 'Personal Profile' tab is selected. Below the tabs, the form displays the following information:

- ID:** KU0043 **Employee**
- Personal Data:** View All First 1 of 1 Last
- Effective Date:** 06/27/1986
- Name:**
 - Format Using:** USA United States
 - Name:** Sims, Evelyn
 - Prefix:** Mrs
 - First Name:** Evelyn **Middle:**
 - Last Name:** Sims **Suffix:**
- Benefits Information:**
 - Marital Status:** Married **As of Hire**
 - Canada**
 - USA**

At the bottom of the form, there are several navigation buttons: Save, Return to Search, Next in List, Previous in List, Previous tab, Next tab, Update/Display, Include History, and Correct History. Below the buttons, there are links for Name, Address, Personal Profile, and Eligibility/Identity.

Component including four pages (tabs)

If a component contains more than one page, control which page appears first by setting the display order in PeopleSoft Application Designer. Navigate between the pages of a component by selecting:

- Folder tabs at the top of the page.
- Links at the bottom of the page.
- Specified access or hot keys.

Component Buffer

When you open any page in a component, the system retrieves all of the data records for the entire component and stores them in one set of record buffers, organized by scroll level and then by page level. This *component buffer* consists of rows of buffer fields that hold data for the various records that are associated with page controls, including the primary records, related display records, derived work records, and translate table records.

You can change the records in memory either through the user actions on the page or through PeopleCode that is associated with different page controls. At runtime, you open and save the entire component, not just individual pages. When you save *any* page in the component, you automatically save the whole component.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, Referencing Data in the Component Buffer

Defining Components

When you design pages of a component, the pages should share the same basic key structure because they share the same search record.

Depending on the complexity of the component, the system might take longer to display the first page than to display other pages in the component (or even redisplay the first page) because it is loading records for the entire component.

This section provides an overview of the component definition window and discusses how to:

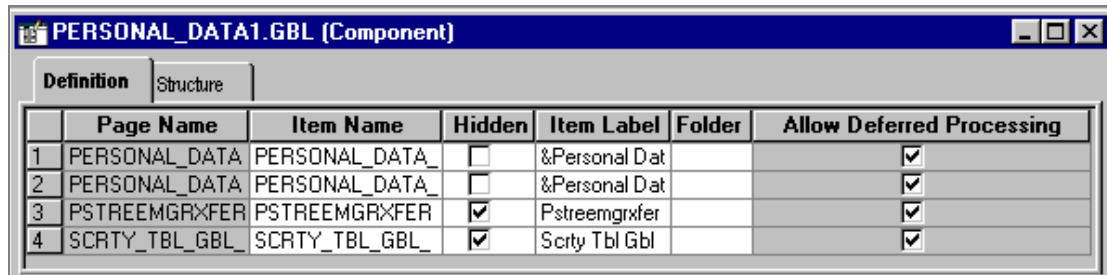
- Create a new component definition.
- Open an existing component definition.
- Add pages to components.
- Reorder pages in a component.
- Set page attributes.

Understanding the Component Definition Window

The component definition window has two tabs, Definition and Structure, which provide different views of a component.

Definition Tab

The default component definition view displays the page items and corresponding attributes of a component definition.

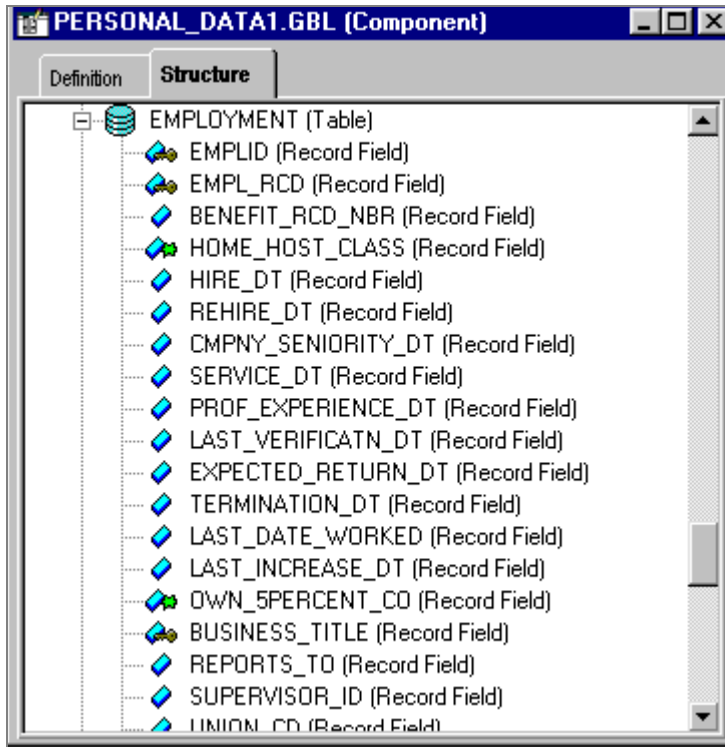


	Page Name	Item Name	Hidden	Item Label	Folder	Allow Deferred Processing
1	PERSONAL_DATA	PERSONAL_DATA_	<input type="checkbox"/>	&Personal Dat		<input checked="" type="checkbox"/>
2	PERSONAL_DATA	PERSONAL_DATA_	<input type="checkbox"/>	&Personal Dat		<input checked="" type="checkbox"/>
3	PSTREEMGRXFER	PSTREEMGRXFER	<input checked="" type="checkbox"/>	Pstreemgrxfer		<input checked="" type="checkbox"/>
4	SCRTY_TBL_GBL_	SCRTY_TBL_GBL_	<input checked="" type="checkbox"/>	ScrtY Tbl Gbl		<input checked="" type="checkbox"/>

Component definition view

Structure Tab

The structure view shows records and scrolls in a tree representation. Double-click the components in this view and open their definitions.



Component structure view

You can view the PeopleCode that is attached to any of the components by right-clicking and selecting the *View PeopleCode* menu option. The PeopleCode Editor opens directly in the workspace, displaying the related PeopleCode.



A key icon appears next to all key and alternative search key fields in the component structure view.



An asterisks icon appears next to all fields that are required.

Creating a New Component Definition

To create a new component definition:

1. With a new or existing project open in PeopleSoft Application Designer, select File, New.
2. Double-click **Component**.

The new component definition appears in the workspace.

Opening an Existing Component Definition

To open an existing component definition:

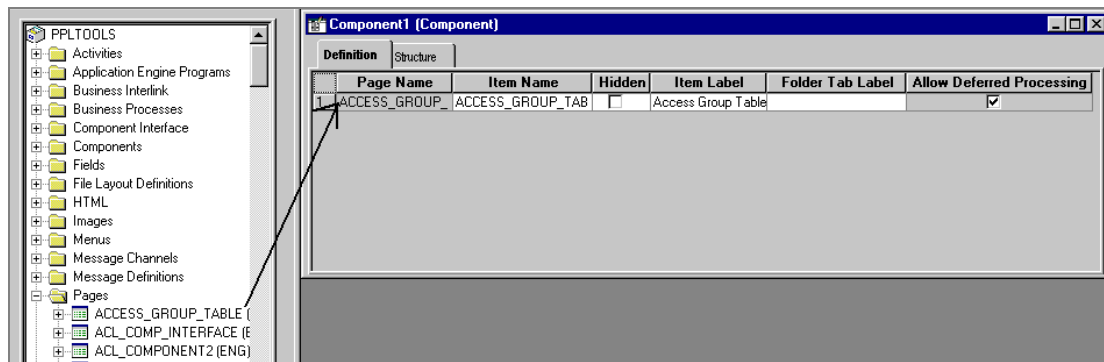
1. Select File, Open.
2. Select **Component** as the type.
3. Specify the selection criteria.

The component definition appears in the workspace.

Adding Pages to Components

This section discusses how to insert a page into a component by:

- Using the Insert menu.
- Dragging a page definition into the component.



Dragging from the project workspace to a component

Using the Insert Menu to Add a Page

To add a page to a component using the Insert menu:

1. Open a new or existing component in the workspace and make the definition active.
2. Select Insert, Page into Component.
3. To narrow your search, enter selection criteria, such as name, description, or project.
4. Click **Insert**.

A list of available pages matching your search criteria appears.

5. Select the page that you want to add to the component.
6. Click **Insert**.

The page that you selected appears in the component in the workspace.

7. When you are finished adding pages to your component, click **Close**.
8. Save your component.

Component names can be up to 18 characters in length.

Dragging a Page Into a Component

To drag a page into a component:

1. Open the project and component.
2. Drag pages from the project workspace to the component.

Reordering Pages in a Component

After you add pages to your component, you can change the order in which they appear in the component.

	Page Name	Item Name	Hidden	Item Label	Folder Tab Label	Allow Deferred Processing
1	BANK_ACCOUNT	BANK_ACCOUNT	<input type="checkbox"/>	Ban&k Account		<input type="checkbox"/>
2	BANK_ACCOUNT	BANK_ACCOUNT_FRA	<input type="checkbox"/>	Ban&k Account FR	France	<input type="checkbox"/>
3	BANK_ACCOUNT	BANK_ACCOUNT_UK	<input type="checkbox"/>	Ban&k Account UK	UK	<input type="checkbox"/>

Moving a page in a component

To reorder pages in a component:

1. Select a row number on the left-hand side of the component definition.
2. Drag the row to the correct position.

The page is inserted immediately below the highlighted line. In the preceding example, the third page (UK) becomes the second.

Copying or Moving Pages to Another Component

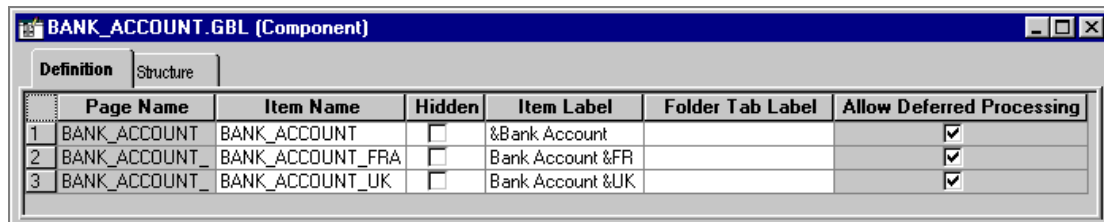
After you create a component, you can copy or move pages from one component to another.

To copy or move a page from one component to another:

1. Open both components.
2. In the left-hand column, select the number of the page that you want to copy.
3. Copy or cut the page:
 - To copy the page to another component, select Edit, Copy.
 - To move the page to another component, select Edit, Cut.
4. Select the other component.
5. Select Edit, Paste.

Setting Page Attributes

Each page in a component has attributes. Each attribute is represented by a column in the component definition.



	Page Name	Item Name	Hidden	Item Label	Folder Tab Label	Allow Deferred Processing
1	BANK_ACCOUNT	BANK_ACCOUNT	<input type="checkbox"/>	&Bank Account		<input checked="" type="checkbox"/>
2	BANK_ACCOUNT_	BANK_ACCOUNT_FRA	<input type="checkbox"/>	Bank Account &FR		<input checked="" type="checkbox"/>
3	BANK_ACCOUNT_	BANK_ACCOUNT_UK	<input type="checkbox"/>	Bank Account &UK		<input checked="" type="checkbox"/>

Component item label and tab label

Page Name

Contains the read-only name of the page definition. If you rename the page, this column is updated automatically.

When creating page definitions, you might want to use similar names to make them easily recognizable as a group of pages. For example, if you create three pages to hold the information for the Personal Data Table, the page names might be:

PERSONAL_DATA1

PERSONAL_DATA2

PERSONAL_DATA3

Item Name

Contains a name for each page in the component. This name must be unique in the component and the default is the page name. This name is for informational purposes only. If you use the same page on more than one component, you might want to change the item name to reflect the purpose of the page in the component.

Hidden

Specifies whether the page can be viewed by the user at runtime. Pages are usually hidden when they are used in work groups or associated with derived work records. For example, information from a page might need to be loaded into the buffer for PeopleCode to perform calculations, but the user does not need to see it.

Item Label

Serves as the default folder tab label, unless a different label is specified. The item label should be unique for each page in a single component menu. The folder tab label is usually used when shorter names are needed for folder tabs.

In the preceding example (BANK_ACCOUNT.GBL), for the first page in the component, the same text appears on both the Folder tab and the component menu. The second and third pages have different menu names and folder tabs.

Folder Tab Label

Contains the text that appears on the folder tab label. If no text is specified, the text of the item label is used on the folder tabs.

Allow Deferred Processing

Indicates whether deferred processing is active for that page in its property settings.

Setting Access Keys

You can set *access keys* by placing an ampersand (&) in the text of each item label. Put the ampersand in front of the letter that you want to be underlined on the folder tab at runtime.

Definition		Structure		
	Page Name	Item Name	Hidden	Item Label
1	JOB_DATA1	JOB_DATA_1	<input type="checkbox"/>	Work Location
2	JOB_DATA2_US	JOB_DATA_2	<input type="checkbox"/>	&Job Information
3	JOB_DATA3	JOB_DATA_3	<input type="checkbox"/>	Job &Labor
4	JOB_DATA_ERNDI	JOB_EARNINGS_DIST	<input type="checkbox"/>	&Payroll
5	JOB_DATA_BENP	BENEFIT_PROGRAM_	<input type="checkbox"/>	&Salary Plan
6	EMPLOYMENT_DT	EMPLOYMENT_DATA_	<input type="checkbox"/>	&Compensation

Item labels with ampersands (&)

At runtime, the user can navigate between pages by pressing ALT, plus the letter that is underlined, followed by ENTER.



Underlined access keys on tabs

Specifying Market-Specific Components

You might want to add custom features to a component that is specific to an international market or region. For example, suppose that a page is used in a procedure for hiring new employees and that the procedure includes special transactions that are required only when an employee is hired in Brazil. You can create a custom component using the same component name as the component from which it is derived and saving it using a market setting of *BRA*.



Component saved with BRA market setting

Market-specific components are independent of system-side language settings and are accessible to any user who has security access to the component. This makes it possible for an English-speaking user in New York, for example, to perform a procedure for hiring an employee in Brazil.

Access the market setting of a component using the PeopleCode `%Market` system variable. Consequently, you can maintain a single set of PeopleCode programs for a set of market-specific components and build conditional logic into the PeopleCode programs that run only in components that have specific market settings.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, “System Variables,” `%Market`

Finding Where a Component Is Used

The Find References feature enables you to generate a list of the menus in the database that reference a specific component; that is, a list of the menus in which the component is used. You can invoke this feature from either the project workspace or the workspace. Use Find References

See Also

“Using PeopleSoft Application Designer,” Finding Definitions

Setting Component Properties

In the Component Properties dialogbox, specify the update and data entry actions; on the Use tab, specify the search record information. You can also save notes about the component on

the General tab. Use the Internet tab to set attributes that affect how the component appears in the browser at runtime.

This section discusses how to:

- Open the Component Properties dialog box.
- Set general properties.
- Set use properties.
- Set internet properties.

Opening the Component Properties Dialog Box

To open the Component Properties dialog box:

1. Open the component definition.
2. Select File, Definition Properties.

The Component Properties dialog box appears with the General tab active.

Setting General Properties

Access the Component Properties dialog box.

Description	Enter a descriptive name for the component.
Owner ID	View a list of applications with which this component is used. This list is helpful to identify the applications that are associated with the component during the application development phase.
Last Updated	View the date and time of the last modification made to the component and the name of the user who made the modification.

Setting Use Properties

Access the Component Properties dialog box. Select the Use tab.

Access

Search record	Specify the search record for this component.
Add search record	Specify if you want a different search record specifically for add actions. For example, if you selected the auto-

numbering option for employee IDs (EMPLID), don't include EMPLID in the search record. Likewise, you might want to create special security views for add actions that limit the rows that users can add, based on specific search criteria. The system default is the standard search record if you don't specify an add search record.

Force Search Processing	Select to always run search logic (SearchInit PeopleCode) for this component. The default is cleared.
Detail page	Specify the page that you want for details.

Note. To see a subset of search records, type a few characters first. The drop-down list box is populated with a list of all record definitions with names that begin with those characters. This reduces access time and enables you to find specific records faster.

Actions

Add	Select to add a new high-level key, such as a new employee ID or customer. Except in the case of effective dating, add is used to insert a new current row or to update future rows.
Update/Display	Select to update existing rows only.
Update/Display All	Select to update current and future rows in an effective-dated record. Use only with effective-dated records. Do not use these actions unless the main record that is associated with the page definitions is effective-dated. This is translated to include history at runtime.
Correction	Select to update any rows (history, current, and future) in an effective-dated record. Use only with effective-dated records. This is translated to correct history at runtime.
Disable Saving Page	Select when you want to hide the Save button in the toolbar. This prevents the user from being prompted to save when exiting a page. However, it doesn't prevent using PeopleCode to save a page with the DoSave() or DoSaveNow() functions. This can be helpful for applications in which the user isn't making database changes and doesn't need to be prompted to save.
Include in Navigation	Select to include the component in the menu navigation at runtime. The default is selected. If you do not want the component included, clear the check box.

Note. If you must add a new high-level key, such as a new employee number or customer, select both Add and Update/Display. If you are adding information to an existing high-level key, such as adding education data for an employee, select only Update/Display. You're not adding a new employee ID—it already exists on the database.

3-Tier Execution Location

Note. This section applies to Windows client applications only.

To partition application processing between the client and the application server, you must define units that, as a whole, run in one location or the other. We call these units *processing groups*. Processing groups can encompass one or more PeopleCode events.

Component Build	Specify where you want all processing to occur after the key list of a page is selected and before the user can interact with the page. This includes building component buffers and running many types of PeopleCode.
Component Save	Specify where you want all processing to occur after the user saves the component and SaveEdit PeopleCode validations have succeeded. It includes SavePreChange, WorkFlow, and SavePostChange PeopleCode and updates to the database.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer's Guide, PeopleCode and PeopleSoft Internet Architecture

Setting Internet Properties

Access the Component Properties dialog box. Select the Internet tab.

Component Properties

General | Use | **Internet**

Search Page

Primary Action New Search

Default Search Action: Update/Display

Default Search/Lookup Type: Basic Advanced

Allow Action Mode Selection

Link To Access Add Page -- Message Set/Nbr: 124 62

Link To Access Search Page -- Message Set/Nbr: 124 63

Instructional Text -- Message Set/Nbr: 124 50

Multi-Page Navigation

Display Folder Tabs (top)

Display Hyperlinks (bottom)

Processing Mode

Interactive Deferred

Allow Expert Entry

Toolbar

Selected Toolbar Actions:

Save Notify

Cancel View WorkList

Return to List Next in WorkList

Next in List Previous in WorkList

Previous in List Add

Next Page in Component Update/Display

Previous Page in Component Update/Display All

Refresh Correction

Disable Toolbar

OK Cancel

Component Properties: Internet tab

Search Page**Primary Action**

Select the default mode by which the user accesses the associated page. Select **New** for Add mode. Select **Search** to use the action that is specified in the Default Search Action drop-down list box.

Specify where you want all processing to occur after the key of a page is selected and before the user can interact with the page. This includes building component buffers and running many types of PeopleCode.

Default Search Action	Select from a list of the actions that you set in the Actions group box on the Use tab of the Components Properties dialog box. If you set only one action, this drop-down list box provides that choice as the default. The default search action determines the default that users see, but they can select another option from the toolbar at runtime.
Default Search/Lookup Type	Select Basic or Advanced. The basic search page provides a choice of which field to search (either the primary and alternate search keys). PeopleSoft recommends using the basic search page for new users because it is easier to understand. If you select Advanced, the advance search page is the default. The search and lookup type applies to the search dialog box and all of the lookup dialog boxes in the component.
Allow Action Mode Selection	Select to display the Include History and Correct History check boxes on a search page. If the user selects Include History on a search page, the page appears in Update/Display All mode. If the user selects Correct History, the page appears in Correction mode. However, both of these check boxes appear only on the search page if Update/Display All and Correction were selected as actions in the Use properties for the component and the user has security access to the modes. This check box is selected by default.
Link to Access Add Page and Link to Access Search Page	Specify the message set and number to display on an Add or Search page.
Instructional Text	This is set to display the "Find an Existing Value" heading on the search page. You can change the default message or redirect the component to use another message that is more appropriate for your use.
<i>Multi-Page Navigation</i>	
Display Folder Tabs	Select to display folder tabs at the top of the component page.
Display Hyperlinks	Select to display links at the bottom of the component page.
<i>Processing Mode</i>	
Interactive	Select to send messages to the server whenever logic must be run. When the user presses TAB to exit a field level event, a transmission to the application server occurs to run that field-level event and the page is refreshed.

Deferred	This is the default processing mode. This mode reduces transmissions to the application server. See “Guidelines for Designing Pages,” Deferred Mode.
Allow Expert Entry	This is available for both processing modes. See Enabling the Expert Entry Feature .

Toolbar

Select the toolbar actions that you want to display on the component pages. When you select a check box, that item appears as a toolbar button at the base of the component at runtime. All toolbar actions are set to display by default with the exception of **Next** and **Previous Page in Component** and **Notify**. Note that the default settings for the Action and Save buttons are impacted by settings on the Use tab of the Component Properties dialog box.

Save	Adds a Save, OK, or Apply button to the toolbar, depending on the page type.
Cancel	For modal components only. Clearing this box removes the Cancel button from the toolbar.
Return to List	Returns user to the search page.
Next or Previous in List	Populates the page with next or previous row of data from the database as shown on the Search page.
Next or Previous Page in Component	Opens the next or previous page in the component if there is more than one page.
Refresh	Redisplays the page without saving any entered data.
Notify	Enables the user to send a notification to other users.
View Worklist	Enables the user to view their worklist from the current component page.
Next or Previous in Worklist	Enables the user to access the next or previous item in their worklist.
Add, Update/Display, Update/Display All, Correction	See Setting Use Properties.
Disable Toolbar	Select if you do not want to display the toolbar on the component pages.

Overriding the Search Record

This section provides an overview of search records and discusses how to override the search record.

Understanding Search Records

The search record controls access to rows of data in a table, and its keys and alternate search keys appear on the search page as criteria. The search record might also contain logic to refine the search to secure rows of data—row-level security is implemented in this way.

The search record field populates the high-level, or level 0, key fields on a page. These key fields usually appear above a scroll area or bar on the page, and they are typically display-only. The search record for a component might differ from the primary record definition for a page and might contain any number of search keys, but it must contain all of the keys for each main level 0 record for a page.

Note. When you add page items that are based on derived work records, do not select that record definition as the search record. Instead, select a record definition that stores the primary key or a SQL view that searches for the criteria that best enables users to identify the rows that they want to retrieve.

Note. If you are configuring menus in an existing PeopleSoft application, the easiest way to decide which search record to use is to look at the other search records that are used on the same menu. Look for pages with similar key structures and then evaluate the search records to see if any are suitable. You might want to print the PeopleTools Menu Listing cross-reference report (XRFMENU) to review which search records are used for pages and gain a better understanding of how search records are assigned in the application.

Overriding the Search Record

You might want to reuse a component, changing only its search record.

You can accomplish this by *overriding* the component search record at the time that the component is invoked from a menu. To override a component search record, specify a different search record in the properties of the menu item that invokes the component. The component uses the override search record when it is invoked from that specific menu item; the search record set in the component properties remains unchanged.

By reusing components in this way, you can limit redundancy, keeping your application smaller and easier to maintain.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Reference, “PeopleCode Built-in Functions and Language Constructs S-Z,” SetSearchDialogBehavior

Accessing the Message Catalog

Message sets and number settings come from the PeopleTools message set catalog.

To access the message catalog:

1. Select **PeopleTools, Utilities, Use, Message Catalog**.
2. Select **Message Catalog**.
3. On the search page, enter the message set number that you want to access.

Component definitions support messages between 0 and 99,999.

4. Click **Search** to access a message catalog page.
5. Enter the message set and number on the Internet tab of the Component Properties dialog box.

For example, enter message set and number *124* and *50* to display the “Find an Existing Value” message on the search page in the browser.

Enabling the Expert Entry Feature

This section provides an overview of the Expert Entry feature and discusses how to enable it in Security.

Understanding Expert Entry

Expert entry enables a user to change from interactive to deferred mode at runtime for appropriate transactions.

Note. Expert entry should be used only by *expert* users of the transaction who understand how all of the fields in the transaction behave. It requires the user to know the exact keystroke sequence for the transaction. This sequence typically varies for a transaction by customer, depending on the customer's setup and entry requirements. Therefore, expert entry should not be used by occasional users, because they might not be aware of the nuances of the transaction and when it is necessary to press the Refresh hot key.

To use expert entry, select:

- The Allow Expert Entry check box on the Internet tab of the Component Properties dialog box.
- The Enable Expert Entry check box in the user's profile.

If these check boxes are selected, an expert entry check box appears on the bottom of the page at runtime. If the user selects this check box, the transaction runs in deferred mode, regardless of the setting on the component, page, or field property.

When you set the component property to deferred mode, that component operates in deferred mode processing for all users, not just those who have expert entry enabled in their profiles.

If you want the component to process in deferred mode for some users and interactive mode for other users:

- Set the component property to Interactive mode.
- Select the Allow Expert Entry check box.

This enables security user profiles to control the users for whom deferred mode processing is possible.

Warning! Users who modify component properties from interactive mode to deferred mode or select the Allow Expert Entry check box should understand that this is an adaptation of the software, and as such, they are responsible for thoroughly testing and supporting this change.

Refresh Button

The Expert Entry feature enables you to specify whether a Refresh button should be included on the component toolbar when the page is displayed. The Refresh button forces a transmission to the server to determine which fields have changed since the last transmission to the server and to run any processing logic that is associated with those changes.

Users can also refresh by pressing the ALT-0 hot key, which keeps the cursor in the same field when the page is refreshed. One can refresh any time during data entry to enable an *expert* user to:

- Update related display field values for the data that is already entered.
- Recalculate totals and balances.
- Provide defaults based on prior data that was entered on the page.
- Validate the data that has been entered on the page so far.
- Invoke the code to hide or gray items associated with specific fields.

Limitations of Expert Entry

The following limitations exist when expert entry is enabled:

Hide, Unhide, Gray, and Ungray

The user must click the Refresh button after entering a value in a field that is associated with PeopleCode associated that hides, unhides, grays, or ungrays other fields on the same page.

Drop-down list box

The user must click the Refresh button after entering a value in a field that is a high-order key that is used to control the values in a drop-down list box.

Default values

Whenever expert entry is properly enabled and selected by the user at runtime, the transaction runs in deferred mode. As such, defaults, totals, balances, and related displays are not updated until the next transmission to the application

server (for example, when the user clicks a button, icon, link, or another tab). If the user wants the page updated before then, the user must click the Refresh button.

Enabling Expert Entry through Security

To have the Expert Entry check box appear in the component at runtime, the security administrator must enable it in Security. This enables the Expert Entry check box to appear in any components for which you select the Allow Expert Entry property on the Internet tab of the Component Properties dialog box.

To enable expert entry through Security:

1. Sign in to the PeopleSoft system in your browser.
2. Navigate to PeopleTools, Security, Use, User Profiles.
3. Select the General tab.
4. Select **Enable Expert Entry** in the General Attributes group box.
5. Click **Save**.

CHAPTER 11

Creating Style Sheet Definitions

This chapter provides an overview of style sheets and classes and discusses how to:

- Create style sheets.
- Add a new class.
- Set class attributes.
- Specify style sheets for an application.
- Specify a style sheet for a page.
- Set grid style options.
- Change colors on tabs.

Understanding Style Sheets and Classes

The default styles we ship with your product come from *style sheets*. A style sheet is a definition, like a record or field definition, that you create in PeopleSoft Application Designer. It is a collection of formatting styles, each of which can be applied to page controls. A style sheet is a standalone definition that can be upgraded, deleted, renamed, and so on.

Style sheets are useful because they enable developers to change the formatting of many page attributes across multiple pages quickly and easily.

Each style sheet comprises individual *classes*, which affect the formatting of each page control. Classes control a broad range of characteristics, including font size, spacing, alignment, border width, weight, and color.

Substyle Sheets

In the same way that PeopleTools supports subrecords, you can define *substyle sheets* to share a common set of classes. A substyle sheet has all of the properties of a style sheet.

Types of Classes

Style sheets have two different types of classes: default and custom. When you create a new style sheet, a series of default classes are included in the definition.

Note. If you change a style attribute for any default classes, you change *every* occurrence of that control throughout an application (unless that control is overridden in the page field properties dialog box).

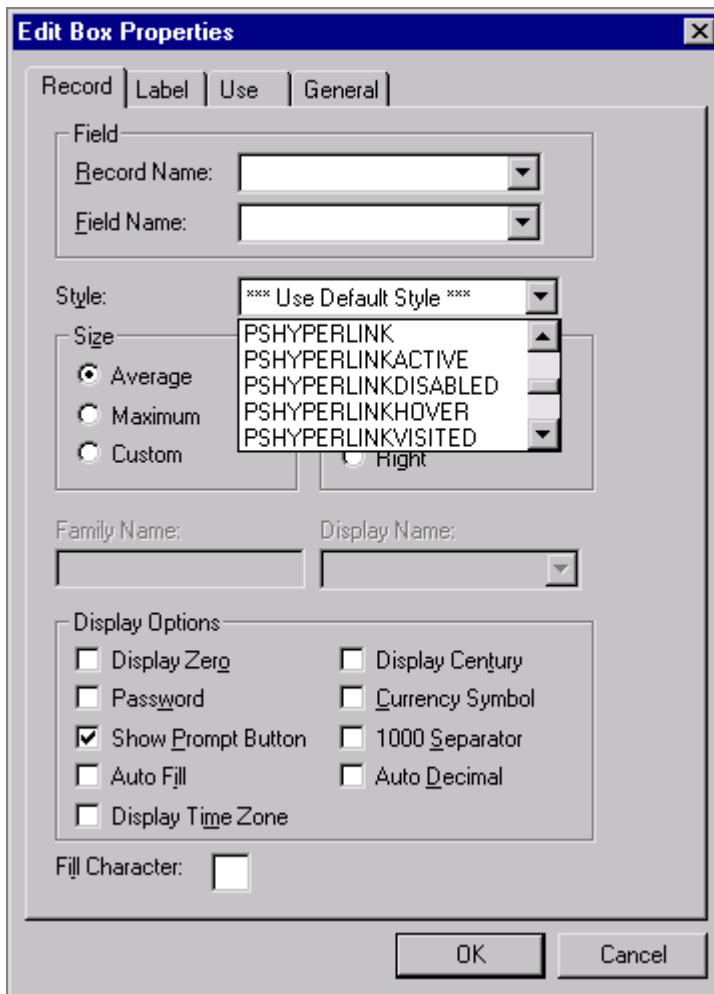
Default Classes

Each type of page control specifies an explicit default class. If the Style drop-down list box of a page element shows *Use Default Style*, the default class controls the formatting of that element on that page. You can override these classes by using the properties dialog box for each specific control.

Custom Classes

Individual page controls do not have to be associated with the default class. By creating new custom classes and overriding the default style, you can have unique pages in an application.

When you select the Style drop-down list box in the properties dialog box for the page control, all of the classes in the style sheet for that page appear.



Edit Box Properties dialog box showing style classes

Overriding Page Styles in a Field

Many page field controls have a style field in their field properties. Using this field property, you can specify a style class other than the default. You can also specify a different style class for a field at runtime using the Style property in PeopleCode.

Note. You can specify only a single style sheet for a page or an application. You can specify different style classes within that style sheet for a control. You cannot specify a page-field control class from a style sheet that is not associated with the page.

Depending on the page control, you can assign a style sheet class to either the label or the control itself. For example, for an edit box, you can specify what color appears in the edit box *and* the color of the label and its text.

Example of Style Class Assigned at Runtime

To set a style class to a field at runtime, use PeopleCode to define the Style property for a field definition. The following example sets a different style class to a field, depending on the value of the field.

```
Local Field &field;

&field = GetField();

If TESTFIELD1 = 1 Then;
    &field.Style = "PSHYPERLINK";
End-If;

If TESTFIELD1 = 2 Then;
    &field.Style = "PSIMAGE";
End-If;
```



Runtime results

PSSTYLEDEF

PSSTYLEDEF consists of the following three substyle sheets:

- PSALTERNATE: Defines application alternatives to PS defaults.
- PAALTERNATE: Defines PeopleSoft Portal Solutions alternatives to PS defaults. .

- PTSTYLEDEF: Defines the standard PeopleSoft Internet Architecture (PIA) and Portal defaults. .

PSSTYLEDEF is the default style sheet delivered with your PeopleTools software. See Appendix E: Default Style Classes.

If you want to change the style sheet, select PeopleTools, Utilities, Administration, PeopleTools Options; then, select the desired style sheet in the Style Sheet Name field.

PeopleTools Options

Language Settings

Language Code: English Translations Change Last Update

*Sort Order Option: Binary Sorting

General Options

Disconnect Cursors After: 30 Background Disconnect Temp Table Instances (Total):
Interval

Multi-Company Organization Temp Table Instances (Online):

Multi-Currency *Maximum App Message Size: 10,000,000

Use Business Unit in nVision Base Time Zone: PST

Multiple Jobs Allowed Last Help Context # Used: 100222

Allow DB Optimizer Trace *Data Field Length Checking: Others

Grant Access *Maximum Attachment Chunk Size: 28,000

Platform Compatibility Mode

Case Insensitive Searching

Allow NT batch when CCSID<>37

Style Sheet Name: PSSTYLEDEF Upgrade Project Commit Limit: 50

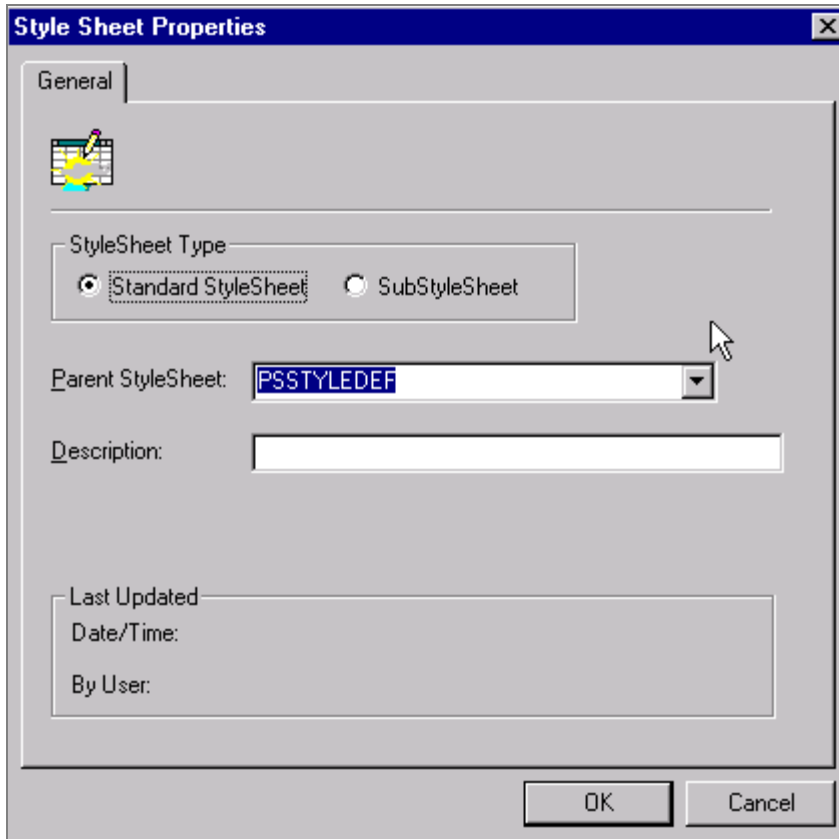
PeopleTools Options dialog box

Creating Style Sheets

This section discusses how to:

- Create a new style sheet or substyle sheet.
- Insert a substyle sheet into a style sheet.

Creating a New Style Sheet



Style Sheet Properties dialog box

To create a new style sheet or substyle sheet:

1. Select File, New.
2. Select Style Sheet from the list.

When you create a new style sheet, the system sets the parent to be the style sheet listed in the PeopleTools Options page (default is PSSTYLEDEF).

3. Select File, Definition Properties.

The Style Sheet Properties dialog box appears.

4. Specify the style sheet options.

Standard StyleSheet and SubStyleSheet

Select the type of style sheet. Use substyle sheets like subrecords or subpages.

Parent StyleSheet

If this is a standard style sheet, the default style sheet (PSSTYLEDEF) is the parent.

Inserting a Substyle Sheet

To insert a substyle sheet into a style sheet:

1. Create or open a substyle sheet.
2. Select Insert, Insert SubStyleSheet.
3. In the drop-down list box, select the substyle sheet that you want to insert into the style sheet.
4. Click **OK**.

Adding a New Class

You can add a new style class to a style sheet and use it like any other class.

To add a new class:

1. Open (or create) the style sheet to which you want to add a class.
2. Select **Insert, Insert Style Class** from the PeopleSoft Application Designer menu.
3. Enter the name of the new class.
4. To copy the class attribute from another style class, select that class from the **Copy Values From Style Class** drop-down list box.
5. Click **OK**.

Setting Class Attributes

This section provides overviews of class attributes and fonts and discusses how to:

- Access class attributes.
- Specify fonts.
- Set font attributes for a specific language.
- Specify spacing and alignment.
- Specify background attributes.
- Reference a background image URL.
- Specify border attributes.
- Specify margins.

- Specify miscellaneous attributes.

Understanding Class Attributes

Class attributes are grouped into categories and are displayed in a tabbed dialog box for each class.

Note. PeopleSoft Application Designer does not always reflect the formatting attributes that are specified for a control. You might be able to see only one attribute at runtime. Also, not all browsers support every attribute.

PIA supports the attributes that are listed in the World Wide Web Consortium (W3), Cascading Style Sheets, Level 1. See <http://www.w3.org/TR/REC-CSS1>.

Every class has each of the following major attributes, which correspond to a tab in the Class Attribute definition.

Font	Controls the font in which text appears. If more than one font is specified, the browser displays the first font; if it cannot find it, it displays the next font.
Spacing/ Alignment	Controls the spacing in addition to the default spacing. You can specify additional spacing between words and between letters. You can also specify the alignment, height, indent, and white space.
Background	Controls the background colors for the page control. If the background is an image, you can select how the image appears.
Border	Controls the border that is displayed around the element. You can specify width, color, and style.
Margins	Controls the margins and padding on each side of the element.
Miscellaneous	Controls the display of list-item markers, URLs, and cursor formats.

Understanding Generic and Installed Fonts

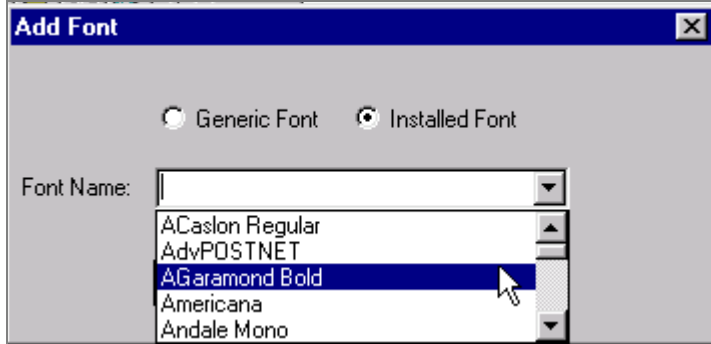
When you add a font, the dialog box provides a choice between *generic* fonts and *installed* fonts.

Generic fonts can be displayed on all browsers.

Generic Font	Example
Cursive	Zapf-Chancery
Fantasy	Western

Generic Font	Example
Monospace	Courier
Sans-serif	Helvetica
Serif	Times Roman

Installed fonts are installed on your computer. The following dialog box displays installed fonts.



Add Font dialog box showing installed fonts

Using Installed Fonts

If you use an installed font for a style class, PeopleSoft recommends that you:

- Verify that all users of your application have the same installed font.
- Specify the installed font first, followed by a generic font.

This way, if the installed font is not available to the user of your application, the generic font can be used.

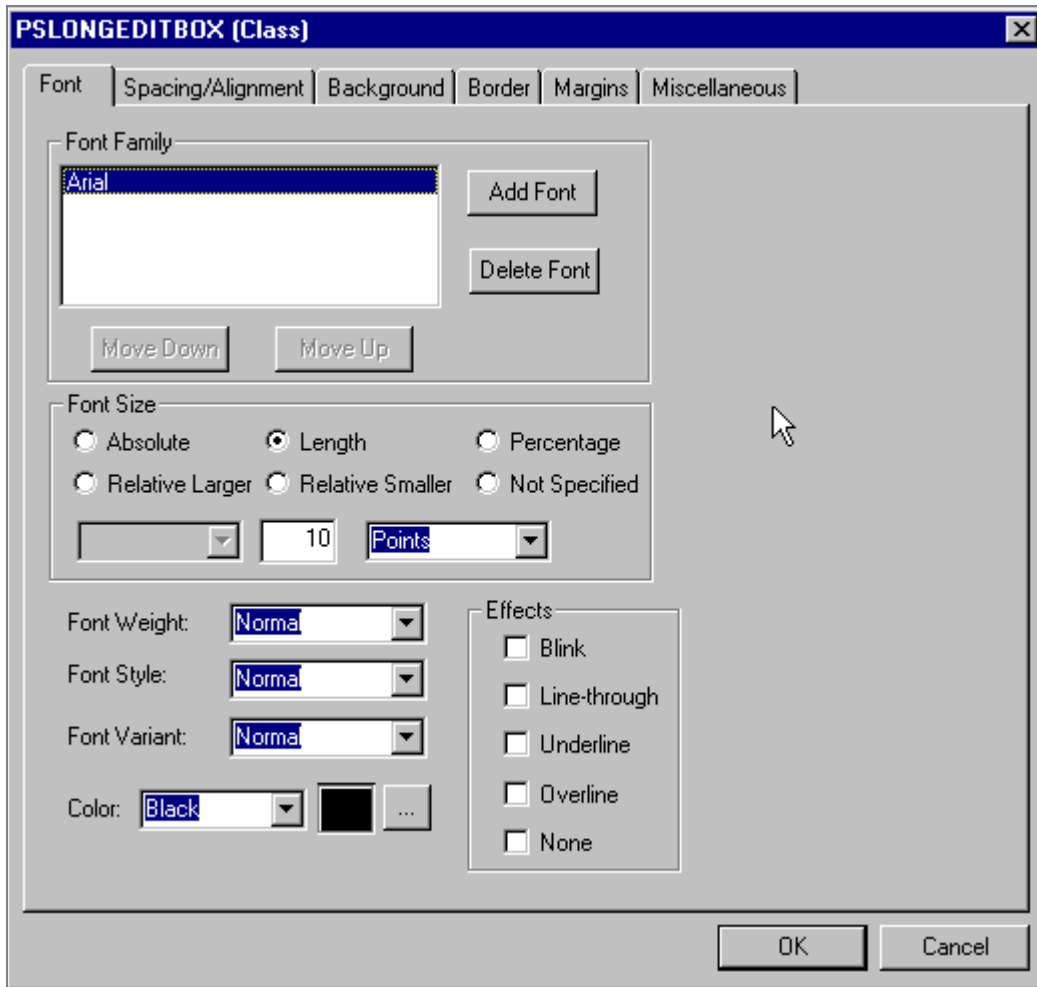
Accessing Class Attributes

To access class attributes:

1. Open a style sheet.
 - a. Select File, Open, Style Sheet.
 - b. Select the style sheet that you want to access from the **Definition Type** drop-down list box.
2. Double-click the class name.

Specifying Fonts

Access the class dialog box. Select the Font tab.



PSLONGEDITBOX (Class) dialog box: Font tab

Font Family

Specify the font in which you want the text to appear. You can specify more than one font, so that if the browser cannot display the first font, it attempts to display the next font, and so on, until it finds a font that it can use.

Font Size

Absolute Size

Select to use a size from the drop-down list box (xx-small, x-small, small, medium, and so on.) There is a scaling factor of 1.5 between adjacent sizes.

Length

Specify the size with a number, and select the measurement type from the drop-down list box (pixels, inches, millimeters, and so on).

Percentage

Specify a number, followed by a percent sign (%). Percentage values are always relative to the parent element.

Relative Larger and Relative Smaller	Select to interpret the font relative to the table of font sizes and the font size of the parent element. For example, if the parent element has a font size of medium, and you select Relative Larger, this font size is large.
Font Weight	Select the weight of the font. The values <i>100</i> to <i>900</i> form an ordered sequence, in which each number indicates a weight that is at least as dark as its predecessor. The value <i>Normal</i> is synonymous with <i>400</i> , and <i>Bold</i> is synonymous with <i>700</i> .
Font Style	Select the style of the font: <i>Normal</i> , <i>Italic</i> , or <i>Oblique</i> . These are matched to existing fonts with those names.
Font Variant	Select a variant: <i>Normal</i> or <i>Small Caps</i> . In a small caps font, the lowercase letters look similar to the uppercase ones, but they're in a smaller size and with slightly different proportions.
Color	Specify the color or select the color from a color palette.

Setting Font Attributes for a Specific Language

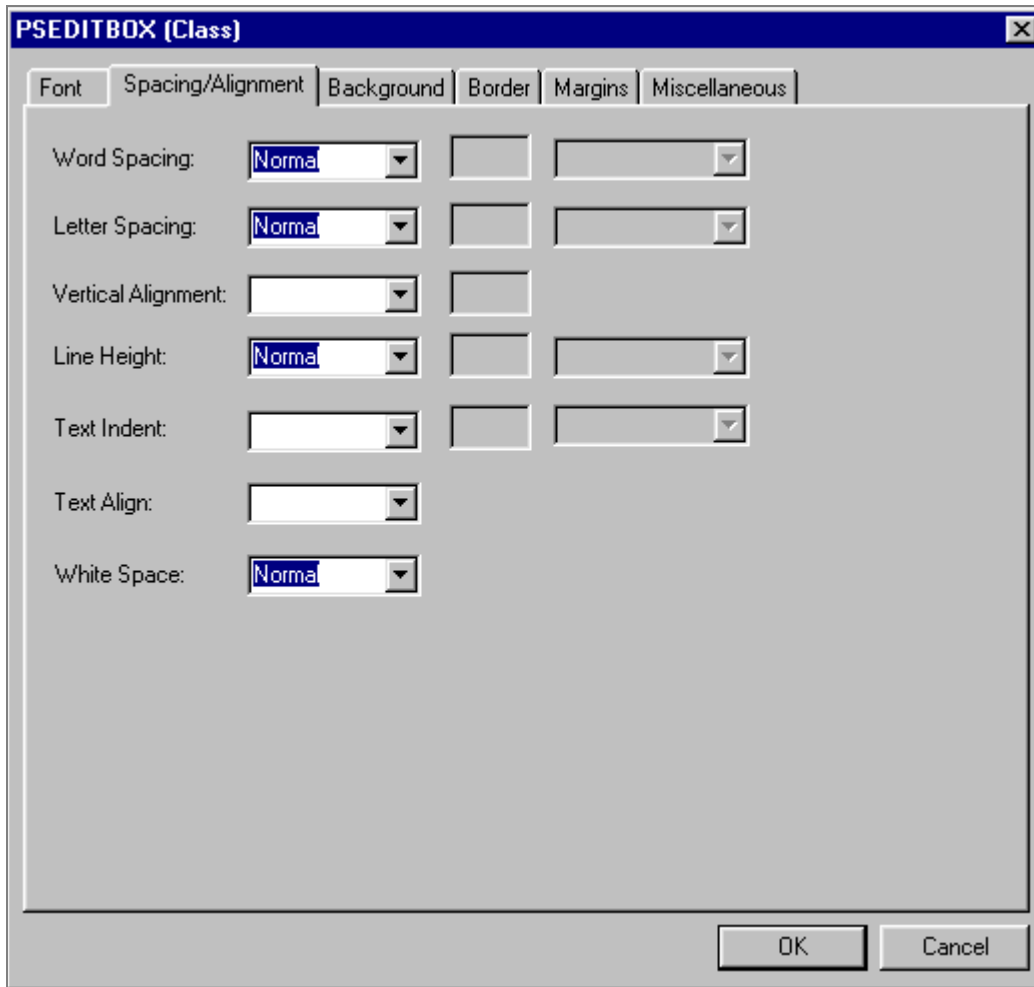
You can change the fonts that are available based on the base language settings. The default for the base language is English, providing generic fonts. If these fonts are not appropriate for a particular language, you must set the language preference before opening a style sheet. You can then set the font name list, font size, or font weight for the selected language.

To set font attributes for a specific language:
--

1. Select **PeopleTools, Utilities, International, Preferences** from your browser.
2. Select the appropriate language for the style sheet from the drop down box.
3. Save the new selected language as the base language.
4. Open the style sheet definition in which you want to save the font name list, font size, or font weight for the selected language.

Specifying Spacing and Alignment

Access the class dialog box. Select the Spacing/Alignment tab.



PSEDITBOX (Class) dialog box: Spacing/Alignment tab

Word Spacing and Letter Spacing

Select *Normal* or *Length*. If you select *Length*, specify a number to indicate an addition to the default space between words or letters. Values can be negative, but there might be implementation-specific limits.

Vertical Alignment

Select the vertical positioning of the element:

Baseline: Aligns the baseline of the element (or the bottom, if the element doesn't have a baseline) with the baseline of the parent.

Sub (subscript)

Super (superscript)

Top: Aligns the top of the element with the tallest element on the line.

Text Top: Aligns the top of the element with the top of the parent elements font.

Middle: Aligns the vertical midpoint of the element (typically an image) with the baseline plus half of the x-height of the parent.

Bottom: Aligns the bottom of the element with the lowest element on the line.

Text Bottom: Aligns the bottom of the element with the bottom of the parent elements font.

Percentage: Refers to the value of the line-height property of the element itself. It raises the baseline of the element (or the bottom, if it has no baseline) to the specified amount above the baseline of the parent. Negative values are possible. For example, a value of *-100%* lowers the element so that the baseline of the element is where the baseline of the next line should have been. This allows precise control over the vertical position of elements (such as images that are used in place of letters) that don't have a baseline.

Note. Using the top and bottom alignments could cause a loop where there are element dependencies.

Line Height

Set the distance between the baselines of two adjacent lines. When a numerical value is specified, the line height is provided by the font size of the current element multiplied with the numerical value. This differs from a percentage value in the way it inherits. When a numerical value is specified, child elements inherit the factor itself, not the resultant value (as is the case with percentage and other units). Negative values are not allowed.

Text Indent

Specify the indentation that appears before the first formatted line. This value may be negative, but there might be implementation-specific limits. An indentation is not inserted in the middle of an element that was broken by another.

Text Align

Specify how text is aligned in the element. Because Text Align inherits, all block-level elements inside the DIV element with CLASS=center are centered.

Note. Alignments are relative to the width of the element, not the canvas.

White Space

Specify how to handle white space inside the element:

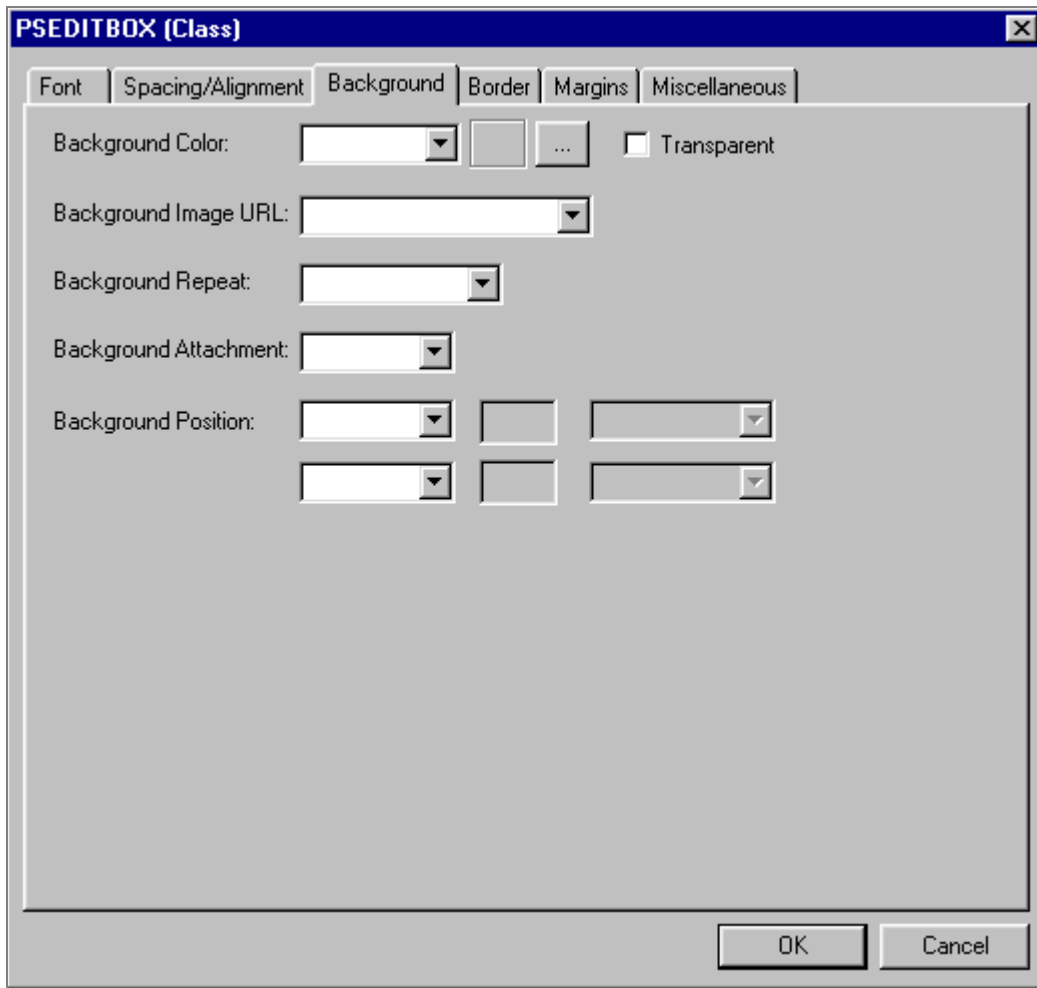
Normal: White space is collapsed.

Pre: Behaves like the PRE element in HTML.

Nowrap: Wrapping is done only through elements having a line break.

Specifying Background Attributes

Access the class dialog box. Select the Background tab.



PSEDITBOX (Class) dialog box: Background tab

Background Color	Specify the background color of an element.
Background Image URL	Set the background image of an element to an image file that is previously defined. When you set a background image, also set a background color to use when the image is unavailable. When the image <i>is</i> available, it appears on top of the background color. See Referencing a Background Image URL.
Background Repeat	If you specify a background image, indicate whether the image is repeated, and if it is, how many times.
Background Attachment	If you specify a background image, indicate whether it is fixed to the canvas or whether it scrolls along with the content.

Background Position

If you specify a background image, set its initial position.

Top: Aligns the background to the top of the element.

Left: Aligns the background to the left of the element.

Center: Aligns the background to the midpoint of the element (typically an image).

Bottom: Aligns the background to the bottom of the element.

Right: Aligns the background to the right of the element.

Length: Specify the length of the background and the unit of measure.

Percentage: Refers to the value of the line-height property of the background itself. It raises the baseline of the element (or the bottom, if it has no baseline) the specified amount above the baseline of the parent. Negative values are possible. For example, a value of -100% lowers the element so that the baseline of the element is where the baseline of the next line should have been. This allows precise control over the vertical position of elements without a baseline, such as images used in place of letters. See the value pairs in following example.

Examples of Percentage and Length Value Pairs and Keywords

Background Position	Value Pairs	Effect
Percentage	0 and 0	Places the upper, left-hand corner of the image in the upper, left-hand corner of the box that surrounds the content of the element (that is, not the box that surrounds the padding, border, or margin).
Percentage	100 and 100	Places the lower, right-hand corner of the image in the lower, right-hand corner of the element
Percentage	14 and 84	Places the point that is 14% across and 84% down the image at the point that is 14% across and 84% down the element.
Length	2cm and 2cm	Places the upper, left-hand corner of the image 2 centimeters (cm) to the right and 2 cm below the upper, left-hand corner of the element.
Top Left or Left Top		The same as 0% and 0%.
Top Center or Center Top		The same as 50% and 0%.
Right Top or Top Right		The same as 100% and 0%.
Left Center or Center Left		The same as 0% and 50%.
Center and Center		The same as 50% and 50%.

Background Position	Value Pairs	Effect
Right Center or Center Right		The same as 100% and 50%
Bottom Left or Left Bottom		The same as 0% and 100%.
Bottom Center or Center Bottom		The same as 50% and 100%.
Bottom Right or Right Bottom		The same as 100% and 100%.

Note. If you set only *one* percentage or length value, the system sets the horizontal position only and the vertical position becomes the default 50 percent. If you set two values, the first one is the horizontal position. You can set negative positions and combinations of length and percentage values, for example 50 percent and 2 cm.

Referencing a Background Image URL

To specify a background image URL, select from a drop-down list box that is populated by entries in the URL Maintenance Table. To reference a background image file on a designated server, add its location to the URL Maintenance Table.

URLs
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search by: begins with

[Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

URL Maintenance

URL Identifier: FILEDB

***Description:**

***URL:**

Comments:

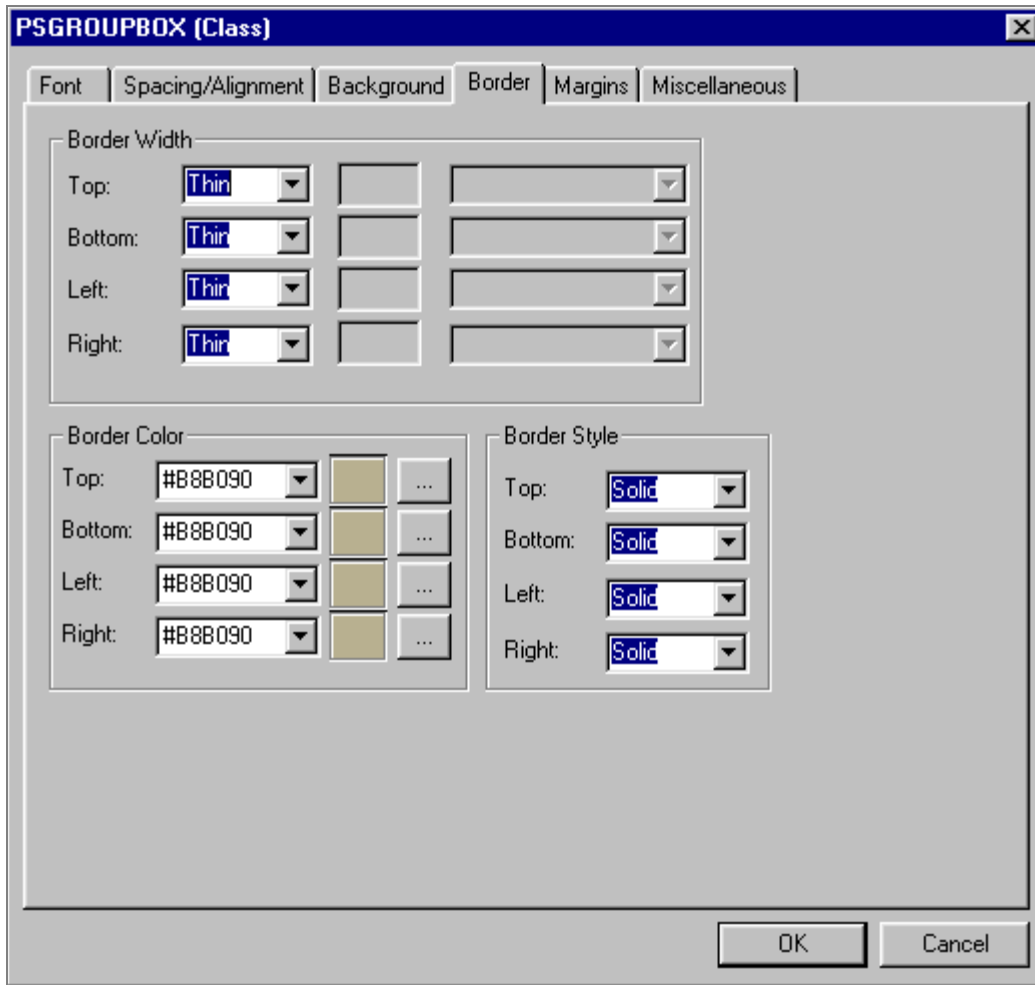
URL Maintenance pages

To reference a background image in the URL Maintenance Table:

1. Select PeopleTools, Utilities, Administration, URLs.
2. Select an option:
 - **Add** to add a new image reference.
If you are adding a new reference, enter the URL identifier.
 - **Find** an existing one.
3. Enter a description and the URL.
4. Save the image reference.

Specifying Border Attributes

Access the class dialog box. Select the Border tab.



PSGROUPBOX (Class) dialog box: Border tab

Border Width

Specify the width of each line in the border. You can specify *Thin*, *Medium*, or *Thick*, or you can specify *Length*, which enables you to specify a font size (with a number) and the measurement type from the drop-down list box (pixels, inches, millimeters, and so on).

Border Color

Specify the color of each line in the border. You can specify a hexadecimal value for the color or select the color from a color palette.

Border Style

Specify the style of line in the border:

None: No border is drawn (regardless of the <border-width> value).

Dotted: Border is a dotted line that is drawn on top of the background of the element.

Dashed: Border is a dashed line that is drawn on top of the background of the element.

Solid: Border is a solid line.

Double: Border is a double line that is drawn on top of the background of the element. The sum of the two single lines and the space between equals the <border-width> value.

Groove: Border is a three-dimensional groove that is drawn in colors based on the <color> value.

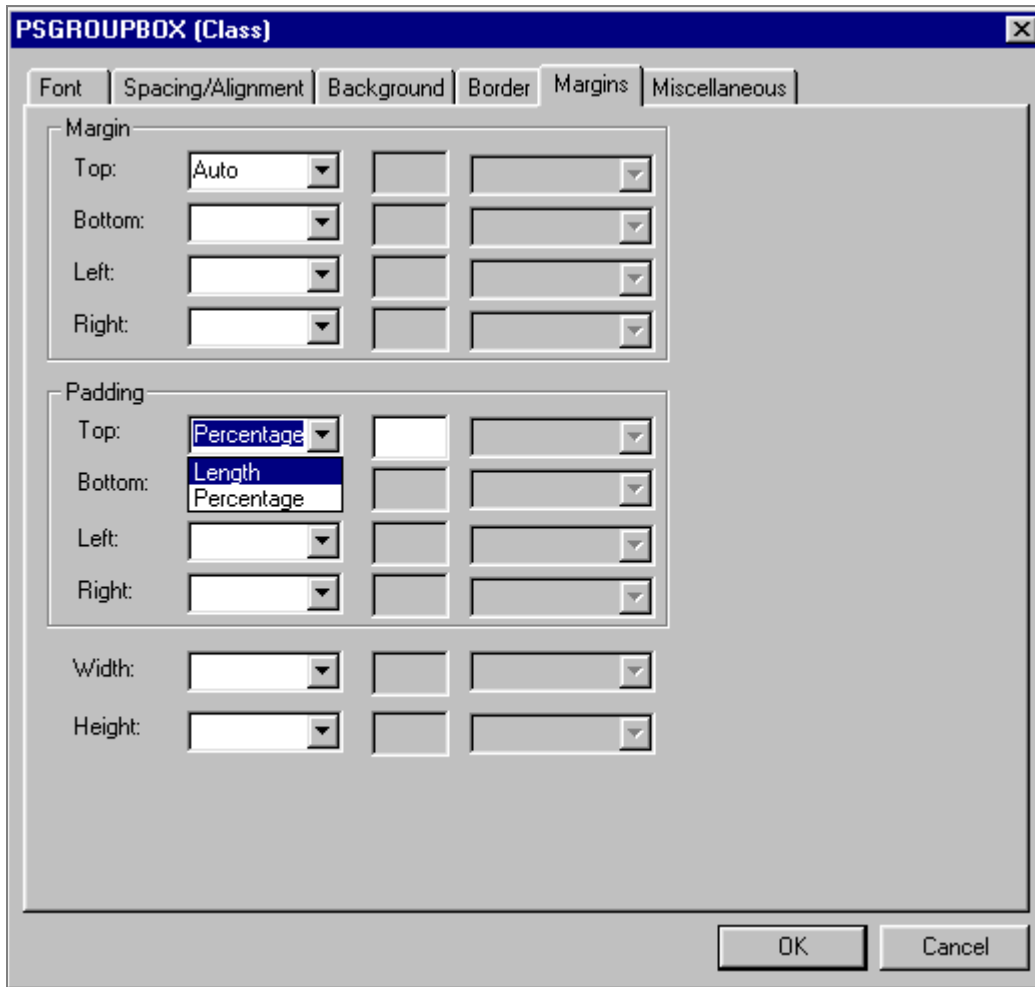
Ridge: Border is a three-dimensional ridge that is drawn in colors based on the <color> value.

Inset: Border is a three-dimensional inset that is drawn in colors based on the <color> value.

Outset: Border is a three-dimensional outset is that is drawn in colors based on the <color> value.

Specifying Margins

Access the class dialog box. Select the Margins tab.



PSGROUPBOX (Class) dialog box: Margins tab

Margin and Padding

Specify the margin and padding for each side of the element:

Length: Specify a font size and the measurement type from the drop-down list box (pixels, inches, millimeters, and so on).

Percentage: Specify a number, followed by a percent sign (%). The percentage value is relative to the parent element.

Auto: The system calculates the width.

Do not use negative values for padding.

Width and Height

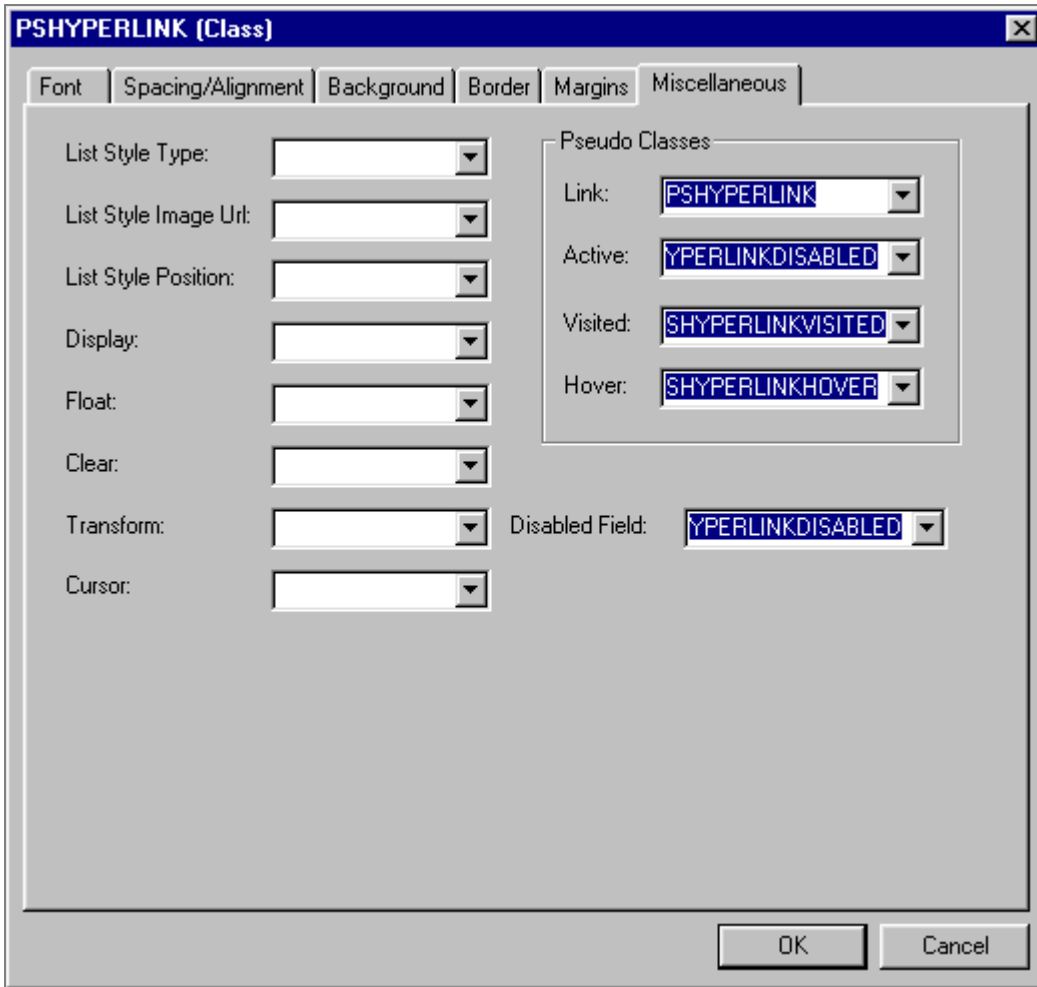
Set the width and height of text elements. These properties are most useful with replaced elements, such as images. The system scales the image to fit the value that you specify. If you set either property to *Auto*, and the image needs scaling, the system preserves the aspect ratio

of the image. Do not use negative values.

Note. If the width and height of a replaced element are both set to *Auto*, the system sets these properties to the intrinsic dimensions of the element.

Specifying Miscellaneous Attributes

Access the class dialog box. Select the Miscellaneous tab.



PSHYPERLINK (Class) dialog box: Miscellaneous tab

List Style Type

Specify the appearance of the list-item marker if List Style Image URL is blank or if the system cannot display the image that is referenced by the URL.

List Style Image Url

Specify the URL containing the image to display as the list-item marker.

List Style Position	Specify how the list-item marker is drawn relative to the content (<i>Inside</i> or <i>Outside</i>).
Display	Specify how an element is displayed on the canvas (which might be on a printed page or a computer display): <i>Block</i> : Opens a new box. The box is positioned relative to adjacent boxes. Typically, elements like H1 and P are block types. <i>ListItem</i> : Similar to block, except that a ListItem marker is added. In HTML, LI typically has this value. <i>Inline</i> : Results in a new inline box on the same line as the previous content. The box dimensions are based on the formatted size of the content. If the content is text, it might span several lines, and there will be a box on each line. The margin, border, and padding properties apply to inline elements but do not affect the line breaks. <i>None</i> : Deactivates the display of the element, including children elements and the surrounding box.
Float	Specify how the element floats with the text. <i>None</i> : Causes the element to appear where it appears in the text. <i>Left</i> and <i>Right</i> : Cause the element to move to the left or right, and the text wraps on the right-hand or left-hand side of the element, respectively. With a <i>Left</i> or <i>Right</i> value, the element is treated as block-level and the Display property is ignored.
Clear	Specify the sides of an element on which floating elements are not accepted. <i>Left</i> : An element appears below any floating element on the left-hand side. <i>None</i> : Floating elements are allowed on all sides.
Transform	Use for text elements only. Select <i>Capitalize</i> , <i>Uppercase</i> , <i>Lowercase</i> , or <i>None</i> .
Cursor	Specify how the cursor displays when passed over the element.

Pseudo Classes

Pseudo classes are mechanisms that extend the expressiveness of style sheets. Using pseudo classes, you can change the style of page links based on whether and when the links have been visited. Pseudo classes do not exist in HTML, that is, they are not visible in the HTML code.

PeopleSoft uses pseudo-classes to specify how a browser indicates to a user the status of links in a document that the user is viewing. For example, it is common for a browser to display a document link in a different color than the rest of the text.

Link	Specify how the link should appear normally.
Visited	Specify how the link should appear if it has been visited.
Active	Specify how the link should appear when it is actively selected.
Hover	Specify how the link should appear when it is designated but not activated. For example, when the cursor hovers over a box that is generated by the element.
Disabled Field	Specify how the link should appear when the link (or field) is disabled.

Specifying Style Sheets for an Application

Specify a style sheet for an entire application on the PeopleTools Options page.

To specify a style sheet for an application:

1. From your browser, select PeopleTools, Utilities, Administration, PeopleTools Options.
2. Click the Style Sheet name prompt button.
Select the system style sheet.
3. Save the page.

Specifying a Style Sheet for a Page

To specify styles for a page:

1. Open the page in PeopleSoft Application Designer.
2. Access the Page Properties dialog box.
3. Select the Use tab.
4. Select a style sheet from the **Page Style Sheet** drop-down list box.

Selecting a different page style sheet for a specific page overrides the style sheet that is selected for the application. If you do not select a different page style sheet (keeping *****Use Default Style*****), the system uses the style sheet that is specified on the PeopleTools Options page.

5. Select a page background from the drop-down list box.

Selecting a different page background style class for a specific page overrides the background style of the page style sheet that you just specified. If you keep the *****Use**

*Default Style**** value, the background of this page is determined by the default background of the page style sheet that you just specified.

Changing Colors on Tabs

You can change the background colors of folder tabs in a component and tabs in a grid. To change the background colors of tabs, it is helpful to have a basic understanding of how tab definitions are built and stored in the database.

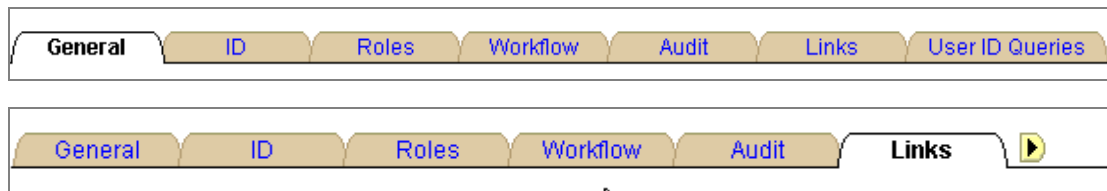
This section provides an overview of tab definitions and discusses how to creating tab images.

Understanding Tab Definitions

PeopleSoft stores tab definitions as images in an HTML table. Each tab, or image definition, has three parts that are stored as rows in the HTML table.

- Row 1 contains code representing the top border.
- Row 2 contains the tab itself.
- Row 3 contains the bottom border.

Because tabs look different depending on where they are located relative to other tabs and whether they are active, tabs must be defined in *sets* for a combination of active and inactive tab colors.



Active and inactive tabs

The tab image names reflect the role of the image in the tab row and the colors that it uses. Colors are encoded using the 6-character, hexadecimal RGB value of the color.

When the system displays tabs on a page, it verifies the existence of all of the images that are required for the pair of colors that is specified by the active and inactive tab styles. If these images are found, the tabs are drawn using these colors. If the system cannot find the images, it uses the default styles and their corresponding images. The default color for an active tab is white (FFFFFF); for an inactive tab, it is beige.

Defining Color in HTML

Computer colors comprise various combinations of red, green, and blue—known as the RGB scale. The RGB decimal scale of colors are converted to the hexadecimal scale for use on a web page. To define HTML colors using the hexadecimal system, set the first 2 digits to the

amount of red, the next 2 to the amount of green, and the last 2 to the amount of blue. In this scheme, 000000 represents black and FFFFFFFF represents white.

The hexadecimal color representation is always preceded by the # symbol, as shown in the following table, which lists 16 named colors.

Color	Hexadecimal Number
Black	#000000
Green	#008000
Silver	#C0C0C0
Lime	#00FF00
Gray	#808080
Olive	#808000
White	#FFFFFF
Yellow	#FFFF00
Maroon	#800000
Navy	#000080
Red	#FF0000
Blue	#0000FF
Purple	#800080
Teal	#008080
Fuchsia	#FF00FF
Aqua	#00FFFF

Tab Image Naming Scheme

This section describes in detail how tab images are named. However, to change tab colors, change only the RGB values.

All tab images are named in this format:

PT_TABNABRRGGBB

- **PT_TAB**: System-defined image definition name prefix.
- **N**: HTML table row.
Values are 1, 2, or 3. Create images only for 2 or 3.
- **A**: Location of the tab parts in a tab.

Values are:

- **L**: Left end.

- *B*: Between.
 - *R*: Right end.
 - *M*: Middle of a tab.
- *BB*: Relative position to other tabs.
- Values are:
- *AI*: Piece between active and inactive.
 - *IA*: Piece between inactive and active.
 - *II*: Piece between two inactive tabs.
 - *AX*: Piece of an active tab.
 - *IX*: Piece of an inactive tab.
- *RRGGBB* is either omitted (when the tab image does not use any color), or it is one or two 6-character RGB codes for inactive and active tab colors.

The following screen shows a partial list of predefined tab images.

PT_TAB2BAIB8B090FFFFFF	
PT_TAB2BIA6666FFFFFF	
PT_TAB2BIA6666FFFFFF	
PT_TAB2BIAB8B090FFFFFF	
PT_TAB2BIAB8B090FFFFFF	
PT_TAB2BII6666FF	
PT_TAB2BII6666FF	
PT_TAB2BIIB8B090	
PT_TAB2BIIB8B090	
PT_TAB2LAXFFFFFF	
PT_TAB2LAXFFFFFF	
PT_TAB2LIX6666FF	
PT_TAB2LIX6666FF	
PT_TAB2LIXB8B090	
PT_TAB2LIXB8B090	
PT_TAB2RAXFFFFFF	
PT_TAB2RAXFFFFFF	

Predefined tab images

The first entry in the table is PT_TAB2BAIB8090FFFFFF which represents a tab (PT_TAB2) part in the 2nd row of the HTML table, BAI (between an active and inactive tab), B8B090 (inactive tab color of beige), and FFFFFFF (active tab color of white). When the tab image requires two colors, the inactive tab color is always listed first.

Creating Tab Images

Before you can assign a new background color to the active or inactive tabs, you must create the necessary tab images with that color.

To produce tabs in a different color combination:
--

1. In PeopleSoft Application Designer, open the image definitions for the tabs that you want to change.

Because you want to change only the color of tabs, open only those image definitions that already contain an RGB color code.

If you are changing *both* the active and inactive tab color, access the following image definitions:

- PT_TAB2LAXFFFFFF
- PT_TAB2RAXFFFFFF
- PT_TAB2LIXB8B090
- PT_TAB2RIXB8B090
- PT_TAB2BAIB8B090FFFFFF
- PT_TAB2BIAB8B090FFFFFF
- PT_TAB2BIIB8B090
- PT_TAB3LAXFFFFFF
- PT_TAB3RAXFFFFFF
- PT_TAB3MAXFFFFFF
- PT_TAB3LIXB8B090
- PT_TAB3RIXB8B090
- PT_TAB3MIXB8B090
- PT_TAB3BAIB8B090FFFFFF
- PT_TAB3BIAB8B090FFFFFF
- PT_TAB3BIIB8B090

If you are changing only the inactive color, which is beige, you need only the files that contain the beige color code, B8B090. Likewise, if you are changing only the active tab color, which is white, you need only the files that include FFFFFFFF.

2. To export the files to a directory, select File, Export Image.

3. In the Save Image dialog box, select the directory in which you want to place the images.
4. Use any image editor to alter the image colors.

Note. Do not change the size or shape of the images, and *do not* replace any of the transparent pixels with solid pixels.

5. In PeopleSoft Application Designer, add the new image definitions by selecting File, New, Image.

Save the new image files under the appropriate name. The new images must have new names reflecting the HTML colors that they represent. For example, replace FFFFFFFF with the new active tab color, and replace B8B090 with the new inactive tab color.

6. In PeopleSoft Application Designer, open the appropriate style sheet.

If you are changing the tab folder colors, use PSSTYLEDEF. If you are changing grid tabs, use PSSTYLEDEF or the style sheet that is associated with the page definition in which the grid is located.

Note. The grid tab styles can be set for each grid individually using the grid properties. However, for page tabs, you can set the styles using only the default styles in the application style sheet.

You must access PSACTIVETAB, PSINACTIVE TAB, and any other tab classes that your application uses (for example, PSLEVEL1GRIDACTIVETAB).

7. For folder tabs, open the PSACTIVETAB class by double-clicking the class name.
8. On the Background tab, select the color of the background of the active tab (matching the color of the tab image that you created).

Use the drop-down list box to find the color or browse through the color choices.
9. Do the same for the PSINACTIVETAB class (or any others that you need) for folder tabs by double-clicking the class name and selecting the Background tab.
10. For grid tabs, access the style class that is associated with the grid tab.
11. Change the colors as indicated in the previous steps.
12. Save the style sheet.

Examples

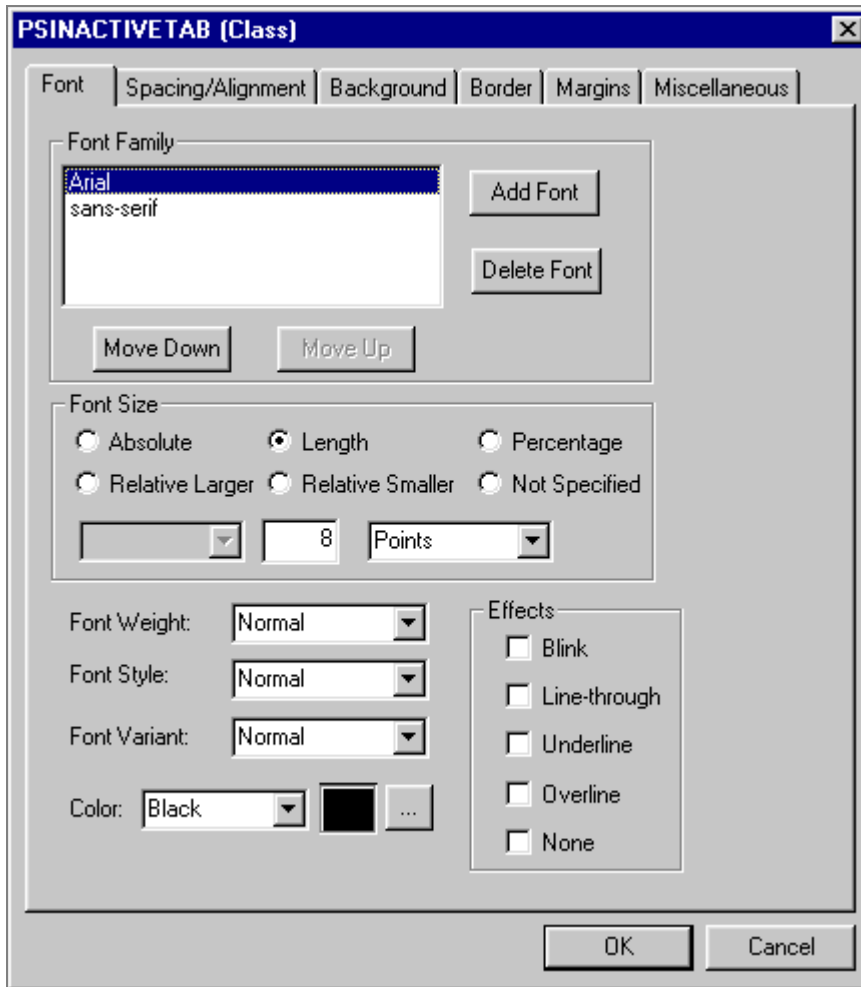
The following is an example of folder tabs with a green background. In addition, the color of the text on the tabs was changed to black.



Green tabs

For the following example, the active tab color stayed the same (FFFFFF). Only the inactive tab color changed. Therefore, only the following files were created and added to the list of images:

- PT_TAB2LIX80FF80
- PT_TAB2RIX80FF80
- PT_TAB2BAI80FF80FFFFFF
- PT_TAB2BIA80FF80FFFFFF
- PT_TAB2BII80FF80
- PT_TAB3LIX80FF80
- PT_TAB3RIX80FF80
- PT_TAB3MIX80FF80
- PT_TAB3BAI80FF80FFFFFF
- PT_TAB3BIA80FF80FFFFFF
- PT_TAB3BII80FF80



PSINACTIVETAB (Class) dialog box: Font tab

CHAPTER 12

Creating Menu Definitions

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

- Define custom component menus.
- Work with menu definitions.
- Define pop-up menus.

Understanding Menus

A menu is a logical grouping for assigning security to your system. You create a menu as a placeholder for components. Once you save your menu, use the Registration Wizard to assign components and security.

You can create two types of menus using PeopleSoft Application Designer:

- *Custom* (component) menus provide an internal reference for components and pages. They are grouped logically into menu groups to assign security. They are not used for navigational purposes.
- *Pop-up* menus appear when a user clicks a pop-up button.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Portal Technology, Using Registration Wizard.

PeopleTools 8.4 PeopleBook: PeopleSoft Security, Understanding PeopleSoft Security

Defining Custom Component Menus

This section provides an overview of component menus and discusses how to:

- Create custom component menus.
- Set menu item properties.
- Set general properties.
- Set use properties.

Creating Custom Component Menus

After you create records, pages, and components, register your new component using the Registration Wizard. To do so you must first create a menu definition, if one is not already existing. This allows you to add the component to the new menu (for navigational purposes) and register it in the Portal.

To create a new menu definition:

1. From the PeopleSoft Application Designer toolbar, select File, New.
2. Select **Menu** from the list.
3. Click **OK**.
4. Select the **Standard** option for the menu type.
5. Click **OK**.

The thick rectangle surrounding the bar item indicates that this element in the menu definition is currently selected. The empty, dashed rectangle is a placeholder for a new bar item label.

6. Assign a bar name and label.

You can define multiple menu bars for the menu. Double-click the rectangle to display the Bar Item Properties dialog box.

7. Enter the bar item name and label.

The most commonly used bar item name is “Use.”

8. Click **OK** to accept the Bar Item Properties settings.

The new label appears in the menu and the empty rectangle appears in a new location.

9. Set the menu item properties.

When creating a menu simply as a placeholder for components for the Registration Wizard, you need only add a separator bar to save the menu.

10. Set the menu properties.
11. Save the menu definition.

See Also

Setting Menu Item Properties

Setting General Properties

Setting Use Properties

Setting Up Menu Security

PeopleTools 8.4 PeopleBook: PeopleSoft Portal Technology, Using Registration Wizard.

Setting Menu Item Properties

Set the menu item properties to define your menu item. When creating a new menu definition to be used in the Registration Wizard, you need only select Separator from the Type area of the Menu Item Properties dialog box. This enables you to save the menu definition for use in the Registration Wizard. If you decide not to use the Registration Wizard you need to follow the entire procedure below and set the general and use properties for the menu definition.

To define a menu item:

1. In a standard menu definition, double-click a menu item to access its properties.

To create a new menu item, double-click the empty rectangle at the bottom of the menu.

2. Specify the menu item.

Name	Specify the system name for the menu or menu item. Menu and menu item names must conform to a specific set of naming conventions for the system to recognize them: all upper case letters, no embedded spaces, and no special characters (for example, % ^ & * \$ #).
Label	Specify the text label to appear on the menu. The label appears in the Home bar item or in a cascade menu of a menu group. You can place an ampersand in the text to assign a keyboard shortcut for the menu.

3. Select the menu item type.

Component	Select for a standard component menu item.
PeopleCode	PeopleCode menu items trigger PeopleCode programs. The program runs in a component buffer context, which allows PeopleCode to access values in the component buffer.
Separator	Select this option when creating a menu for the Registration Wizard. Selecting this option disables all other fields in the Menu Item Properties dialog box.

4. Click the **Select** button.
5. Select an enabling component in the Open dialog box.

At runtime standard PeopleCode menu items are always visible in a menu, but they are active (enabled) only when their enabling components are open.

6. Save the menu item if it has not yet been saved.

- In the menu definition, right-click the menu item, then select *View PeopleCode*.

The PeopleCode editor appears.

- Add a PeopleCode program in the menu item's ItemSelected event.
- When you have finished typing the program, save the PeopleCode program and close the PeopleCode editor.
- (Optional) Override the component search record.

You might want to reuse the same component multiple times with different search records. You can accomplish this by overriding the component search record at runtime when the component is opened from a menu item without creating separate copies of the component. The component override is temporary, and occurs only when the component is opened from the menu item in which the override is set. It does not change the component definition.

Select the **Override** check box, then select an override search record from the **Override** prompt field. The override search record must be a valid search record for the component; that is, it must have all of the search key fields that are at level 0 of the component pages.

- Click **OK** to accept the settings.
- Save the menu definition.

Setting General Properties

When you create or make changes to a menu, it's a good idea to document it for future reference. You can do this on the General tab of the Menu Properties dialog box. There are three areas where you can enter information.

Description	Enter a descriptive name for the menu.
Comments	Add a description of the menu or any other useful information.
Owner ID	View a list of applications with which this menu is used. This list is helpful to identify the applications with which the menu is associated during application development.
Last Updated	View the date and time of the last modification and the name of the user who made the modification.

Setting Use Properties

Setting properties on the Use tab of Menu Properties is optional. Any settings you assign are stored internally only.

Working With Existing Menu Definitions

PeopleSoft recommends that you do not modify PeopleTools menus, but that you create your own custom menu. This section discusses how to:

- Add components to a menu.
- Rename menu definitions.
- Copy a menu definition.
- Delete menu items.
- Uninstall menu definitions.
- Print menu definitions.
- Set up menu security.
- Import menu groups into portals.

Adding Components to a Menu

Use the Registration Wizard to add your component to a menu.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Portal Technology, Using Registration Wizard.

Renaming Menu Definitions

When you change the name of the menu definition, you do not change the name of the application window that appears when you select the new menu from the PeopleSoft application.

To rename a menu definition:

1. Close all open definitions in the definition workspace.
2. Select File, Rename.
The Rename Definition dialog box appears.
3. Select *Menu* from the **Definition Type** drop-down list box.
4. Click **Rename**.
5. From the list of available menus, double-click the menu that you want to rename.

6. Type the new name over the name that is selected on the menu definition.
7. Click **Rename**.

Note. If you rename a menu definition, be sure to manually rename the corresponding registry entries.

Copying a Menu Definition

Creating a copy of a menu definition is different from renaming the definition. The Save As command creates a copy of the definition with a new name while keeping the old menu definition unchanged.

To copy a menu definition:

1. Open the menu definition that you want to copy.
2. Select File, Save As.

The Save As dialog box appears.
3. Type a new name for the copy of the menu definition.
4. Click **OK**.

You are prompted to save a copy of any PeopleCode that you have associated with the menu definition.

Deleting Menu Items

Delete an item to remove it permanently from a menu definition. To help prevent accidental deletions, you can delete only one entry at a time.

To delete a menu item:

1. Select the menu item that you want to delete.
2. Select Edit, Clear.

If you attempt to delete a menu item that is linked to PeopleCode, the system issues a warning.

If you proceed to delete it, the linked PeopleCode menu items are also deleted.

If you delete an item by mistake, before you perform any additional edits or saves, select Edit, Undo to restore the menu item.

Note. When deleting menu items, remember to delete any corresponding registry entries.

Printing Menu Definitions

In addition to printing a menu definition from the definition workspace, you can obtain a formatted report of all menu definitions by printing the PeopleTools Menu Listing cross-reference report (XRFMENU). This report lists application windows in alphabetical order and details all menus in each window and all page definitions in each menu. It also includes the associated search record definition name and detail page definition name.

To print a menu definition:

1. Open the menu definition that you want to print so that it appears in the definition workspace as the current definition.
2. Select File, Print.

The standard Windows Print dialog box appears.

Setting Up Menu Security

Whenever you make a change or add items to an existing custom menu definition, you might need to adjust your security settings. When you add a new menu to a security profile, that menu is available the next time that you sign in to the system. Use the Registration Wizard to assign Security.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Portal Technology, Using Registration Wizard.

PeopleTools 8.4 PeopleBook: PeopleSoft Security, Understanding PeopleSoft Security

Importing Custom Menu Groups Into Portals

The menu import process creates content references for all components and pages that belong to the menu group. This should only be used to migrate custom menus only.

See Also

PeopleTools 8.4 PeopleBook: PeopleSoft Portal Technology, “Administering a PeopleSoft Portal,” Importing a Menu Group Into the Portal Registry .

Defining Pop-up Menus

This section provides an overview of pop-up menus and discusses how to:

- Define pop-up menus.
- Define transfer menu items.

Understanding Pop-up Menus

Pop-up menus define the transition to another page—either a system-defined page containing a set of standard commands or a pop-up menu page that was created and associated with the pop-up button by an application developer.

You can also use pop-up menus to run a PeopleCode program. PeopleCode in pop-up menus do not share the same limitations as PeopleCode in standard menus, so pop-up transition menus provide an effective alternative to using command push buttons on pages. Pop-up menu PeopleCode programs can be used for any number of purposes, for example:

- To perform a modal transfer.
- To recalculate a field value.
- To trigger a PeopleSoft Workflow business event.

Behavior of Pop-up Menus in Pages



When a user clicks the pop-up icon on a page, a screen appears with a list of menu items from which to select.



This pop-up icon appears if a pop-up menu has only one menu item. When a user clicks this icon, the target transaction page appears immediately, skipping an intermediate page containing a list with one menu item.

For example, in the following screen, the Job Code field has a pop-up icon.

Job Data 1		Job Data 2		Job Data 3		Job Earnings Distribution	
Schumacher,Simon				ID: 8001			
Employee Status:		Active					
Effective Date:		09/01/1996		Current		Effective Sequence: 0	
Action / Reason:		Data Chg		CJC		Correction-Job Code	
						Action Dt: 09/16/1996	
Position Number:		00000001		Position Entry Date		09/01/1996	
						President & CEO	
Department:		10100		09/01/1996		Office of the President	
Job Code:		1001		09/01/1996		President & CEO	
Location:		001		Corp HQ		Tax Loc: 001	
						Corp HQ	
Shift/Rate/Factor:		N/A		/		/	

Pop-up control

When the user clicks the pop-up icon, the following page appears with the menu items, *Add New Jobcode* and *View Jobcode Details*:

Please select one of the following links:

[Add New Jobcode](#)

[View Jobcode Details](#)

Pop-up page to start another component

This type of transfer to another component is called a *definitional transfer* to distinguish it from transfers that are made using PeopleCode programs. Definitional transfers are always nonmodal. To run a modal transfer, you must use PeopleCode.

Defining Pop-up Menus

This section discusses how to:

1. Create a new pop-up menu.
2. Associate a pop-up menu with a page field.

Creating a New Pop-up Menu

To create a new pop-up menu:

1. Select File, New.
The New dialog box appears.
2. Select **Menu**.
3. Click **OK**.
The New Menu dialog box appears.
4. Select the **Popup** option for the menu type.
5. Click **OK**.
A new pop-up menu definition appears.
6. Define the menu items for the pop-up menu.
7. Set the Menu Properties.
 - a. Add a Description and Comments about your pop-up menu.
 - b. On the Use tab, type the menu label you want to appear for that pop-up.
8. Save the pop-up menu definition.
9. To provide users with access to the pop-up menu, associate it with a page field.

Associating a Pop-up Menu With a Page Field

To associate a pop-up menu with a page field:
--

1. Open the page definition that contains the page field to which you want to associate the pop-up menu.
2. Right-click the page field, then select *Page Field Properties*.
3. When the properties dialog box appears, select the Use tab.
4. In the **Popup Menu** group box, select from the available pop-up menus in the drop-down list box.
5. Click **OK**.
6. Save the page definition.

See Also

Setting Menu Item Properties

Defining Transfer Menu Items

Transfer menu items, which can be created only in pop-up menus, enable you to specify a menu, component, and page to which the user is taken when the transfer menu item is selected. The following procedure describes how to create a new transfer menu item or redefine an existing menu item as a transfer menu item.

To define a transfer menu item:

1. In a pop-up menu definition, double-click a menu item to access its properties.

To create a menu item, double-click the empty rectangle at the bottom of the menu. This displays the Menu Item Properties dialog box for pop-up menus.

2. If this is a new menu item, enter a menu item name and label text in the **Menu Item** fields.

You can create a shortcut key for the menu item by placing an ampersand in the label.

3. Set the transfer properties.

- Click the **Transfer** button to make this a Transfer menu item.
- Click the **Define Transfer** button to display the Transfer Properties dialog box.

This dialog box enables you to define the properties of a definitional transfer that is made from a pop-up menu item. The component from which you are transferring is called the *originating component*. The *component* to which you are transferring is called the *destination component*.

4. Specify the following:

Portal	Select the navigation registry, such as employee portal.
Node	Select the PeopleSoft database to which you want the transfer menu to point. <i>Local</i> is the default. Valid values include all of the values in the MSGNODENAME column of the PSMMSGNODEDEFN table. If you select a node other than <i>Local</i> , the system clears the Use data from current page in search dialog check box.
Menu	Select the name of the menu containing the destination component.
Component	Select the name of the destination component.
Market	Select the market of the destination component.
Component Item	Select the name of the page to display at the front of the destination component.
Action	Select an action mode (<i>Update/Display</i> , <i>Update/Display All</i> , <i>Correction</i> , or <i>Data Entry</i>) to constrain the user profile to a specific action mode at the time of the transfer.

The action modes that are available in the prompt list depend on which modes are specified as valid in the destination component definition.

Select *Prompt* to enable the user profile to select an available action mode at the time of the transfer. The action modes that the user profile can select depend on which action modes are defined as valid in the destination component definition and which action modes to which the user profile is granted access in Maintain Security.

5. Set the transfer type.

Re-use current window Select to transfer to the component in the same window in which the transfer is initiated.

Use new window (minimize current window) Select to minimize the current window and open the destination component in a separate window.

6. Specify whether to supply search key values from the originating component.

Use data from current page in search dialog Select to use the values from the originating component search keys in the search dialog box of the destination component. If these values allow the system to select a unique row from the search record, the search dialog box is bypassed and the destination component opens immediately.

Clear this check box if you want the user to type the search key values into the search dialog box.

7. Click **OK** to accept the Transfer Properties dialog box settings.
8. Click **OK** to accept the Menu Item Properties dialog box settings.
9. Save the menu definition.

Creating Image Definitions

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

- Create new image definitions.
- Open an image definition.
- Update an image definition.
- Convert images.
- Consolidate images.
- Use the catalog of image definitions

Understanding Images

Images improve the look and usability for the user in virtually every web page on the internet. In fact, images have become so ubiquitous on the web that we forget how crucial they are to every aspect of our web experience, from helping us view the key contents of a web site to providing a clear and intuitive path for navigating from one page to the next.

PeopleSoft Internet Architecture comes equipped with several different types of image-related features, each of which serves a different function. It is easy to become confused with the various image types and their functions. The following table provides a brief description of each type.

<i>Image Type</i>	<i>Description</i>
Image Fields	Use for storing images in a user-defined format, such as bitmap (BMP) or PostScript (EPS). Image fields cannot be changed at runtime.
ImageReference Fields	Use when you want to change an image dynamically at runtime using PeopleCode.
Image Definition	Source from which all static images and image fields are taken and used elsewhere in the system.
Image Control	Place this control on a page when you want a variable image that is taken from a record field in the database.
Static Image Control	Use this control when you want to place a static image definition on the page, such as on a push button.

Creating New Image Definitions

This section provides an overview of image definitions and discusses how to:

1. Create an image definition from an image file.
2. Set image properties.
3. Create alternate image types.

Understanding Image Definitions

Image definitions are managed PeopleSoft definitions that can be associated with a variety of page controls. They are primarily for aesthetic purposes, but can also demonstrate a simple function, such as an arrow on a push button. Many organizations store images along with the rest of their employee, customer, and supplier data as part of their ongoing business operations. For example:

- Retailers often store images of each product with the standard merchandise information that they use to manage inventory.

Online retailers can display product pictures on their customer web sites.

- Many organizations store images of each employee as part of their standard human resources information.
- Consumer banks might store images of their customers' cancelled checks.

PeopleSoft Application Designer enables you to create an image definition from any type of image file and store it in a central PeopleTools image catalog. In this process, you convert the image files into image definitions and store them in the image catalog so that you can refer to them from a PeopleTools application. After you create the image definition, it is available for use throughout the system, such as in a static image page control or on a push button or link.

Creating an Image Definition

To create an image definition from an image file:
--

1. Select File, New.
2. Select **Image**.
3. Click **OK** to access the Open Image File dialog box.
4. Select an image file type.

You can select from several file types, such as BMP, WBMP, DIB, GIF, and JPG. You can create an image definition using any file type. GIF and WBMP images are considered alternate image types. See Creating Alternate Image Types.

Note. Some browsers do not support all image types. For example, Netscape does not support BMP images.

5. Select an image file name.

PeopleSoft Application Designer displays a warning message if the image size is greater than 32 kilobytes. The maximum image size depends on the database platform that you are using. Some database platforms support much larger image sizes while others limit the size.

6. Select **Open**.

The image is now open as an image definition in the definition workspace.

7. Select File, Save to save the image definition in the PeopleSoft image repository.

Upon saving, the Image Properties dialog box appears.

Setting Image Properties

After you create a new image definition, you can set the image properties.

To set image properties:

1. Access the Image Properties dialog box.

If not already open, select File, Definition Properties.

2. (Optional) Enter a description on the General tab.
3. Select the Use tab to view image use properties.

Image Name and Image Size Name and size with which it was saved.

Image Format Specify the main and alternate image formats. The main image format, which appears at runtime, is the format in which it was imported, such as BMP. The alternate format is the optional image format that you can specify if you want a GIF image as the main image format that appears at runtime.

Image URL Specify a reference to an image on a web server. It can be used as an alternative to storing an image definition in the database once an image definition is saved. When the user opens a page containing a control that is associated with this image definition, the application retrieves the image from the URL to be displayed, rather than from the database. Set up URLs in the URL Maintenance utility.

Used in Workflow Maps

Select to filter images that appear in a list box for the Change Icon function for PeopleSoft Workflow designers.

Creating Alternate Image Types

When creating new image definitions to use with applications, you might want to use different image types for different purposes. Some developers believe, for example, that JPG is the best format for photographic images because it provides the greatest compression of any bitmap format in common use. However, some believe that JPG is not as effective in compressing text and drawings as it is at compressing photographs. GIF images, on the other hand, seem to be the most widely used format for image storage and continue to be the preferred format for storing text and drawings. Regardless of your image type preferences, PeopleSoft enables you to store all image types in the image catalog.

However, there are two image types (GIF and WBMP) that cannot be viewed in PeopleSoft Application Designer during design time but can be viewed through the browser at runtime. By providing an alternate image type of the image, such as JPG, PeopleSoft enables you to import images for viewing purposes only in PeopleSoft Application Designer. The image that you view at runtime in the browser or in the wireless application is still the original GIF or WBMP image.

To import a GIF or WBMP image type:
--

1. Select File, New.
2. Select **Image**.
The Open Image File dialog box appears.
3. Select *GIF* or *WBMP* from the **Files of Type** drop-down list box.
4. Locate the image that you want to import.
5. Click the **Open** button.

The Content Repository Interface dialog box appears, prompting you to select an alternate image.

6. Select **Yes**.

The Open Alternate Image File dialog box appears, prompting you to select an alternate image type. You must have the same image stored in the directory under a different file type, such as JPG, to view the image in PeopleSoft Application Designer. If you select **No**, you can still open the GIF or WBMP image definition, but you cannot see it. Instead, you see the message: *This image cannot be viewed in Application Designer*.

7. Select the alternate image format and the appropriate file.
8. Click **Open**.

You cannot select a GIF image as an alternate image type for WBMP images. Nor can you select a WBMP image as an alternate image type for a GIF image.

9. Select File, Save As.

Upon saving, the Image Properties dialog box appears. If you select the Use tab, the Image Format group box shows the main image format as GIF (or WBMP) and the alternate as JPG. Now you can view the image in PeopleSoft Application Designer as a JPG image and still display the image at runtime as GIF (or WBMP).

Opening an Image Definition

To open an image definition:

Select File, Open in PeopleSoft Application Designer.

Select *Image* from the **Definition** drop-down list box.

Click **Open** to view the full list of image definitions and brief descriptions.

Updating an Image Definition

This section discusses how to:

- Update an image definition.
- Change the image display size.
- Specify the image storage format.

Updating an Image Definition

Occasionally, the original image file from which you created an image definition might change. To keep the image definitions current, you might want to update them rather than create an entirely new image definition.

To update an image definition:

1. To change the image for a saved image definition, right-click the open definition.
2. Select *Update Image* from the pop-up menu.

The Open Image File dialog box appears, in which you can select the changed image file to replace the open image definition.

3. Click **Open**.

This replaces the previous image in the image definition with the new image that you selected.

4. Select File, Save to save the current image definition with the new image.

Changing the Image Display Size

If the image file is smaller than you want it to appear in the open image definition, you can increase the size by zooming in on the definition workspace. This does not alter the size of the image in the image catalog.

To change image definition display size:

1. Open the image.
2. Right-click the image and select *Zoom* to see the different size ratios.
3. Select a new image display percentage.

The image automatically changes to that selection.

Specifying the Image Storage Format

You can specify a default storage format in which image definitions are stored. For example, if JPG is specified as the preferred storage format, then a BMP image is stored as a JPG after it is converted to an image definition.

To specify an image definition storage format:

1. Select Tools, Options to open the Options dialog box.
2. Select the Image tab.

No conversion

Select to import all image definitions in their original formats. This is the default.

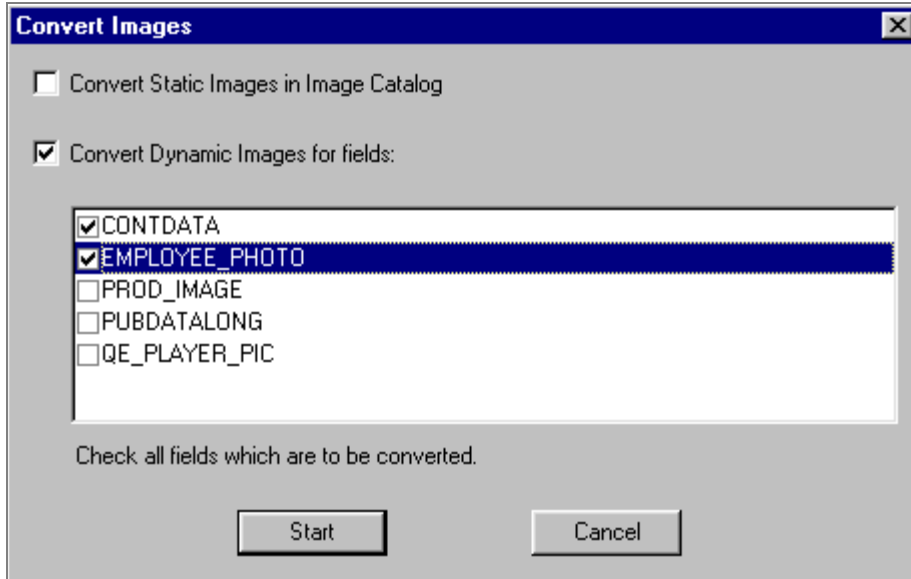
DIB and JPG

Select to convert and store imported image definitions as either DIB or JPG in the PeopleSoft Application Designer image catalog. GIF and WBMP images cannot be converted to DIB or JPG.

3. Click **OK**.

Converting Images

Not all browsers support all image formats, but most browsers support the JPG image type. Therefore, PeopleSoft has a utility to convert all application images to JPG.



Convert Images dialog box

To convert images to JPG format:

1. Select Tools, Upgrade, Convert Images.
2. Select one of these check boxes:

Convert Static Images in Image Catalog

Converts all image definitions that are stored in the image catalog of the PeopleSoft database.

Convert Dynamic Images for fields

Converts all images that are dynamically referenced by PeopleCode to appear in image fields.

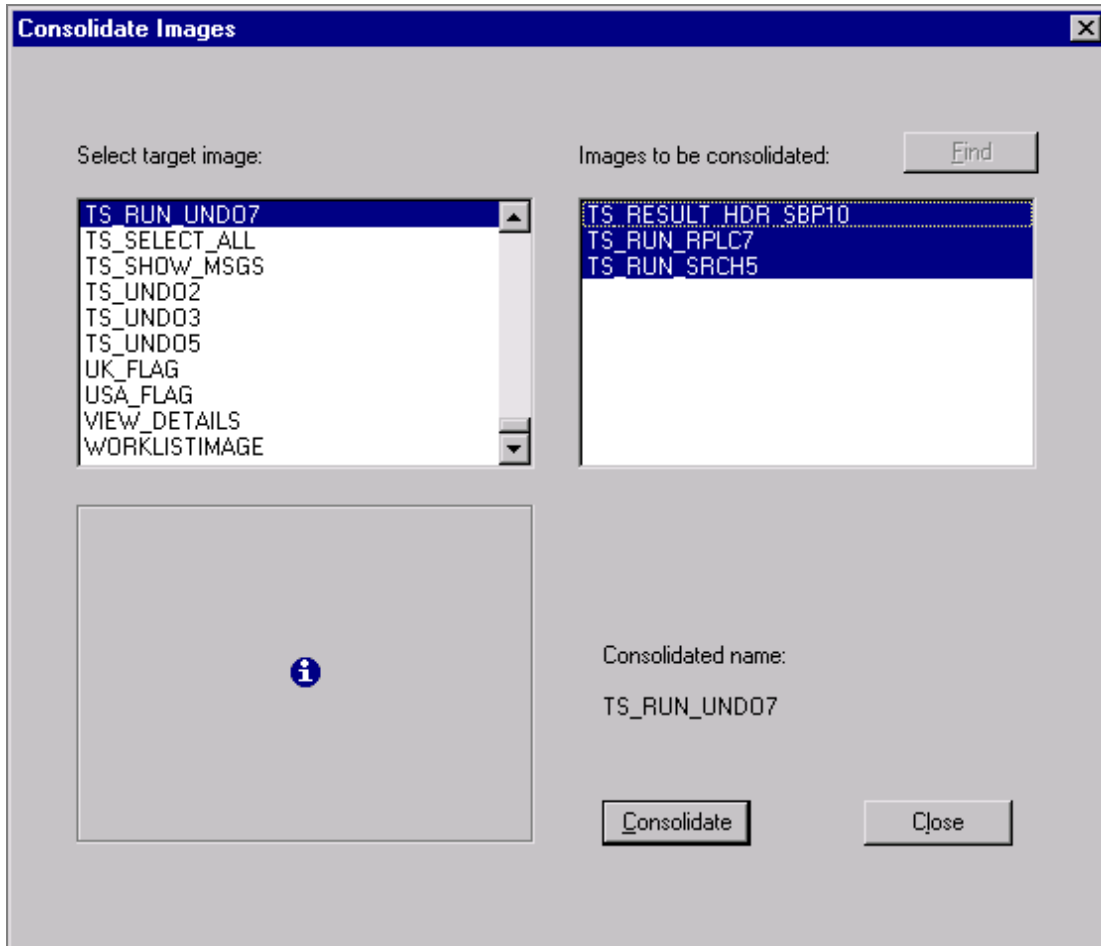
3. Select the fields to convert.
4. Click the **Start** button.

When the process is complete, a confirmation message appears in the Image tab of the output window.

Consolidating Images

Use this tool if you create custom image definitions and use them in multiple record definitions. Consolidating images helps you avoid having the same image stored in several

places. All image definitions that are packaged with the PeopleSoft system have already been consolidated.



Consolidate Images dialog box

To consolidate custom image definitions:

1. Open an existing image definition in the definition workspace.
2. Select Tools, Consolidate Images.
3. Select a target image from the list.
4. Click **Find** to gather all of the consolidated image candidates.
5. Select all of the images.
6. Click **Consolidate**.

The selected image definitions are removed from the **Images to be consolidated** list box and consolidated into the target image.

7. Click **Close**.

Using the Catalog of Image Definitions

This section provides an overview of the image catalog and discusses how to open an image definition.

Understanding the Image Catalog

In addition to the image definitions that you create, the system comes equipped with many predefined image definitions. These images can be used to help you identify an action that a user must perform on a page or for aesthetic purposes only. For example, you can access an image by either inserting it onto a page as a static image or by specifying it as a label on a push button to accompany a specific function.

The following tables list some of the common image definitions in the image catalog that are used by PeopleTools in the deployment of internet applications. PeopleSoft does *not* recommend changing any of these images. You can also use SQL to get a full list of different images:

```
SELECT DISTINCT CONTNAME FROM PSCONTDEFN WHERE CONTTYPE = 1.
```

For a list of language-dependent versions of images, use the following SQL:

```
SELECT CONTNAME, LANGUAGE_CD, CONTTYPE CONTFMT DESCR FROM PSCONTDEFNLANG WHERE CONTTYPE = 1
```

Note. Before logging into Application Designer in a different language, the language support must first be enabled. Use PeopleTools Utilities to enable support.

In general:

- All PeopleTools image definitions start with *PT_*.
- Any image definition with *_D* at the end of the name is the disabled mode of the image.
- All images that start with *PT_TAB* are used for tab construction and colors.

It is important to use these images consistently as you create new pages and update pages in the applications. The images are categorized by function and listed alphabetically by image name.

Note. This list contains a sample of the common images in Application Designer and it is not complete list of PeopleTools images. For a complete list of images, choose File, Open, Image. Click Open to see the full list of images.

Toolbar Images



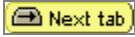
PT_ADDMODE: Add mode.



PT_CORRECTMODE: Correction mode.



PT_NEXTINLIST: View next in list.



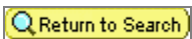
PT_NEXTTAB: Next page in component.



PT_POPUP3: Transfer to a page of links that are related to the current page.



PT_REFRESH: Connects to the server to validate data. Available only to Expert Entry users who defer page processing.



PT_RETURN: Return to search page.



PT_SAVE: Save.



PT_UPDATEALLMODE: Update/Display All mode.



PT_UPDATEMODE: Update/Display mode.

Scroll or Grid Actions

The following standard images are used when creating scroll areas, scroll bars, and grids.



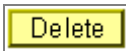
PT_ADD: Add a row.



PT_ADD_LARGE: Large add a row button. Alternative to PT_ADD if there is enough room on the page.



PT_DELETE: Delete a row.



PT_DELETE_LARGE: Large delete a row button. Alternative to PT_DELETE if there is enough room on the page.



PT_GRID_NO_TABS: Expand grid columns horizontally so that grid tabs are no longer showing.



PT_GRID_SHOW_TABS: Return an expanded grid to a tabbed grid.



PT_NEXTROW: View next row.



PT_PREVIOUSROW: View previous row.

Tab Images

You can change the look of both folder and grid tabs.



PT_TAB_LSCROLL: Scroll left to the previous tab in a page or grid.



PT_TAB_RSCROLL: Scroll right to the next tab in a page or grid.



PT_TABxxx through PT_TABxxxxxxx: Selection of over 80 images that can be used for creating folder tabs.



Calendar Prompt Images

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

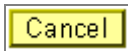
PT_028 through PT_631: Variations of the numbering sequence for a calendar month (28 options).



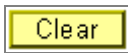
PT_CALENDAR: Open calendar prompt.

Lookup and Search Page Images

The following images are used on lookup and search pages.



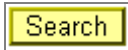
PT_CANCEL: Cancel a lookup page.



PT_CLEAR: Clear search criteria from the page (appears only on the Advanced Search/Lookup page).

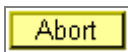


PT_LOOKUP: Begin lookup of data.



PT_SEARCH: Start search on the search page.

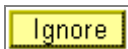
General



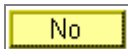
PT_ABORT: Abort transaction. Used in some PeopleCode message boxes.



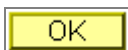
PT_APPLY: Applies changes made to the database. Usually found when transferring to another page through PeopleCode.



PT_IGNORE: Used in some PeopleCode message boxes.



PT_NO: Used in some PeopleCode message boxes.



PT_OK: Accept the input on a secondary page and return to the main page.



PT_PRINT: Open the print dialog box for designated item.

Processing

PT_PROCESSING: Display as flashing text while accessing a server or database.



PT_PROMPT_LOOKUP: Lookup button for a field prompt table.



PT_REPORT_DIST_ICN: Usually found on the Process Scheduler Request page, this button takes you to the Distribution Detail page. Use to select roles and users who can access or receive an email of report output.



PT_SEC_RETURN: Return from a secondary page to the main (calling) page.



PT_WF_ACTIVITY: Used for a subprocess of the business task for workflow, consisting of one or more steps.



PT_WF_BUSPROC: Depict a complete business task for workflow.



PT_WF_STEP: Show a discrete step in the business process, corresponding to a single transaction that is performed on an application page or through an external program.

Query Images



PT_QUERY_ADD_CRITERIA: Add criteria to query.



PT_QUERY_KEY: Denotes a query key field.



PT_QUERY_SORT: Sort query fields alphabetically.

Tree Images

The following tree images are used with PeopleSoft Tree Manager.

Tree node and leaf images:



PSTREEMGR_COL_BRANCH: Identifies the root node for a branch.



PSTREEMGR_COL_NODE: Standard node image.



PSTREEMGR_COL_SKNODE: Tree node that has skipped a level.



PSTREEMGR_END_NODE: Tree node that has no children; that is, a terminal node.



PSTREEMGR_EXP_BRANCH: Root node on a branched tree.



PSTREEMGR_EXP_NODE: Expanded node.

















PSTREEMGR_EXP_SKNODE: Expanded node that has skipped a level.







PSTREEMGR_LEAF: Lowest level detail value of a tree.

Node and leaf command button images:

	PTTREE_ADDCHILD: Add a new child node.
	PTTREE_ADDLEAF: Add a new detail value, such as a leaf.
	PTTREE_ADDSIB: Add a new node as a sibling to selected node.
	PTTREE_CUT: Cut a node or leaf and place it on the clipboard.
	PTTREE_DELETELEAF: Delete a leaf.
	PTTREE_DELETENODE: Delete a node.
	PTTREE_DISP_AS_ROOT: Redisplay the tree, starting with the currently selected node being displayed as the root node.
	PTTREE_EDITDATA: Display underlying user data page.
	PTTREE_MAKEBRANCH: Create a new tree branch, starting with the selected node.
	PTTREE_PASTECHILD: Paste the node on the clipboard as a child of the currently selected node.
	PTTREE_PASTESIB: Paste the node on the clipboard as a sibling of the currently selected node.
	PTTREE_UNBRANCH: Unbranch a branch.
	PTTREE_UPDATELEAF: Update the values and properties for a leaf.
	PTTREE_UPDATENODE: Update the value or properties for a node.

Portal Images

The following portal images are used to perform a specific action. Additional images that are used in the portal, such as PT_PORTAL_HEADER_BG, are purely aesthetic. In general, all images that are reserved for the portal contain the word *PORTAL* in the image name, such as PT_PORTAL_SEPARATOR.

	PT_PORTAL_DOWN_ARROW_Y: Move a pagelet down when personalizing the portal layout.
	PT_PORTAL_GO: Process search criteria.
	PT_PORTAL_MENU: Open the menu navigation.
	PT_PORTAL_FAVORITES: Open the favorites page.



PT_PORTAL_FAVORITES_ADD: Add the current open page to the list of favorites.



PT_PORTAL_IC_BACK: Go back one level in the menu.



PT_PORTAL_IC_CLOSE: Remove a pagelet from the home page.



PT_PORTAL_IC_CLOSE_OVER: Mouse-over image for the close a page button.



PT_PORTAL_IC_HELP: Open help.

CHAPTER 14

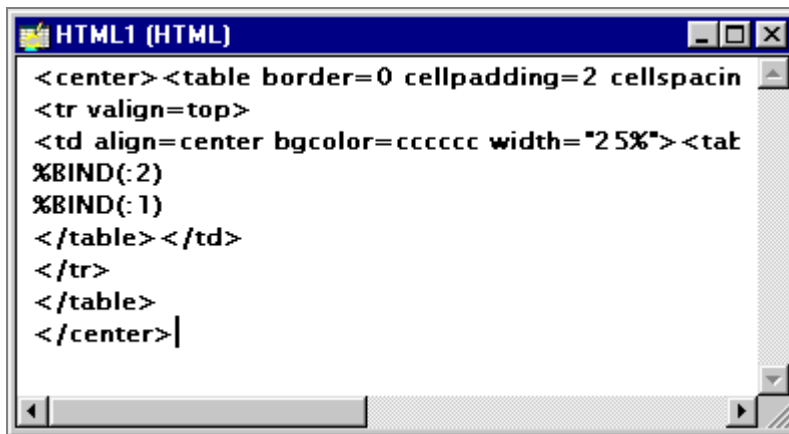
Creating HTML Definitions

Use HTML definitions for storing long strings of HTML text or HTML text that you use repeatedly in your application. You can later access the definition dynamically from an HTML area control using the GetHTMLText PeopleCode function.

This chapter discusses how to:

- Create an HTML definition.
- Open an HTML definition.
- Reference HTML definitions dynamically.

Creating an HTML Definition



```
<center><table border=0 cellpadding=2 cellspacing=2>
<tr valign=top>
<td align=center bgcolor=cccccc width="25%"><table border=0 cellpadding=2 cellspacing=2>
%BIND(:2)
%BIND(:1)
</table></td>
</tr>
</table>
</center>
```

HTML definition

To create an HTML definition:

1. Select File, New.
2. Select *HTML*.
3. Click **OK** to open a new HTML definition.
4. Type or paste the HTML text directly into the open definition window.

5. Select File, Save to save the HTML definition.

The HTML definition is saved in the current database for accessing.

Opening an HTML Definition

To open an HTML Definition:

1. Select File, Open to access the Open Definition dialog box.
2. Select *HTML* from the **Definition** drop-down list box.
3. Click **Open** to show all of the HTML definitions that are currently stored in your database.

You can also enter a letter or word in the **Name** edit box to filter the display. For example, typing the letter *H* reveals all of the HTML definitions that begin with *H* in the database.

Naming a group of HTML definitions by the same introductory phrase can help keep them together for easy selecting.

Referencing HTML Definitions Dynamically

HTML definitions can be referenced from an HTML area control statically or dynamically. However, the most common usage is to reference one or more HTML definitions dynamically from an HTML area control.

To reference an HTML definition dynamically:

1. Add an HTML area control to a page definition.
2. Open the HTML Area Properties dialog box.
3. On the HTML tab, enter the GetHTMLText PeopleCode function for the HTML definition you want to reference.
4. Click **OK**.

See Also

“Using Page Controls,” Populating an HTML Area.

“Creating Page Definitions,” Adding Page Controls .

PeopleTools 8.4 PeopleBook: PeopleSoft PeopleCode Developer’s Guide, “Using Methods and Built In Functions,” Using HTML Definitions and the GetHTMLText Function

Upgrading with PeopleSoft Application Designer

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

- Prepare projects for an upgrade.
- Set upgrade options.
- Review upgrade settings.
- Copy projects.
- Access online reports.
- View copy or compare process error messages.
- Stamp the target database.
- Reuse projects.

Understanding Upgrading

PeopleSoft Application Designer streamlines the migration of database definitions—such as records, pages, projects, and PeopleCode—from one PeopleSoft database to another. You can also use PeopleSoft Application Designer to generate online and printed reports about how the definitions in a project differ between the source and target databases.

There are many types of upgrades, each requiring a different amount of time and effort. However, there are basic steps to perform in PeopleSoft Application Designer regardless of the type of upgrade. To understand the specific procedures for an enterprise-wide upgrade for a specific platform, see the upgrade documentation for your platform.

Definition Types That Can Be Upgraded

PeopleSoft Application Designer has the following levels of upgrade support for PeopleSoft definitions: full (compare and copy), copy to and from file, and copy-only. If a definition type has full upgrade support, it can be compared and copied. If the definition type has "copy to and from file" support, then the definition can be copied to the database and to the file. Copy-only support means that a definition can be copied but not compared.

Definition Type	Compare and Copy	Copy to and from File	Copy-only
Access Groups			X
Activities	X	X	
Application Engine Programs	X	X	
Application Engine Sections	X	X	
Application Packages	X	X	
Approval Rule Sets	X	X	
Archive Templates	X	X	
Business Interlink	X	X	
Business Processes	X	X	
Colors	X	X	
Component Interfaces	X	X	
Components	X	X	
Cube Definitions			X
Cube Instance Definitions			X
Dimensions			X
Field Formats	X	X	
Fields	X	X	
File Layout Definitions	X	X	
File References**			
HTML	X	X	
Images	X	X	
Indexes	X	X	
Job Definitions	X	X	
Menus	X	X	
Message Catalog Entries			X
Message Channels	X	X	
Message Nodes	X	X	
Messages	X	X	
Mobile Pages	X	X	
Pages	X	X	

Definition Type	Compare and Copy	Copy to and from File	Copy-only
PeopleCode—Application Engine	X	X	
PeopleCode—Application Package	X	X	
PeopleCode—Component	X	X	
PeopleCode—Component Interface	X	X	
PeopleCode—Component Record	X	X	
PeopleCode—Component Record Field	X	X	
PeopleCode—Menu	X	X	
PeopleCode—Message	X	X	
PeopleCode—Page	X	X	
PeopleCode—Page Field	X	X	
PeopleCode—Record	X	X	
PeopleCode—Subscription	X	X	
Permission Lists	X	X	
Portal Registry Definition	X	X	
Portal Registry Structures	X	X	
Portal Registry User Favorites	X	X	
Portal Registry User Homepages	X	X	
Problem Types	X	X	
Process Definitions	X	X	
Process Type Definitions	X	X	
Queries	X	X	
Records	X	X	
Recurrence Definitions	X	X	
Relationships	X	X	
Roles			X
Server Definitions	X	X	
SQL	X	X	
Style Sheets	X	X	
Styles	X	X	
Translate Values	X	X	
Tree Structures	X	X	

Definition Type	Compare and Copy	Copy to and from File	Copy-only
Trees			X
URL Definitions	X	X	
XSLT	X	X	

**File Reference definitions cannot be compared or copied. They are only references to files that are delivered as part of a maintenance project.

Note. Certain definition types that are specified as compare and copy or copy-only (for example, Cube Dimensions) do not appear on the Development tab because you cannot edit them in PeopleSoft Application Designer. Refer to the specific PeopleSoft PeopleTools documentation that supports these definition types.

Preparing for an Upgrade

Before you can copy a database to a destination, either a target database or a file, prepare for the upgrade.

This section discusses how to:

- Navigate in the upgrade workspace.
- Connect to a target database.
- Populate projects.
- Obtain security access.
- Compare databases.

Navigating in the Upgrade Workspace

When using the PeopleSoft Application Designer upgrade feature, use the Upgrade tab at the bottom of the project workspace. This is different from the one that is used for developing definitions.

The upgrade view of the project workspace shows all of the definition types in the project that are *available for upgrade*—not only those that PeopleSoft Application Designer can modify, as in the development view. The upgrade definition window displays the definitions in the project and their upgrade settings. One definition type appears at a time.

Records (Upgrade Definition Type)							
Records Key							
	Record Name	Field Name	Source	Target	Action	Upgrade	Done
1	ACCESS_GRP_LANG		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	ACCESS_GRP_TBL		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	ACCESS_GRP_WRK		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	ACLCOMPREF_VW		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	ACLCOMPONENT_V2		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	ACL_PAGES_VW2		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	ACTIONAME_VW		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	AEAPPL_AUX		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	AEAPPL_LNG_VW		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	AEAPPL_VW		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	AECOBOLPARM		Unknown	Unknown	Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12	AEDAEMONMGR_AET		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13	AEONLINEINST		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14	AEREQUESTPARM		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15	AETEMPTBLMGR		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16	AE_DAEMON_PGM_V		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	AE_DERIVED		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18	AE_PTTSRPLC_AET		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19	AE_PTTSUNDO_AET		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
20	AE_REQUEST		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21	AE_REQUEST_OPT		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
22	AE_SYNCGEN_AET		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
23	AE_TEMPLOCK2_VW		Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Upgrade definition window

To view the upgrade attributes of a project:

1. Open a project.
2. Select the Upgrade tab at the bottom of the project workspace.

With the exception of PeopleCode, the folders in the upgrade view are not expandable. Double-clicking one of these folders opens the upgrade definition window. To view all of the definitions in a project for an upgrade, double-click a folder that is listed in the upgrade view.

The upgrade definition window contains a grid displaying definitions in the project that are of the selected type. For example, if you double-click the Records folder in the upgrade view, the upgrade definition window displays the records in the project.

You can view only one upgrade definition window—and one definition type—at a time. When you double-click another definition type in the upgrade view, the upgrade definition window is refreshed with the new definitions of that type.

Note. You can filter which definitions are displayed in this window. By default, no filtering is applied.

Upgrade Definition Columns

The columns in the upgrade definition window display various information about each definition.

Key	Displays the name of the definition, plus any other key values. The number and titles of the key columns vary, depending on the definition type.
Source	Displays the definition status in the source (current) database.
Target	Displays the definition target database status.
Action	Displays the action that is performed if the definition is copied into the target database.
Upgrade	Select which definitions to upgrade during a copy.
Done	Displays whether a definition has been copied. You can't select Done check boxes yourself—PeopleSoft Application Designer does this after a copy—but you can <i>clear</i> them. Only definitions that have Upgrade selected and Done cleared are copied during an upgrade.

The key columns on the left-hand side of the grid do not scroll horizontally. When you use the horizontal scroll bar, only the upgrade columns scroll, enabling you to see the key information about the definitions at all times. The various definition types have different numbers of key columns. For example, fields have only one column (Field Name), while translates have four (Field Name, Field Value, Language Code, and Effective Date).

When viewing definition types with a large nonscrolling region, the horizontal scroll bar is disabled unless there is at least one scrolling column displayed.

To enlarge the window enough so that you can scroll the upgrade columns:

- Maximize the upgrade definition window.
- Maximize PeopleSoft Application Designer.
- Hide the project workspace.

If you want to display *all* of the grid columns at one time and the preceding options don't allow you to see every column, use the zooming commands in the View menu. With each Zoom Out command, the grid size is reduced. To restore the normal view, select 100%.

You can also resize individual columns in the grid. Place the cursor over the right-hand edge of the column that you want to resize (in the header row).



Resize cursor.

When the cursor changes to the preceding icon, drag the column border to the appropriate size. If you resize the upgrade columns, save the sizing and use it for every project. Custom key column sizing is not preserved after you close a project; these columns reset to their default size.

Connecting to a Target Database

You must connect to a target database using the PeopleSoft Signon dialog box for many upgrade tasks.

To connect to a target database, enter the following information in the PeopleSoft Signon dialog box:

Database Name	The name of your target database.
User ID	The standard user-defined ID for the target system.
Password	The user-defined password for the target system.

Populating Projects

Before you can copy definitions from one database to another, you must insert them into a PeopleSoft Application Designer project. If you have a custom application, identify which definitions must be copied from the source into the target database. When you know which definitions you want to upgrade, specify and insert the definitions into the project.

However, when you are unfamiliar with one of the databases, you might want to populate a project by comparison—for example, when you upgrade to a new PeopleSoft application release. When you populate a project by comparison, the source and target databases are compared and the project is automatically populated with definitions that are defined differently in the two databases.

This section provides a summary of Upgrade menu actions and discusses how to:

- Populate projects.
- Open definitions.
- Search for a definition.
- Print all definitions in a project.
- Obtain access for upgrading.
- Convert definitions.

Summary of Upgrade Menu Actions

Menu Item	Action
View Definition	Opens multiple definitions in the upgrade grid.
View PeopleCode	Opens the PeopleCode Editor. This is enabled for PeopleCode definition types.
Filtering	Opens a cascading menu with various filtering options that you can apply to the upgrade grid. These same options are also in the View menu.

Menu Item	Action
Refresh View	Updates the information in the upgrade definition window.
Set Action	Enables you to select and tag definitions for copying and deleting.
Set Action for Project	Enables you to select and tag all definitions in a project for copy or delete.
Tag for Upgrade	Enables you to tag a group of definitions for upgrade.
Untag for Upgrade	Enables you to remove the tag on a group of definitions for upgrade.
Reset Done Flag	Enables you reset Done flags for a group of definitions.
Reset Project Done Flags	Enables you to reset all Done check boxes.
Insert Definitions into Project	Opens the Insert Definitions into Project dialog box.
Remove from Project	Removes the selected definitions from the current project. You can also use the DEL (delete) key.
Project Properties	Opens the Project Properties dialog box, in which you define the report filter and copy.

Populating Projects

To populate projects:

1. Select Insert, Definitions into Project from the PeopleSoft Application Designer toolbar.

PeopleSoft Application Designer designates certain definition types as related to a parent or controlling definition type. For example, a record's related definitions can include fields, indexes, and subrecords. When you insert definitions into a project for upgrading, it can be important for these related definitions to be included.

2. Select the definitions and click **Insert**.
3. Select Tools, Options.
4. On the Project tab, review the settings in **Related Definitions Options** and reset.

Opening Definitions

To open a single definition in the upgrade grid, double-click the item. You can also open more than one definition in the upgrade grid.

To open multiple definitions:

1. Select the items in the grid.

Hold down the SHIFT key to select a range of definitions, or use the CTRL key to select individual definitions.

2. Right-click one of the selected items.
3. Select *View Definition*.

Searching for a definition

To find a particular definition in the grid, search for all or part of the definition name.

<h4>To find a definition in the project:</h4>
--

1. Select Edit, Find.

The Find dialog displays. Use this dialog to find a text string in an upgrade definition window.

2. Enter a value in the Find what text box.
3. Specify the Direction and whether to Match case in the search.

Search Up or Down. Select Match case for the search results to match the letter casing of your search string.

4. Click Find Next.

If a match is found, the cell containing the match is highlighted.

Printing All Definitions in a Project

You can print a project definition for all of the definition types in the current project. This differs from the Print menu item, which prints only the currently selected definition type that is open in the upgrade grid. The data, however, is the same.

To print a project definition for all definitions in current project, select File, Print Project... from the PeopleSoft Application Designer toolbar.

Obtaining Access for Upgrading

To use the PeopleSoft Application Designer upgrade features, you must have full access to projects and upgrade access in the target database.

Also, PeopleSoft recommends that you lock all PeopleSoft Application Designer definitions in the source and target databases before comparing and copying projects. To do this, you need supervisor-level access to Change Control (in the Tools menu). If your Change Control administrator performs this action for you, the administrator's user ID is the only one allowed to perform the copy while the target definitions are locked.

Converting Definitions

The Upgrade process enables you to convert images, PeopleCode, field names, PeopleSoft Application Engine programs, and Business Process Images.

Comparing Databases

PeopleSoft Application Designer enables you to compare the contents of your project with the target database and shows you the status of each definition in the target and source databases. You can then decide which definitions to keep.

There are two ways to compare a source and target database.

- Compare all database definitions of a certain type—then, populate the current project with definitions that are defined differently in the source than in the target.
- Compare only the definitions in the current project.

This section provides overviews of these two methods and discusses how to set options for comparison.

Note. Save any changes to objects and close all windows before starting the Compare process. This will ensure that all generated reports are saved during the Compare process. Once the process is complete, you can open the report from a file and view them on-line.

Comparing All Definitions by Type

PeopleSoft Application Designer performs comparisons one definition type at a time. For each definition type that you select, the system removes any existing definitions of that type from the current project and repopulates the project based on the comparison results. For this reason, be careful when performing a database comparison on a predefined project.

For example, suppose that your project includes several record, page, and menu definitions and you perform a database comparison on pages only. All of the page definitions that were originally in the project are removed and replaced by any page definitions that were found in the compare process. However, the record and menu definitions in your project are not affected.

Performing a database comparison overwrites custom upgrade settings with the defaults for the specified target orientation.

Comparing Definitions by Project

If you manually inserted definitions into your project and you want to see how those definitions differ from the same definitions in another database, perform a project comparison. This method compares only the definitions in the project and does not repopulate the project—except in record and field comparisons. Upgrade settings are never modified when you perform a project comparison.

When records are compared—during a database *or* project comparison—differences that are found in record fields are written into the project. For example, suppose that Record A in the source database contains record fields 1, 2, 3, 4, and 5, and Record A in the target database contains fields 2, 4, 6, and 7. Before the comparison, the project contains only Record A. After the comparison, the project contains Record A and record fields 1, 3, 5, 6, and 7.

Similarly, when field definitions are compared, differences that are found in the field labels are inserted into the project as new field definitions. For example, suppose that you are comparing the source with the target, and both databases have the same field definitions. However, the field labels for one of those field definitions is different. The source field definition is labeled Employee ID, but in the target, it is labeled Staff ID. The compare creates a new field definition that is labeled Staff ID. After the comparison, the project contains both an Employee ID field and a Staff ID field.

Note. These are the only situations where a project comparison repopulates a project.

Performing a Comparison

To perform a comparison:

1. (Optional) Lock all of the Application Designer definitions in the target database.

If you perform a full comparison, it might take several days for you to review all of the comparison reports and set the upgrade settings accordingly. Locking the PeopleSoft Application Designer definitions in the target database ensures that those definitions cannot be changed between the comparison and the time that you perform the copy.
2. Turn off all tracing.
3. Select Tools, Compare and Report....

The PeopleSoft Signon dialog box appears, prompting you to sign in to an upgrade target database.
4. Sign in to the target database.

Sign in as you do with any PeopleSoft database. The Compare and Report dialog box appears.
5. Select the types of definitions to compare from the Definition list.
6. Click Options to access the Upgrade Options dialog box.

Set all Upgrade Options including comparison report filters.
7. Click Compare to perform the comparison.

The system creates online reports for the definitions that you are comparing. Upgrade Compare reports are saved once they are generated.

Setting Upgrade Options

The upgrade options covered in this section are also tabs in the Upgrade Options dialog box. The options include:

- General
- Compare
- Report
- Report filter
- Copy

To access these tabs, select Tools, Compare and Report. Sign on to an upgrade target database. In the Compare and Report dialog box, click Options. Click the General Options tab.

Setting General Options

Set general options for either the compare or copy process.

The screenshot shows the 'Upgrade Options' dialog box with the 'General Options' tab selected. The dialog has a title bar with a close button (X) and a tabbed interface with five tabs: 'General Options', 'Compare Options', 'Report Options', 'Report Filter', and 'Copy Options'. The 'General Options' tab is active and contains the following settings:

- Commit Limit:** A text input field containing the value '50'.
- Audit Flags on Records:** Two radio buttons: 'Keep Target Audit Flags' (selected) and 'Set Target Audit Flags from Source'.
- DDL on Records and Indexes:** Two radio buttons: 'Keep Target DDL' (selected) and 'Take DDL from Source'.
- Portal Structures Permission List:** Two radio buttons: 'Keep Target References' (selected) and 'Set References from Source'.
- Chartfield Options:** Two radio buttons: 'Keep Target Display Size' (selected) and 'Set Display Size from Source'.
- Database Field Format:** Two radio buttons: 'Keep Target Field Format' (selected) and 'Set Field Format from Source'.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

General Options Tab

To set general options:

1. Click the General Options tab.
2. Select a commit limit.

Start with the default of *50*. If the copy process seems slow and there is sufficient log file space, try increasing the commit limit. You can modify the initial project default commit limit from the Utilities page in PeopleTools Security.

Very large commit limits, however, can cause more work if something goes wrong during the copy. For example, if the commit limit is set to *1,000* and the copy process stalls on the 999th definition, none of the previous definitions are copied. The copy process must be performed again.

3. Determine the Audit Flags on Records setting.

Keep Target Audit Flags Select to preserve all of the enabled target flags. Audit flags that are enabled in the source are also retained. Differences between the source and target audit flags are not shown on the compare report. This is the default.

Set Target Audit Flags from Source Select to copy audit flag settings from the source to the target database.

4. Select the DDL on records and indexes.

Keep Target DDL Select to preserve the target DDLs. This is the default. Differences between the source and target DDL are not shown on the compare report.

Take DDL from Source Select to copy the DDL from the source to the target database.

5. Determine the Portal Structures Permission List.

Keep Target References Select to preserve the target portal structures permission list references. This is the default.

Set References from Source Select to copy the portal structures permission list references from the source to the target database.

6. Determine the Chartfield Options.

- a. Set the display size page property for copying or comparing Page objects.

Keep Target Display Size Any display changes to a chartfield on the source database will not be copied (the target values are saved).

If this is set for a Compare, no differences between the source and target in the named fields are displayed. If the only differences on the page are the chartfield display

properties, then the page will compare as the same for both.

Set Display Size from Source

This will copy the position as well as the size and type attributes from the source to the target database.

- b. Set the database field format for copying or comparing Field objects.

Keep Target Field Format

Any changes to the Field Format values for a database Field which is a chartfield on the source database will not be copied, and the target field format values are preserved.

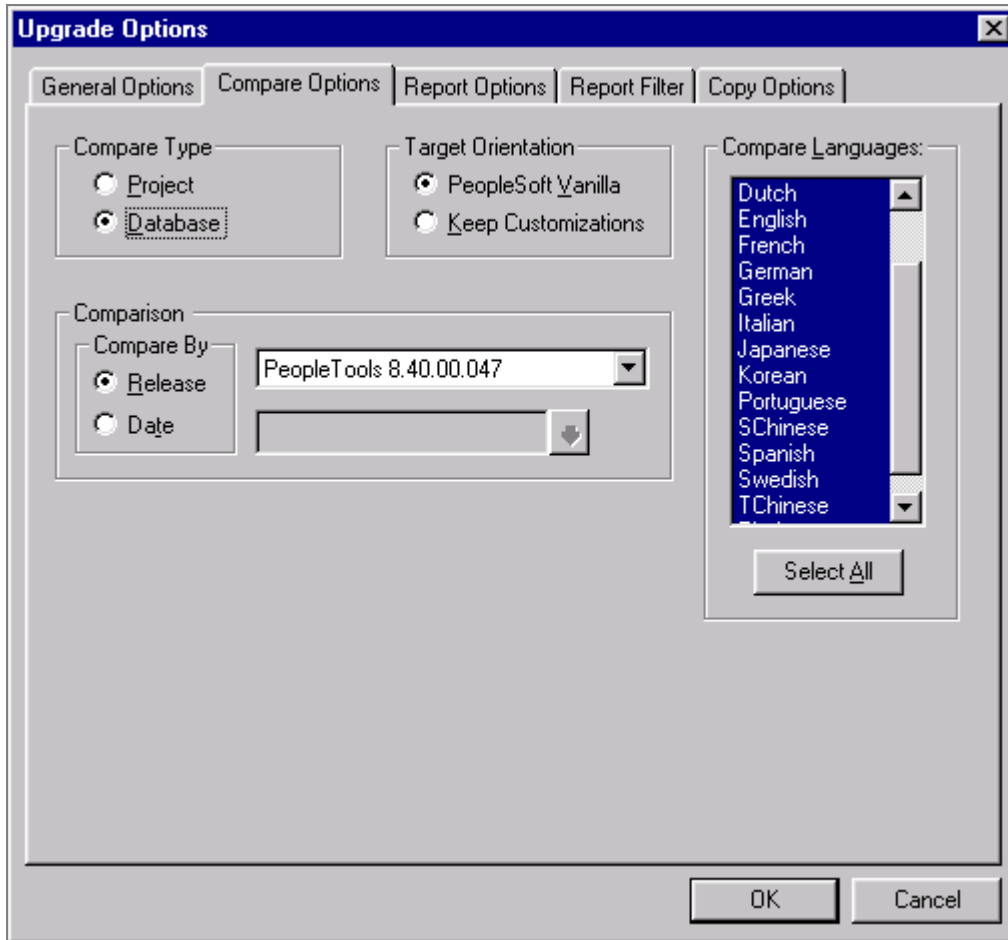
If this is set for a Compare, any changes to the chartfield field format attributes are not displayed. If these attributes are the only changes for a field, then the definition will compare as the same for both.

Set Field Format from Source

This will copy the chartfield field format attributes from the source database to the target.

7. Click **OK**.

Setting Compare Options



Compare Options tab

To set compare options:

1. Click the Compare Options tab.
2. Select the compare type.

Project

Select to compare only the definitions of the specified definition type in the current project. The contents of the project do not change.

Database

Select to compare all definitions of the specified definition type.

Warning! If you select Database, the contents of the current project are deleted and replaced with definitions found during the comparison.

3. Select a target orientation.

This option determines how the Upgrade check boxes in the upgrade definition window are set for definitions that were last modified by the customer in one database and last modified by PeopleSoft in the other database.

PeopleSoft Vanilla Select to preserve PeopleSoft changes.

Keep Customizations Select to preserve customer changes.

4. In the **Comparison** group box, select the criteria by which to compare databases.

Release Select to compare databases by the highest release that the two databases have in common. Use the drop-down list box to select from lower common releases. The comparison process labels definitions as Changed or Custom/Changed if they've been changed since the date and time stamp for that release level. This is the default.

Date Select to have the comparison process label definitions as Changed or Custom/Changed if they have been modified since the date that you specify.

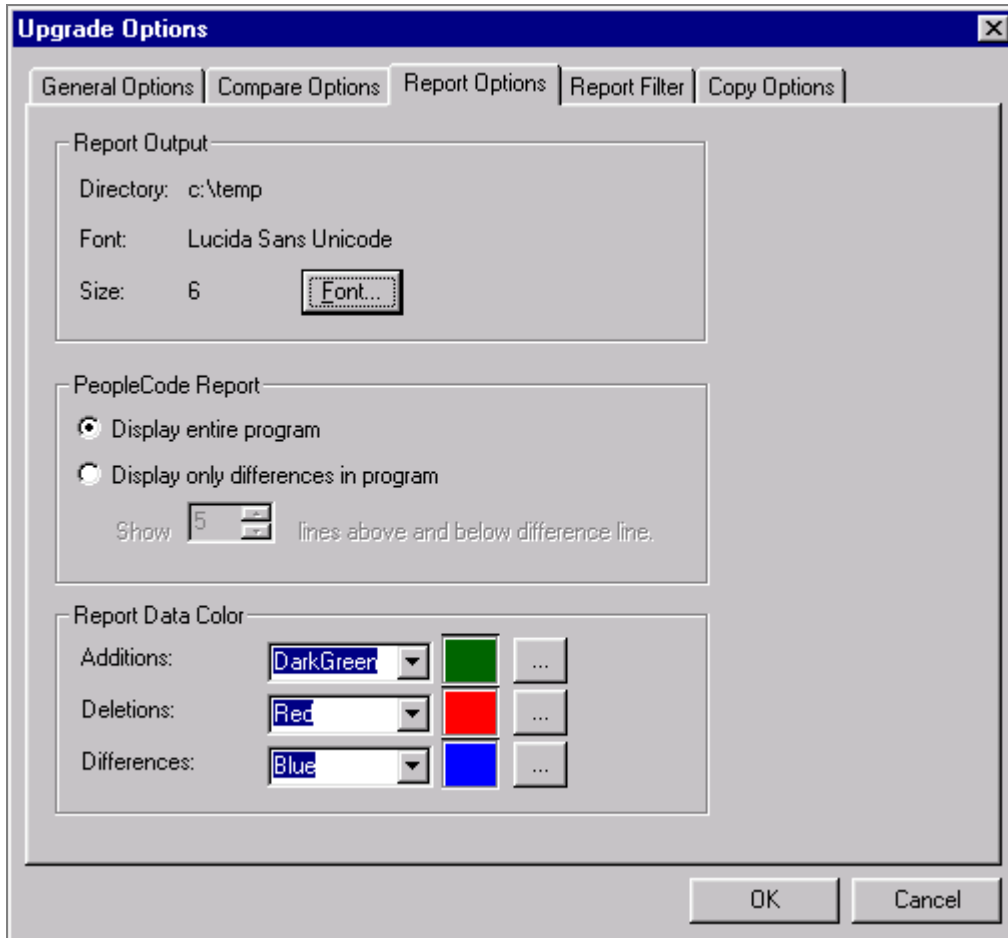
5. Select languages.

Compare Languages Select the languages of definitions that you want to compare and *Common*, which specifies basic definition characteristics and parameters in the architecture that are not language-sensitive. Language options specify label-oriented characteristics of a definition, such as page names, labels, and messages. If you do not select *COMMON*, basic definition characteristics are omitted.

If you need specific languages and basic definition characteristics, also select *COMMON*. However, if you want to copy only language attributes of a definition, you do not need *COMMON*.

Select All This is the recommended default. Make sure that the languages in the source and target databases match. Use the CTRL key to clear unwanted languages.

Setting Report Options



Report Options tab

To set options for reports:

1. Click the Report Options tab.
2. Select the Report Output options.
 - a. The output directory is set. To change this path, select Tools, Options from the Application Designer toolbar. Select the General tab to enter a new Report Output Directory path.
 - b. Choose a font for the report output. Click Font to select from a list of fonts.
2. Specify the **PeopleCode Report** options.

For PeopleCode compare reports, specify whether to show the entire program on the report (the default setting) or only the code differences between the source and target. If you select the latter, you can specify the number of code lines to show above and below the difference for context. The values for the number of lines to show are 0 to 99. A

value of 0 shows only the difference line. A value greater than 0 shows that many lines above and below the difference line.

Note. The PeopleCode Report settings are global across all projects. Changing settings for one project changes all subsequent PeopleCode compares, regardless of project.

3. Select the report data color.

Use the Browse button to display the standard color dialog box. Choose a color that is not included in the drop-down list or create a custom color.

Additions	Additional data values on the source database. These are also source-only values. The default value is dark green.
Deletions	Data values deleted from the source database. These are target-only values. The default value is red.
Differences	Changed values which are both source and target values. The default value is blue.

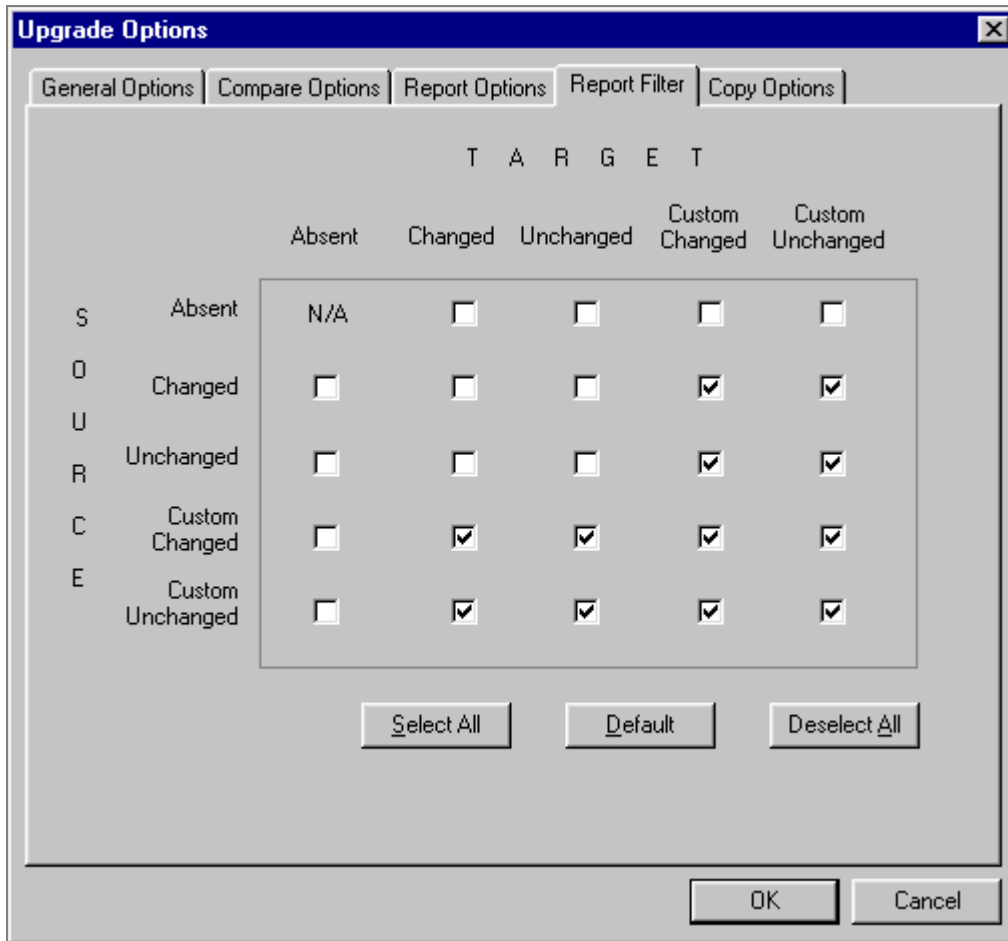
Setting Report Filter Options

When you perform a comparison, the system generates a report for each definition type compared. These reports provide detailed information about how each definition in the source differs from its counterpart in the target.

Before performing a comparison, you can select the definition status combinations with which you generate reports using report filter options. For example, during an upgrade to a new PeopleSoft release, you might decide that if a definition that was last changed in the target by PeopleSoft is found in the source and it hasn't changed since the last upgrade, you don't need to see information about the definition differences (because you intend to accept the new PeopleSoft version). In this case, you want to filter the compare reports so that a report is not generated if:

- Source = (Any status).
- Target = Unchanged.

Note. Filtering comparison reports does not affect which definitions are added to a project during a database comparison, only which definitions are reported. Definitions that are defined differently in the two databases are always added to the project.



Report Filter tab

To define the comparison report filter options:

1. Click the Report Filter tab.

Use the check boxes to specify how you want to filter the upgrade comparison reports.

2. Select the check boxes corresponding to the definition status combinations that you want to report.

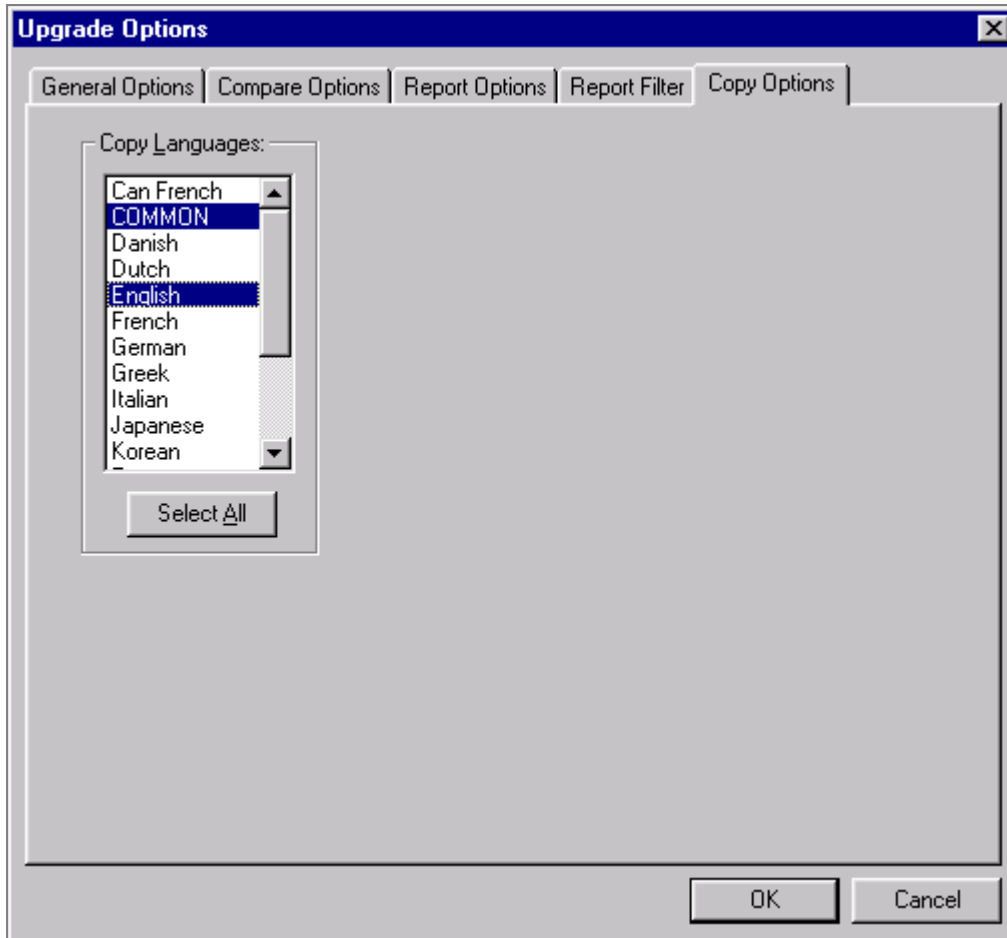
Each row in the matrix corresponds to the definition status in the source database. Each column corresponds to the definition status in the target.

The default settings for report filtering show conflicting configured definitions only.

- To reset your selections to the default setting, click the **Default** button.
- To select all definition status combinations, click **Select All**.
- If you don't want to generate any reports, click the **Deselect All** button to clear all of the check boxes.

3. Click OK.

Setting Copy Options



Copy Options tab

To set copy options:

1. Click the Copy Options tab.
2. Select the languages of the definitions that you want to copy.

Select All

This is the recommended default. Make sure that the languages in the source and target databases match. Otherwise, you might overwrite translations in the target. Use the CTRL key to clear unwanted languages.

Copy Languages

Select a specific language and *COMMON*, which specifies basic definition characteristics and parameters in the architecture that are not language-sensitive. Language

options specify label-oriented characteristics of a definition, such as page names, labels, and messages. If you do not select *COMMON*, basic definition characteristics are omitted. If you need specific languages and basic definition characteristics, also select *COMMON*.

Translation scenario examples:

Selection	Result
<i>COMMON</i> and <i>English</i>	The source database does not include translations, but the target database has translations that you do not want to overwrite.
Languages (omit <i>COMMON</i>)	You sent the database out for translations and want to avoid copying inadvertent changes that were made by the translators to the definitions.
<i>COMMON</i> (omit languages)	You want to copy the source without translations to the target.

3. Click OK.

When you save the project, the copy settings that you made are saved and remain set unless you change them again.

Reviewing Upgrade Settings

After your project is populated with definitions and has been compared (if applicable), review it and check the upgrade settings before copying it.

To reduce the number of definitions through which you must search, filter out the information you don't need to see by setting your view options. Afterwards, you can adjust the default upgrade settings.

This section discusses how to:

- Select view options.
- Override upgrade defaults.
- Record upgrade settings.

Selecting View Options

Filter your view of the upgrade definition window by selecting one of the options in the View, Filtering menu. These same options are available in the upgrade pop-up menu in the Filtering menu. The options are:

No Filtering	All definitions are displayed.
Tagged for Upgrade	Only definitions with the Upgrade check box selected are displayed.
Not Tagged for Upgrade	Only definitions with the Upgrade check box cleared are displayed.
Done	Only definitions with the Done check box selected are displayed.
Not Done	Only definitions with the Done check box cleared are displayed.
Custom Filtering	Select to open a dialog box in which you can specify which definition status combinations to display.

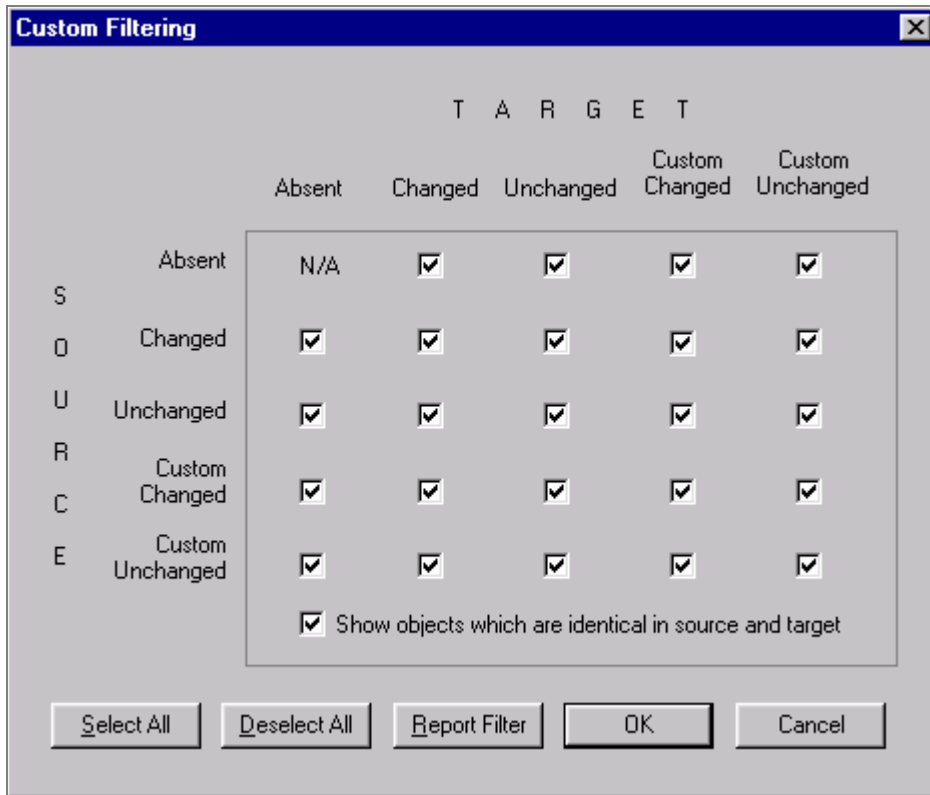
When you apply a filter, the filter type is displayed in the bar above the upgrade columns. For example, in the following graphic, there is a custom filter applied and the Not Tagged for Upgrade and Done options.

View Custom Filter					View Upgrade = No					View Copy Done = Yes				
Source	Target	Action	Upgrade	Done										

Applied filters displayed

Custom Filtering

When you select View, Filtering, Custom Filtering, you see with a matrix similar to that found in the Project Properties dialog box on the Report Filters tab.



Custom Filtering dialog box

Select which definition status combinations to display in the upgrade definition window.

Report Filter

Click to set these options the same as your settings on the Report Filter tab in the Project Properties dialog box.

Show objects which are identical in source and target

Select to display definitions having a status combination of Same/Same. This status combination is possible only if you performed a project comparison and definitions in the project were defined the same in the source and target. You can never have a Same/Same status combination for definition types on which you performed a database comparison.

Overriding Upgrade Defaults

After reviewing your project and its compare reports, if you're unhappy with the default upgrade column values for any definitions, you can override them by changing the Upgrade and Action values.

For example, to preserve a definition that PeopleSoft Application Designer plans to delete from the target (Action is Delete and the Upgrade check box is selected) change the Upgrade setting. You can also remove a definition from the project. This does not delete the definition from the database.

Overriding defaults helps if you want to propagate deletions from one database to another.

This section discusses how to:

- Specify whether action is taken on a single definition.
- Specify whether action is taken on a group of definitions.
- Specify which action is performed on a definition during a copy.
- Remove a definition from a project.
- Select and tag definitions for copying or deleting.

Specifying Whether Action is Taken on a Single Definition

To specify whether action is taken on a single definition, select or clear the definition's Upgrade check box.

When the Upgrade check box is selected, the displayed action is performed when you copy the project. If the check box is cleared, no action is taken.

Specifying Whether Action is Taken on a Group of Definitions

To specify whether any action is taken on a group of definitions:

1. Select a group of definitions.

Use the CTRL and SHIFT keys, or select all definitions in the upgrade definition window by clicking the top, left-hand cell of the grid.

2. Right-click one of the definitions.

The upgrade pop-up menu appears.

3. Select:

Tag for Upgrade

Select to select the Upgrade check boxes for all of the selected definitions.

Untag for Upgrade

Select to clear the Upgrade check boxes for all of the selected definitions.

Specifying Which Action is Performed on a Definition During a Copy

To specify which action is performed on a definition during a copy:

1. Click the **Action** cell of the definition.

This activates a drop-down list box in the cell.

2. Select *Copy* or *Delete* from the drop-down list box.

Remove a Definition From a Project

To remove a definition from a project, select the definition and click DEL.

Selecting and Tagging Definitions for Copying or Deleting**To select and tag definitions for copying or deleting:**

1. Select the definition rows.
2. Right-click one of the definitions.
The Upgrade pop-up menu appears.
3. Select *Set Action*.
4. Select Copy or Delete.

Your selected definition reflects this change in the Action column. When you upgrade the project, it is copied or deleted from the target database.

You can also select *Set Action for Project* to tag all of the definitions in a project for a selected action.

Recording Upgrade Settings

After you change the default upgrade settings, save the project. You might also want to print a hard-copy record of the project in its current state. You can rerun the comparison process (as a project compare) to regenerate new upgrade reports, or you can print the contents of the upgrade definition window to save a high-level view of the project.

This section discusses how to:

- Regenerate upgrade reports.
- Print the contents of the upgrade definition window.

Regenerating Upgrade Reports**To regenerate upgrade reports:**

1. Set up the reporting filter.
2. Perform a project comparison.

A project comparison compares only the definitions in the project, not the Action and Upgrade settings. Your project contents are not altered, unless record fields have changed in the target database, in which case the corresponding changes are made in the project.

This comparison generates new upgrade reports that reflect the configured Action and Upgrade settings.

Printing the Contents of the Upgrade Definition Window

To print the contents of the upgrade definition window:

1. Open the upgrade definition with the appropriate definition type displayed.

To do this, select the appropriate folder in the upgrade view.

2. Select File, Print.

The print job is automatically in landscape-style format.

Copying Projects

There are two ways to copy projects to another database:

- Copying a source project directly to a target database to which you are connected.
- Copying a source project to a file and then copying the file to a target database.

This is a new feature providing more flexibility in moving PeopleTools definitions and projects across databases. To move definitions to another database, you copy definitions to a target directory and files instead of another database. The directory and files can be local or reside on a file server. These files then become the source when copy a project from a file.

This section discusses how to:

- Copy projects to a target database.
- Copy a project to a file.
- Copy a project from a file.

Note. When upgrading from one database to another some of your migrated images may not display in a browser. To remedy this situation, either run setup (which will clear the cache directory) or manually clear any cache files after the project is copied.

Copying Projects to a Target Database

To copy a project:

1. (Optional) Lock target database definitions.

Before PeopleSoft Application Designer replaces or deletes a definition in the target database, it checks to determine whether the definition has a Change Control lock applied. If so, PeopleSoft Application Designer takes action on that definition if it has been locked by the same user ID that is performing the copy. Consequently, the speed of a copy might be slow because every definition to be deleted or replaced in the target must be checked.

You can avoid the performance degradation by locking all of the database definitions in the target database using the Change Control Administrator dialog box. This sets a flag telling PeopleSoft Application Designer not to check the lock status of every definition. When all target definitions are locked, the copy is faster.

2. Deactivate all system tracing.
3. Select Tools, Copy Project, To Database ... from the Application Designer toolbar.

The Target Signon dialog box appears, prompting you to sign in to a target database.

4. Sign in to the target database.

Sign in as you do with any PeopleSoft database.

The Copy dialog box appears. In this dialog box, specify the types of definitions to copy and start the copy process.

5. (Optional) Select the **Reset Done Flags** check box.

Any definition with a selected Done check box is not copied. The first time that you copy a project, all Done check boxes are cleared. When you're repeating a copy due to problems found the first time, however, you might want to clear the Done check boxes of definitions that were copied incorrectly. Clear all project Done check boxes from the Copy dialog box by selecting **Reset Done Flags**. This option is selected by default.

6. (Optional) Select the Copy Project Definition check box.

If you select this check box, the project definition is copied to the target database.

7. Select the definition types to copy.

Only the definition types that exist in the project are displayed in the **Object Type(s)** list. To select all types, click **Select All**. You can also copy one definition type at a time (repeat this procedure each time).

Note. If you copy definition types individually, copy them in the order in which they're presented in the dialog box. For instance, start with records, then indexes, and so on.

8. Click Copy.

As the copy process runs, a progress indicator appears on the status bar of the dialog box, displaying the definition type, total number of definitions to copy, and the number copied so far.

9. After the copy completes, check for messages.

If you find any problems, correct them and repeat the copy.

10. Stamp the database.

To track the history of the configuration upgrades, PeopleSoft recommends that you stamp the target database after each copy.

Copying a Project to a File

To copy a project to a file:

1. Open the project that you want to copy.
2. Select Tools, Copy Project, To File.... The Copy File dialog box appears.
3. Select the objects you want to copy and enter the output directory.
4. Click Copy.

The Progress dialog box shows the progress of the copy process as it copies each definition in the project to the specified directory. If you click the **Cancel** button, the system cancels the copy process. Any files that were created by the copy process are removed from the specified directory. To continue copying a project, restart the copy process if it was cancelled.

When the copy process completes successfully, a directory with the same name as the current project is created under the specified export directory. This directory contains the PeopleSoft PeopleTools definitions and project definition in XML file format.

Copying a Project From a File

Copy Project From File... in the Tools menu imports PeopleSoft PeopleTools definitions and the project definition from a file that was previously copied using the Copy To File feature. To do this, you must have write access to the directory location in which the exported files exist.

This section discusses how to:

- Track fixed incidents.
- Copy a project from a file.

Tracking Fixed Incidents

When PeopleSoft delivers a software update, it is in the form of a maintenance project file. This project file usually includes enhancements or updates that fix incidents. You can view incident IDs and their dependencies before you copy the file to the target database.

To view incident IDs that were included in the project file:

1. Open the maintenance project that you are planning to copy to the database.
2. Click the **Project Properties** button.
3. Select the Incidents tab.

This tab contains a list of incident IDs that were fixed and applied to the software.

4. Select the Dependencies tab.

This tab contains a list of incident IDs that are dependent on other fixes being applied. These are validated against the target database when you copy the project. If a fix in the dependency list has not been applied, a message displays, indicating that the target database is missing a dependency. The only way to have the system allow you to copy projects that have unapplied dependencies is to use the **Override Dependencies** check box.

Note. We can track applied incident ID fixes only through Copy Project From File... in the Tools menu. Therefore, every incident ID fix that PeopleSoft delivers is in a maintenance project that must be copied to your database.

Copying a Project From a File

To copy a project from a file:

1. Select Tools, Copy Project, From File....

The Copy From File: Select Project dialog box appears.

2. Browse to locate the project file or select the file from the Projects list.

You can copy only one project from a file at a time. If a project exists in the current database with the same name as the selected project, the Copy from File process replaces it.

3. Select the project and click Open.

The Copy From File dialog box appears.

4. Select the definition types to copy.

The Definition Type(s) list shows the definition types that have been exported and are available to be copied into the database.

5. Select the Override Dependencies check box, if appropriate.

Select to ensure that the system allows you to copy projects that have unapplied dependencies.

6. Click Copy.

The Progress dialog box shows the progress of the copy process as it copies each definition from the export directory into the attached database. If you click the Cancel button, the system cancels the copy process and performs a rollback to the last commit point.

When the Copy from File process successfully completes, the system creates a new project definition from the PeopleSoft PeopleTools definitions in the current database.

Accessing Online Reports

PeopleSoft provides online comparison reports that replace the SQR reports run through PeopleSoft Process Scheduler. These reports appear in the project workspace area after you select Tools, Compare and Report.

This section discusses how to:

- Access reports.
- Search for definitions in reports.
- Print the report.

Accessing Reports

To access reports:

1. Select Tools, Compare and Report... from the Application Designer toolbar.
2. Sign in to the target database.

The system automatically displays a comparison report for each definition that you selected to be copied. In the preceding screen, only the definition type Pages (ABSENCE_HIST) was compared. Note the message in the message area, *Pages Compare Report Created: c:\temp\UpgPages1.prt (75,9)*. The comparison report is saved to the location that you previously specified. In this case, it is the default: *c:\temp...*

You can open the definition from the online report by double-clicking it.

If your comparison report is large, you can search for specific definition names.

See Also

Connecting to a Target Database

Searching for Definitions in Reports

To search for an definition in the comparison report:

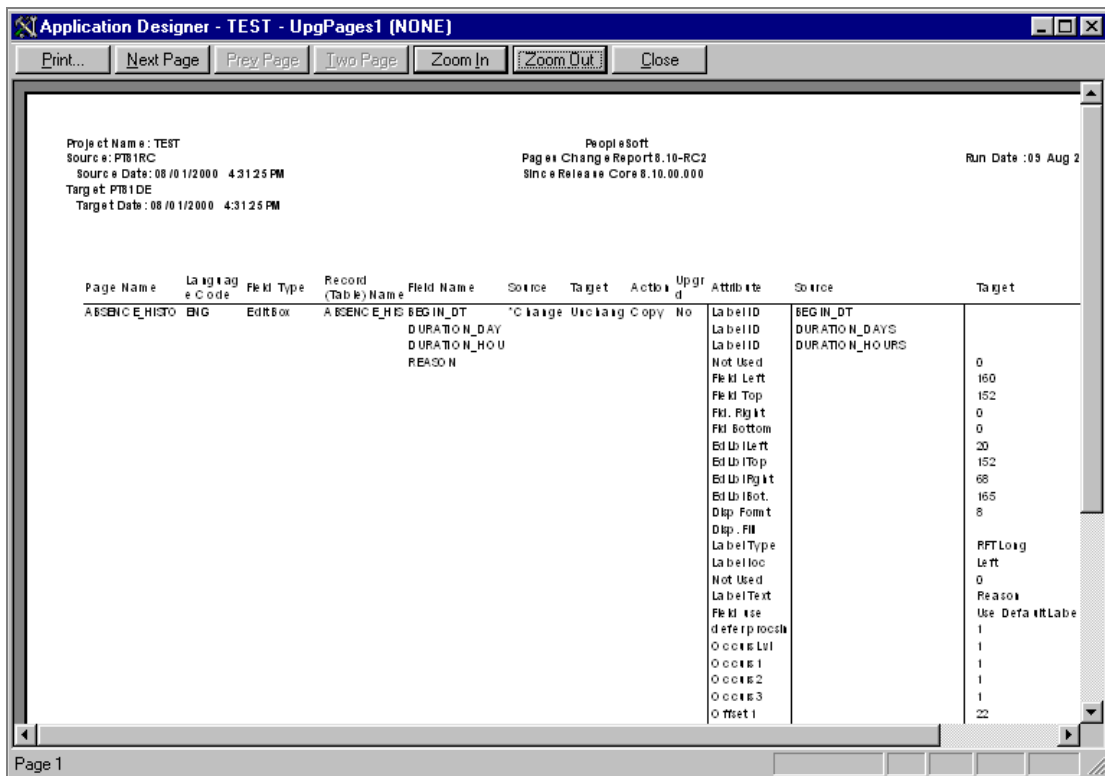
1. Select Edit, Find in Report.
2. Enter the definition name for which you want to search in the **Find what** edit box.
3. Click **Find Next**.

The definition appears in the definition workspace.

Printing the Report

This section discusses how to:

- Print the comparison report.
- Print a comparison report from a file.
- Move print files.



Previewing printed comparison report

Printing the Comparison Report

To print the comparison report:

1. If the comparison report that you want to print is already selected, select File, Print Preview.

Otherwise, select the comparison report that you want to preview. If you are ready to print the report without previewing it, select File, Print.

You can use the buttons at the top of the screen to zoom in, zoom out, or go to the next page.

2. Click **Print**.

The standard Print dialog box appears, enabling you to select the printer, number of copies, and so on.

Printing a Comparison Report From a File

To print a comparison report from a file:

1. To print a saved comparison report, select Find, Report from File.

Select *Print Preview*, *Print*, or *View Report*. These options require that you specify the report name and its location in a standard Open dialog box. *View Report* displays the specified report in the project workspace.

Moving Print Files

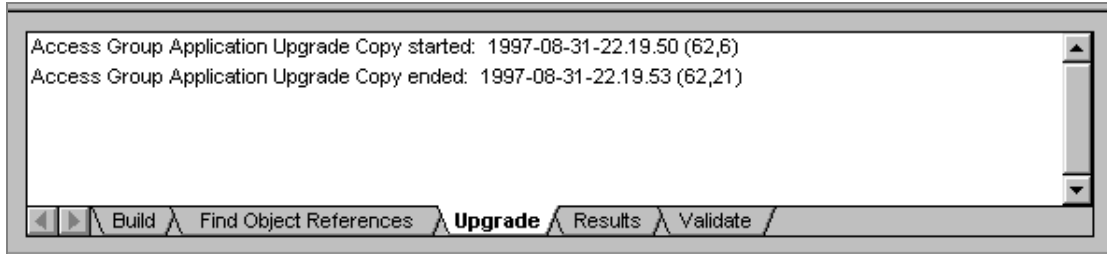
You might want to move the comparison report files to another directory or send as an email attachment. Each comparison report file is saved as two files with the following format:

- Upg<number>*ObjectType*.prt
- Upg<number>*ObjectType*.idx

Both files (*filename.prt* and *filename.idx*) are required to view or print the report.

Viewing Messages

You can determine whether any errors were encountered during the compare or copy process by selecting the Upgrade tab in the output window.



Upgrade view in the output window

This view displays upgrade messages pertaining to the definition type that was most recently displayed in the upgrade definition window. In the preceding example, Access Groups was the last definition type viewed in the window.

This section discusses how to:

- View messages.
- Print upgrade messages.
- Clear messages.

Viewing Messages

To view messages:

1. Reopen the project.
When you perform comparisons, the system automatically saves and closes your project.
2. Click the Upgrade tab in the project workspace.
3. Double-click the folder of the definition type for which you want to view messages, or click the project icon to view all messages.

Any upgrade messages for that definition type appear in the output window.

Printing Upgrade Messages

To print upgrade messages:

1. View the messages that you want to print.
2. Right-click the output window.

3. From the pop-up menu, select *Print*.

Clearing Messages

To clear messages:

1. View the messages that you want to clear.
2. Right-click the output window.
3. From the pop-up menu, select *Clear*.

Stamping a Database

After successfully copying a project into the target database, “stamp” it to reflect the fact that it has changed from its previous customer release level. This helps to identify modifications that you make after this version of the database.

Note. When upgrading to a new PeopleSoft release, this step is *required*, except that you stamp the database with the new PeopleSoft release level, as directed by the upgrade instructions in the Release Notes.

To stamp the target database:

1. Select Tools, Upgrade, Stamp Database.

The Stamp Database dialog box appears.

Use this dialog box to specify and stamp the database with a new customer release level.

2. Enter the appropriate PeopleSoft Release description, service pack level, and customer release value.

Do not change the service pack level unless instructed to do so during a PeopleSoft delivered release upgrade.

The new customer release value must be greater than or equal to the previous value.

3. Click **Stamp**.

Reusing Projects

PeopleSoft Application Designer enables you to reuse your projects. To reuse a project, clear the Done check boxes for the definitions to be recopied. You might also want to validate the project integrity and delete invalid definitions. However, this is not necessary. During a copy, invalid definitions are reported and ignored.

This section discusses how to:

- Validate project integrity.
- Reset all Done check boxes.
- Reset Done check boxes for a group of definitions.
- Reset the Done check box for a single definition.

Validating Project Integrity

To validate project integrity:

1. Select Tools, Options.
2. Select the Validate tab.

Use this tab to specify what kind of checks you want to perform during a project validation. This procedure discusses only project integrity validation.

3. Select the **Validate project integrity** check box.
4. Click **OK**.
5. Select Tools, Validate.

A message appears, asking whether you want to delete and report invalid definitions or just to report them.

Note. An invalid definition is any definition in the project with an Add or Replace action that does not exist in the database. PeopleSoft Application Designer does not act on definitions with a Delete action, because it assumes that you want to retain such definitions in the project—regardless of whether they still exist in the database—for the purpose of deleting the same definition in a target database. See *Overriding Upgrade Defaults*.

Resetting All Done Check Boxes

To reset all Done check boxes:

1. Right-click the upgrade definition window.

The upgrade pop-up menu appears.

2. Select *Reset Project Done Flags*.

You can also select Edit, Upgrade, Reset Project Done Flags from the main menu. All Done check boxes for all definitions in the project are cleared.

Resetting Done Check Boxes for a Group of Definitions

To reset Done check boxes for a group of definitions:

1. Select a group of definitions.

Use the CTRL and SHIFT keys, or select all definitions in the upgrade definition window by clicking the top, left-hand cell of the grid.

2. Right-click one of the definitions.

The upgrade pop-up menu appears.

3. Select *Reset Done Flag*.

You can also select Edit, Upgrade, Reset Done Flag from the main menu. This clears all Done check boxes for the selected definitions.

Resetting the Done Check Box for a Single Definition

To reset the Done check box for a single definition, clear the Done check box for the definition.

Note. You can only manually *clear* Done check boxes. You cannot activate these flags yourself; they are automatically selected after a successful copy.

Using Change Control

This section provides overviews of Change Control features and implementation considerations and discusses how to:

- Set up Change Control.
- Use projects.
- Use Change Control.

Understanding Change Control Features

Change Control has three main functions to help you manage and track development:

- Locking
- History
- Stamping

You can enable one or all of these functions and control how much access each user has to the Change Control commands.

Locking

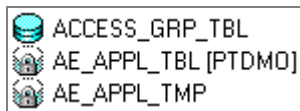
Change Control locking is keyed by PeopleSoft user IDs. When a definition is locked, it cannot be modified by anyone other than the user ID who locked it, and it can be unlocked only by that same user or by a Change Control administrator.

You can determine whether a definition is locked by:

- A small padlock icon on top of the definition in the project workspace (development view) of PeopleSoft Application Designer.
- The user ID of the person who locked the definition, which appears next to the name of the definition.

Your user ID is not displayed for definitions that *you* have locked.

For example, the following graphic displays icons for three record definitions. The top record is unlocked; the middle record is locked by another user ID (PTDMO), the bottom record (with no ID displayed) is locked by you, the current user.



Locked and unlocked record icons

Note. Standard Change Control locking is supported only for definitions that you can modify with PeopleSoft Application Designer. Other PeopleSoft definitions can be added to a project for upgrading, but cannot be locked by developers.

If you are a Change Control administrator, you can lock all upgradable database definitions—both PeopleSoft Application Designer development definitions and other types. However, for non-PeopleSoft Application Designer definitions, this action prevents unauthorized upgrading only—not unauthorized development.

Locking Projects

Under Change Control, projects are treated like any other PeopleSoft Application Designer definition—they must be locked before you can modify them. However, locking a project does *not* lock the definitions in the project, and modifying a definition in a project does not modify the project itself.

A project definition consists of a name and a list of definitions. When you lock a project definition, it prevents other users from adding or removing definitions from the project and from renaming or deleting the project. However, it does *not* restrict access to the definitions that are named in the project definition. Likewise, modifying a definition has no effect on the definition of any project to which the definition might belong.

Note. PeopleSoft Application Designer provides an option to load the last open project on startup. If this option is enabled on your machine and Change Control locking is activated, you might receive an *open in read-only mode?* message at startup if you hadn't locked the project before, or if someone else has the project locked. In either case, you can open the project in read-only mode. Remember, this does not restrict your access to definitions in the project.

Locking Compared to Version Control

Change Control locking is not the same as version control. With a version control system, you check out a copy of a definition and make your changes to the copy. After you check in the changed version, you can always undo your changes. This is *not* the case with change control locking.

Locking a definition prevents other users from modifying it. However, any changes that you save are written directly to the database, overlaying or replacing the existing definition. There is no way to restore a previous version of a definition.

Locking and Upgrades

When preparing to upgrade a database, it's crucial that all development ceases in the source database. This assures that the comparison process is dealing with a static environment. It also assures that changes aren't made to any definitions between the time that you set the upgrade defaults and the time that you copy the definitions.

You can freeze all development by using the Change Control Administrator dialog box to lock *all* database definitions. When the upgrade is done, use the same dialog box to unlock all definitions. However, be aware that this action *permanently* removes all previous lock settings from all definitions. Developers have no way of resetting their locks except by manually relocking. When you lock definitions in this way, it is not reflected in the Locked Objects dialog box or in the project workspace. If a developer has unsaved changes when you lock all definitions, the developer cannot save those changes.

For all of these reasons, it's imperative that you inform developers that you plan to lock all definitions and that you give them time to save their changes, perhaps even to view the Locked Definitions dialog box and print the screen.

Locking definitions with the Change Control Administrator dialog box doesn't actually mark every definition as locked. Instead, it adds a single row at the top of the locking table. The presence of this row indicates to the system that full database locking is in effect, and it stores the user ID of the administrator who enabled the locking.

Full database locking also plays a role in the target database during the upgrade copy process. During a copy, the system always checks the locking status of the target database definitions to see if they're locked and by whom. If they've been locked by a user ID other than the one performing the copy, those definitions aren't modified.

In major upgrades, checking the locking status of each definition before copying severely impacts performance. To prevent this, use the Change Control Administrator dialog box to lock all target database definitions before copying. During the copy, if the entire target database is locked, the system verifies that the user ID performing the copy is the same user ID that locked the database. If these conditions are true, the system assumes that it was locked for the purpose of the upgrade and that it can safely copy all definitions without checking each one individually.

Note. When you copy a project, the system doesn't check the locking status of the definitions in the source database. However, PeopleSoft recommends that you keep your definitions locked until the copy is complete.

History

When Change Control history is enabled, you can enter comments about the modifications made to PeopleSoft Application Designer development definitions. History entries contain a

common set of information, including who created the entry, when, and the type of action that is associated with the entry. For example, when a user locks a definition, a history entry is automatically created containing the user ID, the data and time, and an action value of Add. If desired, this entry can also contain a project name, incident ID, and comment.

Automated History Prompting

Although you can always insert history entries manually, there are many situations in which PeopleSoft Application Designer automatically inserts history entries and prompts you for comments. In addition, there are special circumstances when entries are added without a prompt. For example, an action history provides some idea of what has happened to a definition, even if no comments were entered. Possible action values are:

Lock and Unlock

Whenever a definition is locked or unlocked, you are automatically prompted for a comment, after which a Lock or Unlock action entry is added to the definition history.

Rename

When you rename a definition, you're prompted for a comment, after which a Rename action entry is added to the definition history. PeopleSoft provides a default comment of `<name1> renamed to <name2>`:

- `<name1>` is the previous name of the definition.
- `<name2>` is the new name you gave it.

Note. If the definition is locked when you try to rename it, the system unlocks it before renaming and relocks it afterward. In this case, three history entries are added: one for unlocking, one for renaming, and one for relocking.

Delete

When you delete a PeopleSoft Application Designer definition, its history is retained. During the deletion, PeopleSoft Application Designer prompts you to add a final comment into the definition history, after which a Delete action entry is added to the definition history.

Note. If Change Control locking is enabled, you can only delete locked definitions. After a locked definition is deleted, it is automatically unlocked and an Unlock action history entry is added. You are not prompted for comments for this unlock event.

Add

When you create a new definition, PeopleSoft Application Designer creates a history entry with an Add action. You are not prompted for comments.

Copy

If Change Control history is enabled in the target database when you perform an upgrade copy, any added, replaced, or deleted definitions have a Copy action entry inserted into their histories. You are not prompted for comments.

History and Upgrades

Change Control history is not copied along with its associated definition during an upgrade. However, if history is enabled in the source database, then the history of each affected *target* definition is updated with a comment noting when the copy was performed and by whom.

This behind-the-scenes history updating occurs for all target definitions that are affected by the copy—even non-PeopleSoft Application Designer definitions with histories that can't be updated or viewed—regardless of whether Change Control history is enabled in the source database.

Stamping

Change Control stamping is always in effect, regardless of whether locking and history are also enabled. For every definition in the database, PeopleTools maintains a *last updated* stamp, which denotes the date and time of the last update, and the user ID of the person who saved the definition. When PeopleSoft delivers a new database, all of the definitions are stamped with a PeopleSoft proprietary ID, PPLSOFT.

Stamping and Upgrades

Change Control stamping provides critical information during an upgrade comparison. Because the system tracks the user ID of whoever last changed each definition, you can easily identify your adaptations. (Any definition stamped with a user ID that isn't the PeopleSoft proprietary ID is considered an adaptation.) Whether you made an adaptation before or after the last update is irrelevant. The adaptation is always identified as such.

During a comparison, definitions that you last modified are given a status of Custom Changed (if they've changed since the compare date), or Custom Unchanged (if they haven't changed since the compare date). Definitions that PeopleSoft last modified are given a status of either Changed or Unchanged.

Understanding Implementation Considerations

When deciding how to implement Change Control, consider:

- The level of development control that you want to maintain.
- The amount of freedom that developers need.
- The security requirements of the site.

<i>How to Implement</i>	<i>Advantage</i>	<i>Disadvantage</i>
Individual Control	For maximum control of the development environment, use both locking and history, and assign each developer a unique user ID. Then, definitions can be modified by only one developer (user ID) at a time, and developers are always prompted for comments when they lock and unlock definitions.	Developers can share ownership of their definitions only by unlocking them after each change.
Group Control	For flexibility, use locking and history, but assign developers who work on the same project a common ID. Then, developers can share definitions with the other members of their group, but not with members of other groups. Administering security is also easier, as there are fewer user IDs to maintain.	Decreased protection from simultaneous development on definitions. History is harder to track, unless developers always include their names in their comments.
History Only	Provides the least restricted Change Control environment. In this situation, all definitions can be shared among all developers.	Developers aren't automatically prompted for comments. They can all share the same ID. If you have a very small development team, this might be a good option.

Setting Up Change Control

This section provides an overview of Change Control security and discusses how to:

1. Appoint a Change Control administrator.
2. Enable or disable Change Control.

Understanding Change Control Security

Using the Security component, you can assign users one of three Change Control access levels, depending on how much authority you want them to have.

Restricted access

Restricts users from locking or unlocking definitions. When Change Control locking is enabled, users with restricted access can open PeopleSoft Application Designer development definitions in read-only mode only. Users are also unable to view or update definition histories.

Developer access

Allows users to lock any unlocked definitions and to unlock any definitions that they have locked. They can then manipulate definitions, as they are allowed in Security. Users can also view and enter definition history comments.

Supervisor access Allows users to unlock any locked definitions, regardless of who locked them. They can also access the Change Control Administrator dialog box, in which you lock and unlock all definitions at one time and enable and disable Change Control locking and history.

If Change Control locking is disabled, these access levels have no security value. If history is disabled, user with developer and supervisor access can still view the History dialog box—users with restricted access cannot.

Remember that Change Control is based on user IDs. If developers all share the same user ID, Change Control offers no advantage in control because each developer can modify definitions that are locked by others.

Appointing a Change Control Administrator

Appoint Change Control administrators by giving certain users supervisor-level access to Change Control. When a user has this access level, they can enable and disable Change Control.

Enabling or Disabling Change Control

To enable or disable Change Control:

1. In PeopleSoft Application Designer, select Tools, Change Control, Administrator.

The Change Control Administrator dialog box appears.

2. Specify the system-wide options and access control:

Use change control locking If selected, PeopleSoft Application Designer definitions must be locked before they can be modified.

Use change control history If selected, PeopleSoft Application Designer developers can insert comments about open definitions.

If both options are selected, developers are prompted for comments when locking and unlocking definitions.

Note. Because these are system-wide settings, if you change them, all users must log off and on again for the changes to take effect.

Lock all definitions If selected, you can lock or unlock all definitions in the database. Usually, you lock all definitions only before a major upgrade, because it permanently removes all individual developer locks.

Using Projects

You can use all levels of Change Control with or without also using projects. If you decide not to use projects, you rely on the Locked Objects dialog box, rather than the project workspace, to identify locked definitions. The dialog box provides a better overall view of locking status because it shows all of the PeopleSoft Application Designer definitions in the database, not just those in the current project.

PeopleSoft recommends that you use projects to track the definitions that are changed as part of a change or feature request. This set of definitions is commonly referred to as the *change set*. The PeopleSoft Application Designer Tools Options dialog box has an option to insert a definition into a project when it is modified and saved. If you start with an empty project, this option provides an easy way of tracking the change set for this incident. When the change request is completed, the project contains everything that is associated with the change. It's also a good idea to use the **Comments** field in the Project Properties dialog box to list any external definitions like COBOL or SQR modules that must be migrated with this change.

This section discusses how to:

- Use multiple databases for development.
- Use distributed development environments.

Using Multiple Databases for Development

Managing change in a single database environment is straightforward, but very few PeopleSoft users operate in a single database environment. The classic development model uses three databases: development, test, and production. All changes are applied to the development database. After unit-testing the change, the change set is migrated to the test database, where it goes through more rigorous testing. Usually, one or more regression test suites are run to ensure that it resolves the issue that it was intended to resolve and has no unwelcome side effects. Finally, that change set is migrated into the production database. If a problem is found at any stage in the process, the incident is sent back to development and the process begins again.

This model assumes that the development database is the master database. Developers can use the Change Control locking feature to lock down the modules on which they are working. When the changes are completed in the development database, the Change Control administrator is notified and uses the upgrade copy facility to copy the change set into the test environment. As long as the technique described in Using Projects is used, the project should contain the entire change set. All of the documentation for the change is tracked in the development database. The only information that appears in the test and production databases is a history line that says that it was copied. Definitions move only in one direction in this model: from development to test, then from test to production.

Note. The only case in which a definition might be copied back to development from either test or production is if a problem must be re-created and another change has already been made to the affected definition. This must be done with extreme care because upgrade copies are destructive and cannot be undone if you discover that you overlaid another developer's change. For this reason, changes are rarely applied directly to test or production databases.

Note. This is just one Change Control model that can be used. This is provided to give you an idea of how you can implement Change Control in your environment. While you do not need to follow this model exactly, it is important that you implement a Change Control model that enables you to track changes to the system and prevent developers from overwriting each other's changes.

Using Distributed Development Environments

It is good idea to use a master development database, even if each developer or development team works on their own copy of the database. The recommended approach in this scenario is for developers to lock down the definitions on which they intend to work in the master development database, then copy those modules to their private databases. This ensures that no other developer makes a change to those definitions while they are checked out.

When the developer is ready to copy changes back to the master development database, check the Change Control history of the locked definitions in the master development database. Do this before using upgrade copy to migrate them back, just in case a Change Control administrator has overridden a lock and made a change while the definitions were checked out.

Note. Change Control administrators should always notify the developer who has a lock on a definition before they override to avoid unexpected surprises later.

Using Change Control

This section discusses how to:

- Lock and unlock definitions.
- View locked definitions.
- Insert comments.
- View Change Control history.
- Report Change Control information.

Locking and Unlocking Definitions

You can lock and unlock definitions manually. You can also have PeopleSoft Application Designer lock unlocked definitions for you each time that you open them.

You must have developer or supervisor access to Change Control to lock and unlock definitions. If you have supervisor access, you can also lock all definitions at once. This can be helpful when performing upgrades to ensure that definitions aren't modified in the middle of the process.

This section discusses how to:

- Lock or unlock an unopened definition in the current project.
- Unlock an unopened definition that is not in the current project.
- Lock or unlock an open definition.
- Lock definitions automatically when you open them.
- Lock or unlock all definitions at once.

Locking or Unlocking an Unopened Definition in the Current Project

To lock or unlock an unopened definition in the current project:

1. In the project workspace, select the Development tab at the base of the workspace window to activate the development view.
2. Select the definitions that you want to lock or unlock.
3. Right-click any of the selected definitions.
A pop-up menu appears.
4. Select *Lock Definition* or *Unlock Definition*.

Unlocking an Unopened Definition Not in the Current Project

To unlock an unopened definition that is not in the current project:

1. Select Tools, Change Control, View Locked Definitions.

The Locked Definitions dialog box appears.

Note. This menu item is not available if you have restricted access to Change Control.

2. Select the definition type and user.

You can view all locked definitions of the specified type by selecting (*all*) from the **User** drop-down list box.

3. Select the definitions to unlock.
4. Right-click any selected definition.
5. Select **Unlock Definition**.

If Change Control history is enabled, you're prompted for comments.

Locking or Unlocking an Open Definition

To lock or unlock an open definition:

1. Activate the definition.
2. In the Tools, Change Control menu, select **Lock Definition** or **Unlock Definition**.

Locking Definitions Automatically

To lock definitions automatically:

1. Select Tools, Options, Change Control.
2. Select **Lock definition when it is opened**.

Now, whenever you open a definition it is locked automatically, unless you have only restricted access to Change Control. In this case, you're notified that you have restricted access and asked whether you want to open the definition in read-only mode

Note. Like all settings in the Application Designer Options dialog box, this setting controls the behavior on *your* workstation only. Also, definitions cannot be unlocked automatically. You must always unlock them manually.

Locking or Unlocking All Definitions at Once

To lock or unlock all definitions at once:

1. Select Tools, Change Control, Administrator.
The Change Control Administrator dialog box appears.
2. Select **Lock all definitions** to lock all definitions, or clear it to unlock all definitions.

Locking all definitions applies a database-wide lock tagged with your user ID.

Warning! Selecting this check box removes individual locks from all database definitions. You should proceed with this step only if you've informed all of your developers and given them an opportunity to save any unsaved work.

3. Click **OK**.

If locking all definitions, you're warned that this action permanently cancels existing locks. Click **Yes**.

Viewing Locked Definitions

To view locked definitions:

1. Select Tools, Change Control, View Locked Definitions.

The Locked Definitions dialog box appears.

2. Select the user whose locked definitions you want to view.

3. Select the type to display.

You can view only one definition type at a time. You can also unlock definitions in this dialog box.

Inserting Comments

When Change Control history is enabled, you can insert comments about an open definition at any time. To help ensure that you insert new comments with each modification, you can instruct PeopleSoft Application Designer to prompt you for a comment every time you save a definition, every time you lock or unlock a definition, or both.

This section discusses how to:

- Insert a comment for an unopened definition in the current project.
- Insert a comment for an open definition.
- Enable a prompt for comments when saving a definition.

Inserting a Comment for an Unopened Definition

To insert a comment for an unopened definition in the current project:

1. In the project workspace, select the Development tab at the base of the workspace window to activate the development view.
2. Select the definition for which you want to insert comments.

You cannot insert comments for more than one definition at a time.

3. Right-click the selected definition.
4. Select *Insert Comment* from the pop-up menu.

The Insert Comment dialog box appears.

5. Enter the necessary information:

Project	The default value is the name of the current project, but you can delete or replace this value.
Incident ID	Denote the incident to which your development corresponds.
Comments	Comments should include information about why and how you're modifying the definition.

If you click **OK**, the information is inserted into the definition history and the dialog box closes. If you click **Apply**, your comments are inserted, but the dialog box remains open. You can then enter comments for another history entry. When you click **OK** or **Apply**, these new comments are inserted as a new history entry; they do not replace the previous entry.

Inserting a Comment for an Open Definition

To insert a comment for an open definition:

1. Use the list in Window menu to navigate to the definition.
1. Select Tools, Change Control, Insert Comment.
2. Enter the name of the project and incident ID.
3. Enter your comments.
4. Click OK or Apply.

Enabling a Prompt for Comments When Saving a Definition

To be prompted for comments when saving a definition:

1. Select Tools, Options, Change Control.

The Change Control page appears.

2. Select **Prompt for comments when definition is saved.**

Whenever you save a definition, the system prompts you to insert history comments.

Note. This setting affects the behavior on *your* workstation only. One possible drawback to using this option is that a definition might be saved many times as part of a single change and you're prompted for comments at every save.

Viewing Change Control History

For every PeopleSoft Application Designer development definition in the database, you can view its Change Control history.

To view Change Control history:
--

1. Select Tools, Change Control, View History.

The History dialog box appears.

2. Select a definition type and name.

The **Definition Name** list contains only the names of PeopleSoft Application Designer definitions that have at least one history entry. Click the **Refresh** button to ensure that you're viewing the most recent listing of locked definitions.

Date	Indicates when each entry was added.
User	Indicates who added the entry.
Action	Identifies why the comment was entered. Five of these Action types— <i>Lock</i> , <i>Informational</i> , <i>Unlock</i> , <i>Rename</i> , and <i>Delete</i> —represent actions that you perform in PeopleSoft Application Designer, and for which you're prompted for comments.
Add	This denotes an automatic history entry that PeopleTools inserts when a new definition is created. In this case—and whenever the system performs a behind-the-scenes lock or unlock—you aren't prompted for comments. The Comment column contains the text <i>System Generated</i> .

Note. PeopleSoft Application Designer performs automatic locks and unlocks under certain situations. For example, when you rename a locked definition, that definition must be unlocked before the rename and relocked afterward. Likewise, when you delete a locked definition, the definition is automatically unlocked after the delete. The system does not prompt you for comments during any of these unlock or relock actions, but corresponding history entries are added automatically.

Copy	This type of history entry is added automatically when a definition is copied into the current database. In this case, the Project value is the name of the copied project in the source database, and no comments are added.
Project, Incident ID, and Comment	Indicates the project name, incident ID, and relevant comments from the Insert Comments dialog box.

3. Select a different definition type and definition, if necessary.
4. Double-click a row in the grid to open a history entry, if necessary.

The History Details dialog box appears. This dialog box is a read-only version of the Insert Comments dialog box. You cannot update the information displayed in this dialog box.

Reporting Change Control Information

Currently, PeopleSoft doesn't deliver predefined reports for retrieving Change Control information. However, you can create your own reports by querying the Change Control tables.

The two tables that you can use for reporting are PSCHGCTLHIST and PSCHGCTLLOCK, which contain the history and locking information, respectively. These tables have an almost identical column structure.

Num	Field Name	Type	Len	Format	H	Short Name	Long Name
1	OPRID	Char	8	Mixed		Operator	Operator Id
2	OBJECTTYPE	Nbr	5	Raw B		ObjectType	Object Type
3	OBJECTID1	Nbr	5	Raw B		Object Id 1	Object Id 1
4	OBJECTVALUE1	Char	30	Mixed		Object Value 1	Object Value 1
5	OBJECTID2	Nbr	5	Raw B		Object Id 2	Object Id 2
6	OBJECTVALUE2	Char	30	Mixed		Object Value 2	Object Value 2
7	OBJECTID3	Nbr	5	Raw B		Object Id 3	Object Id 3
8	OBJECTVALUE3	Char	30	Mixed		Object Value 3	Object Value 3
9	OBJECTID4	Nbr	5	Raw B		Object Id 4	Object Id 4
10	OBJECTVALUE4	Char	30	Mixed		Object Value 4	Object Value 4
11	DTTM_STAMP	DtTm	26	Scnds		Date/Time	Date/Time Stamp
12	CHGCTRL_ACTION	Char	1	Upper		Action	Change Control Action
13	PROJECTNAME	Char	30	Upper		Project	Project Name
14	INCIDENT_ID	Char	18	Mixed		Incident	Incident ID
15	DESCRLONG	Long	0			Descr	Description

Structure of PSCHGCTLHIST

The main difference between these two tables is that PSCHGCTLHIST contains a CHGCTRL_ACTION field, while PSCHGCTLLOCK does not.

Each PeopleSoft definition in these tables is uniquely identified by numeric codes (DEFINITIONID columns) and names (DEFINITIONVALUE columns). The different DEFINITIONID and DEFINITIONVALUE column pairs correspond to the various definition key types and values for each kind of definition. You can see these definition keys when you

view the upgrade definition window. For example, translate values have four keys—Field Name, Field Value, Language Code, and Effective Date.

Translate Values Key									
	Field Name	Language Code	Field Value	Effective Date	Source	Target	Action	Upgrade	Done
1	AE_ABEND_ACTION	ENG	A	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	AE_ABEND_ACTION	ENG	B	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	AE_ABEND_ACTION	ENG	I	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	AE_ABEND_ACTION	ENG	S	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	AE_ACTIVE_STATUS	ENG	A	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	AE_ACTIVE_STATUS	ENG	A	1997-02-03	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	AE_ACTIVE_STATUS	ENG	I	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	AE_ACTIVE_STATUS	ENG	I	1997-02-03	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	AE_ADJUST_STATUS	ENG	A	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	AE_ADJUST_STATUS	ENG	D	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	AE_ADJUST_STATUS	ENG	M	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12	AE_ADJUST_STATUS	ENG	X	1900-01-01	Unknown	Unknown	Copy	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Viewing definition keys

In the Change Control tables, the row containing the first translate value in the preceding graphic has the following field values:

<i>DEFINITIONVALUE1</i>	<i>DEFINITIONVALUE2</i>	<i>DEFINITIONVALUE3</i>	<i>DEFINITIONVALUE4</i>
AE_ABEND_ACTION	A	ENG	1900-01-01

When reporting on a particular definition type, you want to retrieve definition values, but you must limit the query using the definition IDs for the definition type. The following table lists all of the upgradable definition types, their corresponding definition ID codes, and the type of value each ID represents (in parentheses).

PeopleTools Definition Types

<i>Definition Type</i>	<i>DEFINITIONID1</i>	<i>DEFINITIONID2</i>	<i>DEFINITIONID3</i>	<i>DEFINITIONID4</i>
Access Groups	17 (name)	0	0	0
Activities	18 (name)	0	0	0
Application Engine Programs	66 (name)			
Application Engine Sections	66 (name)	77 (section)		
Application Package	104 (name)			
Approval Rule Sets	85 (name)	21 (effective date)		
Business Interlink	64 (name)			
Business Processes	7 (name)			
Colors	19 (name)	25 (user ID)	0	0

Definition Type	DEFINITIONID1	DEFINITIONID2	DEFINITIONID3	DEFINITIONID4
Components	10 (name)	39 (market)		
Component Interfaces	74 (name)			
Cube Definitions	54 (name)	55 (description)		
Cube Instance Definitions	56 (name)	57 (description)		
Dimensions	51 (name)	52 (dimension type)	53 (description)	0
Fields	6 (name)	0	0	0
Field Formats	23 (family name)	0	0	0
File Layout Definitions	71 (name)			
HTML	90 (name)	95 (type)		
Images	91 (name)	95 (type)		
Indexes	1 (name)	24 (index ID)	0	0
Job Definitions	27 (name)			
Menus	3 (name)	0	0	0
Message Catalog Entries	48 (message set number)	48 (message number)	16 (language code)	50 (description)
Message Channels	61 (name)			
Message Definitions	60 (name)			
Mobile Page	111 (name)			
Message Nodes	62 (name)			
Pages	9 (name)		0	0
PeopleCode	See PeopleCode Definition Types			
Problem Type	109 (name)			
Process Definitions	29 (process type)	28 (name)	0	0
Process Type Definitions	29 (name)	26 (operating system)	20 (database type)	
Queries	30 (name)	25 (user ID)	0	0
Records	1 (name)	2 (RecField name)	0	0

Definition Type	DEFINITIONID1	DEFINITIONID2	DEFINITIONID3	DEFINITIONID4
Recurrence Definitions	31 (name)			
Roles	32 (name)	0	0	0
Server Definitions	33 (name)			
SQL	65 (name)	81 (SQL type)		
Styles	35 (name)	0	0	0
Style Sheets	94 (name)			
Translate Values	6 (database field name)	22 (value)	21 (effective date)	
Trees	34 (setID)	68 (user key value)	36 (tree name)	21 (effective date)
Tree Structures	37 (name)	0	0	0

PeopleCode Definition Types

Definition Type	DEFINITIONID1	DEFINITIONID2	DEFINITIONID3	DEFINITIONID4
Application Engine	66 (PeopleSoft Application Engine program)	77 (section, market, database type, effective date)	78 (step)	12 (method)
Application Package	104 (Application Package)			
Component Interface	74 (business component)	12 (method)		
Menu	3 (menu)	4 (bar)	5 (item)	12 (method)
Message	60 (message)	12 (method)		
Page	9 (panel)	16 (language code)	12 (method)	
Page Field	9 (panel)	16 (language code)	67 (field)	12 (method)
Component	10 (panel group)	39 (market)	12 (method)	
Component Record	10 (panel group)	39 (market)	1 (record)	12 (method)
Component Record Field	10 (panel group)	39 (market)	1 (record)	2 (fieldname, method)
Record	1 (record)	2 (field)	12 (method)	
Subscription	60 (message)	87 (subscription)	12 (method)	

Change Control Supported Definition Types

- Activity.
- Application Engine Program.
- Approval Rule Set.
- Business Interlink.
- Business Process.
- Component.
- Component Interface.
- Field.
- File Layout.
- HTML.
- Image.
- Menu.
- Message.
- Message Channel
- Mobile Page
- Problem Type
- Page.
- Project.
- Record.
- SQL.
- Style Sheet.

When reporting on Change Control history, consider one other field: CHGCTRL_ACTION. This field stores the one-letter code for the various actions that Change Control history tracks. (A=Add, C=Copy, D=Delete, I=Informational, L=Lock, R=Rename, and U=Unlock.)

Here's an example of a SQL query to report on all deleted definitions:

```
select oprid, definitionvalue1, definitionvalue2, definitionvalue3,
definitionvalue4, dttm_stamp, projectname, incident_id, descrlong
from pschgctlhist
  where chgctrl_action = 'D'
  order by oprid, definitionvalue1
```

Note. Full history tracking is supported only for PeopleSoft Application Designer definitions—business processes, business process maps, fields, menus, panels, panel groups, projects, and records. Other definition types have history entries only when CHGCTL_ACTION='C', and only if they've been upgraded.

CHAPTER 17

Appendix A: Functional Indexes for Microsoft SQL Server 2000

The following example shows how the key fields are concatenated:

```
USE FS840U70

go

SET IMPLICIT_TRANSACTIONS ON

go

IF EXISTS (SELECT 'X' FROM SYSOBJECTS WHERE TYPE = 'U' AND NAME =
'PS_QE_ALTER_NEW') DROP TABLE PS_QE_ALTER_NEW

go

CREATE TABLE PS_QE_ALTER_NEW (QE_ALTER_FLD1 NCHAR(1) NOT NULL,
QE_ALTER_FLD2 NCHAR(1) NOT NULL,
QE_ALTER_FLD3 NCHAR(1) NOT NULL,
QE_ALTER_FLD4 NCHAR(10) NOT NULL,
QE_ALTER_FLD5 NCHAR(20) NOT NULL,
QE_ALTER_FLD6 NCHAR(11) NOT NULL,
QE_ALTER_FLD7 NCHAR(1) NOT NULL,
QE_ALTER_FLD8 NCHAR(1) NOT NULL,
QEPC_AGE SMALLINT NOT NULL,
QEPC_FILE_NUM DECIMAL(6, 2) NOT NULL,
QE_BEGIN_DT PSDATE NULL,
QE_BIRTHDATE PSDATE NULL,
QE_31DIGFLD9 DECIMAL(31, 8) NOT NULL,
QE_ANNUAL_PCT DECIMAL(3, 1) NOT NULL,
```

```

QE_MS_DTTM1 PSDATETIME NULL,

QE_MS_DTTM2 PSDATETIME NULL,

QE_ALTER_TIMEA PSTIME NULL,

QE_ALTER_TIMEB PSTIME NULL,

MSSCONCATCOL AS QE_ALTER_FLD1 + QE_ALTER_FLD2 + QE_ALTER_FLD3 +
QE_ALTER_FLD4 + QE_ALTER_FLD5 + QE_ALTER_FLD6 + QE_ALTER_FLD7 +
QE_ALTER_FLD8 + CONVERT(NCHAR, QEPC_AGE) + CONVERT(NCHAR
, QEPC_FILE_NUM) + CONVERT(NCHAR(16), QE_BEGIN_DT, 109) +
CONVERT(NCHAR(16), QE_BIRTHDATE, 109) + CONVERT(NCHAR, QE_31DIGFLD9) +
CONVERT(NCHAR, QE_ANNUAL_PCT) + CONVERT(NCHAR(16), QE_MS_DTTM1, 109) +
CONVERT(NCHAR(16), QE_MS_DTTM2, 109) + CONVERT(NCHAR(16)
, QE_ALTER_TIMEA, 109)
go

COMMIT

go

SET ARITHABORT ON

go

CREATE UNIQUE CLUSTERED INDEX PS_QE_ALTER_NEW ON PS_QE_ALTER_NEW
(MSSCONCATCOL)

go

CREATE NONCLUSTERED INDEX PSWQE_ALTER_NEW ON PS_QE_ALTER_NEW
(QE_ALTER_FLD1,
QE_ALTER_FLD2,
QE_ALTER_FLD3,
QE_ALTER_FLD4,
QE_ALTER_FLD5,
QE_ALTER_FLD6,
QE_ALTER_FLD7,
QE_ALTER_FLD8,

```



```
QEPC_AGE,  
  
QEPC_FILE_NUM,  
  
QE_BEGIN_DT,  
  
QE_BIRTHDATE,  
  
QE_31DIGFLD9,  
  
QE_ANNUAL_PCT,  
  
QE_MS_DTTM1,  
  
QE_MS_DTTM2)  
  
go  
  
COMMIT  
  
Go
```


CHAPTER 18

Appendix B: Functional Indexes for DB2 (UNIX)

The following example shows how the key fields are concatenated:

```
CREATE TABLE PS_QE_ALTER_NEW (QE_ALTER_FLD1 VARGRAPHIC(1) NOT NULL,  
  
    QE_ALTER_FLD2 VARGRAPHIC(1) NOT NULL,  
  
    QE_ALTER_FLD3 VARGRAPHIC(1) NOT NULL,  
  
    QE_ALTER_FLD4 VARGRAPHIC(10) NOT NULL,  
  
    QE_ALTER_FLD5 VARGRAPHIC(20) NOT NULL,  
  
    QE_ALTER_FLD6 VARGRAPHIC(11) NOT NULL,  
  
    QE_ALTER_FLD7 VARGRAPHIC(1) NOT NULL,  
  
    QE_ALTER_FLD8 VARGRAPHIC(1) NOT NULL,  
  
    QEPC_AGE VARGRAPHIC(8) NOT NULL,  
  
    QEPC_FILE_NUM DECIMAL(6, 2) NOT NULL,  
  
    QE_BEGIN_DT DATE,  
  
    QE_BIRTHDATE DATE,  
  
    QE_31DIGFLD9 DECIMAL(31, 8) NOT NULL,  
  
    QE_ANNUAL_PCT DECIMAL(3, 1) NOT NULL,  
  
    QE_MS_DTTM1 TIMESTAMP,  
  
    QE_MS_DTTM2 TIMESTAMP,  
  
    QE_ALTER_TIMEA TIME,  
  
    QE_ALTER_TIMEB TIME,  
  
    DBXCONCATCOL GENERATED ALWAYS AS (QE_ALTER_FLD1 || QE_ALTER_FLD2 ||  
  
QE_ALTER_FLD3 || QE_ALTER_FLD4 || QE_ALTER_FLD5 || QE_ALTER_FLD6 ||  
  
QE_ALTER_FLD7 || QE_ALTER_FLD8 || QEPC_AGE ||
```

```

VARGRAPHIC (CHAR (QEPC_FILE_NUM) ) ||
VALUE (VARGRAPHIC (CHAR (QE_BEGIN_DT) ) , '' ) ||
VALUE (VARGRAPHIC (CHAR (QE_BIRTHDATE) ) , '' ) ||
VARGRAPHIC (CHAR (QE_31DIGFLD9) ) || VARGRAPHIC (CHAR (QE_ANNUAL_PCT) ) ||
VALUE (VARGRAPHIC (CHAR (QE_MS_DTTM1) ) , '' ) ||
VALUE (VARGRAPHIC (CHAR (QE_MS_DTTM2) ) , '' ) ||
VALUE (VARGRAPHIC (CHAR (QE_ALTER_TIMEA) ) , '' ) ) IN PTAPP INDEX IN
PTAPPIDX NOT LOGGED INITIALLY;

COMMIT;

CREATE UNIQUE INDEX PS_QE_ALTER_NEW ON PS_QE_ALTER_NEW (DBXCONCATCOL);

CREATE INDEX PSWQE_ALTER_NEW ON PS_QE_ALTER_NEW (QE_ALTER_FLD1,
QE_ALTER_FLD2,
QE_ALTER_FLD3,
QE_ALTER_FLD4,
QE_ALTER_FLD5,
QE_ALTER_FLD6,
QE_ALTER_FLD7,
QE_ALTER_FLD8,
QEPC_AGE,
QEPC_FILE_NUM,
QE_BEGIN_DT,
QE_BIRTHDATE,
QE_31DIGFLD9,
QE_ANNUAL_PCT,
QE_MS_DTTM1,
QE_MS_DTTM2);

COMMIT;

```

CHAPTER 19

Appendix C: Functional Indexes for Informix

The following example shows how the key fields are concatenated:

```
BEGIN WORK;

CREATE TABLE PS_QE_ALTER_NEW (QE_ALTER_FLD1 CHAR(1) NOT NULL,

    QE_ALTER_FLD2 CHAR(1) NOT NULL,

    QE_ALTER_FLD3 CHAR(1) NOT NULL,

    QE_ALTER_FLD4 CHAR(10) NOT NULL,

    QE_ALTER_FLD5 CHAR(20) NOT NULL,

    QE_ALTER_FLD6 CHAR(11) NOT NULL,

    QE_ALTER_FLD7 CHAR(1) NOT NULL,

    QE_ALTER_FLD8 CHAR(1) NOT NULL,

    QEPC_AGE SMALLINT NOT NULL,

    QEPC_FILE_NUM DECIMAL(6, 2) NOT NULL,

    QE_BEGIN_DT DATE,

    QE_BIRTHDATE DATE,

    QE_31DIGFLD9 DECIMAL(31, 8) NOT NULL,

    QE_ANNUAL_PCT DECIMAL(3, 1) NOT NULL,

    QE_MS_DTTM1 DATETIME YEAR TO FRACTION(3),

    QE_MS_DTTM2 DATETIME YEAR TO FRACTION(3),

    QE_ALTER_TIMEA DATETIME HOUR TO FRACTION(3),

    QE_ALTER_TIMEB DATETIME HOUR TO FRACTION(3)) IN PTAPP LOCK MODE ROW;

REVOKE ALL ON PS_QE_ALTER_NEW FROM PUBLIC;

COMMIT;
```

```

BEGIN WORK;

CREATE FUNCTION PS_QE_ALTER_NEW_SP1 (

    QE_ALTER_FLD1 CHAR(1) ,

    QE_ALTER_FLD2 CHAR(1) ,

    QE_ALTER_FLD3 CHAR(1) ,

    QE_ALTER_FLD4 CHAR(10) ,

    QE_ALTER_FLD5 CHAR(20) ,

    QE_ALTER_FLD6 CHAR(11) ,

    QE_ALTER_FLD7 CHAR(1) ,

    QE_ALTER_FLD8 CHAR(1) ,

    QEPC_AGE SMALLINT,

    QEPC_FILE_NUM DECIMAL,

    QE_BEGIN_DT DATE,

    QE_BIRTHDATE DATE,

    QE_31DIGFLD9 DECIMAL,

    QE_ANNUAL_PCT DECIMAL,

    QE_MS_DTTM1 DATETIME YEAR TO FRACTION(3) ,

    QE_MS_DTTM2 DATETIME YEAR TO FRACTION(3))

RETURNING VARCHAR(166) WITH (NOT VARIANT) ;

RETURN QE_ALTER_FLD1 ||

    QE_ALTER_FLD2 ||

    QE_ALTER_FLD3 ||

    QE_ALTER_FLD4 ||

    QE_ALTER_FLD5 ||

    QE_ALTER_FLD6 ||

    QE_ALTER_FLD7 ||

    QE_ALTER_FLD8 ||

    QEPC_AGE ||

    QEPC_FILE_NUM ||

```

```

QE_BEGIN_DT ||
QE_BIRTHDATE ||
QE_31DIGFLD9 ||
QE_ANNUAL_PCT ||
QE_MS_DTTM1 ||
QE_MS_DTTM2;

END FUNCTION;

CREATE FUNCTION PS_QE_ALTER_NEW_SP2 (
    QE_ALTER_TIMEA DATETIME HOUR TO FRACTION(3))
    RETURNING VARCHAR(15) WITH (NOT VARIANT);
RETURN QE_ALTER_TIMEA;
END FUNCTION;

CREATE UNIQUE INDEX PS_QE_ALTER_NEW ON PS_QE_ALTER_NEW
(PS_QE_ALTER_NEW_SP1 (
    QE_ALTER_FLD1,
    QE_ALTER_FLD2,
    QE_ALTER_FLD3,
    QE_ALTER_FLD4,
    QE_ALTER_FLD5,
    QE_ALTER_FLD6,
    QE_ALTER_FLD7,
    QE_ALTER_FLD8,
    QEPC_AGE,
    QEPC_FILE_NUM,
    QE_BEGIN_DT,
    QE_BIRTHDATE,
    QE_31DIGFLD9,
    QE_ANNUAL_PCT,
    QE_MS_DTTM1,

```

```
QE_MS_DTTM2) ,  
PS_QE_ALTER_NEW_SP2 (  
QE_ALTER_TIMEA)) IN FS840IDX;  
CREATE INDEX PSWQE_ALTER_NEW ON PS_QE_ALTER_NEW (QE_ALTER_FLD1,  
QE_ALTER_FLD2,  
QE_ALTER_FLD3,  
QE_ALTER_FLD4,  
QE_ALTER_FLD5,  
QE_ALTER_FLD6,  
QE_ALTER_FLD7,  
QE_ALTER_FLD8,  
QEPC_AGE,  
QEPC_FILE_NUM,  
QE_BEGIN_DT,  
QE_BIRTHDATE,  
QE_31DIGFLD9,  
QE_ANNUAL_PCT,  
QE_MS_DTTM1,  
QE_MS_DTTM2) IN FS840IDX;  
COMMIT;
```


Appendix D: PeopleSoft Application Designer Command Line Parameters

This chapter provides an overview of Application Designer command line parameters and describes how to:

- Start Application Designer.
- Build projects.
- Compare databases.
- Copy source objects to a database.
- Copy source objects to or from a file.

Understanding PeopleSoft Application Designer Command Line Parameters

The simplest way to link a PeopleSoft application and a third-party application is to launch the Application Designer executable file from the third-party application using a WinEXE-type function. This method enables you to start a PeopleSoft application or Application Designer, although it does not establish any kind of connection between the applications.

Application Designer offers a variety of command-line parameters that you can use to control the database it connects to. Using these parameters, you can automatically navigate to the part of the system you need.

Starting PeopleSoft Application Designer and PeopleSoft Applications

This section describes:

- Command line syntax.
- Available parameters.
- Examples.

Command Line Syntax

The command line for starting Application Designer contains the following syntax:

```
PSIDE [-parameter value [-parameter value . . .]]
```

The command line for starting Data Mover has the following syntax:

```
PSDMT [-parameter value [-parameter value . . .]]
```

You can include as many or as few parameters as you need or none.

Each parameter starts with a hyphen (-) or a forward slash (/). The value for each parameter follows the hyphen or slash, separated by zero or more spaces. In general, the value doesn't need to have quotation marks around it, even if it has internal spaces—the system treats all text following the parameter as part of the value, up to the next parameter or the end of the command line.

Note. You need to enclose a value in quotation marks only when it includes a hyphen or forward slash, or when you want to include leading or trailing spaces. If the value itself includes a quotation mark character, precede the double quote with a backslash (\).

If you pass incorrect values, or if the specified user doesn't have security access to the specified menu or page, the system returns the error "You are not authorized to access this component. (40,20)."

Available Parameters

The available parameters for PSIDE.EXE fall into three general categories:

- Parameters providing login information.
- Parameters setting general options.

All of the available parameters are listed in the table below.

If the command line includes login parameters, it uses them only if no PeopleSoft applications are currently running. If you already have a PeopleSoft application running, the system starts a new instance using the same login information as the active instance.

Parameter	Value	Description
-CT	Database type	The type of database to connect to. The valid values are ORACLE, INFORMIX, SYBASE, MICROSOFT, DB2ODBC, and DB2UNIX (note the spelling of MICROSOFT).
-CS	Server name	The name of the database server for the database you're connecting to. This setting is required for some database types.

Parameter	Value	Description
-CD	Database name	The name of the database to connect to, as you would enter it into the PeopleSoft Login dialog box.
-CO	User ID	The PeopleSoft user ID to use to log in.
-CP	Password	The password for the specified user ID.
-CI	Connect ID	The ID used to connect to the database server.
-CW	Password	The password for the specified connect ID.
-SS	NO	Suppresses the display of the PeopleSoft splash screen.
-SN	NO	Suppresses the sound that plays when you log in to the PeopleSoft system.
-QUIET	(none)	Run in “quiet mode,” so that no message boxes appear.
-HIDE	(none)	Hides the Application Designer interface.
-FP	Filename	Data Mover only. The name of the Data Mover script to run.

Examples

This command line statement starts Application Designer and logs onto the DEP7TST database:

```
PSIDE -CT MICROSFT -CS SEPNTDB05 -CD EP7TST -CO VP1 -CP VP1
```

Building Projects

The command line statement for the project build:

- Connects the project to the source database.
- Uses the build settings from the Windows registry to generate the SQL script for create or alter.

Verify the following before executing the build command line:

- The project’s system components are created and loaded.
- Build options are set in the Windows registry.

The remainder of this section includes:

- Available parameters.
- Examples.

Available Parameters

The following table lists all the available parameters for the project build statement.

Parameter	Description	Error Handling
-HIDE	Hide the Application Designer interface. This parameter should always be used when performing a command line copy process.	This is a mandatory parameter for all project command line processes.
-CT	Database type. The type of database to connect to. (MICROSOFT, ORACLE, SYBASE, and so on)	Required. If this parameter is not supplied, the last database type is taken from the registry. If it fails, further execution is stopped and error messages are written to the log file.
-CS	Server name. The name of the source database server for the database to which you are connecting. This setting is required for some database types.	Required for some database types. If this parameter is not supplied, further execution is stopped and error messages are written to the log file.
-CD	Database name. The name of the source database to connect to, as you would enter it into the PeopleSoft Login dialog box.	Required. If this parameter is not supplied, further execution is stopped and error messages are written to the log file.
-CO	User ID. PeopleSoft user ID to log in to source.	Required. If this parameter is not supplied, the last database type is taken from the registry. If it fails, further execution is stopped and error messages are written to the log file.
-CP	User password. The password for the specified user ID for source.	Required. If this parameter is not supplied, a PeopleSoft Login dialog box appears for the user to input a valid user password. If the password fails, the process stops and error messages are written to the log file.
-PJB	Project name. The name of the project to be built. This project should be available in the database before starting the command line project build.	Required. This is the main parameter and is used internally to decide that the user the trying to build a project. If this parameter is not specified and if all the source login parameters are given, this program will only launch the application.

Example

Assume the following:

- Project name = CJR1
- Database type = Microsoft
- Database name = CJR810G
- User ID = PTDMO
- Password = PTDMO
- Pathname of SQL script file = c:\temp\psbuild.sql
- Pathname of log file = c:\temp\psbuild.log in the Windows registry.

You enter the following at the command line:

```
PSIDE.EXE -CT MICROSOFT -CD CJR810G -CO PTDMO -CP PTDMO -PJB CJR_PRJ
```

Copying Definitions

The command line statement for upgrade copy:

- Connects to the source database.
- Connects to the target database.
- Copies the project and its objects from the source to target. If the same project already exists in the target database, you can set the option to overwrite the older project with the new project.

The remainder of this section includes:

- Available parameters.
- Examples.
- Database type selection table.
- Definition type selection table.
- Language selection table.

Available Parameters

The following table lists all available parameters for the upgrade copy statement.

Parameter	Description	Error Handling
-HIDE	Hide the Application Designer interface. This parameter should always be used when performing a command line copy process.	This is a mandatory parameter for all project command line processes.
-CT	Source – Database type. The type of database to connect to source. (For example , ORACLE, SYBASE, and so on).	Required. If the process stops, error messages are written to the log file (if log file name parameter is specified).
-CS	Source – Server name. The name of the source database server for the database you're connecting to. This setting is required for some database types.	Required for some database types. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-CD	Source – Database name. The name of the source database to connect to, as you would enter it into the PeopleSoft Login dialog box.	Required. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-CO	Source – Operator ID. The PeopleSoft operator ID to use to log into the source.	Required. If this parameter is not supplied, the operator ID is taken from the registry. If it fails, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-CP	Source – Operator password. The password for the specified operator ID for source.	Required. If this parameter is not supplied, the PeopleSoft Login dialog box will prompt the user to give the valid password. If it fails, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-TS	Target – Server name. The name of the target database server for the database you're connecting to. This setting is required for some database types.	Required for some database types and for a database copy (not used for Copy To/From File). If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).

Parameter	Description	Error Handling
-TD	Target – Database name. The name of the target database to connect to, as you would enter it into the PeopleSoft Login dialog box.	Required for a database copy (not used for Copy To/From File). If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-TO	Target – Operator ID. The PeopleSoft operator ID to use to log in to the target.	Required for a database copy (not used for Copy To/From File). If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-TP	Target – Operator Password. The password for the specified operator ID for the target.	Required for a database copy (not used for Copy To/From File). If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-LF	Log file name. The name of the file in which error messages are logged during the command line upgrade copy process.	Not required. If this parameter is specified, a file is created in the specified path and name and all the processing and error messages are written to that file.
-PJC	Source – Project name. The name of the project that is to be copied from source to target database. This project should be available in the source before starting the command line upgrade copy to target.	Required for database copy. This is the main parameter which is used internally by the EXE to identify an upgrade copy. If this parameter is not specified, and if all the source login parameters are given, this EXE will launch the application.
-PJTF	Copy Project To File – Project Name. The name of the project to be copied from the source database to the file.	Required for Copy To File. Do not include the file path to the project with this parameter. Use -FP to specify the file path.
-PJFF	Copy Project From File – Project Name. The name of the project to be copied from the file into the source database.	Required Copy From File. Do not include the file path to the project with this parameter. Use -FP to specify the file path.

Parameter	Description	Error Handling
-FP	Project File Path Specification. For the Copy To/From File, this is the path to the project file.	Required for Copy To/From File. For Copy From File, the directory must exist. For Copy To File, any project with the same name will be overwritten unless the -OVW parameter is used. A directory specification will be created if it does not exist. Do not include the name of the project in the file path. Use -PJTF or -PJFF to specify the project name. Not applicable for Database Copy.
-OVD	Override Dependencies (Number 0 or 1). Override the incident dependency checking during the Copy From File process. Use 1 to override the checks for unapplied dependency incidents, and perform the copy even if the project's dependency incidents have not been applied to the source database. Not applicable for processes other than Copy From File.	Not required. The default (0) is used. When the default is set and if the project's dependency incidents have not been applied to the source database, an error message is generated to the log file listing which incidents need to be applied. The Copy From File process also stops. When 1 is set, a warning message is written to the log for unapplied incidents and processing continues.
-CL	Commit limit (Number > 0). The Commit limit for the number of objects copied/compared before a commit is issued. Example: -CL 150	Not required. The default is 50 if the user does not set this parameter.
-AF	Audit flags on records (Number -> 0 or 1). This indicates if the target audit flags are kept or set from source. Example: -AF 0	Not required. The default is (1) to keep target audit flags. If the value is set to 0, then the target audit flags are taken from source. If the value is set to 1, then the target audit flags are kept as is.
-DDL	DDL on records and indexes (Number -> 0 or 1). This indicates if the target DDL flags are to be kept or set from source. Example: -DDL 0	Not required. The default is (1) to keep target DDL flags. If the value is set 0, then the target DDL flags are taken from source. If the value is set to 1, then the target DDL flags are kept as is.

Parameter	Description	Error Handling
-PPL	Portal Registry Structures Permission List References. This indicates if the Target Portal Registry Permission List References are kept or are set from the source database values.	Not required. If this option is not used, the default is 1 to keep the target database Portal Registry Structures Permission List References. If the value is 0, the Target Portal Registry Structures Permission List References are taken from the source database. If the value is 1, then the target references are retained and they are not copied or compared from the source database.
-EXP	Export Project Definition (Number 0 or 1). Use to turn on or off exporting project definition to the target database when using the database copy. Not applicable for File, Copy.	Not required. The default is (1) to export the project definition to the target database. Any project with the same name will be overwritten with the new project definition.
-OBJ	Object type to copy (Numbers with comma (,) as the delimiter). List of object types to copy. For example, If you choose records and indexes alone for copying, use the appropriate numbers for records and indexes from the Definition Type Selection table. For records, the number is 0, and for the Indexes, the number is 1. Example: -OBJ 0,1	Not required. If this parameter is not specified, then all of the objects are copied by default.
-RST	Reset done flags (Number - > 0 or 1). This is to reset the done flags before initiating the copy. Example: -RST 0	Not required. The default is (1) to reset the done flags before initiating the copy. If the value is 0, then the done flags are not reset before initiating the copy. If the value is 1, then the done flags are reset before initiating the copy.
-OVW	Overwrite existing project (Number -> 0 or 1). Applies to Copy Project To File only. It will determine if any existing project with the same name in the specified path will be overwritten during Copy To File.	Not required. If this parameter is not provided, the default value from (1) will be used. Copy to File will always overwrite existing projects unless it is set to 0.

Parameter	Description	Error Handling
-LNG	Copy languages (codes with comma (,) as the delimiter). This is the list of languages to copy. For example: If you choose English and Spanish for copying, choose the appropriate codes for English and Spanish from the Language Selection table. For English, the code is ENG, and for Spanish, the code is ESP. Example: -LNG ENG,ESP	Not required. If this parameter is not given, then the languages that are already set in the project are used as the default.

Examples of Copy

Database Copy

- Copy the project PPLTOOLS from the source Microsoft SQL Server database PTDMO to the target database PTTST.
- Log process and error messages to c:\temp\copy.log.
- Set the commit limit to 150. Copy the Audit Flags and Record/Index DDL from the source database.
- Only copy Records, Indexes, Pages, Queries, and Process Definition object types from the project.
- Do not reset the Done flags before initiating the copy.
- Only copy English and Spanish translations.

```
PSIDE.EXE -HIDE -PJC PPLTOOLS -CT MICROSOFT -CD PTDMO -CO PTDMO -CP PTDMO -TD PTTST -TO PTDMO -TP PTDMO -LF C:\TEMP\COPY.LOG -CL 150 -AF 0 -DDL 0 -OBJ 0,1,5,10,20 -RST 0 -LNG ENG, ESP
```

Copy To File

- Copy the project PPLTOOLS from the Oracle database PTDMO using the Operator ID PTDMO to the local directory c:\temp\export.
- A directory named PPLTOOLS will be created under c:\temp\export.
- Log progress and error messages to c:\temp\copy.log.

```
PSIDE.EXE -HIDE -PJTF PPLTOOLS -FP c:\temp\export -CT ORACLE -CD PTDMO -CO PTDMO -CP PTDMO -LF c:\temp\copy.log
```

Copy From File

- Copy the project PPLTOOLS to the DB2/UNIX database PTDMO using the Operator ID PTDMO from the local directory c:\temp\export.
- A directory named PPLTOOLS must exist under c:\temp\export.
- Log progress and error messages to c:\temp\copy.log.

```
PSIDE.EXE -HIDE -PJFF PPLTOOLS -FP c:\temp\export -CT DB2UNIX -CD PTDMO -CO
PTDMO -CP PTDMO -LF c:\temp\copy.log
```

Comparing Definitions

The command line statement for upgrade compare:

- Connects to the source database.
- Connects to the target database.
- Performs a project or database compare (based on parameter).
- Creates compare reports in the specified output directory parameter.

The remainder of this section includes:

- Available parameters.
- Examples.
- Release number selection table.

Available Parameters

The following table lists all available parameters for the upgrade compare statement.

Parameter	Description	Error Handling
-HIDE	Hide the Application Designer interface. This parameter should always be used when performing a command line Compare process.	This is a mandatory parameter for all project command line processes.

Parameter	Description	Error Handling
-CT	Source – Database type. The type of database to connect to source. Choose from the Database Type Selection Table. (For example ORACLE, SYBASE, and so on).	Required. If the process stops, error messages are written to the log file (if log file name parameter is specified).
-CS	Source – Server name. The name of the source database server for the database you're connecting to. This setting is required for some database types.	Required for some database types. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-CD	Source – Database name. The name of the source database to connect to, as you would enter it into the PeopleSoft Login dialog box.	Required. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-CO	Source – Operator ID. The PeopleSoft operator ID to use to log in to source.	Required. If this parameter is not supplied, the operator ID is taken from the registry. If it fails, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-CP	Source – Operator password. The password for the specified operator ID for source.	Required. If this parameter is not supplied, the PeopleSoft Login dialog box prompts the user to give the valid user password. If the password fails, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-TS	Target – Server name. The name of the target database server for the database you're connecting to. This setting is required for some database types.	Required for some database types. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-TD	Target – Database name. The name of the target database to connect to, as you would enter it into the PeopleSoft Login dialog box.	Required. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).

Parameter	Description	Error Handling
-TO	Target – Operator ID. The PeopleSoft operator ID to use to log in to the target.	Required. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-TP	Target – Operator Password. The password for the specified operator ID for the target.	Required. If this parameter is not supplied, further execution is stopped and error messages are written to the log file (if log file name parameter is specified).
-LF	Log file name. The name of the file in which error messages are logged during the command line upgrade copy process.	Not required. If this parameter is specified, a file is created in the specified path and name and all the error messages are written to that file.
-PJM	Source – Project name. The name of the project that is to be compared from the source to the target. This project should be available in the source before starting the command line upgrade copy to target.	Required. This is the main parameter that is used internally by the EXE to identify an upgrade compare. If this parameter is not specified, and if all the source login parameters are given, this EXE will launch the application.
-CL	Commit limit (Number > 0). The Commit limit for the number of objects copied or compared before a commit is issued. Example: -CL 150	Not required. The default is 50 if the user does not set this parameter.
-AF	Audit flags on records (Number -> 0 or 1). This indicates if the target audit flags are kept or set from source. Example: -AF 0	Not required. The default is (1) to keep target audit flags. If the value is set to 0, then the target audit flags are taken from source. If the value is set to 1, then the target audit flags are kept as is.
-PPL	Portal Registry Structures Permission List References. This indicates if the Target Portal Registry Permission List References are kept or are set from the source database values. Example: -PPL 0	Not required. If this option is not used, the default is 1 to keep the target database Portal Registry Structures Permission List References. If the value is 0, the Target Portal Registry Structures Permission List References are taken from the source database. If the value is 1, then the target references are retained and they are not copied or compared from the source database.

Parameter	Description	Error Handling
-DDL	DDL on records and indexes (Number -> 0 or 1). This indicates if the target DDL flags are to be kept or set target DDL from source. Example: -DDL 0	Not required. The default is (1) to keep target DDL flags. If the value is set 0, then the target DDL flags are taken from source. If the value is set to 1, then the target DDL flags are kept as is. When keeping target DDL, no differences are shown on the compare report.
-CMT	Compare Type. Project (1) or Database (0). Example: -CMT 0	Not required. The default is 1 or Project.
-TGT	Target Orientation. PeopleSoft Vanilla (0) or Keep Customization (1).	Not required. The default is 0, PeopleSoft Vanilla.
-CBY	Comparison By. Compare by Release or Compare by Date. To compare by release, set to REL followed by the "Release no." To compare by date, set to DAT followed by a date in the following format: YYYY-MM-DD-HH.MM.SS.sss. Release numbers are included in the Release Number Selection table. Example: 2002-02-01-12.00.00.000	Not required. The default is Compare by Release.
-ROD	Report Output Directory. The report output directory location. ExampleL -ROD c:\temp\upgreports	Not required. If this is not set, the value from the Report Output Directory is used (Tools menu, Options).
-OBJ	Definition type to compare (Numbers with comma (,) as the delimiter). List of definitions types to compare or All. Example: -OBJ 0,1	Not required. If this parameter is not specified, then all of the definitions are compared by default. For a project comparison, this refers to all definitions in the project. For a database comparison, this includes all definitions in the database. For example, If you choose records and indexes alone for copying, use the appropriate numbers for records and indexes from the table. For records, the number is 0, and for the Indexes, the number is 1.

Parameter	Description	Error Handling
-LNG	<p>Compare languages (Language codes with a comma (,) as the delimiter or ALL to select all available languages). This is the list of languages to compare. For new languages not listed in the Languages Selection table, use the xlat shortname from the LANGUAGE_CD field in the translate table.</p> <p>Example: If you choose English and Spanish for compare, choose the appropriate codes for English and Spanish from the Language Selection table. For English, the code is ENG, and for Spanish, the code is ESP. Example: -LNG ENG,ESP</p>	<p>Not required. If this parameter is not given, then the languages that are already set in the project are used as the default. The COMMON language code refers to non-language attributes that are not translated. Translated attributes can be compared separately from non-translated attributes. Not specifying COMMON code when using -LNG will only compare the translated language attributes.</p> <p>Changing languages on the command line change the values stored with the project definition. Subsequent copy and compare processes on the modified project will use the new value unless it is explicitly changed again in the upgrade options.</p>

Example of Copy

- Run a database compare against the source SQL Server database PTDMO and the target database PTTST.
- Log process and error messages to c:\temp\compare.log.
- Set the commit limit to 150.
- Show the Audit Flag and DDL differences between databases.
- Compare Records, Indexes, Pages, Queries, and Process Definition definitions.
- Compare only English and Spanish translations.
- Set database compare type.
- Set Target Orientation setting to Keep Customizations.
- Compare by Release 8.40.00.000.
- Generate compare reports to the c:\temp\upgreports directory.

```
PSIDE.EXE -HIDE -CT MICROSOFT -CD PTDMO -CO PTDMO -CP PTDMO -PJM
PPLTOOLS -TD PTTST -TO PTDMO -TP PTDMO -LF C:\TEMP\COMPARE.LOG -CL
150 -AF 0 -DDL 0 -OBJ 0,1,5,10,20 -LNG ENG, ESP -CMT 0 -TGT 1 -CBY REL Core
8.40.00.000 -ROD C:\TEMP\UPGREPORTS
```

See also

Definition Type Selection Table

Language Selection Table

Database Type Selection Table

<i>Database</i>	<i>Database Description</i>
DB2ODBC	DB2 UDB for OS/390
DB2UNIX	DB2 UDB for UNIX, NT
INFORMIX	Informix
MICROSOFT	Microsoft SQL Server
ORACLE	Oracle
SYBASE	Sybase

Definition Type Selection Table

<i>Number</i>	<i>Definition Description</i>
0	Record
1	Index
2	Field
3	Format Definition
4	Translate
5	Page
6	Menu
7	Components
8	Record PeopleCode
9	Menu PeopleCode
10	Query
11	Tree Structure
12	Tree*
13	Access Group*
14	Color

Number	Definition Description
15	Style
16	<i>Not used</i>
17	Business Process
18	Activity
19	Role*
20	Process Definition
21	Process Server
22	Process Type
23	Process Job
24	Process Recurrence
25	Message Catalog Entries*
26	Dimension*
27	Cube Definitions*
28	Cube Instance Definitions*
29	Business Interlink
30	SQL Definition
31	File Layout Definition
32	Component Interfaces
33	App Engine Program
34	App Engine Section
35	Message Node
36	Message Channel
37	Message Definition
38	Approval Rule Set
39	Message PeopleCode
40	Subscription PeopleCode
41	<i>Not used</i>
42	Component Interface PeopleCode
43	Application Engine PeopleCode
44	Page PeopleCode
45	Page Field PeopleCode
46	Component PeopleCode

Number	Definition Description
47	Component Record PeopleCode
48	Component Record Field PeopleCode
49	Image
50	Style Sheet
51	HTML
52	File Reference Definitions* (no copy support)
53	Permission List
54	Portal Registry Definitions
55	Portal Registry Structures
56	URL Definitions
57	Application Package
58	Application Package PeopleCode
59	Portal Registry User Homepage
60	Problem Type Definition
61	Data Archival
62	XSLT
63	Portal Registry User Favorite
64	Mobile Page
65	Relationship

* These object types do not have Copy To/From File support

Language Selection Table

Symbol	Language Description
CFR	Canadian French
DAN	Danish
DUT	Dutch
ENG	English
ESP	Spanish
FRA	French
GER	German

<i>Symbol</i>	<i>Language Description</i>
GRK	Greek
ITA	Italian
JPN	Japanese
KOR	Korean
POR	Portuguese
SVE	Swedish
THA	Thai
ZHS	Simplified Chinese
ZHT	Traditional Chinese
COMMON	Non-language attributes

Release Number Selection Table

<i>Available Release Numbers</i>
Core 5.10.00.000
Core 6.00.00.000
Core 6.10.00.000
Core 7.00.00.000
Core 7.50.00.000
Core 8.00.00.000
Core 8.10.00.000
Core 8.40.00.000

CHAPTER 21

Appendix E: Default Style Classes

This table displays the list of default style classes that are shipped with your system, the substyle to which each belongs, and a brief description of the default style.

Style Class Name	SubStyle	Default Style for:
EDGE	PTSTYLEDEF	*Default PIA navigation
HILEFT1	PTSTYLEDEF	*Default PIA navigation
HILEFT2	PTSTYLEDEF	*Default PIA navigation
KNOCKOUT	PTSTYLEDEF	*Portal administration left navigation
LEVEL1	PTSTYLEDEF	*Default PIA navigation
LEVEL2	PTSTYLEDEF	*Default PIA navigation
LEVEL3	PTSTYLEDEF	*Default PIA navigation
MID	PTSTYLEDEF	Hyperlinks at first level of PIA navigation
MUTE	PTSTYLEDEF	Descriptive text in PIA navigation
PAADDITIONALINSTRUCTIONS	PSALTERNATE	For additional instructions on the page (slightly smaller font).
PABOLDBLUETEXT	PSALTERNATE	Placing a strong emphasis on text on a page.
PABOLDTEXT	PSALTERNATE	Emphasizing field values.
PACALENDARDAYNUM	PSALTERNATE	Text for numeric day on calendars.
PACALENDARDAYNUMDISABLED	PSALTERNATE	Text for numeric day on calendars (disabled state)
PACFGRIDFOOT	PSALTERNATE	Footer border for chartfield grids
PACFGRIDLABEL	PSALTERNATE	Header label background for chartfield grids
PAERRORETEXT	PSALTERNATE	Text font type, color, size for applications with inline error messages on page.
PAEXAMPLE	PSALTERNATE	Smaller font to show examples (example: 01/21/1990).
PAEXPANDCOLLAPSE	PSALTERNATE	Expandable/collapsible area borders.
PAFRAMEBACKGROUND	PSALTERNATE	Mimics the PAGROUPDIVIDER, only allows text on dividing bar for self-service pages.

Style Class Name	SubStyle	Default Style for:
PAFRAMELEVEL1	PSALTERNATE	Level 1 frames
PAFRAMELEVEL2	PSALTERNATE	Level 2 frames.
PAFRAMELEVEL3	PSALTERNATE	Level 3 frames.
PAGRIDHEADER	PSALTERNATE	Grid column headers for Self Service grids without navigation controls.
PAGROUPBOX	PSALTERNATE	Group boxes.
PAGROUPBOXLABELINVISIBLE	PSALTERNATE	An invisible group box label.
PAGROUPBOXLABELLEVEL1	PSALTERNATE	Group box labels at level 1.
PAGROUPBOXLABELLEVEL2	PSALTERNATE	Group box labels at level 2.
PAGROUPBOXLABELLEVEL3	PSALTERNATE	Group box labels at level 3.
PAGROUPBOXLEVEL1	PSALTERNATE	Group box body at level 1.
PAGROUPBOXLEVEL2	PSALTERNATE	Group box body at level 2.
PAGROUPBOXLEVEL3	PSALTERNATE	Group box body at level 3.
PAGROUPDIVIDER	PSALTERNATE	Group box label style on self-service pages.
PAGROUPDIVIDERBODY	PSALTERNATE	Group box body style on developer defined advanced search
PAHEADERTOOLBARBODY	PSALTERNATE	Frame background for CRM toolbar
PAHEADERTOOLBARFRAME	PSALTERNATE	Frame border for CRM toolbar
PAHORIZONTALRULELEVEL1	PSALTERNATE	Horizontal rule at level 1.
PAHORIZONTALRULELEVEL2	PSALTERNATE	Horizontal rule at level 2.
PAHORIZONTALRULELEVEL3	PSALTERNATE	Horizontal rule at level 3.
PAHYPERLINKDESCR	PSALTERNATE	Text descriptions for hyperlinks on application home pages.
PAHYPERLINKERRSTAT	PSALTERNATE	Hyperlinks conveying an error status (use with image).
PAHYPERLINKLVL1ODD	PSALTERNATE	Hyperlink style for grid odd rows using PeopleCode style property.
PAHYPERLINKSUCCESSSTAT	PSALTERNATE	Hyperlinks conveying a successful status (use with image).

Style Class Name	SubStyle	Default Style for:
PAHYPERLINKWARNSTAT	PSALTERNATE	Hyperlinks conveying a warning status (use with image).
PALEGENDBACKGROUND	PSALTERNATE	Group box body color for legends on pages.
PALEVEL0PRIMARY	PSALTERNATE	Level 0 high-level key data on Self Service pages.
PALEVEL0SECONDARY	PSALTERNATE	Additional fields to identify the object.
PAPAGEINSTRUCTIONS	PSALTERNATE	Text instructions on the top of the page.
PAPAGETITLE	PSALTERNATE	Text style for the title of the page.
PASTEPBYSTEPSTITLE	PSALTERNATE	Text style for step by step transactions.
PATEXTBACKGROUND	PSALTERNATE	
PATRANSACTIONTITLE	PSALTERNATE	Text style for transaction name above the current page title.
PSACTIVETAB	PTSTYLEDEF	Labels and background colors of active tabs.
PSCHARTAXISTITLE	PTSTYLEDEF	Labels on chart axis.
PSCHARTDEFAULT	PTSTYLEDEF	Default chart text.
PSCHARTTITLE	PTSTYLEDEF	Chart title text.
PSCHECKBOX	PTSTYLEDEF	Checkbox label.
PSDISABLED	PTSTYLEDEF	Font type, size, color for disabled field values.
PSDROPDOWNLABEL	PTSTYLEDEF	Label on a dropdown list.
PSDROPDOWNLIST	PTSTYLEDEF	Text in a dropdown list.
PSEEDITBOX	PTSTYLEDEF	Label on an edit box.
PSEEDITBOXLABEL	PTSTYLEDEF	Text in an edit box.
PSERROR	PTSTYLEDEF	Background color and text on an error field.
PSFRAME	PTSTYLEDEF	Borders for frames.
PSGRIDCOLUMNHDR	PTSTYLEDEF	Text for grid column headers.
PSGROUPBOX	PTSTYLEDEF	Borders and body style for group box.
PSGROUPBOXLABEL	PTSTYLEDEF	Labels for group boxes.
PSHEADERHYPERLINK	PTSTYLEDEF	Hyperlink in a scroll area or grid header.
PSHEADERHYPERLINKD	PTSTYLEDEF	Disabled hyperlink in a scroll area or grid header.
PSHORIZONTALRULE	PTSTYLEDEF	Horizontal rule.
PSHYPERLINK	PTSTYLEDEF	Hyperlink.
PSHYPERLINKACTIVE	PTSTYLEDEF	Selected Hyperlink.

Style Class Name	SubStyle	Default Style for:
PSHYPERLINKDISABLED	PTSTYLEDEF	Disabled hyperlink.
PSHYPERLINKHOVER	PTSTYLEDEF	Hyperlink when the mouse hovers over it.
PSHYPERLINKVISITED	PTSTYLEDEF	Previously visited link.
PSHYPERLINKYELLOWBKGRD	PTSTYLEDEF	Hyperlink with a yellow background.
PSIMAGE	PTSTYLEDEF	Border style, width, and colors of images.
PSINACTIVETAB	PTSTYLEDEF	Inactive tab labels and their background color.
PSINACTIVETABHOVER	PTSTYLEDEF	Inactive tab labels and their background color when the mouse hovers over it.
PSLEVEL1GRID	PTSTYLEDEF	Background colors, border settings, and fonts for level 1 grids.
PSLEVEL1GRIDACTIVETAB	PTSTYLEDEF	Labels and background colors of active tabs on level 1 grids.
PSLEVEL1GRIDCOLUMNHDR	PTSTYLEDEF	Grid column labels on level 1 grids.
PSLEVEL1GRIDEVENROW	PTSTYLEDEF	Even rows for level 1 grids.
PSLEVEL1GRIDINACTIVETAB	PTSTYLEDEF	Labels and backgrounds of inactive tabs on level 1 grids.
PSLEVEL1GRIDINACTIVETABHOVER	PTSTYLEDEF	Labels and backgrounds of inactive tabs on level 1 grids when mouse hovers over it.
PSLEVEL1GRIDLABEL	PTSTYLEDEF	Labels of level 1 grids.
PSLEVEL1GRIDNAVIGATIONBAR	PTSTYLEDEF	Navigation bars on level 1 grids.
PSLEVEL1GRIDODDROW	PTSTYLEDEF	Odd rows on level 1 grids.
PSLEVEL1GRIDROW	PTSTYLEDEF	Background settings, border settings, and fonts for level 1 grids.
PSLEVEL1SCROLLAREA BODY	PTSTYLEDEF	Level 1 scroll area body.
PSLEVEL1SCROLLAREAFOOTER	PTSTYLEDEF	Level 1 scroll area footer.
PSLEVEL1SCROLLAREAHEADER	PTSTYLEDEF	Level 1 scroll area header.
PSLEVEL2GRID	PTSTYLEDEF	Background colors, border settings, and fonts for level 2 grids.
PSLEVEL2GRIDACTIVETAB	PTSTYLEDEF	Labels and background colors of active tabs on level 2 grids appear.
PSLEVEL2GRIDCOLUMNHDR	PTSTYLEDEF	Grid column labels on level 2 grids.

Style Class Name	SubStyle	Default Style for:
PSLEVEL2GRIDEVENROW	PTSTYLEDEF	Even rows for level 2 grids.
PSLEVEL2GRIDINACTIVETAB	PTSTYLEDEF	Labels and backgrounds of inactive tabs on level 2 grids.
PSLEVEL2GRIDINACTIVETABHOVER	PTSTYLEDEF	Labels and backgrounds of inactive tabs on level 2 grids when mouse hovers over it.
PSLEVEL2GRIDLABEL	PTSTYLEDEF	Labels on level 2 grids.
PSLEVEL2GRIDNAVIGATIONBAR	PTSTYLEDEF	Navigation bars on level 2 grids.
PSLEVEL2GRIDODDROW	PTSTYLEDEF	Odd rows on level 2 grids.
PSLEVEL2GRIDROW	PTSTYLEDEF	Background settings, border settings, and fonts for level 2 grids.
PSLEVEL2SCROLLAREA BODY	PTSTYLEDEF	Level 2 scroll area body.
PSLEVEL2SCROLLAREAFOOTER	PTSTYLEDEF	Level 2 scroll area footer.
PSLEVEL2SCROLLAREAHEADER	PTSTYLEDEF	Level 2 scroll area header.
PSLEVEL3GRID	PTSTYLEDEF	Background settings, border settings, and fonts for level 3 grids.
PSLEVEL3GRIDACTIVETAB	PTSTYLEDEF	Labels and background colors of active tabs on level 3 grids.
PSLEVEL3GRIDCOLUMNHEADER	PTSTYLEDEF	Grid column labels on level 3 grids.
PSLEVEL3GRIDEVENROW	PTSTYLEDEF	Even rows for level 3 grids.
PSLEVEL3GRIDINACTIVETAB	PTSTYLEDEF	Labels and backgrounds of inactive tabs on level 3 grids.
PSLEVEL3GRIDINACTIVETABHOVER	PTSTYLEDEF	Labels and backgrounds of inactive tabs on level 3 grids when mouse hovers over it.
PSLEVEL3GRIDLABEL	PTSTYLEDEF	Labels on level 3 grids.
PSLEVEL3GRIDNAVIGATIONBAR	PTSTYLEDEF	Navigation bars on level 3 grids.
PSLEVEL3GRIDODDROW	PTSTYLEDEF	Odd rows on level 3 grids.
PSLEVEL3GRIDROW	PTSTYLEDEF	Background settings, border settings, and fonts for level 3 grids.
PSLEVEL3SCROLLAREA BODY	PTSTYLEDEF	Level 3 scroll area body.
PSLEVEL3SCROLLAREAFOOTER	PTSTYLEDEF	Level 3 scroll area footer.

Style Class Name	SubStyle	Default Style for:
PSLEVEL3SCROLLAREAHEADER	PTSTYLEDEF	Level 3 scroll area header.
PSLONGEDITBOX	PTSTYLEDEF	Data-portion of long edit boxes.
PSLONGEDITLABEL	PTSTYLEDEF	Labels for long edit boxes
PSMULTILANG	PTSTYLEDEF	Multilingual field background color
PSNAVPARENTLINK	PTSTYLEDEF	Hyperlink color on left navigation
PSPAGE	PTSTYLEDEF	Background color and margins of all pages.
PSPROCESSING	PTSTYLEDEF	Background color for processing message.
PSPSMALLTEXT	PTSTYLEDEF	Font type, size, weight, and color for footer text.
PSPUSHBUTTON	PTSTYLEDEF	Labels and background color for push buttons.
PSPUSHBUTTONDISABLED	PTSTYLEDEF	Labels and background color for disabled push buttons.
PSRADIOBUTTON	PTSTYLEDEF	Radio buttons.
PSSRCHCHECKBOX	PTSTYLEDEF	Search checkbox.
PSSRCHDROPDOWNLABEL	PTSTYLEDEF	Search drop-down labels.
PSSRCHEDITBOXLABEL	PTSTYLEDEF	Search edit box labels.
PSSRCHINSTRUCTIONS	PTSTYLEDEF	Search instructions.
PSSRCHPAGE	PTSTYLEDEF	Font type, background color, and margins for all search pages.
PSSRCHRESULTSEVENROW	PTSTYLEDEF	Even rows for search page results grid.
PSSRCHRESULTSFOOTER	PTSTYLEDEF	Footer for search page results grid.
PSSRCHRESULTSHDR	PTSTYLEDEF	Headers for search page results grid.
PSSRCHRESULTSHYPERLINK	PTSTYLEDEF	Navigation hyperlinks above search results.
PSSRCHRESULTSHYPERLINKD	PTSTYLEDEF	Disabled navigation hyperlinks above search results.
PSSRCHRESULTSODDROW	PTSTYLEDEF	Odd rows for search page results grid.
PSSRCHRESULTSTITLE	PTSTYLEDEF	Instructional text on search results page.
PSSRCHSUBTITLE	PTSTYLEDEF	Search results section title.
PSSRCHTIPS	PTSTYLEDEF	Search tips.
PSSRCHTITLE	PTSTYLEDEF	First level title on a search page.
PSSTATICIMAGE	PTSTYLEDEF	Border styles, border width, and border colors for static images.

Style Class Name	SubStyle	Default Style for:
PSTEXT	PTSTYLEDEF	Static text controls.
PSTLEFTMENU	PTSTYLEDEF	No longer used.
PSTREENODESELECTED	PTSTYLEDEF	Tree node when it is selected.
PSTRELLINKSBODYNARROW	PAALTERNATE	Related links body for narrow template.
PSTRELLINKSBODYWIDE	PAALTERNATE	Related links body for wide template.
PSTRELLINKSHDRNARROW	PAALTERNATE	Related links header label for narrow template.
PSTRELLINKSHDRWIDE	PAALTERNATE	Related links header label for wide template.
PTBREADCRUMB	PTSTYLEDEF	Breadcrumbs.
PTBREADCRUMBCUR	PTSTYLEDEF	Current location on breadcrumb trail.
PTBREADCRUMBMARGIN	PTSTYLEDEF	Adds margins on breadcrumbs.
PTMENULINK	PTSTYLEDEF	Hyperlink on level 2 of PIA navigation
PTNAVSELCHILDBK	PTSTYLEDEF	Background color on selected content reference in navigation.
PTNAVSELCHILDEDGELT	PTSTYLEDEF	Background color on top edge of selected content reference in navigation.
PTNAVSELCHILDLINK	PTSTYLEDEF	Link font type, color, on selected content reference in navigation.
PTNAVSELPARENTBK	PTSTYLEDEF	Background color on selected parent folder in navigation.
PTNAVSELPARENTEGE	PTSTYLEDEF	Background color on edge of selected parent folder in navigation.
PTPAGELET	PTSTYLEDEF	Border thickness and color on homepage pagelets.
PTPAGELETBODY	PTSTYLEDEF	Font type, size, border thickness, border color, padding on homepage pagelets.
PTPAGELETHEADER	PTSTYLEDEF	Font type, size, color, background color, border thickness, border color, padding on homepage pagelet headers.
PTQUERYSTYLESUB	PTSTYLEDEF	Contains query style definitions.
PTSELECTBODY	PTSTYLEDEF	Portal Layout Page selection box body.
PTSELECTHEADER	PTSTYLEDEF	Portal Layout Page selection box header.
RESET	PTSTYLEDEF	*Default PIA navigation
SMALL	PTSTYLEDEF	Hyperlinks in portal homepage personalization page, and portal structure breadcrumbs.

Style Class Name	SubStyle	Default Style for:
STRONG	PSSTYLEDEF	Text size and weight for emphasizing labels.

* Default PIA styles are no longer in use.

Appendix F: Performing Bulk Operations

This chapter provides an overview of bulk operations and discusses how to:

- Perform bulk insertions.
- Perform bulk modifications.
- Perform bulk deletions.

Understanding Bulk Operations

PeopleTools enables you to perform *bulk* operations on fields that might be in many different records or pages.

Bulk operations are useful for financial ChartFields. ChartField is an accounting term used to describe a small group of character fields, typically 5 to 20, that are present in many records and pages. ChartFields can be between 1 and 30 characters long, with an average length of 10. They often identify organization-wide attributes, such as DEPTID (department identification).

Note that financial applications have created a standardized way to modify chartfields, using standard pages and invoking bulk operations through their corresponding PeopleCode API's, rather than these dialog boxes. It is recommended that you consult your application to ensure that you are using the appropriate mechanism to update your chartfields, before using these dialogs.

To perform bulk operations on ChartFields, select Tools, Bulk Operations from the PeopleSoft Application Designer menu. The menu options are:

Insert	Select to insert fields into records, record fields onto pages, or fields onto both records and pages.
Modify	Select to modify record or page fields.
Delete	Select to delete fields.

Performing Bulk Insertions

This section lists common elements and discusses how to insert:

- Fields into records.
- Record fields onto pages.
- Fields into both records and pages.

Note. If you try to insert a field that is already present on a record or page, no processing takes place.

Common Elements Used in This Section

Field Name	Enter the name of the field to insert.
Model Field	Specify a field with record attributes that you want to copy to all inserted fields.
Clone peoplecode of model field	Select if you want PeopleCode in the record fields to be copied and references modified to the inserted field.
Field will be inserted into these records	Select the records in which you want the source field inserted.
RecFields will be inserted into these pages	Specify the page names onto which you want the record fields copied.

Inserting Fields Into Records

You can insert a source field into selected records only if the model field exists in those records. The source field is assigned the same record field properties as the model field in each record and is inserted directly after the model field.

If the model field has a prompt table, a prompt table is created for the source field using the name of the source field with *TBL* appended to it.

If the record is either a SQL view or dynamic view type, the associated SQL is modified by expanding the SELECT clause to include the new field.

If the record is a subrecord, the parent records of type SQL view or dynamic view that contain this subrecord are updated. If the SQL contains the model field in the WHERE clause or if the SQL is complex, the associated record is inserted into a project called BLK_<SOURCEFIELDNAME> and displays a status message. Examine the contents of that project after the operation completes to verify successful completion.

If the model field has PeopleCode associated with it in the record or in a component, this PeopleCode is copied to the new field with all of the references to the model field changed to refer to the new field.

Note. Because performing this operation changes records that are used to build application tables, you must rebuild (alter) the database before these changes can be used. Select Tools, Bulk Operations, Insert from the PeopleSoft Application Designer menu to access the insert dialog box.

Inserting Record Fields Onto Pages

This operation inserts the specified record field onto each page listed if the model field exists on the page.

If the model field is in a grid, the system inserts the new field into the grid next to the model field and assigns it the same page field properties.

If the model field is not in a grid, the system inserts the new field to the right of the model field (in the first open space) and assigns it the same page field properties. If the system detects a questionable field position, it inserts the page into a project called BLK_ <SOURCEFIELDNAME> and displays a status message. Examine that project after the operation completes to verify successful completion.

The page field name property is not cloned if it exists on the model field. Instead, the name of the new field is used, because the page field name should be a unique identifier for page elements.

Note. You do not need to rebuild the database after performing this operation. The changes take affect when the page is opened.

Record Name	Enter the record name containing the field to insert onto pages.
Get Pages from Project	Specify the project name containing the pages to modify.
Get Records from Project	Specify the project containing the records to modify.

Inserting Fields Into Records and Pages

This operation is a combination of inserting fields into records and inserting record fields onto pages. The system examines each record to see if a model field exists. If so, it inserts the source field after the model field, including all field properties, PeopleCode, and SQL additions to itself and parent records. Then, for each record, the system checks all pages to see if the new record field should be inserted.

If the system detects a questionable field position, it inserts the page into a project called BLK_ <SOURCEFIELDNAME> and displays a status message. Examine that project after the operation completes.

Get Records and Pages from Project	Specify the project containing the records and pages to modify.
---	---

Performing Bulk Modifications

This section discusses how to:

- Modify record fields.
- Modify page fields.
- Reorder or resize grid fields.
- Change page field attributes.

Modifying Record Fields

This operation can modify record fields by applying record field properties to a field in a set of records. All of the properties that are associated with the page are set for the record field in the listed records. Therefore, after this operation completes, the source field in these records contains identical record field properties.

Note. In most cases, you must rebuild the database for these attributes to take effect.

Field Name	Enter the field name for which you want to modify attributes.
Field will be modified on records from Project	Specify the project name containing the record fields to modify.
Records	Specify the records containing the fields with attributes that you want to modify.
Change Attributes	Click to open the menu to select specific attributes. Enter the appropriate attributes for the modified fields.

Modifying Page Fields

This operation can modify page fields in a variety of ways. You can specify a source field from a list of fields, records, pages, or projects. You can modify page field attributes on a single field at a time; therefore, if you do not specify a single field, the Change Attributes button is unavailable.

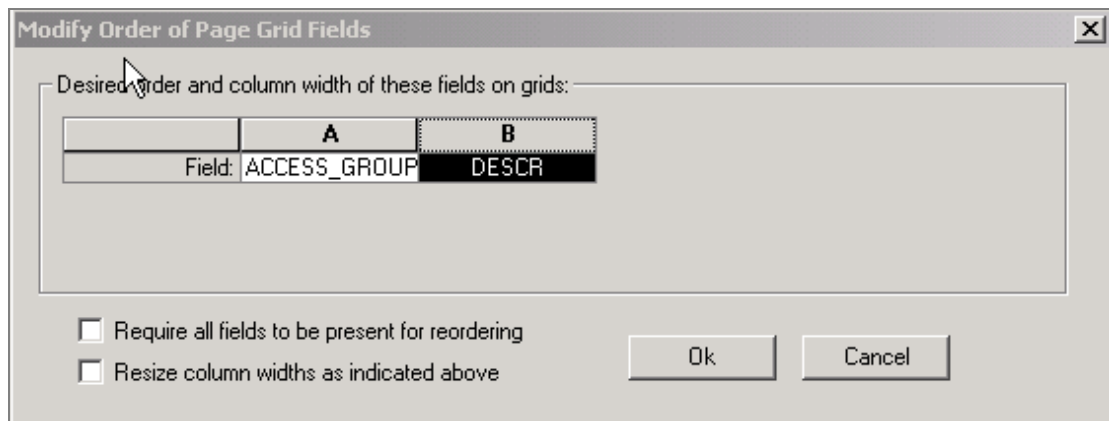
Field, From Record, From Page, and From Project	Specify the field used this to populate the “Fields to be modified” list.
Fields to be modified	Displays the list of fields that will be modified on pages.
Get Pages from Project	Specify pages used to populate the “Pages to be modified” list.
Pages to be modified	Displays the list of pages that will be examined.

- Reorder/Resize Grid Fields** Opens a dialog box which will allow you to specify the order and width of the “Fields to be modified” fields on all listed pages.
- Change Attributes** Opens a dialog box which will allow you to specify the attributes of the field on all listed pages.

Reordering or Resizing Grid Fields

You can rearrange columns as needed, and the order is applied on target pages. The reordering algorithm “bunches” these fields together at the first instance of any of these fields in a target page grid and forces the remaining fields into the order specified.

Pages that have these fields outside of grids are not affected by these changes. The resize operation applies only to grid column widths.



Modify Order of Page Grid Fields dialog box

- Require all fields to be present for reordering** Select if you do not want to modify pages that do not have all the fields in the grid.
- Resize column widths as indicated above** Select to resize the columns to the column widths that are defined.

Note. These changes take effect immediately; no database build is required.

Changing Page Field Attributes

Like record field attributes, page field attributes for the selected field (on the selected set of pages) can be modified using the Modify Page Field Attribute dialog box. All of the attributes on the screen are applied to the page field on all pages.

Performing Bulk Deletions

Use the delete operation to:

- Remove the field from a list of pages, regardless of where the field exists on the page or whether it is in a grid
- Remove the field from the list of records.

This removes associated PeopleCode and modifies associated SQL either in the record or, if the record is a subrecord, in parent records.

If the field is in the SELECT clause of the SQL, the removal is straightforward. However, if the field is also used in a WHERE clause, or if the field is the only item in the SELECT clause, the record is not modified. Instead, it is inserted into a project called BLK_<SOURCEFIELDNAME> as noted in messages in the status screen.

Note. A project with a targeted field in SQL statements should be examined by hand to delete the field as required from associated SQL.

Deleting fields from records and pages does *not* remove the field definition itself and it does not remove the field from other applications, such as Crystal Reports.

Note. Because performing this operation changes records, you must subsequently rebuild the database, since each application data table is built based on the record definition.

Field Name	Enter the name of the field to delete.
Field will be deleted from these records	Select the records from which to delete fields.
RecFields will be deleted from these pages	Select the pages from which to delete record fields.

Appendix G: PeopleTools Cross Reference Reports

This chapter provides an overview of cross-reference reports and discusses how to run a sample Crystal report.

Understanding Cross-Reference Reports

Using PeopleTools, you can create new applications by defining menus and pages that you use to enter data and database tables. PeopleTools includes a variety of cross-reference reports (similar to blueprints) that guide you through the definitions (such as menus, pages, and records) that are delivered with the system and those that you create or adapt with PeopleTools.

- PeopleTools cross-reference reports are predefined Crystal reports, not unlike the standard reports that are delivered with the PeopleSoft application. Like other standard reports, you can identify cross-reference reports by the three-character prefix *XRF*. The reports provide several views of the application, ranging from high-level lists of the windows, menus, and pages to the detailed database attributes of fields.

PeopleSoft assumes that you are already familiar with the types of definitions that are delivered with the PeopleSoft application, as well as PeopleTools and relational databases.

The cross-reference reports include:

<i>Report</i>	<i>ID</i>	<i>Description</i>
Fields and Pages	XRFFLPN	Lists all fields in alphabetical order. It includes the names of all record and page definitions in which the fields occur and lists the field long names.
Fields and Records	XRFRCL	Lists all fields in alphabetical order by the associated record definition name. It details the field long name, type, length, and formatting.
Records and Fields	XRFFLRC	Lists all fields in alphabetical order. It includes the field long name, type, length, and formatting, as well as the names of all record definitions that contain the field.

Report	ID	Description
Applications and Fields	XRFAPFL	Lists all menus, such as general tables, in alphabetical order, including the fields in each menu. For each field, it lists the field name, type, length, and format, as well as all record and page definitions that contain the field (in the window).
Fields Referenced by PeopleCode Programs	XRFFLPC	Lists all PeopleCode programs in alphabetical order by the associated record definition and field. It includes the types of fields that are referenced in the PeopleCode program.
Field Listing	XRFIELDS	Lists all fields in alphabetical order. It includes field type, length, format, long name, and short name.
Menu Listing	XRFMENU	Lists all menus in alphabetical order, including all page definitions in each menu. It includes the associated search record definition name and detail page definition name.
Page Listing	XRFPAGE	Lists all page definitions in alphabetical order.
PeopleCode Programs and Field References	XRFPCFL	Lists record definitions that contain fields with PeopleCode program attributes. It includes the field name, as well as the associated record definitions and fields that are referenced in the PeopleCode program.
Pages with PeopleCode	XRFPNPC	Lists all pages that contain fields with PeopleCode attributes. For each page, it includes the name of the record definitions that contain the field, as well as the field name and type
Records and Pages	XRFRCPN	Lists all record definitions in alphabetical order. It includes the menu and page definitions that are associated with each record definition.
Window Listing	XRFWIN	Lists all application menu windows in alphabetical order.

Note. In addition to standard cross-reference reports, if you are familiar with the PeopleSoft database, you can generate additional ad-hoc reports to extract the exact combination of information that you need.

Running a Sample Crystal Report

Cross-reference reports run from the Multi-Process Jobs page..

The following example explains how to generate the Field Cross Reference (XRFIELDSDS) report.






Process Scheduler Request

User ID: QEDMO Run Control ID: CrystalClient

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	
<input type="checkbox"/>	COBOL Multi-process Job	3CBL	PSJob	(None)	(None)	
<input type="checkbox"/>	Crystal Multi-process Job	3CRYSTAL	PSJob	(None)	(None)	
<input type="checkbox"/>	SQR Multi-process Job	3SQR	PSJob	(None)	(None)	
<input type="checkbox"/>	Simple AE test program	AEMINITEST	Application Engine	Web	TXT	
<input type="checkbox"/>	All Process Types	ALLTYPES	PSJob	(None)	(None)	

Process Request page

To create a Field Cross Reference report:

- From the menu, select PeopleTools, Process Scheduler , System Process Requests.
The Sample Process Prompt appears.
- From the Sample Process prompt, select Add a New Value.
- Enter *CrystalClient* for the run control ID.
- Click **Add**.
- Select **Run**.
The Process Request page appears.
- Select *Field Cross Reference, XRFIELDSDS, Crystal* from the scrollable list at the bottom of the dialog.
- Click **OK** to generate a formatted display of this Crystal report in HTML.

Glossary

The terms in this glossary are used among multiple Financials and Supply Chain Management applications.

Numbers

401(a)(17) Limits

The limitations on the earnings that may be included in the calculation of benefits under qualified U.S. pension plans.

1st Year Amount

In PeopleSoft Workforce Analytics, 1st Year Amount is an employee-level compensation amount, totaling the calculations for the first calendar year's worth of accounting periods, in a compensation scenario.

A

Abend

Abnormal End (to a process).

ABM (Activity-Based Management)

See PeopleSoft Activity-Based Management.

ABPS (Activity-Based Planning and Simulation)

See Activity-Based Planning and Simulation.

Absence

An absence occurs when an employee is not at work (absent) during a normally scheduled work period. Absences may be scheduled or non-scheduled, compensated or uncompensated, excused or unexcused. An absence may occur for a variety of reasons like illness, family emergency, civic obligations (e.g. Military duty or jury duty), or vacation.

Absence Entitlement

Element which defines the rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

Absence Take

Element which defines the conditions that must be met before a payee is entitled to take paid time off.

Accepted Exception

An exception that has been reviewed and validated (see Time Management).

Accommodations

Accommodations are efforts your organization is able to make for employees or applicants with disabilities, such as purchasing special equipment or making structural changes to a work environment.

Account Management

In PeopleSoft Demand Planning, a feature that enables you to divide a centrally held corporate forecast into multiple subsections for easier maintenance and management. These subsections are separate databases that can be distributed to account managers for use and updates, then rejoined with the main database at a later date.

Account

A code for recording and summarizing financial transactions as expenditures, revenues, assets, or liabilities balances. This is a delivered PeopleSoft ChartField, specific use of which is typically defined by the organization during implementation of PeopleSoft General Ledger.

Account Type

A name for one of the different kinds of accounts used in a PeopleSoft General Ledger, such as Asset, Liability, Equity, Revenue, and Expense.

Accounting Class

In PeopleSoft Enterprise Performance Management, an attribute that defines how the particular resource would be treated for generally accepted accounting practices. Inventory denotes whether a Resource will become part of a balance sheet account such as inventory or fixed assets, while Non-inventory denotes that the Resource will be treated as an expense of the period during which it occurs.

Accounting Date

The date that a transaction is recognized as opposed to the date the transaction actually occurred—the **Transaction Date** (although the two dates 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. In PeopleSoft Asset Management, the difference between accounting date and transaction date determines whether prior period depreciation must be calculated, and how much. Accounting Date must be later than or equal to Transaction Date.

Accounting Entry

A set of related debits and credits. An Accounting Entry is made up of multiple *Accounting Lines*. In most PeopleSoft applications, accounting entries are always balanced (debits = credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in general ledger, and so forth (depending on the application).

Accounting Entry Template

A user-defined table that controls the use of system-generated accounting lines in the posting processes.

Accounting Split

Method indicating how expenses are allocated or divided among one or more sets of accounting ChartFields.

Accredited Education

Education above the high school level completed in a U.S. college, university, or other educational institution that has been credited by one of the accrediting agencies or associations recognized by the Secretary, U.S. Department of Education.

Accrual

Any hours that employees accumulate for use at another time in the form of earned vacation time or sick leave, for example.

Accrual Basis Accounting

Accounting that records the impact of a business event as it occurs, regardless of whether the transaction affected cash.

Accrual Class Codes

Classes or categories of accruals.

Accrual Type

Defines an accrual such as annual leave or sick leave.

Accumulate Demand

In PeopleSoft Demand Planning, a transfer process function that adds demand quantities for an item to any quantities that already exist for the period.

Accumulator

Element which allows you to combine several elements. 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. See also Time Administration.

Accumulator [Global Payroll]

Element which provides a means for storing the cumulative values of defined items as they are processed. As you make payments, take deductions, and perform calculations, you'll use accumulators to track accumulated amounts, or balances. You can accumulate a single value over time or multiple values over time, as your requirements specify. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

Action

In PeopleSoft Deduction Management, a task that you perform to obtain information required to resolve a deduction.

Action and Conditions

A process that defines actions and conditions independently of one another and then combines them to create a complete rule (see Rule Creation).

Action Code

In PeopleSoft Engineering, a user-defined code associated with an event/action triggered by the implementation of an engineering change order (ECO). Actions could include analyzing an item's existing quantity on hand, scrapping existing inventory, or modifying current documentation.

In PeopleSoft Product Configurator, a 2-character code that identifies rule types. For example, *FP* is the action code for the Finalize Price rule, and *CN* is the action code for the Condition rule. The rules control the processing path for configured items.

Action List

An online list of customers who meet predefined credit management criteria. The list also includes appropriate procedures for each action and contact information for the customer.

Action Owner

In PeopleSoft Deduction Management, the individual assigned a task to obtain information to resolve a deduction.

Action Reason

The reason an employee's job or employment information is updated. The action reason is entered in two parts: a *personnel action*, such as a promotion, termination, or change from one paygroup to another—and a *reason* for that action. Action Reason is used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

Active Control

A target control requiring that the user validate the budget against the planning targets before submitting it. If the budget totals are not within the tolerance levels, the system indicates that the status is invalid and the user cannot submit their budget until the budget is modified and the amount is within the tolerance range of the planning target.

Activity

In PeopleSoft Receivables and Deduction Management, an action taken on an item, such as creating an item, unposting an item, or writing off an item.

In PeopleSoft Projects, the unit of work that provides a further breakdown of projects—usually into specific tasks. Resources are assigned directly to activities within a project, not directly to projects.

A self-contained task that is part of one or more business processes. Business process maps display the activities that make up the process. An activity consists of steps representing the pages the user needs to complete and events representing the workflow routings triggered by the user's actions.

In PeopleSoft Enterprise Warehouse, the work of an organization and the aggregation of actions used for Activity-Based Costing.

Activity Attributes

Activity Attributes provide pieces of activity information. For example: capacity and performance, cost drivers, cycle time and performance measures.

Activity-Based Costing (ABC)

A methodology that measures the cost and performance of activities, resources and cost objects, assigns resources to activities and activities to cost objects based on their use and recognizes the causal relationships of cost drivers to activities.

Activity-Based Management (ABM)

See PeopleSoft Activity-Based Management (ABM).

Activity-Based Planning and Simulation (ABPS)

ABPS, a feature of PeopleSoft Activity-Based Management, calculates resource demands, new rates, costs, and activity volumes based on demand forecasts. It converts the new

resource demands into new cost requirements at the General Ledger item level to feed as input for budgeting.

Activity Driver

An Activity Driver indicates the amount of demand there is for a particular activity and it is used to assign cost to cost objects. In some instances, an activity driver may represent the yield of an activity.

Activity Fragmentation

The part of the Employee Profile feature that provides information about the number of employees that is involved in completing a particular activity on a full or part-time basis.

Activity ID

A unique 15-character alphanumeric identifier given to each activity within a project. Activity IDs need only be unique within a single project.

Activity List

In PeopleSoft Pension Administration, a checklist used to monitor pension-related activities.

Activity Type

A user-definable identifier for grouping activities.

Activity Type

Also known as Activity Code. A categorization of work effort. Typically work effort is categorized as productive or non-productive; Repair, Maintenance, Enhancement, or Improvement; or Development or Construction. Activity type is usually required to support cost accounting or financial accounting (recording) functions. It may also be required to support some organizational administration requirements such as organizational productivity goals, or employee performance measurement. In some companies, activity type is inferred from job function, work group affiliation, or organization.

Activity Use

An attribute used to describe the behavior of an Activity as defined within PeopleSoft Enterprise Performance Management. A Primary Activity is an activity that is performed for the purpose of directly generating revenue within the course of business. A Secondary Activity is generally performed in direct support of a Primary Activity such as activities related to human resources or MIS.

Actual Base Hours

This defines the number of hours that an employee is expected to work within a given period under analysis within PeopleSoft Enterprise Performance Management. Hours worked in excess of Actual Base Hours are generally considered overtime, while hours worked less than Actual Base Hours would illustrate that the employee is working part-time.

Actual Contribution Percentage (ACP)

The amount of an employee's after-tax or employer matching contributions made in a Section 401(m) plan on behalf of highly compensated plan participants, divided by the employee's annual compensation, or an amount determined in the same manner with respect to non-highly compensated employees. The Base Benefits business process is set up to perform ACP nondiscrimination tests for Section 401(m) plans. See Nondiscrimination Tests and Highly Compensated Employee.

Actual Date

Calendar date in which a punch occurred (see Time Reporting).

Actual Deferral Percentage (ADP)

The amount of salary reduction contributions made by an employee to a Section 401(k) plan for a year, divided by the employee's total compensation for that year. The Base Benefits business process is set up to perform ADP nondiscrimination tests for Section 401(k) plans. See Nondiscrimination Tests and Highly Compensated Employee.

Actual Demand

In PeopleSoft Demand Planning, an **Array** of demand by historical period imported from an external system. The demand figures are determined by imported values and typically include shipments, orders booked, orders booked by requested ship date, or shipments.

Actual Rates

An Actual Rate is the rate that your business currently uses for its business practice.

Actuarial Assumptions

Any assumptions used to calculate an equivalent benefit for an optional form of payment or an alternative retirement date.

Actuarial Valuation

A comparison of a pension plan's assets and liabilities.

Actuarial Valuation Extract

A PeopleSoft Pension Administration data extract containing data that a plan actuary needs in order to determine the plan's assets and liabilities.

Address Type

A high-level address classification that identifies addresses associated with a **Material Issue**. Examples include Ship To Address, Bill To Address, and Ship Notification Address.

Adjusted

In the Enterprise Planning and Simulation forecasting process, in addition to versions of the statistical forecast, there is an adjusted version of the forecast. Managers create this version by reviewing the forecasts and entering adjustments that cannot be inferred statistically. For example, there may be a promotional campaign next quarter that is expected to boost volume for certain products over several weeks.

Adjusted Demand

In PeopleSoft Demand Planning, an **Array** of demand after adjustments have been made to the actual demand values. The adjusted figures may include both manual and system-generated changes, such as demand filtering and depromotion. The system uses adjusted demand rather than actual demand in the Forecasting Reset process and in the recalculation of model components during period-end processing.

Adjusted Forecast

In PeopleSoft Demand Planning, a **Statistical Forecast** that has been adjusted using management overrides, proration, or summarization.

Adjustment

See **Bill Adjustment** or **Inventory Adjustment**.

Adjustment Voucher

A PeopleSoft Payables voucher that enables you to apply an adjustment to an existing voucher or to relate one voucher to another.

Advice

The Form that employees who choose direct payroll deposit receive in lieu of a check.

Affiliate

A control person of a corporation. Generally, an officer, director, or major shareholder that has the ability to influence the corporate management decisions.

After-tax Deductions

Deductions that reduce net pay. These deductions are subtracted from gross pay after taxes have been taken out. Also called “post-tax” deductions.

Agency

Any Department or independent establishment of the Federal Government, including a government-owned or -controlled corporation, that has the authority to hire employees in the competitive, excepted, and senior executive services.

Aggregated

In Enterprise Planning and Simulation, each period the statistical forecast is calculated automatically by the system. A forecast for each individual product can be computed using history for that product. Then these forecasts can be aggregated (that is, summarized) into forecasts for the product family.

Aggregate Reporting

The ability to report time as a collection or mass. In Time and Labor aggregate time reporting features include the ability to report time in a lump sum, as a pattern, in a range of dates, or for an entire crew.

Aging Data

Updating data from separate sources, and separate dates, to a common date using an annualized factor.

Aging ID

A code representing rules for aging open items.

Alias

Any of several PeopleSoft Pension Administration utilities that look up or calculate employee information.

Allocated

In Enterprise Planning and Simulation, the computed forecast and the summarized forecast are two different versions of the statistical forecast. In addition, the forecast at the product family level can be allocated down to the individual products. Usually this allocation is done in proportion to the calculated product forecasts at that level. This version of the (statistical) forecast is called the allocated or prorated statistical forecast.

Allocated Inventory

The inventory assigned to a specific stock request.

Allocation Manager

Perform allocations using the Allocation Manager. Allocations enable you to distribute revenue, expense, and statistical quantities across business units, departments, and so on. You can allocate budget planning to detail levels so that you may perform detailed budgeting. The type of allocation you select determines the output.

Allocation Manager Rules

In the PeopleSoft Enterprise Warehouse, Allocation Manager rules allow you to specify the basis as well as the target tables for moving, aggregating, or multidimensionalizing your output. Rules use Allocation Manager methods to enrich the PeopleSoft Enterprise Warehouse data. *See* Allocation Manager Methods.

Allocation Manager Methods

There are several methods: Arithmetic Operation, Prorata, and Spread Even. Each method enables you to move and/or enrich output.

Allocations

A process of distributing budget amounts to and from other Budget Centers. Budget amounts are allocated to cover, or offset, the costs in one Budget Center by charging them to another Budget Center. An allocation is also the budget amount that is distributed to or from a Budget Center. A budget amount that is charged to another Budget Center appears as a negative amount. This same budget amount appears as a positive amount in the other Budget Center receiving the allocation. PeopleSoft Budgeting-specific.

Allotment

This is a voluntary deduction from pay. Employees may elect up to two allotments from pay, transmitted to a financial institution to the employee's checking or savings account.

ALM (Asset Liability Management)

See PeopleSoft Asset Liability Management.

Allowances

The amount owed to an employee in addition to base salary and which is not defined as part of gross salary. For example, vacation can be considered an allowance. PeopleSoft Budgeting-specific.

Alternate Account

A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level as required for recording and reporting by some national governments.

Alternate BOM

Identifies the multiple ways in which an item can be produced. The primary production BOM is designated as BOM code 1. By using BOM codes, you can associate up to 98 other alternate BOMs with the item.

Alternate Routing

A routing, usually less preferred than the primary routing, but resulting in an identical item. You can specify up to 98 alternate routings for production routing types by entering additional Routing Codes (greater than 1) for the same routing type.

Alternative Minimum Tax (AMT)

AMT is calculated by adjusting the taxpayer's regular taxable income with a number of tax preference items and adjustments. Tax preference items are positive items increasing

Alternative Minimum Taxable Income (AMTI) and are excluded from regular taxable income. Tax preference items include gain from the exercise of incentive stock options.

Amount Type

In PeopleSoft Workforce Analytics, the Amount Type specifies whether a benefits compensation amount is a value or expense, to the employee or the employer.

Analysis Base

Defined static, historical data used both to seed and compare against proposed budgets.

Analysis Group

A grouping of analysis types. Analysis groups can be used for project analysis and grouping or for mapping analysis types.

Analysis Template

A set of pre-defined reports that you can view and publish online. These templates access data in the Enterprise Warehouse tables, and organize it by function, role and industry. The templates allow you to pivot, sort, rank, drill and chart the data, for your analysis needs.

Analysis Type

A 3-character, user-definable identifier that enables you to label the different types of costs. For example, you might want to track budgeted costs (BUD), committed costs (COM), and actual costs (ACT).

Analytical Applications

See PeopleSoft Analytic Applications.

Analytic Forecasting

Analytic Forecasting is the part of the Planning and Simulation feature that creates forecasts for your business requirements.

Annual Amount

In PeopleSoft Workforce Analytics, Annual Amount is an employee-level compensation amount, totaling the calculations for a full fiscal year's worth of accounting periods, in a compensation scenario.

Annual Declaration Report

The French Annual Declaration report is a payroll report which checks establishment profiles to see whether an establishment has to produce the report, and then calculates the amount of all the social security contributions for this establishment.

Annual Leave

Annual leave is absence from work with pay and must be approved by the employee's supervisor in advance. This type of leave (Plan Type 51) is accrued based on years of service: Full-time Permanent/Full-time Seasonal employees ...0-3 years - 4 hours per biweekly pay period; 3-15 years - 6 hours per biweekly pay period (plus an additional 4 hours in the final pay period of the leave year); and 15+ years - 8 hours per biweekly pay period. Part-time Permanent/Part-time Seasonal employees...0-3 years - 1 hour for every 20 hours worked; 3-15 years - 1 hour for every 13 hours worked; 15+ years - 1 hour for every 10 hours worked. Generally, there is a leave year ceiling of 240 hours on accrual; amounts accrued in excess of the ceiling and not used prior to leave year-end are forfeited.

Annual Shareholders Meeting

A meeting of corporation's directors, officers, and shareholders held for the purpose of communicating the operating and financial results for the prior year, the prospects for the future and major decisions of management.

Annual Workforce Survey by Nationality and Professional Category (Enquête sur l'activité et les conditions d'emploi de la main d'oeuvre)

In France, companies are required to submit the Annual Workforce Survey by Nationality and Professional Category to the Ministry of Labor. This report provides an analysis of the company's foreign workforce, which includes any employee who does not have French citizenship.

Annualized Tax Method

A payroll tax calculation method that divides the tax on an annualized amount by the number of pay periods in the year to find withholding for a given pay period, based on the number of withholding allowances. Annualized is the most common tax method.

Annuitant Amount

The gross monthly annuity a federally retired employee receives.

Annuitant CSA Number

A unique number assigned by OPM for a retired employee.

Annuitant Indicator

A code used to indicate the status of an annuitant appointed to a position in the Federal civilian service. Text for the codes is as follows:

1. Reemployed annuitant - Civil Service/FERS
2. Retired military officer receiving pay
3. Retired military non-officer (enlisted) receiving pay
4. Retired military officer receiving pay and a reemployed annuitant - Civil Service

5. Retired military non-officer (enlisted) receiving pay and a reemployed annuitant - Civil Service
6. Not applicable (none of the above)

Annuitant Indicator (cont)

- A. Reemployed Annuitant – FERS
- B. Former Annuitant - FERS
- C. Retired Officer/Reemployed Annuitant - FERS
- D. Retired Officer/Former Annuitant - FERS
- E. Retired Enlisted/Reemployed Annuitant - FERS
- F. Retired Enlisted/Former Annuitant - FERS

Annuity

A series of periodic payments made to an individual. Under a pension plan, these payments are generally made monthly.

Anti-Dilutive

Typically, options or shares where the price is greater than the current fair market value of the security.

APE (Activité Principale Exercée) Codes

APE codes classify the type of industry or activity your French company is in, such as software, banking or insurance. The APE codes are a normalized set of codes that are required by law and are used in regulatory reporting.

API

An Application Programming Interface (API) is the technology that a software product supplies so you can control it or communicate with it from another application. PeopleSoft APIs enable the user to perform desired actions upon PeopleSoft data without having to know the internal logic or rules of the program.

Applicant Hire Process

The procedure of hiring an applicant who has been tracked and administered in the Recruitment pages. Once you assign an Employee ID, the system uses recruitment data to populate the fields in the Personal Data pages.

Application agent

An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

Application Designer

The integrated development environment used to develop PeopleSoft applications.

Application Engine

PeopleTools batch processes consisting of a set of defined SQL statements. Application Engine processes is more efficient than COBOL or SQR, since they operate within the database system, and don't rely on external processing.

Application Journal Template

A set of rules and default values to control the creation of journals from accounting entries.

Application Processor

The Application Processor is the PeopleTools runtime engine that controls processing of the application from the time the user requests a panel group from an application menu through the time that the database is updated and processing of the panel group is complete.

Application Server

The application server is the centerpiece of PeopleSoft's three-tier architecture. It utilizes Tuxedo, BEA Systems' transaction monitor, to manage client transactions and provide the business rules and workflow capabilities of PeopleSoft's enterprise applications.

Application Server Domain

The collection of server processes and associated resource managers defined by a single PSTUXCFG configuration file. Each application server domain is configured to connect to a single database. Multiple application server domains can exist on the same server machine.

Appointing Authority

The basis that authorized the appointing officer to effect personnel actions on an employee.

Appointing Officer

Denotes if the employee has appointment authority based on laws and regulations.

Approve Time

The Time and Labor feature that approves all employee daily time before it can be sent to payroll for processing. You can approve time by group or by individual employee. You can also unapprove previously approved time.

Approving Official

Individual with the delegated authority responsible for signing the action(s) taken on an employee.

Array

An ordered grouping of data by period and year. PeopleSoft Demand Planning uses arrays in forecasting demand.

Array

Element which enables you to extract information based on a column value. One way of thinking of an array is that it is a SQL statement that retrieves data from an existing table.

Array Dimension

Determines which inventory-stocking possibilities are included in a **Cube View**. This standard one-level dimension consists of the key fields that include, for example, order quantity, safety stock, and turn rate.

Arrears Balance

An amount owed to either the employer or employee, usually the result of a deduction not fully taken.

Ask Price

The price at which someone who owns a security offers to sell it; also known as the asked price.

As-of-Dated

Refers to a snapshot of the data at a given point in time.

Asset Assignment

A streamlined means of associating project costs to assets or asset profiles within PeopleSoft Projects.

Asset Budgeting

Budget for planned asset acquisitions and the associated depreciation expense that can be associated with a Capital Acquisition Plan (CAP).

Asset Catalog

A list of asset profiles which includes information about that asset type, including Cost, Life, Salvage Value, Depreciation Method, Currency Code, and Asset and Depreciation Account.

Asset Category

A standard group of assets. Typical asset categories include Furniture and Fixtures, Machinery and Equipment, Land, Buildings, Leasehold Improvements, and the like. These generally correspond to General Ledger asset accounts. Assets in one category usually share some depreciation characteristics, such as estimated service life and depreciation limits.

Asset Class

An asset group used for reporting purposes. It can be used in conjunction with Category to refine asset classification.

Asset Liability Management

See PeopleSoft Asset Liability Management.

Asset Life

The number of years an asset will depreciate, after which time it might be kept or sold for its Salvage Value. Also *see* Useful Life.

Asset Profile

A template that contains standard depreciation criteria for an asset type and its corresponding asset books. You can use the information in asset profiles as default values when adding assets.

Assignment of Life Insurance

Effective 10/3/94, Federal employees can assign their Basic, Option A and Option B insurance to another person(s), firm(s), or trust(s); Option C is excluded. The assignment of benefits transfers ownership of the FEGLI coverage to the assignee(s). The insured no longer has control over his/her insurance coverage and can no longer designate beneficiaries.

Assignment is irrevocable. Either all or none of the insurance can be assigned. Assignment does not have to be to the same person or firm. Assignments must be made in percentages of total insurance versus an assignment of Basic Insurance to one person and Option A to another. Additionally, terminally ill employees can assign their insurance to a Viatical Settlement Firm in exchange for cash (approx. 60% - 85% of the face value of the coverage). Life Expectancy is usually 24 months or less for a Viatical Settlement Agreement.

Assignment Type

This defines the behavior of the object, (resource, activity, or cost object) within PeopleSoft Activity-Based Management. If the object is identified as a source then costs may be allocated from that object to another object, which must be identified as a target. If an object ID is identified as a target it may be allocated costs from another object ID but may not allocate costs. An object ID can be both a source and a target, thereby having the functionality of each.

Associated Primary BOM

With multiple outputs, it's possible that a given co-product can be created in more than one way – in other words, an item is a co-product on more than one items' primary BOM. By assigning an associated primary BOM to a co-product, you are telling the system which BOM to use in exploding the co-product to the next level.

AT Section

In France, this stands for Section Accident du Travail, or Work Accident Section. It is information needed to identify the establishment risk code for insurance purposes.

ATP Reserved Order

An order that has been promised against future supply. The user has an obligation to the customer to fulfill the order quantity by a certain date. ATP-reserved orders are also referred to as *promised orders*.

Attendance

A component of time reporting application whose purpose is to apply business rules related to Benefit Entitlement and Administration and Organizational Administration to time reported as worked or not worked, and to satisfy a variety of reporting needs.

Attendance Reporting

A Time and Labor report that indicates an employee's attendance record. It includes sick leave, vacation time, and other leaves taken.

Attribute

An attribute is an element within a dimension. For example, the element "Store" is an attribute of the dimension "Geography" for the retail industry. An attribute is also a column heading on an analysis and reporting template.

Audit Trail

See Drill-Back Calculation.

Auditor

Person designated to review expense sheets and cash advances before payment.

Automatic Revision Incrementing (Auto Rev)

The ability to automatically set up revision control and generate revisions for revision-controlled items at the business unit level. This includes setting up a revision scheme or a predetermined, ordered list of revision names.

Automatic Spouse Benefit

A joint and survivor pension benefit provided without any actuarial reduction to a pension benefit. The automatic benefit is a n% joint and survivor; the employee is still entitled to choose any optional form of payment and any beneficiary for the remainder of the benefit.

Availability Date

The date a lot becomes acceptable for fulfillment in PeopleSoft Inventory or for consumption in PeopleSoft Production Management. (Availability Date = Creation Date + Availability Lead Time)

Available to Promise (ATP)

The projected supply of a product less the actual demand, which informs the sales and marketing department of the products that can still be sold without modifying the master schedule. ATP isn't cumulative – it's calculated for each period.

Average Daily Balancing

A feature in PeopleSoft General Ledger that enables you to target the ChartFields on which you base average balance calculations, summarize amounts for selected ChartField values according to your reporting requirements, and define the periods for these calculations.

Used by the financial analytic applications in Enterprise Performance Management. For a reporting period (usually monthly) this refers to the average daily balance of an account as opposed to the month-end-balance, which is the balance as of the last day of the month.

Average Daily Balance Ledger (ADB_Ledger)

In the PeopleSoft Enterprise Warehouse, the Average Daily Balance Ledger table (PF_ADB_LEDGER_F00) is similar to the functionality of the PF Ledger table (PF_LEDGER_F00), in that it too supports reporting. However, the Average Daily Balance Ledger is used for average daily balances. It is a table that is used mostly for processes associated with the financial services industry.

Average Inventory

In PeopleSoft Inventory Planning, one half of the average lot size plus the safety stock when demand and lot sizes are expected to be relatively uniform over time. When demand and lot sizes are not uniform, the stock level versus time can be charted to determine the average.

Average Price

The average price derived from either the bid and ask prices (for bid/ask/average) or from the high and low prices (for high/low/average).

Average Static Calc Flag

In PeopleSoft Inventory Planning, a method used with static policies. The average method sets the static policy equal to the weighted-average, time-phased policy over the next argument periods.

Award

A special payment to an employee for certain prescribed kinds of activities or accomplishments.

B***Back Pay Interest***

Under certain circumstances, an employee can be eligible to receive additional pay relative to a delayed receipt in salary caused by administrative error in processing a personnel action. The U.S. Office of Personnel Management has established guidelines for Federal agencies on when and how to make these calculations.

Background Process

Any task or process that is grouped with another and runs in the background. Background processes are usually scheduled to run on a regular basis. All background processes are executed through process-specific COBOL programs run outside the Windows environment.

Backlog Reason Code

An identifier indicating the reason an item could not be shipped. Example codes might include out of stock, discontinued, or seasonal.

BAD Forecast Ratio

In PeopleSoft Demand Planning, the maximum acceptable value of the ratio of the and the base component (Standard Deviation/Base Component). When this value is exceeded, the system automatically resets forecast model parameters. The higher the value, the less likely it is that the system will reset the parameters. In most organizations, a BAD ratio of 1.00 or lower is appropriate for most items.

Balance Segmentation

Balance Segmentation is used in Funds Transfer Pricing to divide balances in deposit accounts between core (stable) and non-core (volatile) segments. Core funds represent the minimum balances that are retained on a long-term basis, building a relatively reliable source of funding to the bank. Non-core funds are temporary in nature due to their volatility caused by customer preferences for liquidity, and cannot be utilized on a long-term basis.

Balance Type

Balance Type is a lookup code used to define the type of instrument balances that will be stored in the PeopleSoft Enterprise Warehouse and processed by the analytic applications. Examples of different Balance are Current Balance, Average Daily Balance, Period Ending Balance, or Commitment Balance.

Balanced Scorecard

See PeopleSoft Balanced Scorecard.

BAM

Business Analysis Model. XXX I think this term is incorrect because we use BAM to refer to the application. If we were referring to the business analysis model, we would say BAM model (that is, Business Analysis Modeler model.)

BAM Model

The BAM database published from the template. The model contains both the data and analytic structure used in the application. The BAM database is physically separate from the Enterprise Warehouse database. Data is sent to the model through migration processes.

BAM Template

A file created using BAM design tools, representing the model prior to its creation as a database. This file has an extension of .MDL. This file is published to a BAM database once the model design process is complete. Each application using BAM will deliver templates which the customer will review and publish to a database in their environment.

Bank Identification Number (BIN)

In PeopleSoft Payables, a part of the bank information that identifies business unit banks.

Base Budget

The initial budget defined by the Budget Coordinator. The base budget is distributed as a starting point for Budget to review and edit. The base budget can be zero-based or incremental.

Base Compensation

In PeopleSoft Workforce Analytics, Cash Compensation that is typically categorized as fixed. It includes base pay and shift differentials as well as associated merit, equity, and step increases.

Base Currency

Base Currency is used to consolidate and report financial results of a multinational company. When a company transacts its business operations in different transaction currencies, those currencies are translated to the base currency for reporting purposes.

Base Currency Equivalent (BCE) Amount

If the monetary amount is in a currency other than the base currency, either the Extract-Transform-Load (ETL) process or the Multi Currency Engine can be used to convert the monetary amount to the Base Currency Equivalent (BCE) Amount.

Base Factor

In PeopleSoft Demand Planning, an element of a smoothing constant simulation set that controls base component smoothing in the Model Reset Simulation process.

Base Metric

Metric found on a fact table. A base metric usually contains an aggregate operator, for example “sum” or “count”.

Base Pay

A pay component included in the job comp (job compensation rate) calculation. It is pay for a regularly assigned workweek. For example, you can set up a regular hourly rate plus a shift rate, a union-negotiated rate for hazardous work, and so on.

Base Pay Structure

A PeopleSoft Workforce Rewards module you use to create or revise pay structures, and to assess the cost and impact of implementing new structures.

Base Time Zone

Customer defined time zone used for converting reported time to a common time zone for ease of applying rules (see Time Administration).

Batch

Batch systems are used when realtime updates are not needed. Batch-oriented data collection applications, developed in-house or by a third-party vendor, produce transactions that are collected in an ASCII text file. The text file is fed to a PeopleSoft SQR program that loads the transactions into the database.

Batch Processes

Any of the background programs in the client/server environment of PeopleSoft applications. Batch processes perform operations—such as pay confirmation, deduction calculation, and so forth—on groups of records, and are usually scheduled to run on a regular basis. You run these processes from the Process Scheduler, and they are executed through process-specific COBOL programs.

Before-Tax Deduction

Deduction that reduces net pay and FWT taxable gross, applied prior to the calculation of federal and state/provincial withholding taxes. Also called “pre-tax” deductions.

Begin Calc Date

The date on which PeopleSoft Asset Management begins to deduct from an asset's life.

Begin Depr Date

The date on which PeopleSoft Asset Management begins to calculate depreciation for an asset. Begin Depr Date is calculated using In-Service Date and Prorate convention.

Benchmark Job

In PeopleSoft Workforce Analytics, this refers to a Job Code for which there is corresponding salary survey data from published, third party sources. Jobs for which there is no corresponding salary survey data are referred to as non-benchmark jobs.

Benefit Commencement Date (BCD)

The date on which a pension payee elects to begin receiving payments.

Benefit Deduction

Any amount taken from an employee's pay check to offset all or part of the cost of the employee's benefits.

Benefit Eligibility

The PeopleSoft Pension Administration function that determines if an employee is eligible for retirement or ancillary benefits. A plan may have several retirement types—normal, early, late, death, and disability—each with its own eligibility criteria.

Benefit Entitlement

Any rules governing the circumstances under which employees are entitled to receive certain benefits. Typically, entitlement to benefits is based on type of employee (for example, full time, part time, occasional), length of employment, and specific rules which apply thereto, i. e., work group affiliation, and compensation base. Other criteria may also apply, such as reasons-for-claiming or job performance.

Benefit Formula

The formula that determines a participant's pension benefit in a defined benefit plan, as well as the PeopleSoft Pension Administration function that calculates the benefit.

Benefit Group

Part of a group of defaults assigned to job codes. Benefit group may include medical, dental, and health benefits dependent on individual company parameters.

Benefit Plan

A specific benefit within a plan type. For example, your company's life plan type might include benefit plans of one times salary, two times salary, and three times salary.

Benefit Plan Type

Any category of benefit, such as health, life, or savings.

Benefit Program

A set of benefits and deductions valid for an employee or group of employees. A single company may have any number of programs. An individual employee may belong to only

one program; the deductions and benefits contained in that program are the only valid deductions and benefits for that employee.

Benefit Tables

Any of the tables that contain employee benefits information. These are often relevant to payroll processing.

Benefits Base

The salary used for benefit calculations. The benefits base will be either the employee Annual Rate or Annual Benefits Base Rate.

Benefits Compensation

In PeopleSoft Workforce Analytics, Benefits Compensation is value associated with employment benefits. It can include benefits types for Health and Welfare (Medical, Life Insurance), Retirement (annuities, savings plans, pensions), and Paid Time Off (Vacation Leave, Sick Leave). Benefits compensation is sometimes fixed, and sometimes variable, depending upon the benefit type.

Betriebszählung (Company Statistics Report)

Also called the OFIAMT report. This report provides statistics required by the Swiss Federal Department of Statistics (BFS).

Bias Signal Limit

In PeopleSoft Demand Planning, a number between one and six that indicates how many **Forecast Period** to test for bias. If the bias test is violated, the system records a **Tracking Signals** error in the period up to the number of periods determined by the bias signal limit.

Bias Test

In PeopleSoft Demand Planning, a forecasting test that sets the limit for tripping a **Tracking Signals**. The lower the value, the more likely it is that a tracking signal is set.

Bid Price

The price a prospective buyer is prepared to pay at a particular time for trading a unit of a given security.

BIF file

This is the bulk insert file (input.bif) used with the Verity search engine to specify the documents to be submitted to a collection (search index). It contains a unique key, document size (in bytes), field names and values, and document location in the file system.

Bilan Social Report

See Employee Survey Report.

Bill

In PeopleSoft Billing, any group of bill lines.

Bill Adjustment

The process of making credit or credit and rebill adjustments to an invoiced billing activity.

Bill By Identifier

The Bill By Identifier is used to define how billing activity is grouped when added to a bill through the billing interface or the Populate Billing process.

Bill Header

The record containing information that pertains to the bill as a whole. Each bill has a unique bill header that identifies it within the system.

Bill Inquiry Phone

Bill Inquiry Phone is the number printed on your invoices for your customers to call if they have any questions about their bill.

Bill Line

The basic unit of billing activity representing a billable charge, including the charge identifier, quantity, price, and any other information regarding an individual transaction. Every bill line is related to a bill header that may have one or more bill lines related to it.

Bill Search

A method of finding a bill or bill line when you don't have enough information to call up the bill directly. **Customer Bill Search** enables you to locate a bill by Customer Name. You can also choose other parameters to limit your search. With **Bill Line Search** you first search for a particular bill and then a line on that bill. Parameters for bill line search include Reference, Date, and Amount.

Bill Source

The point where billing activity originates. Bill sources may be external to the system (imported through the billing interface) or entered directly online. Examples of bill sources include order management, project costing, and contract administration.

Bill To Customer

A customer who receives an invoice.

Bill Type

A category of billing activity variety. Examples of Bill Types include standard and custom order activities.

Bill Update

The process that adjusts bills that have either been entered manually or generated within the system.

Billable Indicator

A status flag that identifies an item as eligible for billing to a customer.

Billback Discount (BB)

A per unit discount which typically requires a customer to perform one or more merchandising activities to receive the discount. A BB discount is not deducted from the customer invoice, but once the customer performs the merchandising activity, a sales representative or broker can approve payment for the discount amount. Billback discounts can originate from a National Allowance or Customer Promotion, and are passed to PeopleSoft Order Management for informational purposes only. Billback discounts are recognized as a liability when the product is shipped.

Billing Location

A number identifying a customer address. Each customer may have multiple locations, but must have one *Primary Location* at which you contact them.

Blackout Period

The period of time, determined by the company, which prohibits certain activity in the company stock. Blackout Periods can affect the trading of some key individuals or can be placed on the entire company.

Bonus Tax Method

Annualizes your year-to-date earnings by multiplying them by the number of pay periods in the year. This method is used for Canadian tax processing.

Book

In PeopleSoft Asset Management, a data location storing financial information—like cost, depreciation attributes, and retirement information—on assets.

Borrow/Loan

The temporary reassignment of an employee to other task reporting or compensation requirements to allow the business to meet unexpected, short-term, fluctuations in staffing or work load. Typically, this kind of reassignment is done informally at a local level, where HR isn't involved and a new job record isn't created. Companies may have specific rules about how long an employee may be borrowed/loaned, how and where productive, non-productive, and compensated absence time will be charged, and what business rules to apply to the borrowed employee's time for the purpose of compensation and benefit entitlement and administration. See also Casual work Assignment.

Bracket

Brackets are a way to look up and retrieve database table values. After you've defined a table, the system finds a corresponding row on that table and returns the value of the bracket. The result is then available for use in other items such as formulas.

Branch

A tree node that rolls up to nodes above it in the hierarchy, as defined in the Tree Manager.

Branch Of Military Service

Identifies, if any, military service in which the employee served.

Breadcrumbs

Breadcrumbs show the navigation path to the current web page location. As you drill down through the different levels of the registry, a “breadcrumb trail” appears that shows the path you've selected. Each registry level is separated by an angled brace (>), and you can select any level to navigate directly back to that level.

A typical Breadcrumb would look like this:

Home > HR > Administer Workforce > Benefits

Break Funding

Charges assessed for mortgages that are paid off before maturity. In the Funds Transfer Pricing (FTP) application, Break Funding charges are factored into the transfer price for a loan that may be prepaid.

Break in Service

A period of time for which an employee does not meet stated service requirements.

Break Price

The price used to determine which options are eligible for repricing. For example, if the break price is \$36, then all outstanding option with a grant price of \$36 and greater are eligible for repricing.

Break Punch

An in/out punch of when a time reporter takes a break.

Brokers

Individuals or organizations who buy and sell securities. Often they are account executives who work for firms registered with the Stock Exchanges and the SEC. Unlike Transfer Agents, (who are not responsible for sales) Brokers do not maintain records on all your company's certificates. They maintain only sales records and stocks for their clients.

BSC (Balanced Scorecard)

See PeopleSoft Balanced Scorecard.

Budget Activity

A type of activity performed using PeopleSoft Budget Planning. Budget activities include Line Item Budgeting, Line Item Mass Adjustments, Budget Allocations, and Position Budgeting. PeopleSoft Budget Planning-specific.

Budget Amount Ledger

Stores budget amounts and is updated by posting budget entries, transfers, and adjustments.

Budget Analyst

A role within PeopleSoft Budgeting. Budget Analysts are typically people within an organization responsible for reviewing and analyzing a prepared budget before submitting it to the Budget Coordinator. PeopleSoft Budgeting-specific.

Budgetary Account Only

An account used by the system only and not by users; this type of account will not accept transactions. You can only budget with this account. Formerly called “system-maintained account.”

Budget Category

A set of related expenses that are accumulated for proposal budgets and reporting to a sponsor. The estimated cost for a set or class of accounts.

Budget Category

Numeric/alpha identification given to each category of positions.

Budget Center

In PeopleSoft Budgets, any entity responsible for producing or reviewing budget data. For example, a Budget Center might be the individual departments responsible for producing budgets.

Budget Center Dimension

In PeopleSoft Budgets, the dimension by which you distribute budget data. If you budget by department, your department dimension will be your Budget Center Dimension. You'll assign Budgets Users to the nodes and detail values on the tree you use to build your Budgets Center Dimension.

Budget Check

In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

Budget Check Override

Selective suspension of Budget Processing. With this feature you can override the controlled budget for a transaction that failed budget checking due to insufficient funds; or override the tolerance limits for a transaction rejected due to exceeded tolerance limits. When you push the Override button, the system flags the transaction to allow the Budget Processor to process successfully regardless of available funding. You can cancel the override any time before the Budget Processor is run by clicking the Cancel Override button.

Budget Control

In commitment control, it ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and abort a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

Budget Coordinator

A role within PeopleSoft Budgeting. Budget coordinators are responsible for monitoring the budget process. The Budget Coordinator is typically located within an organization's central budget office and builds the budgeting model. PeopleSoft Budgeting-specific.

Budget Detail

A level of itemization that when combined makes up a major budget category.

Budgeted Rates

In PeopleSoft Activity-Based Management, the rate your organization uses based on the budget.

Budget Error Exception

A transaction that fails budget checking, causing an Error or Warning to be issued. See **Error Exception** and **Warning Exception**.

Budgeting Functions

PeopleSoft Budgeting's six main action categories, including: system administration, budgeting setup, budgeting preparation, budgeting analysis, data integration and my profile. Your user role determines how many of these functions display and are available.

Budgeting Model

The framework for an organization's budget development process. Business unit defines a Budgeting Model. The Budget Coordinator typically defines the model and includes the time period of a budget cycle, time period for phases within a budget cycle, the sources of data that will be available to budget users, the methods that will apply to line-item budgets, and other budget options and control parameters. PeopleSoft Budgeting-specific.

Budgeting Type

Associated with the budget ledger type set definition, a budget type is an indication of whether the organization uses a standard budget ledger, project budget ledger, or controlled budget ledger for budgeting.

Budget Justification

Written explanation further defining the what and why of a budget category.

Budget Period

The period in which you define plans to meet your organizations training requirements.

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.

Budget Phase

In PeopleSoft Budgets, a span of time during which a budget or portion of a budget is to be completed. You'll filter dimensions, assign alternate Budgets Users, enable Position and Asset budgeting, and specify Budgets User notification options at the Phase level.

Budget Plan

In PeopleSoft Workforce Rewards, when working with a Compensation Planning BAM model. A budget plan is a rollup of like compensation rules. For example, for base pay rules budget plans are a rollup of values for like Action Reasons. For variable pay rules budget plans are a rollup of the values for like Variable Compensation Plan IDs.

Budget Preparer

A role within PeopleSoft Budgeting. Budget preparers are typically people within an organization responsible for developing the detailed budget for a Budget Center and submitting it to a Budget Reviewer or Analyst for review and approval. PeopleSoft Budgeting-specific.

Budget Reviewer

A role within PeopleSoft Budgeting. Budget reviewers are typically people within an organization responsible for reviewing and approving a prepared budget submitted by a Budget Preparer. PeopleSoft Budgeting-specific.

Budget Seeding

Represents a new budget or forecast, such as historical data that is manipulated to develop a more current representation for a proposed budget. Uses detail data as the budget seed or basis to create the base budget that represent the level of detail in which budget numbers are prepared.

Budget Translation Trees

Trees translate (summarize) source transactions into the appropriate levels for processing against control budgets. This is because you usually budget above the level of your source transaction ChartFields on a tree.

Budget Type

Indicates whether a budget is for expenditures or revenues.

Budget Warning

See **Warning Exception**.

Budgets User

In PeopleSoft Budgets, any user who needs to gain access to the Budgets. You'll designate Budgets Users on the Budgets Users page through the Coordinate Budgets window. You'll also assign these users to the tree representing your Budget Center Dimension.

Budget View

A user-defined view where selected dimensions, columns and rows of data determine the layout of line-item budgets affecting the view or entry of data.

Budget Year

The institutionally defined, consecutive, 12-month period to which a financial transaction or summary applies.

Build Option

A detailed PeopleSoft Planning model that specifies a method of building an assembly item. This model specifies the routing, resources, and materials that are necessary to produce the item.

Built-in function

Prior to PeopleTools 8.0, there were only built-in functions, like FetchValue, ScrollSelect, etc. A built-in function, in your code, is on a line by itself, and doesn't (generally) have any dependencies. You don't have to instantiate anything before you can use a built-in.

Business Interlink Definition

A definition encapsulating an external Transaction or Query and providing a set of generically typed input/outputs that can be assigned to PeopleCode variable or Record Fields at runtime. A Business Interlink Definition is added to the Application Designer's objects at the same level as Fields, Records, Panels, etc.

Business Interlink Design-Time Plug-in

An XML file that, when coded for an external system, encapsulate that external system and provide a catalog of Transactions, Classes and Criteria specific and meaningful to that external system.

Business Interlink Framework

The framework for integrating any external system with PeopleTools application objects. It is composed of the following components:

1) An External System, 2) Generic definitions for a Transaction/Query command interfaces, 4) Business Interlink Definitions, 4) Business Interlink Plug-in.

Business Interlink Object

An instantiation based on a Business Interlink Definition. Actual data can be added to the inputs of the Business Interlink Objects once the appropriate bindings are provided. The Business Interlink Object can be executed to perform the external service. Once a Business Interlink Object is executed, the user of that object can retrieve the outputs of the external service. The Business Interlink Objects use buffers to receive input and send output. When a Business Interlink Object is executed, the transaction/query/class associated to the Business Interlink Object will be executed once per each row of the input buffers corresponding to the input Records. If there is only one row, after appropriate substitution by the driver, it is executed only once.

Business Interlink Runtime Plug-in

A set of C++, Visual Basic, or other high-level language methods that, when coded for an external system, encapsulate that external system and provide the execution methods to match the Business Interlink Design-Time Plug-in. (The catalog of Transactions, Classes and Criteria provided by the Design-Time Plug-in can also be provided by the Runtime Plug-in.)

Business Objects

A way of identifying those mass changes that have been designed to be referenced by a flexible formula and provide them with a shorter name to simplify the creation of flexible formulas.

Business Planning

The type of planning that focuses on elimination activities that are not needed by changing the drivers.

Business Rules

Rules that can process information differently depending on the values of data in the PeopleSoft Enterprise Warehouse.

Business Unit

A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions. PeopleSoft General Ledger business units typically comprise individual entities for accounting purposes.

Business units in PeopleSoft Projects represent operational structures but not necessarily independent financial units.

PeopleSoft Payables business units are either *Vouching* (have payables accrued to them) or *Charge to* (have voucher expense distributions charged to them), and pass journals to general ledger units.

PeopleSoft Purchasing business units share vendor, purchase order, and receiving information with PeopleSoft Payables units in the same SetID.

A PeopleSoft Inventory business unit is a storage facility that maintains its own replenishment and costing methods, as well as its own definitions and guidelines.

The Manufacturing business unit must be identical to the Inventory business unit in order to link the manufacturing and inventory processes.

The Order Management business unit controls certain order processing parameters (tax and freight calculation methods, base currency, credit card hold options, and so on) for its associated PeopleSoft eStore and Mobile Order Management merchant variants.

Business Unit Audit List

One or more business units specifically targeted for expense report and cash advance audits.

Buying Agreement

You can structure flexible and easy-to-use buying agreements for customers or groups of customers. You can set up maximum amounts and specify the minimum dollar value per order placed against it. You can automatically generate sales orders or create sales orders online from buying agreements. Rebate and penalty calculations can be implemented for buying agreements.

C**Cafeteria-Style Benefits**

Any programs offering several benefit plans from which participants make elections. Cafeteria-style benefits may or may not include flexible credits.

Calculation

In PeopleSoft Pension Administration, the determination of a participant's pension benefit.

Calculation Rule

Criteria for calculating benefits, including as-of dates for age, service, premium, and coverage calculations; rounding rules; and minimum and maximum coverage amounts. Any number of program and plan combinations can use a single set of calculation rules.

Calculation Rule [Global Payroll]

Any rule you develop using combinations of elements to command the system to perform a type of calculation.

Calendar

In PeopleSoft Manufacturing, a list defining the days your enterprise is available and the hours of operation for each day. The system first looks to see whether you are using a work center specific calendar. If none is defined, it looks at the production calendar. If no production calendar is defined, planning and scheduling functions base start and due dates on a five-day workweek.

In PeopleSoft Demand Planning and Inventory Planning, a list defining the start and end dates for each time-phased period. It also contains daily weights for distributing raw data into different period buckets.

In PeopleSoft General Ledger, your accounting calendar defines the time periods to which you post transactions for different ledger group and business unit combinations. You can have multiple calendars, so you can keep a calendar for actuals, another for budget and forecast activity, and still others for special reporting or transitional needs.

Calendar Group ID

Allows you to group together multiple Calendars that you want to run together at the same time. It also controls the order in which the Calendars are processed. You can only group calendars together that are for the same country (based on pay entity country).

Calendar Scope

A time period type (Day-Factored, Month-Factored, or Week-Factored) for use in building your time period calendar.

Canada Academic Teaching Surveys

Statistics Canada requires that all Canadian universities (all degree granting institutions) produce full-time and part-time *Canada Academic Teaching Surveys*. These reports are a legislative requirement. PeopleSoft HRMS 8 provides you with the functionality to code HRMS information using Statistics Canada codes and create both the full-time and part-time Academic Teaching Surveys.

Canadian Industrial Sector

The Canadian industrial classification code with which employees are associated for Canadian employment equity reporting purposes.

Canadian National Occupational Classification (NOC) Codes

NOC codes are occupational classification codes for Canadian companies provided by the government.

Canadian Standard Occupational Classification (SOC) Codes

SOC codes are occupational classification codes for Canadian companies provided by the government.

Cancellation

A process that terminates stock fulfillment requests, allowing reserved and allocated items to be returned to inventory.

Cancellation

In the context of an employee stock plan, a transaction (usually triggered by a specific event, such as a termination of employment) in which outstanding securities are declared void and inactive and returned to the pool of securities reserved for issuance under the plan or retired.

Candidate Keys

In PeopleSoft Demand Planning, elements of data that can be used to construct the **Forecast Item** key field at different levels of the forecast.

Capacity Rate

A rate you assign to a capacity cost object. This enables you to track and report on excess capacity.

Capacity Fence

A time fence that indicates that date and time after which PeopleSoft Enterprise Planning or Production Planning solvers ignore capacity violations. The solvers do not use this date in processing capacity violations.

Capacity Multipliers

A multiple used in PeopleSoft Enterprise Planning and Production Planning to determine the available capacity on a resource. Since a capacity multiplier is effective-dated, you can use it to vary the resource's available capacity over time.

Capital Acquisition Plan (CAP)

A method of projecting and tracking capital expenditures for a project. Budgeted assets and actual expenditures can be associated with a CAP Plan so the owner can track planned against actual costs.

Capital Gain

The difference between an asset's purchase price and selling price, when the difference is positive. Capital gains can be either short-term (where the capital asset was held for 12 months or less) or long-term (where the capital asset was held for 12 months or more).

Capital Gains Tax

A tax on profits from appreciation in owned real property, recognized at the time the property is sold; real property includes owned company shares.

Capitalization

The total types and amount of the outstanding securities that have been issued by a corporation. Generally includes both equity and debt securities.

Capital Markets Instrument

In the financial services industry, Capital Market Instruments are assorted financial instruments issued by organizations to raise capital for funding operations. Participants are made up of interested parties that choose to supply or acquire the capital funding through such vehicles. Derivatives, debt instruments, equities and foreign exchange instruments that are traded in highly liquid markets represent the instruments. In the PeopleSoft financial analytic applications, Capital Market securities refer to instruments that are bought/sold by the institution for its own investment account. The capital markets set the product prices and interest rates.

CAP Sequence Number

The number that distinguishes a small project belonging to a CAP plan. Budgeted assets can be associated with an overall CAP Plan and a CAP Sequence, if that level of detailed tracking is desired.

Carry-Forward

Residual contributions that remain in a stock purchase participant's account after the purchase of shares that are used toward future purchases.

Carrying Cost

In PeopleSoft Inventory Planning, a value that shows the cost associated with holding a dollar of inventory for one year. The value is presented as a percentage.

Case Officer

In Germany employees in your company are designated as Case Officers, and have responsibilities for handling health and safety incidents.

Cash Balance Accounts

The PeopleSoft Pension Administration function that tracks the activity in an employee's hypothetical account under a cash balance plan.

Cash Balance Plan

A defined benefit plan designed to look like a defined contributory plan. The plan periodically credits a percentage of pay to each employee's hypothetical account.

Cash Compensation

In PeopleSoft Workforce Analytics, Cash Compensation is a component of direct compensation. Cash Compensation consists of direct cash payments made to an employee for base compensation and short-term variable compensation.

Cash Exercise

At the time of exercise, the optionee is required to pay in cash the total option price plus any withholding taxes due to the company.

Cash Flow Generator

This is a support module for the PeopleSoft financial services analytic applications. It generates actual and projected cash flows for financial instruments by using output from the other support modules, such as loan prepayment rates, deposit runoff rates, product pricing indices, discount rates, and product definitions (such as start and end dates, balance amount, interest rate, term, payment dates, repricing and compounding frequency, and accrual basis) to generate the cash flows. The Financial Performance Measures module accesses the cash flow results to calculate the required financial measures.

Casual Preparer

An additional user role at the lowest level of budget preparation for a budget center. This user performs the same activities as the Budget Preparer role when access is granted. The system does not, however, enable the Casual Preparer role to define their own private views for line-item budgeting.

Casual Work Assignment

The temporary assignment of an employee to a work position or location to meet the needs of the business. Typically, there is no Human Resource activity to support the work assignment (that is, a new Job record is NOT created). Often compensation rules that accrue to the temporary assignment override the compensation rules that apply to the employee's normal work assignment. See also Borrow/Loan.

Catalog

The list of transactions, classes, and queries used to interface to the external system. Integration users are presented with this list when they pick the type of Business Interlink Plug-in they are going to use. There are four types of catalogs: transaction, class, operator, and configuration parameter.

Catalog

A way of organizing your training courses into classifications for increased flexibility. Catalogs consist of categories and subcategories.

Category

Categories are the primary level of a two-tier structure of training courses. Categories can consist of subcategories that provide further course definition.

Category Tree

A hierarchical structure that groups products by category to control how they are displayed in PeopleSoft eStore web pages. Used also by Mobile Order Management to enable product information to be accessed by a wireless device.

CBM

See PeopleSoft Customer Behavior Modeling.

Census Metropolitan Area (CMA) Code

In Canada this code is prescribed by the government and refers to the area of an urbanized core with a population of at least 100,000.

Central Personnel Data File (CPDF)

Two types of reporting made by agencies to the OPM include the Dynamic and Status files (quarterly and monthly, respectively) covering a range of employee personnel/payroll data.

Certain and Continuous Payment Option

A form of pension payment where the benefit is paid out for the lifetime of the participant with a specified number of payments guaranteed so that a beneficiary will receive payments until the end of the guarantee period if the employee dies before the guaranteed payments are complete. For example, under a ten-year certain and continuous payment option, a retiree who lives less than ten years receives payments until death, then the retiree's beneficiary continues to receive payments for the remainder of the ten year period. A retiree who lives longer than ten years continues receiving payments after the ten year period until death. Also known as a "Term Certain and Continuous" payment option.

Certain Only Payment Option

A form of pension payment where the benefit is paid out entirely over a specified period of time—usually five, ten, or fifteen years—with no ongoing payments after the specified period. If the retiree dies before payment period is over, the remaining payments are made to a beneficiary. Also known as a "Term Certain" payment option.

Change To Lower Grade

- For positions under the General Schedule or under the same wage grade schedule, a change-to-lower grade changes the employee to a lower grade; and
- When both the old and new positions are under the same type ungraded wage schedule, or in different pay-method categories, a change-to-lower grade changes the employee to a position with a lower rate of basic pay.

Charge Out

A **Material Issue** used when the item is scheduled for future return.

ChartField

A field storing a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField Balancing

PeopleSoft enables you to set up ChartFields and indicate that you want specific ChartFields to match (balance) on the debit and the credit side of a transaction. When you work with Controlled Budgets, the Fund and Budget Period are already set up in the system to balance (match). For example, suppose you want to balance by Class and Program. You indicate that these on a panel that these ChartFields are required, along with Fund and Budget Period which should already be selected. When you enter a transaction, you must enter the same Class, Program, Fund, and Budget Period ChartFields on both sides of the accounting entry, but you can modify any ChartFields, other than these four, on the user-defined line. The system always requires that total debits equal credits.

ChartField Combination Edit

Also called *Combo Edit*. The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey

One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

ChartViews

Charts of data in the model, presented through the Worksheet which retains the ability to drag dimensions on the chart as desired.

Check In/ Check Out

The process of retrieving planning activities from the BAM database (check out) and posting changes and results back into the database (check in).

Child

A node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes—projects, customers, and so on—can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.

Child

A node or detail of a tree linked to another, higher-level node referred to as the parent. Child nodes can be rolled up into their parent. A node can be a child and a parent at the same time depending on its location within the tree.

Chunking

Chunking is a PeopleSoft Enterprise Warehouse mechanism that makes voluminous processing easier through the use of multiple small parallel processes. By enabling chunking, multiple jobs are spawned from one Jobstream. These jobs run in parallel (behind the scenes) to process data efficiently.

Citizenship Code

Numeric indicator as to whether the employee is a U.S. citizen or a foreign national serving in the U.S. The codes are:

- citizen
- other

Civil Service Retirement System (CSRS)

A retirement plan available to employees of the federal government. CSRS covers all employees appointed to a position in the federal government before January 1, 1984. Coverage includes a basic annuity plan with employee contributions and the Medicare Hospital Insurance component (1.45%) of the Social Security tax.

Class catalog

Lists classes used to interface to an external system. A class contains data members of basic types and/or objects that are typed after another class. A Class can also contain lists of basic types or objects.

Class ChartField

A ChartField value that identifies a unique appropriation budget key when you combine it with a Fund, DeptID, and Program Code as well as a Budget Period. Formerly called “sub-classification.”

Classification Code

Need App A code that categorizes an engineering change. Example classification codes include the following: Mandatory, Optional, Upgrade, Quality, and Safety.

Clock Hour Reporting

Method of reporting time by recording actual times in and out (start and stop) (see Time Reporting).

Clone

To create a unique copy of an object. When used in PeopleCode, clone will always mean to make a unique copy. Copy, on the other hand, may or may not mean making a unique copy. Copy may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

Cloning

The process that enables you to copy run controls to create employee schedules from existing Run Control ID's that have already been executed and saved.

Close Date

The date in which time entry is no longer allowed for a given pay period. Defined as an offset number of days to the pay period end date.

Close Price

The price of the final trade for a security at the end of the trading day.

Closure Calendar

A calendar that establishes closure dates for shipping, receiving, and materials management operations for a specific **Business Unit**. Typically, application processes account for these closure dates when determining Lead Time and dates for anticipated fulfillment processing dates (scheduled shipment dates, scheduled arrival dates, and lot retest dates, for example).

CMA (Census Metropolitan Area) Code

In PeopleSoft Workforce Analytics, the CMA code is prescribed by Statistics Canada, and refers to the main labor market area of an urbanized core with a population of at least 100,000.

COBRA (Consolidated Omnibus Budget Reconciliation Act)

In PeopleSoft Workforce Analytics, this refers to legislation that requires employers to offer continued health care coverage to employees, and their dependents, who lose benefits coverage under certain defined conditions such as voluntary termination, divorce, becoming an overage dependent, or retirement. Any individual, whether employee or dependent, that is covered under a health plan at the time of a qualifying event, has the option to elect COBRA coverage.

Codepage

One character set.

Collection

To make a set of documents available for searching in Verity, you must first create one or more collections. 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 matching various search criteria. A collection is a set of statistics and pointers to the source documents, stored

in a proprietary format on a file server. Since a collection can only store information for a single locale, PeopleSoft maintains a set of collocations (one per language code) for each search index object.

Combined Federal Campaign (CFC)

A vehicle used by federal employees to contribute to a charity or charities of their choice.

Commercial-Off-The-Shelf (COTS)

Equipment or software that is currently sold commercially to at least one customer.

Commission Tax Method

A payroll tax calculation method that adds year-to-date earnings to earnings for this pay period and finds the annualized gross by multiplying by the number of pay periods in the year; the gross is then divided by the number of tax periods specified on the paysheet. This method is used for Canadian processing only.

Commitment Control

Commitment control includes budget control and commitment accounting functionality.

Common Shares Issued and Outstanding

Represents the residual ownership interests in the corporation. This is the composite number of shares available and tradable on the open market.

Community Background

In the United Kingdom Community Background refers to the religious category, such as Catholic or Protestant, of employees, job applicants or appointees. See the Northern Ireland Report for more information.

Compa-Ratio

In PeopleSoft Workforce Analytics, Compa-Ratio is most commonly defined as the relationship between current pay and the midpoint calculated as: $(\text{Incumbent Pay}/\text{Midpoint}) * 100$. Usually expressed in whole numbers, or in percentage form by dropping the multiplication operation. Much less common is the use of a compa-ratio calculation as: $\text{range midpoint}/\text{market rate}$.

Compensation Frequency

In PeopleSoft Workforce Analytics, this is the frequency at which a job is paid. This is the value you use for reporting or quoting pay. Examples include Annually, Monthly and Weekly.

Compensation Planning

In PeopleSoft Workforce Analytics, this is the process through which employee compensation plans are defined, and compensation budgets are allocated throughout an organization. Major components of compensation planning include designing pay structures, setting individual pay levels, and budgeting and forecasting compensation spending.

Compensation Rate

In PeopleSoft Workforce Analytics, this is the compensation rate for a job. This is the rate the company uses for quoting and reporting pay.

Comp time (compensatory time)

A PeopleSoft Time and Labor-managed employee benefit where time off is granted in exchange for time worked based on customer-defined criteria; is associated with an expiration and is used as reported time (see Attendance).

Compensation

The process by which a worker is remunerated for services rendered to, or work performed on behalf of a business entity.

Compensation Package

All of the base and non-base components on a job row.

Compensation Rules

Business methodology or logical process that is applied to reported time in order to determine payable time (see Time Administration).Competency

In PeopleSoft Workforce Analytics, Competency is a knowledge, ability, skill, accomplishment, or National Vocational Qualification (NVQ).

Competency Inventory

All of the roles, tasks, competencies and accomplishments possessed by the workers in the current workforce. This data is migrated from internal source systems into the data warehouse tables of the PeopleSoft Enterprise Warehouse.

Competency Strategy

The type and number of roles, tasks, competencies and accomplishments essential to accomplishing a business scenario based on your strategic business goals.

Competitive Appointment

An appointment to a position in the competitive service following open competitive examination or under direct-hire authority. The competitive examination, that is open to all applicants, may consist of a written test, an evaluation of an applicant's education and

experience, and/or an evaluation of other attributes necessary for successful performance in the position to be filled.

Competitive Service

All positions as defined by 5 USC 2102 in the executive branch of the Federal Government are in the competitive service unless they are specifically excluded from it. Positions in the legislative and judicial branches are outside of the competitive service unless they are specifically included.

Compress

The act of placing a Planning task as early as possible in the schedule without violating any constraints.

Compressed Split

In PeopleSoft Demand Planning, an optional function that allows a split database to be compressed so it can be transferred to an account manager's computer.

Concurrent Offerings

Multiple stock purchase offerings that are active and outstanding at the same time. The end date is measured from the employee's grant date.

Concurrent Processing

The situation in which you run multiple batch processes at a time. In PeopleSoft Benefits Administration, for example, simultaneous open enrollment and event maintenance qualifies as concurrent processing.

Configuration Code

A unique 50-character identification code that accurately tracks and costs inventory with the PeopleSoft Product Configurator. It corresponds to a lot number for a non-configured item.

Configuration Costing

The overall process of reviewing and evaluating anticipated cost data for a configured item.

Configuration parameter catalog

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

Consolidate Assets

In PeopleSoft Asset Management, the process of consolidating multiple load lines, usually coming from a separate application, into one asset.

Consolidate Depreciation

In PeopleSoft Asset Management, the process of summing all open Add and Adj transactions by transaction type, **Transaction Date**, and accounting date for all composite members reporting to one composite asset.

Consolidated Bill

A grouping of bills gathered together for invoice presentation. The bills belonging to a consolidated bill are invoiced and printed together, with a page summarizing the bills as a group.

Consolidations

The PeopleSoft Pension Administration functions that accumulate hours, earnings, and pension contributions based on payroll data.

Consolidations-Elimination Set

A related group of intercompany accounts that is processed during consolidations. Once eliminated, this group of accounts should normally net to zero.

Constraint

A limit to a schedule, that, when violated, must be repaired to produce a valid schedule. User-configurable Planning constraints include Missed Request Dates, Missed Promise Dates, BI Shortages, RM Shortages, Capacity Overloads, Missed Inventory Targets, Changeovers, and Excess Inventory. See also **Temporal Constraint**.

Constraints

In the PeopleSoft Enterprise Warehouse, a constraint can consist of one or more filters and is used to define complex business logic. Constraints are based on DataMaps.

Consumption Pattern

In PeopleSoft Activity-Based Management, an attribute used to describe how an activity interacts with the cost objects to which it has been assigned. A unit type activity can expect to be performed on a regular basis so that each time a product is produced. A batch type activity may only be performed periodically for a given range of transactions. For example, each time a machine is setup to produce another product type. Sustaining type activities generally occur to support the overall operation of a company unrelated to products produced or customers served.

Contact

A person associated with a Customer ID. Contacts can be internal contacts or external contacts. Internal contacts are your employees who manage the relationship with your customers, from handling billing inquiries to product/warranty questions, to basic product/service questions. Interactions with customers can be recorded via PeopleSoft Conversations. Self service interactions can be recorded through PeopleSoft Contact Us. External contacts are your customer's representatives who can access self-service transactions

and receive documents such as sales order acknowledgements. Contacts must have a User ID to access self-service transactions.

Contact Us

A method by which customers and unregistered guest users send email messages to specific addresses or members of the merchant's organization. Merchants can also define automatic response messages.

Container

An Inventory stock unit for receiving, putaway, bin to bin transfers, picking, shipping, adjustments, and physical accounting. Each container is associated with a unique container ID.

Content Reference

Content references are pointers to some kind of content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three broad categories: target content, templates, and template pagelets.

Contextual reference

PeopleCode refers to a row or buffer field determined by the current context; that is, the context in which the PeopleCode program is currently executing.

Contingent Beneficiary

In PeopleSoft Pension Administration, any non-spouse pension beneficiary, including a child, other relative, or a trust. Spousal consent is required in order for an employee to name a contingent beneficiary.

Contracting Officer (CO)

Individual who has the authority and the official responsibility to produce a sound acquisition document.

Contracting Officer's Technical Representative (COTR)

Individual responsible for monitoring a contract and its associated tasks and deliverables.

Contractor

Any individual or non-employee reporting time that will not be paid through the payroll system.

Contribution

Represents money a stock purchase participant elects to contribute to the plan. Contributions are deducted from the participant's paycheck and used to purchase stock pursuant to the offering and purchase period they are enrolled.

Contributory Plan

A Pension plan to which employees contribute. Contributions are typically a percentage of pay deducted from the employees' paychecks.

Control Budget

Commitment control enables you to establish budgets that provide extensive, active budgetary controls over transactions, rather than just passively recording transactions.

Control ChartField

A control ChartField is a key ChartField that you designate to be the control field. Designating a ChartField as the control allows you to set attributes for a specific value of the ChartField that are different from the attributes specified for the budget type in general. For example, if the tolerance for a Projects budget type is set to 10% in general, you can override this value, making it higher or lower for specific projects.

Control Group

A mechanism to relate vouchers together for the purpose of controlling voucher input into PeopleSoft Payables. Generally used for assigning vouchers to data entry personnel and for reviewing input.

A set of parameters that determines the major forecast process options. The Control Group code is assigned to a group of **Forecast Item** and controls the forecast development and tracking for each item in the group.

Control groups are used by the Analytic Forecast Component to govern particular properties of the forecast rule, such as what accuracy to expect and what statistical method to apply. Forecast elements are assigned to exactly one control group. They manage differences among forecasts within a set.

Control Hierarchy

The relationship between business units, origins, vendors, and control groups in PeopleSoft Payables that defines which processing data will be automatically entered on each voucher.

Control Number

A sequential identifying number used to identify an exercise.

Control Plan

In PeopleSoft Quality, a plan that brings together application, measurement, and control and response criteria for a specific product and process.

Conversation

Any notes, transcript, or detail of a telephone call between an employee and a customer. Conversations may be tied to items, payments, purchase orders, document references, or bills of lading.

Conversion data profile

A conversion data profile takes the values from a particular PeopleSoft database table (such as the table holding bank transaction codes) and specifies how that value appears in PeopleSoft Business Documents.

Conversion data profile

A conversion data profile takes the values from a particular PeopleSoft database table (such as the table holding bank transaction codes) and specifies how that value appears in PeopleSoft Business Documents.

Conversion Loader

A sample SQR delivered with PeopleSoft Asset Management that transfers data from multiple fixed-length ASCII files into sample, relational conversion tables.

Copy Bill

In PeopleSoft Billing, the online environment providing for the replication of a single bill, generating a new bill with its own unique invoice number.

Core Functionality

Core functionality is the set of information in PeopleSoft HRMS that is common to your entire global workforce tracking needs—and is always displayed on the primary page.

Core hours

The hours a workday, workweek or pay period in which a time reporter must be present for work in a flexible work schedule (see Scheduling).

Corporate Account

In PeopleSoft applications, this is equivalent to the Account (ACCOUNT) ChartField. The term is used to make a distinction between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (Alternate) accounts required by a regulatory authority for recording and reporting financial information.

Corporate Reporting

Companies with more than \$10 million in assets whose securities are held by more than 500 owners must file annual and other periodic reports. Publicly held companies are required to file documents with the SEC which include:

- Registration statements for newly-offered securities
- Annual and quarterly filings (Forms 10-K and 10-Q)
- Proxy materials sent to shareholders before an annual meeting

- Annual reports to shareholders
- Documents concerning tender offers (a tender offer is an offer to buy a large number of shares of a corporation, usually at a premium above the current market price)
- Filings related to mergers and acquisitions

Corporate Repurchase

When a corporation elects to repurchase some of its own securities. This reduces the Common Shares Issued and Outstanding. Typically, used to improve the valuation of the company's common securities outstanding as well as the Earnings Per Share (EPS).

Correction to IRR

An IRR type used when corrections need to be made to an original IRR that has already been submitted to the Office of Personnel Management (OPM). Federal employees covered by the CSRS retirement plan require SF-2806-1. Federal employees covered by the FERS retirement plan require SF-3101. A Correction IRR is also used if original retirement deductions were over-reported. See also Individual Retirement Record (IRR).

Correspondence Customer

A customer to whom all correspondence (statements) is addressed, often a corporate customer receiving correspondence for associated child customers.

Cost Accounting

A method where business costs are accumulated and distributed to products, processes, or discrete undertakings on an equitable basis. There are a variety of cost accounting methods, but they all share the same basic functions: classifying costs, recording costs, allocating costs to products or activities, summarizing and reporting costs to management. Cost accounting requirements and financial accounting requirements are not necessarily synonymous.

Cost Assignment

Resources assigned to cost objects or activities.

Cost Basis

Typically, this refers to the original price of an asset used in determining capital gains. However, in the case of death of an optionee, the appraised value of the asset at the time of death is the cost basis.

Cost Center

A Time and Labor Business Unit, in which all related costs attributable to some center within a business (such as an activity, an organization, or a program), are segregated for accounting or reimbursement purposes.

Cost Element

See **Inventory Cost Element** and **Manufacturing Cost Element**.

Cost Flow

Determines how depletions will occur for purposes of costing a transaction. Cost flows available include Specific Lot ID, Specific Serial ID, FIFO, and LIFO.

Cost Objects

Cost objects represent cost information about products, customers, and channels. They are the final results of the activities performed by your business, representing the focal point of costing and profitability analysis. Examples are products, customers and channels. They are the final results of the activities performed by your business. Your model's resources and activities are linked to the cost objects. They are often the focal point of profitability analysis.

Cost of Capital

An attribute used to describe the behavior of a particular cost object. A primary cost object is typically the main focus of the activity-based management analysis. This may be a product, customer or channel that you wish to calculate cost for. A support cost object may be used in a similar manner but may be further allocated to other support cost objects or primary cost objects.

Cost Of Living Allowance (COLA), Non-Foreign

A cost-of-living allowance payable to an employee at a location in a non-foreign area where living costs are substantially higher than those in the Washington, DC area.

Cost Profile

A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

Cost Profile Group

A grouping of items for the purpose of costing transactions and valuing inventory for a given book. Assigning an item to a cost profile group determines the books used by the item when accounting for that item.

Cost Roll-up

A process for calculating item costs. Cost roll-up provides a summation of all of the costs associated with the bill of material structure and the routing used in producing the item.

Cost Row

A cost transaction and amount for a set of ChartFields.

Cost Template

A collection of cost components that you can apply to a group of purchased items.

Cost Type

A user-defined method of categorizing item costs in Manufacturing for simulations and what-if analysis. Examples of cost types include current costs (which reflect the item's current bill of material or routing), proposed costs (which could be used in preparation for the next standard cost period), or activity-based costs (which include costs for items that consume a given activity).

Cost Version Type

A combination of cost types and cost versions used in cost rollups. Valid values include production (rolls up only manufacturing data and uses only the primary BOM and routing, each with a code of 1), engineering (can roll up with either manufacturing or engineering data, with any combination of BOM/routing codes), or simulation (only rolls up with manufacturing data, but can use any combination of BOM/routing codes).

Count Grade

A user-defined evaluation of a counting event.

Count Point

A predefined step on a routing or operation list where you can gather operation completion information. You define the appropriate points on the routing, record completions at these count points, and the system automatically backflushes the prior operations. This is only used on production IDs.

Counts

Count elements allow you to count the number of days or hours from a specific period of time. Counts are used primarily during proration calculations, but can potentially be utilized in other situations as well.

Court-Ordered Benefits Coverage

As prescribed in Title 5, United States Code and Title 5, Code of Federal Regulations, court orders that stipulate that an employee must continue or begin the coverage features for all employee benefits must be enforced. Federal employees are mandated by court orders to continue covering or begin covering their former spouses and/or children under their federal employee benefit programs (health, life, and thrift savings).

Court-Ordered Garnishments

As prescribed in Title 5, United States Code and Title 5, Code of Federal Regulations, court orders enforcing child support, alimony, or collection of commercial indebtedness are served on the appropriate entity within the Federal agency and implemented as offsets against the employee's salary.

Coverage

An employee's chosen benefit plan and coverage level; that is, what sort of benefit is provided as well as the value.

CPAM (Caisse Primaire d'Assurance Maladie)

In France, CPAMs are the local social security offices that manage health coverage for French workers. CPAMs are regulated and established by the French government. If you're managing a French workforce you'll need to identify and track the CPAM offices that impact your enterprise.

CRAM (Caisse Régionale d'Assurance Maladie)

In France, CRAM is the regional social security body which oversees the running of CPAMs. CRAM offices work with companies to both prevent and compensate workers for industrial injury.

Create Date

The date that you extracted a deduction or offset to PeopleSoft Deduction Management or created a split deduction.

Create Missing Items

In PeopleSoft Demand Planning and Inventory Planning, a feature that enables automatic system generation of master records that don't exist in the system.

Created Time

Time collecting device time or elapsed time generated by the system based on the time reporter's schedule (see Time Administration)

Creating Time

The preliminary generation of time segments as close as possible to their likely values when you officially report time—so that the information on the time records is as fresh and current as possible. The system shows you time that has already been created, rather than you having to create it “on the fly” when you come in to report. The process fills in reporting day gaps as defined by work schedules.

Credit Analyst

A required field used in PeopleSoft Receivables, Billing, Order Management, and Deduction Management when working with items. Each item must be assigned to a credit analyst. If no credit analyst is assigned to an item, the credit analyst assigned to the customer is used as the default.

Credit Risk Spreads

In the financial services industry, the additional charge to a risk-free interest rate, based on a riskier credit rating.

Credits

See Flexible Credits.

CREF

Acronym for Content Reference.

Crew Reporting

A Time and Labor process that enables you to report the earnings which consist of one or several time reporting codes and associated quantities of hours, amounts, or units, and task information for one date under report for a user-defined crew. The system transforms the information into instances of daily time for each crew member for the entered date.

Critical Success Factors (CSFs)

In PeopleSoft Balanced Scorecard, things that an organization must do well or excel at to achieve its goals. One or more key factors or objectives that must be accomplished for a particular strategic thrust. Key Performance Indicators are attached to CSFs.

CRM Warehouse

See Warehouses.

Cross Border Walker

This term is used in Europe for an employee who lives near a border in one country and works in another country. Such employees are subject to different tax and social security rules.

Cross-Plan Validation

The process by which the PeopleSoft Benefits Administration determines enrollment prerequisites for benefit plans. You can define four types of cross-plan validation prerequisites: prerequisites based on plan types, benefit plans, dependent enrollments, and coverage percentage limits for Life and AD/D plans.

Cross-View Reconciliation

In PeopleSoft Demand Planning, a process that enables the balancing of forecasts between selected levels of related views with the same **Forecast Item** key. The process is used when adjustments have been made to a working view and are then required in a related view.

Cube

See **Multidimensional Database (MDDB)**.

Cube View

In PeopleSoft Demand Planning, defines the user's own view of a forecast. The parent working view and dimensions determine what forecast data is included and how aggregates are formed.

Cumulative Tax Method

A payroll tax calculation method that adds together year-to-date earnings and earnings for the current pay period, then annualizes the result before calculating tax. This method is useful when Payrolls vary greatly in amounts from pay period to pay period, such as in the case of sales commissions.

Currency Calendar

In the financial services industry, business calendars for markets outside the organization's domestic operations that reflect the foreign markets' holiday schedules.

Currency Conversion Engine

A PeopleSoft Enterprise Warehouse Engine that processes financial information in multiple currencies.

Current Period

The earliest pay period for which the close date has not passed (see Time Reporting).

Current Period (Time and Labor)

In Time and Labor, the employee's current pay period which will be determined via the employee's Pay Group affiliation. Although there can be only one definition of Current Period per installation, the user can change it manually.

Current View

A reporting screen in Time and Labor whose effective date is within the date boundaries of an employee's current pay period, and for which pay has not yet been confirmed. A *Future Time Reporting Transaction* is one that has an effective date after the last day of the employee's current pay period. An *Historical Time Reporting Transaction* is one that has an effective date before the first day of the employee's current pay period.

Current Year

A period for event maintenance processing.

Curve Generator

A supporting module (common to financial services industry applications) that enables you to construct curves used to determine appropriate interest rates for given maturities and / or time periods. You can import market data from outside sources such as Bloomberg, upload the data from a spreadsheet, or manually enter the data. You can then build configured curves from segments or combinations of other curves.

CUSIP Number

A nine digit alphanumeric number associated with issuers' securities. CUSIP (Committee on Uniform Securities Identification Procedures). A uniform numbering system widely used to identify specific securities and their issuers.

Custom Statement

A user-created logical or mathematical expression that determines information about an employee in PeopleSoft Pension Administration. Custom Statements commonly define employee groups and benefit formulas.

Customer Inquiry

A window containing options to review customer balances, aging, history, items, actions, and conversations.

Customer Scorecard

See PeopleSoft Customer Scorecard.

Customer Tree

A user-defined graphical representation of your current sales organization. A customer tree is used to establish and distribute funds and to determine authority levels for promotional activities.

Cut Session

Cut sessions are a means of dividing a course session. You use cut sessions where a course session does not run on consecutive days from start to finish, or if there are multiple instructors or locations. Each cut session has its own start/end date, location, and instructor. For example, if you have a course that runs for two days a week for a month, you would divide the course session into four cut sessions, each of which is two days long.

Cycle Count

A manual counting event that does not cover an entire inventory business unit. Usually includes every item (and lot, if applicable) in a location or family.

Cycle Interval

The number of days between cycle counts.

Cycle Procedures

Inventory planning tasks that need to be performed on a regular basis to ensure an up-to-date **Inventory Policy**. The tasks can be performed either at the end of a processing period or within the period, and should always be performed if the forecast or **Control Group** or **Policy Item** parameters change. Tasks include generating a policy and reviewing **Work Queue** messages.

D***DAT file***

A text file (input.dat) used with the Verity search engine that contains all of the information from documents that will be searchable but not returned in the results list.

Data Elements

Data elements, at their most simple level, define a subset of data and the rules by which to group it.

For PeopleSoft Balanced Scorecard, data elements are used as the basis for key performance indicators, and as target values for Key Performance Indicator (KPI) objects.

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

Data Entry Access List

Used to present a concise list of often-performed data entry tasks to a user. You can assign multiple control plans to a single data entry access list.

Data Extract

A report that creates a file used to transmit data to a third party on magnetic media. There is no meaningful printed output for this type of report.

Data Loader

Data Loader is a PeopleSoft Enterprise Warehouse utility that moves data from the Operational Data Store staging area to either the ODS reporting area or the Data Warehouse. The Data Loader utility is made up of several pages that allow you to enter Metadata to define your source and target records and your transformation rules and then perform the load by running an Application Engine.

Data Loader Map

Defines how to extract data from the Operational Data Store (ODS), transform it, and load to a Target Table. The target table can reside in the warehouse or the ODS layer.

Data Manager

A PeopleSoft Enterprise Warehouse engine that distributes revenue, expense, analytical application engine results, statistical quantities and other measures across business units, departments, products, customers and channels—any field or logical group in the chart of accounts. You can define a number of types and options within this engine. It is also used as a means of posting to the Performance Ledger.

Data Manager Rules

In the PeopleSoft Enterprise Warehouse, Data Manager rules use Constraints to specify the source as well as the target tables for moving, aggregating, or multidimensionalizing your engine output. Rules use Data Manager methods to enrich the PeopleSoft Enterprise Warehouse data.

See Data Manager Methods.

Data Manager Methods

There are several methods: Copy, GL Mapper, Prorata, Spread Even, and Tree Aggregation. Each method enables you to move and/or enrich engine output.

Data Mart

A Data Mart is a data structure that uses a central fact table and related dimension tables to generate a “relational cube” or directly generate an Insight report.

Data Mart Builder

The Data Mart Builder is a multiple Application Engine (AE) process, that is, a framework of procedural programs, that creates a Data Mart.

DataMaps

Information that builds upon the data captured in the TableMap records. DataMaps enable you to define a logical view of the physical PeopleSoft Enterprise Warehouse tables. DataMaps bring together information from many different tables and fields and define it all as one entity or table.

Data Row

Contains the entries for each field in a table. To identify each data row uniquely, the system uses a key consisting of one or more fields in the table.

DataSet

DataSets are used as input for various engines and processes, for instance, the Analytic Forecasting component, the Data Manager, user defined functions, drivers in Activity-Based Management, and data elements in the Key Performance Indicator Manager. DataSets provide a user defined set of information to the engines. DataSets use Constraints to restrict used columns and restrict returned rows. Each DataSet is created by a process specific setup. However, the underlying logic is the same, enabling you to more easily understand the functional aspects of the process.

Data Warehouse

A large database containing data summarized from one or more transactional systems, optimized to support the analysis needs of the enterprise. An ideal data warehouse contains all the data necessary to make business decisions. Users analyze the data in the warehouse using Online Analytical Processing (OLAP) tools and ad hoc query/reporting tools. An increasing

number of organizations have "virtual" data warehouses, where the data warehouse is not one physical database, but rather a collection of specialized (and distributed) data marts.

See also PeopleSoft Enterprise Warehouse.

Data Warehouse Tables

Data Warehouse tables act as the portal for getting data into the PeopleSoft Enterprise Warehouse from PeopleSoft, OLTP applications or other "outside" sources. These tables are used:

- As targets for loading operational data.
- For error detection and handling
- For data validation.
- For aggregation.

Database Alias

The PeopleSoft Pension Administration utility that looks up employee data.

Dataset

A file containing data to be analyzed by the Quality Server program. The dataset is similar in content to a spreadsheet.

In PeopleSoft Planning, a file that stores schedule information such as tasks, resources, calendars, and so on.

Date

See **Accounting Date Transaction Date** or **Effective Date**.

Date

If you want to either include a date in a calculation, or determine a new date by taking a starting date and either adding or subtracting a period of time to come up with another date, you use a date element.

Date Classified

Date the Position Description is approved by Management/Position Management.

Date Eligible To Retire

Date an employee is eligible to optionally retire based on the combination of age and service that meets legal requirements.

Date Under Report

The date (day) in PeopleSoft Time and Labor for which time is being reported. The Date Under Report does not have to equal today's date.

Day Breaker

Customer defined time that is used to determine when one day becomes the next. It's used to determine the "logical" date of a punch. (See Understanding Workgroups.)

Days Supply

In PeopleSoft Inventory Planning, a method that can be used with several types of **Inventory Policy**. Using this method, a specific number of days of supply for an item should be used to calculate the item's inventory policy.

Deal Type

PeopleSoft Treasury has categorized deals into several basic deal types from which you can choose when defining an instrument.

Death Coverage

The PeopleSoft Pension Administration function that determines the factor used to reduce an employee's benefit when the plan charges for PRSA coverage.

Decompressed Split

In PeopleSoft Demand Planning, a function for returning a compressed split database to its original form. See also Compressed Split.

Deduction

Any amount taken from an employee's pay check each pay period. Deductions may include health or medical benefits, union dues, and so on. See also Benefit Deduction and General Deduction.

Deduction Date

The as of date for the deduction item in PeopleSoft Receivables.

Deduction Item

An individual item that you created in receivables and is an open receivable on the customers account due to a deduction that they took in a payment for a receivable item.

Deduction Reason

Code that describes the type of deduction. When assigned to a write-off resolution, it determines what accounting entries to create.

Deduction Specialist

The individual responsible for tracking and resolving deductions in PeopleSoft Deduction Management.

Deduction Subset

A group of deductions selected from a company's standard set of deductions. Deduction subsets minimize data entry time in special processing situations such as bonus check runs.

Default Mode (DM) model

In the financial services industry, an approach used by financial institutions to predict a decline in portfolio value. Only two outcomes are considered – default or non-default. If the debt does not default, there is no change in the value. If the debt does default, then the loss is calculated as the difference between what was contractually owed and the value of any collateral recovered.

Defection Analysis

In PeopleSoft Workforce Analytics, the identification of employees who are likely to leave the organization based on predefined assessment criteria.

Deferred Compensation

Compensation payments that are payable to an individual in the future such as pension plan payments, annuities, stock awards and profit sharing. Note: Profit sharing can be considered direct pay if paid out in cash on a periodic basis or deferred pay if cumulative with the intention of payment in the long-term future.

Deferred Vesting

The adjustment made to the original option's vesting schedule that pushes the vesting into the future.

Defined Benefit Plan (DB Plan)

A retirement income plan (usually called a pension plan) where the employee's benefit is definitely determinable based on a plan-specified benefit formula.

Definition or Function Definition

The parameters for any of PeopleSoft Pension Administration's nineteen core functions. A definition has to be explicitly associated with an employee Group Definition before it can be applied.

Dekit

The ability to return material issued in kits to inventory. This is used when entire kits need to be returned; individual components are handled through kit issues/returns.

Delete Non-Matching Items

In PeopleSoft Inventory Planning, an option used in the Generation process to delete Inventory Planning items that don't have corresponding items in Demand Planning. The item deletion occurs when the system generates the policy.

Delta

When retroactive processing occurs for a given payee, the system recalculates each element generated for the payee. The system compares the recalculated results to the original results. The difference between these results is typically referred to as the retro "delta." A retro delta can represent either an underpayment or an overpayment that results in an adjustment to the payee's earnings.

Demand

Collection of training requests. This could be an employee demand, a departmental one or a company-wide demand.

Demand Filter Width

In PeopleSoft Demand Planning, specifies the confidence interval within which demand is considered to be reasonable. Actual demand that is outside the confidence interval is automatically filtered and replaced by the value at the edge of the interval. The value is expressed as a percentage.

Demand Filtering

In PeopleSoft Demand Planning, provides a way to detect and highlight unusual demands and forecast errors. If the demand falls outside of a band that is considered reasonable, the system automatically adjusts it to the level of the boundary and logs a message to the **Work Queue**.

Demand Number

The configured product sub-component sequence number.

Demand Planning

In PeopleSoft Activity-Based Management, this type of planning focuses on studying the impact of cost objects and activity volumes.

Demand Priority

The placing of importance on independent demand. The Planning engine uses the demand priority value to determine the order in which you fulfill the demand. You can set a demand priority from 1 to 998 with 1 being the most important level. The priority value of 999 is reserved for the system.

Demand Priority Rules

In PeopleSoft Inventory, a set of rules that will sort demand so the most important demand will have the first opportunity to reserve available inventory. If demand priority rules have

been defined, the Material Reservations process (INPLDMND) sequences orders by priority rank, processing those with the lowest rank value first.

Deplete Cost Method

Determines how you cost a depletions transaction within a book. The deplete cost methods available include Actual, Non-Cost, Perpetual Weighted Average, Periodic Weighted Average, and Value at Current Standard.

Depreciate When in Service

A switch that indicates whether PeopleSoft Asset Management should allocate depreciation as of the date an asset was placed in service. This is valid only in the year the asset was acquired.

Depreciation - Declining Balance

Budgeting calculates this as: Cost minus Accumulated Depreciation divided by Life divided by number of periods per year. It results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.

Depreciation - Double Declining Balance

Budgeting calculates this as: Cost minus Accumulated Depreciation multiplied by 2 divided by Life divided by number of periods per year. It results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.

Depreciation Methods

The various methods of spreading the acquisition cost across the life of an asset rather than expense the full value of an asset at the time you acquire it. The value of the asset consequently decreases (or depreciates) through time. The four depreciation formulas delivered with PeopleSoft Budgeting include: declining balance, double declining balance, straight line, and sum of the years.

Depreciation - Straight Line

A method of depreciating asset value in equal amounts across the life of the asset. Per-Period Straight-Line depreciation is calculated as the cost of an item minus the salvage value divided by the number of periods to depreciate.

Depreciation - Sum of the Years

A depreciation method equal to the value of the remaining years of life divided by the sum of the years remaining is multiplied by the Net Book Value. This figure is then multiplied by the percent of years to depreciate. This results in a higher depreciation expense in the early years of an asset, which decreases as you near the end of its useful life.

Depromote

In PeopleSoft Demand Planning, the process of making an adjustment to actual demand data that removes the effect of a promotion during a defined period. As a promoted period moves into history, the system creates an adjusted demand entry that is equal to the **Prorated Forecast**.

DeptID

A ChartField that defines departments or administrative offices that have operational, fiscal and/or budgetary responsibility for specific sets of activities.

Derived Metric

The result of a calculation on a report of base metrics.

Detail

A temporary assignment to a different position for a specified period when the employee is expected to return to his/her regular duties at the end of the assignment. This employee is considered for pay and strength count purposes to be permanently occupying his/her regular position. Unless the agency chooses to use an SF50, a detail is documented with an SF52.

Detail Tree

A tree that employs ranges of detail values under each node; you must manually specify the detail values.

DFI ID (Depository Financial Institution ID)

A PeopleSoft Payables bank identifier, consisting of Transit Number, Swift ID, or CHIPS ID.

Dimension

A single element of a business model, such as product, department, or location. Cube Manager uses the term Conforming Dimension.

In terms of data analysis, dimensions can be thought of as criteria, such as time, product, and location, used to pinpoint a particular piece of data. For example, in the retail industry a set of dimensions could be geography, product, time, customer, and vendor. The geography dimension would include company, chain, region, district, and finally store attributes. A dimension is also a column heading on an analysis and reporting template which you can drill through or roll up to the multiple levels.

In PeopleSoft Budgeting, a view option that assists in summarizing the rows of data in line-item budgeting.

A single element of a budgeting model, such as account, product, project, department, or operating unit. In PeopleSoft Budgeting, these dimensions typically represent the ChartFields used by your organization during your budgeting process.

Dimension Table

In the PeopleSoft Enterprise Warehouse, Dimension Tables store additional attributes or data about Facts. Some example dimensions include Customer, Channel, Geography and Product.

Direct Compensation

In PeopleSoft Workforce Analytics, Direct Compensation is payment made to workers in exchange for their contributions to the organization. Direct Compensation is typically categorized as including Cash Compensation and Long-term Variable Compensation.

Cash payments made to workers in exchange for their contributions to the organization. Direct pay is typically categorized as fixed pay (for example, base pay, shift differentials) and variable pay (for example, profit sharing, incentive, bonus). Note: Profit sharing can be considered direct pay if paid out in cash on a periodic basis or deferred pay if cumulative with the intention of payment in the long-term future.

Direct Calculation

Calculate actual and directly assigned dollars.

Direct Cost

In PeopleSoft Workforce Analytics, a direct cost of an activity or a cost object. An example is the salary cost of employees working on a project.

Director

An affiliate of the company who holds a seat on the Board of Directors for the corporation. A Director, generally, is not an employee of the corporation.

Disability and Discrimination Act of 1995

In the United Kingdom this act makes it unlawful to discriminate against individuals on the basis of their disability in relation to recruitment, promotion, training, benefits, terms and conditions of employment, and dismissal.

Disability Rate Code

The desired percentage of disabled persons that should be employed by French employers, as mandated by the French government.

Disbursement View

In PeopleSoft Demand Planning, a **Forecast View** that allows the forecast from a working view to be reported on using an alternate key. Disbursement views are built directly from the working views and inherit many working view attributes, including time period and associated user data definitions, from the parent working view.

Discounted Stock Option

Rights to a stock option at a price less than 100 percent of fair market value at the time of grant.

Discretionary Plan

In PeopleSoft Workforce Analytics, this is a plan for distributing compensation awards that provide managers the ultimate discretion over a pool of money which is either funded based on company, group, or employee performance, or it's budgeted. The discretionary award determination is sometimes guided by a pre-determined percent of the participant's salary, expressed as an opportunity. This figure can then be modified based upon management's perception of actual value created by the group or employee.

Disqualifying Disposition (DD)

When an optionee sells or otherwise disposes of the shares of stock acquired through the exercise of an incentive stock option or through an employee stock purchase plan before the holding period for preferential tax treatment has lapsed.

In the case of Incentive Stock Options, the holding period is one year of the date of exercise and two years of the date of grant. At the time of disposition, the individual recognizes compensation income equal to the difference, if any, between the option price and the fair market value of the corporation's stock on the date of exercise. If the sale price is less than the fair market value of the stock on the date of exercise, the compensation income is limited to the total sales price less the total option price, less any fees.

In the case of purchases through an employee stock purchase plan, the holding period is one year from the purchase date and two years from the enrollment date. Compensation income in a disqualifying disposition is equal to the difference between the total fair market value on the purchase date and the total purchase price.

Distribution

Provide a repository of time and associated estimated and actual allocated labor costs to other systems

The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.

Distribution Network

A distribution network is a prioritized list of Inventory business units (IBUs). When a customer orders a product, the system uses this network to determine which warehouse the stock ships from.

Distribution Profile

A definition of ChartField distributions assigned for compensation costs. A distribution profile can be used to set up defaults for how the system should distribute costs associated with a position's salary, benefits, and earnings. PeopleSoft Budgeting-specific.

Distribution Rule

You use distribution rules to determine the order in which the system searches for matches against the distribution sets matrix when sales orders are entered.

Distribution Set

Distribution Sets assign account distribution information to combinations of defining elements used on sales orders.

Distribution Type

An identifier that defines one of the different transactions that move an item into or out of an inventory business unit. Distribution types are used to create debit and credit transactions to the general ledger via the Journal Generator.

Dividend

Distribution of earnings back to shareholders, prorated by the class of security and paid typically in the form of money or stock. The amount of a dividend is decided by the Board of Directors and is usually paid quarterly.

Document Management

The process through which a user has complete control of document version including the ability to view, query, and edit documents in a secure vault. Document management enables you to seamlessly perform online document queries and view documents directly, launching them from within PeopleSoft applications. You can associate pertinent documents with engineering change requests (ECR), engineering change orders (ECO), item revisions, bills of material, manufacturing and engineering routings, production component lists, and production operation lists.

Document Sequence Number

A value that the PeopleSoft system assigns to a document (such as an invoice, voucher, or journal) when you create a document for a business unit that you have enabled for document sequencing. The system determines the number by the values of the business unit, accounting date, and document type.

Document Sequencing

A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in your system for the purpose of statutory reporting and tracking of commercial transaction activity. Document sequencing requires that you classify all financial transactions into three transaction types—journal type, journal code, and document type—and that within each transaction type, all documents you enter are numbered sequentially. When you create a document (such as an invoice, voucher, or journal), the PeopleSoft system assigns a document sequence number to that document.

Document Type

The final level of three categories for defining a financial transaction (or document), necessary when using document sequencing. It represents the business purpose of a financial transaction, such as domestic customer invoice or customer credit memo. Document type is within one and only one journal code; journal code is within one and only one journal type. Document type is the only required category, because the values of the other two categories can be derived from document type.

Dollar Tolerance

In PeopleSoft Inventory, the acceptable cost difference between expected cycle count quantities and actual quantities counted. This value allows a margin of error for an item during cycle count reconciliation based on item cost.

Domestic Relations Order (DRO)

A preliminary version of a court order (usually stemming from a divorce settlement) ordering a division of a participant's pension benefits. The order is not in effect until it is determined to be "qualified" by virtue of meeting certain requirements. At that point it becomes a Qualified Domestic Relations Order, or QDRO.

Double Byte Characters

If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].

Draft Worksheet

A work space used in PeopleSoft Receivables to track a draft through its processing life cycle.

Drill-Back Calculation

Assigns indirect dollars and Drill-Back calculations. Also, this picks-up all costs in the Calculations Detail (CALC_DETAIL_F00) that was assigned during direct calculations.

Drill Down

The ability to go down to the next level of detail in a set of data. For instance, if you're looking at an expense figure for a division, you can drill down to the expenses for each department in the division.

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Driver Lookup Table

Tables associated with a driver that enable different rates and amounts unique to a budget center.

Drivers

In PeopleSoft Activity Based Management, drivers are a means of assigning dollar amounts from resources, activities, and cost objects to other resources, activities, and cost objects throughout the model in PeopleSoft Activity-Based Management. Drivers can also be assigned across business units. There are different types of driver categories (transactional, duration, and intensity), and different ways of specifying how those dollar amounts are calculated (amount, percentage, spread even, and direct), as well as different ways that dollar amounts are assigned (depending on assignment type and object type).

In PeopleSoft Business Planning, a driver can be defined as a set of values that are used as an input to another process. In this context, a driver should be interpreted as a projection of external factors and other indicators. The user can define a relationship between the driver and a financial result. The driver values and the defined relationship then combine to produce a projection of the financial result. For example, a projection of the number of square feet used (driver) and the price per square foot paid in rent (driver) can combine to produce a projection of rent expense (financial result).

DRO

See Domestic Relations Order.

DSS (Decision Support System)

A DSS is a workstation-based analysis and reporting system, typically aimed at analysts and line managers. OLAP tools provide a powerful DSS.

Duration

In PeopleSoft Pension Administration, the utility that calculates the length of time between two dates.

Duration [Global Payroll]

An element type that calculates a period of time between two dates. For example, if you want to determine a payee's age, you can calculate the duration between his birth date and the calendar period end date.

Dynamic Group

A group in Time and Labor that enables you to establish criteria or attributes for a group of employees. All employees who fit this criteria at processing time belong to the group.

Dynamic Tree

A tree that takes its detail values—*Dynamic Details*—directly from a table in the database, rather than from a range of values entered by the user.

Dynamic Views

In PeopleSoft Demand Planning, a **Forecast View** that allows interaction with the forecast data using an alternate key structure. By using dynamic views, you streamline the working view and can complete the working-view design without having to anticipate all conceivable adjustments.

E**Earliest Change Date**

Determines both the range of dates and the amount of data that will be processed for each time reporter (see Batch Processing)

Early Punch

A punch that is more than the predefined number of hours/minutes before a scheduled punch where a time reporter is warned

Early Retirement Date (ERD)

A retirement date earlier than a plan-specified “normal” retirement date. Employees usually must meet age and/or service requirements to be eligible for early retirement, and early retirement benefits are often reduced to compensate for the longer duration of payments.

Early Retirement Factor

The reduction made to an employee's benefit if the employee elects for early retirement.

Early Warning

In commitment control, warning of possible future budget exceptions. You can specify that you are to receive a warning when commitments and expenditures reach a predetermined percentage of budget. For example, you can instruct the system to let you know when commitments and expenditures reach 50%, 80%, or some other percent of a budget.

Early/Late Adjustments

The PeopleSoft Pension Administration function that calculates early retirement factors or late retirement factors.

Earning Group

Part of a group of defaults assigned to job codes. Earnings group may include non-salaried items such as holidays and bonus pay dependent on individual company parameters.

Earnings

The amount owed to an employee based on salary, hours worked, or other calculation routines, plus other types of compensation and holiday, vacation, and bonus pay.

Earnings [Global Payroll]

An element type that defines the different types of compensation that are added to a person's pay. Examples include salary, commission, bonuses, and retirement pay.

Earnings Accrual Class

Categorizes a set of accruable earnings.

Earnings Code

Codes that represent the various types of earnings such as regular, overtime or leave.

Earnings Per Share (EPS)

The portion of a company's profit allocated to each outstanding share of common stock. Net income (reported or estimated) for a period of time is divided by the total number of shares outstanding during that period.

Earnings Type

An abbreviated and encrypted set of business instructions containing compensation instructions. Earnings Type may also contain Benefit Entitlement and Administration instructions, taxation instructions, Financial Accounting instructions, Organizational Administration instructions, work group and labor affiliation instructions, and other instructions.

Economic Loss

In Funds Transfer Pricing, this refers to the break fund economic loss, calculated by applying the theoretical value of the interest rate differential (IRD) against a cash flow stream, based on the amount of the prepayment or cancelled draw-down.

Economic Value Added

In the financial services industry, Economic Value Added is a financial metric that factors into the measurement of an activity's profitability the cost of economic capital assigned to that activity.

EDGAR (Electronic Data Gathering, Analysis, and Retrieval)

An electronic system implemented by the SEC that enables companies to file documents in conjunction with disclosure requirements mandated by the SEC.

EDI Agent

Used in EDI processing, the inbound EDI Agent loads trading partner data (flat files) into the PeopleSoft database using transaction, map, and trading partner definitions set up using EDI Manager. The outbound EDI Agent extracts information from the PeopleSoft database and generates data files that can then be processed for transmission to a trading partner.

EDI Manager

A suite of online pages used to define transaction sets, trading partner profiles, and translation maps for EDI transactions.

Edit Table

A table on 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.

EEO Company Code

In the United States companies are assigned this federal code for EEO and VETS100 reporting.

Effective Date

A method of dating information in your system. 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.

Effective Date

A method of dating information in your system. 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. The Effective Date usually defaults to your system's current date.

Effective Periods

In PeopleSoft Demand Planning, the number of periods of historical demand used in the Model Reset process. The value can be used to exclude older, possibly unrepresentative historical demand data from model **Optimization**.

Effective Sequence

A system-generated number assigned to distinguish between two job entries with the same effective date.

Effective Tax Rate

The ratio of income tax paid over gross income, showing the percentage of income actually paid in taxes.

Effectivity Date

The date on which a component can be added or substituted in production, typically specified on an item's bill of material.

EIS (Executive Information System)

An EIS is a workstation-based analysis and reporting system for executives. An EIS provides a higher-level view of the data than a DSS, and typically requires less knowledge about the underlying transactional systems. OLAP tools provide a powerful EIS.

Elapsed Schedule

A method of scheduling a time reporter's time that is based on TRC and duration. This method can be used for scheduling of elapsed time reporters (see Scheduling.)

Elapsed Time

Reporting non-clock time in increments of hours or partial hours (see Managing Time / Understanding Time Reporting).

Elapsed Time Service

A method of calculating a period of service that uses only the start and end dates of the period to determine the amount of service. Hours worked or other measures of the actual work performed during the period are not taken into account.

Electronic Certification System (ECS)

An automated Payment Voucher authorized by the Certifying Officer for use within the Treasury Department, Financial Management Service's financial system. PeopleSoft provides a method to record and generate data files for on- and off-cycle processed payments.

Element

In PeopleSoft Global Payroll, an element refers to both primary elements and supporting elements. Primary elements are comprised of earnings, deductions, absence entitlements, and absence take elements. Supporting elements are element components that are combined to create primary elements.

In PeopleSoft Enterprise Performance Management, elements are used to create a Profile. An Element can be one or more columns of data in an Enterprise Warehouse table, associated with a single dimension (for example, Customer, Product, Department, or Channel). An Element can also be KPI, Population, subscription data from a third party, preexisting Profiles, and data mining scores.

Element Group

Element Group identifies a group of elements to provide eligibility. You can then use this as a notational shortcut—instead of having to list each element, you can use the element group name. Element Group's expedite the process of manipulating earnings and deductions.

Element Name

Name assigned by the user for data fields, rules, formulas, and tables. For example, the names you give to new rules, elements, or objects.

Element Segment

When an element changes mid-period, requiring the affected element (and perhaps a subset of other elements) to be calculated multiple times on either side of the date on which the change takes place, element segmentation is used. Unlike period segmentation, the system segments only the elements you select, and creates separate result columns only for the specified elements. In element segmentation, there is only one gross-to-net result set.

Eligibility Group

Eligibility groups define the possible earnings, deduction, absence entitlement, and absence take elements that a payee might be eligible to receive. This enables you to group payees so as to assign eligibility for certain pay elements.

Eligibility Rule

PeopleSoft Benefits Administration uses eligibility rules during Benefits Administration processing to determine which benefit programs and options an employee is eligible for. Eligibility rules are closely associated with event rules: they determine what options an employee can *have*, while event rules determine which of those options an employee will actually be able to *choose*.

Elimination Set

See **Consolidations-Elimination Set**.

Email Template

Pre-defined parameters that establish automatic email generation during budget submittal, rejection, publishing, and/or targeting.

Employee

An individual employed by an organization and administered as an employee in the PeopleSoft Human Resources system.

Employee Accounts

The PeopleSoft Pension Administration function that tracks employee contributions to a pension plan.

Employee ID

A unique identification code for an individual associated with your organization.

Employee Paid Benefit

The portion of a pension benefit funded by the employee's own contributions to the pension plan. Also, the PeopleSoft Pension Administration function that determines this amount.

Employee Profile

This PeopleSoft Activity-Based Management feature enables time and labor information to be part of an analysis.

Employee Stock Purchase Plan

A type of statutory stock option plan through which employers grant options to their employees in order to provide them with additional forms of compensation.

Employee Survey

In PeopleSoft Workforce Analytics, a method for capturing information about the activities performed by a given employee as well as the amount of time they spend performing each activity to perform activity-based management.

Employee Survey Report

The Employee Survey Report is an annual regulatory report that the French government requires from employers with more than 200 employees. In French it is called "Le Bilan Social". The report is communicated to both labor unions and the government. It provides a snapshot view of the company over the past 3 years for about 200 indicators.

Employee Training Cost

Amount budgeted to pay for students' salaries while on training courses.

Employer Identification Number (EIN)

In the United States a company is typically defined as a business enterprise that has a unique federal Employer Identification Number (EIN) for payroll tax reporting purposes.

Employer's Liability Insurance Associations (Berufsgenossenschaften)

Social Insurance in Germany is maintained and administered by private organizations that act as employer's liability insurance associations. Employers pay out premiums to these associations, who administer and pay out funds to workers who are injured on the job.

Employment Cost Index (ECI) Adjustment

Annual increase to wages established/permitted by statute.

Employment Equity Computerized Reporting System (EECRS)

Canadian companies are required to report to the Federal Government on employment equity. PeopleSoft Human Resources contains the Canadian Employment Equity report (PER101CN), which creates a data interface file to the federal government's Employment Equity Computerized Reporting System (EECRS).

Employment Record Number (EMPL RCD#)

A field in PeopleSoft Human Resources Management Systems and PeopleSoft Workforce Analytics that indicates an employee has multiple job records in the system. A numeric value (0, 1, 2) is assigned to each job as a way to uniquely identify that job record.

Encumbrance

A claim against funds. It is a projection of future expenses based on the situation, as we know it today. Encumbering funds is not the same as spending them or even guaranteeing that you will spend them. It just means that if the situation as it exists today does not change, you will spend all of those funds by the end of the fiscal year.

Engineering Bill of Material (EBOM)

A listing of all the parts, raw materials, and subassemblies that form the basis of all item and product structures. EBOMs differ from MBOMs (Manufacturing Bills of Material) in that they are not visible within Production Planning or Production Management and are isolated from Manufacturing.

Engineering Change Order (ECO)

A revision to a blueprint or design, released by engineering to modify or correct a part and/or bill of material. PeopleSoft Engineering uses ECOs to manage and document required assembly and component changes.

Engineering Change Request (ECR)

A document that allows you to request manufacturing process improvements and report product defects directly to the engineering department. When workflow is enabled, ECRs can also be routed for review and approval, after which they change into ECOs.

Engineering Cost Version

The process of generating cost versions for new and modified configurations based on engineering bills of material (EBOM) and costing data.

Engineering Workbench

An engineering environment, separate from production, consisting of engineering bills of material (EBOM), engineering change requests, engineering change orders, EBOM cost roll-up capability, online BOM comparisons, and seamless integration to a document management vault.

Engineering Workbench

An engineering environment, separate from production, consisting of engineering bills of material (EBOM), engineering routings, engineering change requests, engineering change orders, EBOM cost roll-up capability, online BOM comparisons, and seamless integration to a document management vault.

Enterprise

In PeopleSoft Time and Labor, all of the business units of the installation site.

Enterprise Performance Management (EPM)

See PeopleSoft Enterprise Performance Management

Enterprise Portal

The PeopleSoft Enterprise Portal is a separate product offering purchased independently of any other PeopleSoft applications. It can be used with or without any PeopleSoft application. It can be used as a standalone corporate portal that does not access PeopleSoft data at all.

Enterprise Resource Planning (ERP)

The encompassing term for all the transaction-oriented database applications an organization deploys across its business enterprise. The term includes financial, manufacturing and supply chain, human resources, and payroll applications, among others.

Enterprise Warehouse (EW)

See PeopleSoft Enterprise Warehouse

Entry Authority

Authorization granted by employees to specific user IDs for entering expense data on their behalf.

Entry Currency

The currency used to enter budget data.

Entry Event

An automated process that generates multiple debits and credits resulting from single transactions, to produce standard supplemental accounting entries.

Entry Event Code

Designation of an Entry Event; an identifier or label.

Entry Event Generator

A mechanism that generates standard, supplemental accounting entries based on Entry Event codes.

Entry Event Process

An accounting transaction. Entry Event processes combine to form Entry Events. For example, requisition posting is a Purchasing process, and cash clearing is a Payables process. Each process can involve one or several Entry Event Steps.

Entry Event Step

Part of an accounting transaction. For example, the BUDG process includes these steps, among others: prepare allotment budgets, prepare organization budgets, and prepare revenue estimates. Entry Event steps combine to form Entry Event processes.

Entry On Duty Date (EOD)

Date that indicates when an employee started to work at his/her current agency.

Entry Type

Any activity that creates or updates an item.

EPM (Enterprise Performance Management)

See PeopleSoft Enterprise Performance Management

Equal Employment Opportunity Commission (EEOC)

In the United States the EEOC requires that most companies file one or more reports from a series named EEO-1 through EEO-9. These reports include counts by federal employment categories of male and female employees in certain ethnic groups.

Equitization

A 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. For organizations with complicated parent/subsidiary business unit relationships, this automated process reduces the process time and reduces the possibility for errors.

Equity Increase

In PeopleSoft Workforce Analytics, Equity Increases are base pay increases granted to bring an employee's pay up to some internally specified standard for your organization.

Equivalent Standard Deviation

In PeopleSoft Demand Planning, a **Standard Deviation** developed during the Model Reset process that enables you to compare standard deviations from different models. The deviation is calculated by multiplying the **Model Equivalency Factors** defined on the **Control Group** by the standard deviation.

ERISA (Employee Retirement Income Security Act of 1974)

The U.S. Federal legislation enacted to prevent abuses of employee pension rights by employers.

Error Exception

A transaction that is stopped because the budget limits would be exceeded if it continued. For the transaction to proceed, action must be taken, such as canceling or reducing the transaction amount, increasing the budget amount, overriding the budget limits, or transferring available funds from another budget.

Error Ratio

The ratio of the statistical Standard Deviation to the base component that gives an indication of the accuracy of the forecast. The ratio is presented in the PeopleSoft Demand Planning Audit and Accuracy Review and is calculated during the **Forecast Calculation Process**.

Estimated Gross

Estimated labor cost associated with reported time (see Managing Time, Understanding time Reporting Codes).

Estimated Shipments

A group of shipment schedules used to manage sales order requested shipment data and actual shipment data. Used in conjunction with weight and volume pricing and freight charge calculations.

Ethnic Code

The Federal Office of Management and Budget (OMB) racial and ethnic census categories used for classifying individuals in U.S. Government reports.

ETL (Extract-Transform-Load)

See Extract-Transform-Load.

ETL maps

ETL maps provide rules for importing your source data to the data warehouse tables.

Evaluated Receipts Settlement (ERS)

A PeopleSoft Payables feature that matches receipts against purchase orders and generates vouchers without requiring an invoice.

Evaluations Periods

In PeopleSoft Demand Planning, indicates the number of future periods to use for the calculation of forecast errors. For example, if the number of evaluation periods is two, then the forecast error in April 2001 (after posting demand for April) would be determined by comparing the actual demand for April and the April forecast generated in February 2001. Evaluation periods are set separately for each view.

Event

Events are predefined points either in the Application Processor flow or in the program flow. As each point is encountered, the event fires on each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, OnRouteSubscription, and so on.

Event

Occurrence or happening.

Event Class

An event or type of event that results in a change of benefits eligibility for an employee or dependent. Event classes are prominently used in COBRA and Benefits Administration processing.

Event Maintenance

The process that enables you to manage ongoing enrollments during a plan year. Changes involving maintenance include new hires and re-hires, terminations, family status changes, and changes to benefits eligibility.

Event Rule

Used by PeopleSoft Benefits Administration to determine how events are processed by the system. Event rules look at the benefit plan options an employee is eligible for and determine which options the employee can actually *choose*. Event rules are closely associated with eligibility rules but it is important to note that they are not the same. Event rules *should not* be used to determine eligibility.

Event Trigger

You use triggers to tell the system that when a change takes place to certain data (an event), it should perform an action automatically. When the event occurs, the system writes a line to a trigger table. Then when it's time for the action, the system reads the data from the trigger table and performs the appropriate action.

EW (Enterprise Warehouse)

See PeopleSoft Enterprise Warehouse.

See also PeopleSoft Enterprise Performance Management (EPM).

Expected Losses

In the financial services industry, the amount the institution predicts it will lose in portfolio value. Loan loss reserves are set aside to cover the expected losses.

Excepted Service

As defined by 5 USC 2103, the Excepted Service consists of those civil service positions that are not in the competitive service or Senior Executive Service.

Exception

User or system delivered, defined conditions applied to scheduled, reported or payable time that require audit or review (see Time Management)

Exception Rules

A rule (s) that is applied to scheduled, reported time, and payable time in order to determine conditions which require audit or review (see Time Administration).

Exception Severity

The degree of importance associated with an exception. For example, in exception which is a result of an employee clocking in late may have a Medium severity, while an exception which is a result of an employee not clocking in has a High severity (see Time Management).

Exception Time Reporting

A method of time reporting where only differences to the schedule are provided (see Time Reporting).

Excess Plan

A pension plan where the benefit formula provides an increased benefit for Final Average Earnings above a specified integration level. This compensates for the fact that Social Security benefits are based only on earnings up to a specified maximum.

Exchange Rate Variance

In PeopleSoft Cost Management, the change in currency exchange rate between the time the item is received into inventory and vouchered in Accounts Payable.

In PeopleSoft Payables, a matching feature that compares the exchange rate on the purchase order and the invoice and then copies any variance to PeopleSoft Inventory tables for analysis and accounting purposes.

Exclusive Pricing

Supersedes all pricing structures in effect for customers and products, except **Buying Agreement**, and enables you to drive pricing with a promotional structure. Exclusive pricing can be set up for a specific time frame and associated with particular orders.

Executive Schedule (EX)

Compensation and pay plan used by the Executive Branch of the federal government. Statutory pay limits are derived from several of the pay levels within this plan and imposed on the General Schedule and other existing pay plans throughout the Federal government.

Exercisable

The option shares that are available to the optionee to exercise.

Exercise

The transaction in which an individual purchases or “exercises” the right to purchase the option shares. The IRS refers to the purchase of company stock in an employee stock purchase plan as an exercise.

Exercise Date

The date on which an individual purchases underlying shares from an option grant or transacts a simultaneous purchase and sale of underlying option shares through a cashless exercise and collects option profit in cash or shares.

Exercise Price

The price per share required to exercise a stock option.

Exercise Proceeds

Cash, stock or other recognition received by a company as a result of option exercises, including cash or stock paid by individuals to exercise options and cash company tax savings from deducting non-statutory option profits at exercise.

Expense Location

Geographic area defined to enable the recording, tracking, and reporting of expense activity.

Expense Location Amount

Authorized spending defined for an expense type in a particular expense location and currency.

Expense Location Group

Collection of expense locations based on a common classification such as state, country, or continent.

Expense Type

Means of itemizing various kinds of business expenses. Examples are hotel, dinner, or ground transportation.

Expense Type Edit

User-defined requirement that mandates input of additional data—such as an airline ticket number or number of nights in a hotel—when an expense type is selected in an expense report.

Expense Type Group

Expense types that are classified together for reporting and tracking.

Expensed Item

Non-inventory item which may represent software, manuals, documentation, or any item for which no quantity on hand is maintained, but which can be specified on a bill of material (BOM). Expensed items can only exist as components on a BOM and cannot have a BOM, routing, or production area/item definition.

Expiration

The process by which the outstanding shares of an option cease to be exercisable, generally at the end of the option term. The length of the option term and the date of expiration are established in the Grant Agreement.

Expiration Date

In PeopleSoft Inventory, the date a lot exceeds its Shelf Life and is no longer acceptable for fulfillment or consumption. (Expiration Date = Creation Date + Shelf Life)

Expiration Date

The last day of an option term in which the option is canceled and no longer exercisable.

Expiration Grace Period

When you enter a stock action allows the exercise of the already vested shares as of the action date, the system will calculate the date these shares expire based on the grace period defined on the Stock Action Rules page for that stock action. The system will automatically cancel vested shares not exercised at the end of the expiration grace period.

Express Customer

A customer for whom the minimum necessary information is entered.

Expressions

Expressions enable you to create pseudo-columns made up of mathematical calculations based on actual fields on a table. Since expressions are resolved at run-time, duplicate information is not stored on the database.

Express Order

An order entry shortcut in PeopleSoft eStore and Mobile Order Management whereby the customer populates the shopping cart and goes directly to the order summary to checkout, bypassing any billing or shipment modification screens. Billing and shipping information defaults in as previously entered.

External Data

Data from external sources. For instance, in PeopleSoft Workforce Analytics, external data may include third party salary surveys and benchmark metric surveys.

External Scheme

In the United Kingdom an External Scheme is a vocational training, education and job placement program involving an employee, an employer and the government.

External System

Any system that is not directly compiled with the PeopleTools servers.

Extra Time

Any hours worked outside of an employee's normal (scheduled/shift) hours or days. Extra time may be scheduled in advance of when it is worked, and may be subject to special compensation rules. It may be treated differently than standard time for purposes of Benefit Entitlement and Administration.

Extraction

A reusable query that specifies what information should be retrieved from the Quality database.

Extract-Transform-Load (ETL)

The extraction and transport of data from one server to another remote server. In PeopleSoft budgeting ETL specifically refers to the process by which financial and human resource data is extracted from PeopleSoft Financials and HRMS and transferred to the PeopleSoft Enterprise Warehouse which PeopleSoft Budgeting uses to access and record data transactions. Within PeopleSoft Enterprise Warehouse, data migration typically refers to information moved from outside sources into the Operational Data Store tables.

Extrinsic Rewards

Tangible rewards that can be given to the individual. Typically categorized as financial and non-financial rewards. Financial rewards would include direct compensation, indirect compensation and deferred compensation. Non-financial rewards are provided to the individually and viewed as a benefit by the individual based on the culture of the organization such as the size or location of one's office.

In PeopleSoft Workforce Analytics, tangible rewards given to an individual. Typically categorized as financial and non-financial rewards. Financial rewards would include direct compensation, indirect compensation and deferred compensation. Non-financial rewards are provided to the individually and viewed as a benefit by the individual based on the culture of the organization such as the size or location of one's office.

F**Fact**

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.

Fact Table

A fact table is where facts are stored in the PeopleSoft Enterprise Warehouse.

Fair Labor Standards Act (FLSA)

A federal regulation governing several time and labor issues. *FLSA Overtime* requires that all nonexempt employees be paid at a rate of time-and-one-half for all hours over 40 physically worked during a workweek. This requirement may be superseded by state or local laws when the lesser law is to the greater benefit of the employee, or by union contract. An *FSLA Workweek* is a permanently established, regular workweek for a group of employees.

Fair Market Value (FMV)

The price of a company stock based on the current market value as determined by supply and demand, or a valuation method. The stock market sets the fair market value for a public company. For a private company the fair market value is more subjective, but typically determined by financial factors or set by an outside valuation company.

Fair Market Value Tracking Methods

Methods used to track and report trading activity on various exchanges (i.e. NYSE, AMEX, NASDAQ, etc...).

Family Medical Leave Act (FMLA)

A federal regulation that protects health benefits and job restoration for employees who must take a leave from work to care for themselves or family members. FMLA regulations contain provisions regarding employer coverage, employee eligibility and entitlement, notice and certification, continuation of health benefits, and job restoration. PeopleSoft Benefits applications offer FMLA Plans that help employers and employees determine FMLA eligibility and schedule and track FMLA leave requests.

Federal Employee Group Life Insurance Program (FEGLI)

Generally, if the employee has Federal retirement coverage or is on a temporary appointment exceeding one year, he/she is eligible to participate in the FEGLI program. Once eligible, he/she is covered automatically for Basic Life Insurance and premiums will be deducted from gross salary unless coverage is waived within the first period of eligibility. The program offers Basic Insurance coverage and three types of optional coverage: Option A (Standard), Option B (Additional), and Option C (Family).

Federal Employee Pay Comparability Act (FEPCA)

This law provides a structure and methodology to determine and authorize locality-based pay adjustments to Federal employees in order to elevate their basic pay to be commensurate with private sector employees working in the same occupations in the same geographic localities. It also includes a feature to authorize agencies to make advance salary payments to attract candidates for open positions which have consistently been hard-to-fill in certain geographic areas.

Federal Employees' Compensation Act (FECA)

This law provides compensation and medical benefits to civilian employees of the United States for disability due to personal injury or disease sustained while in the performance of duty. A feature of this law provides for the continuation of pay (COP) without charge to leave for up to 45 calendar days due to disability and/or medical treatment following a traumatic injury. Employees file claims with the U.S. Department of Labor, Office of Worker's Compensation, which adjudicates the claims and compensates the employing agencies for the employee's pay and benefits during the claim period.

Federal Employees Health Benefits (FEHB)

Generally, the employee is entitled to coverage by the FEHB program if appointed to a position with Federal retirement coverage or has been on the rolls on a temporary appointment for more than one year. The Federal employer shares the cost of the premium (about 75%); actual premiums depend on the plan selected. If under a temporary appointment, the employee pays both the employer and employee shares. If the position is part-time, the employee pays the employee share and a portion of the employer's share.

Federal Employees Retirement System (FERS)

A retirement plan available to employees of the federal government. FERS covers all employees appointed to a position in the federal government after January 1, 1987. Coverage includes Social Security, a basic annuity plan, and a TSP.

Federal Employer Identification Number (EIN)

Used to identify the tax accounts of businesses. Businesses, which have employees or operate business as a partnership or corporation, must obtain an EIN.

Federal Insurance Compensation Act (FICA)

Employee and employer contributions to Social Security.

Federal Reserve Transit Number

A unique identifier for U.S.-based banks, allowing banks to transfer funds within the Federal Reserve system.

Feeder Line

A type of production line replenishment used in PeopleSoft Flow Production. If you are using feeder line replenishment, smaller production lines create subassemblies that feed directly to your production line.

FEGLI Living Benefits Act

Beginning 7/25/95, a Federal employee who is terminally ill may elect to receive a lump-sum payment equal to the full amount of basic life insurance only, or a limited portion designated in multiples of \$1000. An election to receive this benefit is irrevocable; the individual is considered terminally ill if his /her life expectancy is 9 months or less.

FICA (Federal Insurance Contributions Act)

FICA consists of both a Social Security (retirement) payroll tax and a Medicare (hospital insurance) tax. The tax is levied on employers, employees, and certain self-employed individuals.

Fictitious Calculations

Fictitious calculation rules perform temporary calculations. A fictitious calculation is a sub-calculation run during a normal calculation to determine a net that would have been computed if certain parameters were used. This result is then used for further processing in the normal calculation. A fictitious calculation is always started from inside a normal calculation, run for one payee, and run for a specified set of periods.

FIFO (First In First Out)

Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the earliest exercise, purchase or release dates for which shares remain available for sale.

Fill-In Employment

Employment held by persons during the time period after leaving their regular occupation in anticipation of, but before entering, military service.

Filter

A filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.

Final Average Earnings (FAE)

The PeopleSoft Pension Administration function that averages earnings from a specified period of an employee's career. The result is used as a component of the pension benefit formula.

Final Forecast

The final forecast is the prorated version of the adjusted forecast, summarized to all levels of the product hierarchy. This is the best-guess version of the forecast that is used to make all decisions dependent on the forecast.

Final Table Merge Engine

Final Table Merge Engine is used by the PeopleSoft Enterprise Warehouse; it moves enriched data from one table into another. When you run a job in a jobstream, the immediate results are stored in temporary tables. At the end of the jobstream, the Merge Engine runs and merges the output temporary tables into the final tables, where processing can continue.

Financial Accounting

The accounting for a business entity's assets, liabilities, revenues, and expenses to determine its net worth and to produce financial statements. Within Generally Accepted Accounting Principles, a business has some latitude as to when and how to record its financial transactions, as long as it continues to meet its legal and regulatory requirements. A business' financial accounting requirements are not necessarily the same as its cost accounting requirements. The one should not be mistaken for the other (i.e. the extent to which a company's financial accounting system meets its cost accounting needs depends on how it has chosen to describe its chart of accounts and the level at which it has chosen to record financial transactions.

Financial Instrument

In the financial services industry, a specific product or service sold by a financial institution to its customers. In terms of the reporting hierarchy, a product falls under a ledger account, while an instrument falls under a product. A product may be treated like a generic description or category, while an instrument is a specific instance of a category.

Financial Performance Measures (FPM)

For the financial services industry, the Financial Performance Measures program performs calculations on financial instruments based on the rules defined in the Financial Calculation Rules module, and using input from the Cash Flow Generator, Stratification engine, Product Pricing, and Curve Generator. Its calculations include: measures of duration, option-adjusted spread and option-adjusted cost for PeopleSoft Funds Transfer Pricing, and Monte Carlo simulation for PeopleSoft Asset Liability Management.

Financial Product

In the financial services industry, a product or service sold by a financial institution to its customers. In terms of the reporting hierarchy, a product falls under a ledger account, while an instrument falls under a product. A product may be treated like a generic description or category, while an instrument is a specific instance of a category.

Financial Services Instrument

In the financial services industry, products created by financial institutions and sold to retail customers. Product prices and interest rates are set by the financial institutions and take into account its customers' behavioral models.

Financial Statement Simulation

A facility within Planning & Simulation which establishes rules for simulating future period, or pro-forma, financial statements. The user defines corporate financial policies, such as corporate tax rates, dividend distribution frequency, and force balancing rules, which are then applied to cash flows for a given future accounting period. The Financial Statement Simulator engine drives costs and revenues to accounts on PF_LEDGER_F00 via a scenario.

Financials Warehouse

See Warehouses.

First Year Amount

See 1st Year Amount.

Fixed Basis

The basis option enables you to create the data for the Basis online, as part of the rule. Fixed Basis is used with the Allocation Manager only. It is available with all methods except when Period-Based Allocation is being used. The Fixed Basis is a predetermined table that can be populated online.

Fixed Offering

The offering type is fixed when the end date of each offering is the same for all employees regardless of the employee's grant dates.

Fixed Percentage

A fixed percentage value. The source pool amount will be split based on this percentage to get the target amount. Used with the Allocation Manager.

Fixed Period Requirements

In PeopleSoft Enterprise Planning and Production Planning, a lot-sizing technique that sets the order quantity to the demand for a given length of time.

Fixed Picking Bin

A dedicated picking location for an inventory item. Fixed picking bins are replenished from bulk locations when the available quantity falls below the optimal quantity.

Fixed Plan

A stock purchase offering period where the ending offering date will be the same as the purchase date. Eligible employees will always purchase stock on the specific purchase dates and by the purchase rules you define.

Fixed Quantity

An **Inventory Policy** method that defines a fixed amount of an item to be ordered to meet replenishment needs. This method can be selected as an inventory policy for order quantity, safety stock, **Reorder Point**, and minimum and maximum parameters.

Fixed Source

The fixed source option enables you to create the data for the Source online, as part of the rule. Fixed Source is used with the Allocation Manager only. It is available with all methods except when Period-Based Allocation is being used. The Fixed Source is a predetermined table that can be populated online.

Flexible Credit

Any credit associated with a given benefits program, plan, or type of coverage. Credits based on an entire program can be applied toward the benefit costs however the employee chooses.

Flexible Hours

Hours during the workday, workweek or pay period during which a time reporter covered by a flexible work schedule may choose to vary his times of arrival and departure from the worksite (see Scheduling)

Flexible Spending Account (FSA)

An account to which an employee and (optionally) an employer pledge an annual amount for a plan year. The employee then submits claims for authorized expenses.

Flexible TimeSpan

A user-defined period into which costs can be collected. Flexible TimeSpans can be as long or as short as you like—covering multiple years or a single day. The main purpose of Flexible TimeSpans is to assist you in analyzing costs.

Flexible Work Schedule

A method of scheduling a time reporter's time that is based on a range of flex hours of start and stop times and core work hours. This method can be used for scheduling clock and elapsed time reporters (see Scheduling)

FLSA Status

A PeopleSoft Human Resources term that is used to indicate whether a job is exempt or nonexempt according to the Fair Labor Standards Act. All employees associated with a

particular job will receive that job's FLSA Status. FLSA Status is an eligibility determination factor for PeopleSoft Benefits Administration.

Forecast Attribution

A FSI (financial services industry) transformation process through which forecasted product originations are pooled and run through the cash flow engine for future periods.

Forecast Calculation Process

In PeopleSoft Demand Planning, the process by which a **Statistical Forecast** is generated for each item at each level of the view. When a **Forecast Item** is set to recalculate, the system tries several forecast calculation methods and picks the one with the least amount of error. This process also makes adjustments for promotions and filters for abnormal demand.

Forecast Definition

Forecast definitions are a set of forecasting rules that generally govern multiple forecasts distinguished by key properties such as products, customers, channels, and so forth.

Forecast Element

Each forecast within a single definition is called a Forecast Element.

Forecast Fulfillment

In PeopleSoft Demand Planning, a process used to manage forecasted demand over a period of time. The process makes it possible to divide the total forecast demand into portions so that certain portions can be met, even if the total forecast cannot be met entirely.

Forecast Item

In PeopleSoft Demand Planning, a logical item used as the basis to forecast demand. The components of a forecast item key are defined for each level in a forecast view.

Forecast Level

See Level.

Forecast Period

A period in time as defined by the calendar for which data is processed through the PeopleSoft Demand Planning model.

Forecast Start Period/Year

Determines the most recent period for which demand data is available for a forecast view. This period can also be described as the last actual demand period to have had an impact on the forecast.

Forecast View

See **View**.

Foreign Education

Education acquired outside of any state of the U.S., the District of Columbia, the Commonwealth of Puerto Rico, a Trust Territory of the Pacific Islands, or any territory or possession of the U.S.

Form 10-K

A form used for annual reports pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934 for which no other form is prescribed.

Form 10-Q

A form used for quarterly reports under Section 13 or 15(d) of the Securities Exchange Act of 1934, filed pursuant to Rules 13a-13 or Rule 15d-13. This report, which public companies are required to file quarterly with the SEC, provides unaudited financial information and other selected material.

Form 5500 Participant Count Extract

A PeopleSoft Pension Administration data extract containing data that a plan administrator needs in order to complete IRS Form 5500, used to report on the number of plan participants.

Form S-8

A form used to register securities offered by a reporting company under its employee benefits plans, including stock option plans. Also called the Registration Statement under the Securities Act of 1933.

Form W-2

A form used by employers to provide workers with a statement of wages, tips and other compensation from the previous year. This form, distributed employees by January 31 of each year, reflects state and federal taxes, social security, Medicare wages, and tips withheld.

Formula

Element which enables you to define your own formulas for use—gives further flexibility to define complex organizational needs.

Formula Plan

This compensation distribution plan type is based on a pay out rule, as the pay out rule is defined. The pay out rule can be based on a flat amount, a percentage, or a data element. Whereas a Target Plan distributes pay out based on a comparison of a performance measure against a target, in a Formula Plan the pay out is based just on the pay out rule.

French Professional Elections

French companies employing a certain number of employees must hold elections for selecting personnel representatives (Délégués du personnel), and members of the Work Council (Comité d'Entreprise).

Frozen Rate

A rate that is applied to allocate resources to activities in place of the actual, budgeted and capacity rates calculated by the Activity-Based Management (ABM) Engine.

FTE (Full Time Equivalency)

FTE is the percent of full time the employee should normally work in this job. Full time is defined by the Standard Hours specified in either the Salary Plan Table or the Default Standard Hours specified in the Installation Table.

FTP (Funds Transfer Pricing) Adjustments

Adjustments made to the PeopleSoft Funds Transfer Pricing (FTP) base rate, for such factors as geographic premiums, liquidity premiums, embedded options, or incentive programs.

FTP (Funds Transfer Pricing) Base Rate

In PeopleSoft Funds Transfer Pricing (FTP), this refers to the basic charge or credit that is applied to a ledger account, a product, or an off-balance sheet position.

FTP (Funds Transfer Pricing)

See PeopleSoft Funds Transfer Pricing.

Full-Time Equivalent

See FTE.

Function

A category of pension calculation. PeopleSoft Pension Administration divides a pension calculation into nineteen “core functions” such as Service, Final Average Earnings, and Benefit Formula.

Function Result

The calculation rules for any of PeopleSoft Pension Administration’s nineteen core functions. These rules match Definitions—the specific parameters for the function—to the Groups of employees that use that particular definition. Function Result also refers to the value produced by the rules.

Fund ID

In the financial services industry, Fund ID is a lookup code used to track investment funds associated with a financial instrument or account. Provided primarily by the financial analytic applications to track investment funds for insurance policies.

Funds Transfer Pricing (FTP)

See PeopleSoft Funds Transfer Pricing.

Fungible

This term describes a resource used for multiple activities.

Future Period

Any pay period which is not current and whose close date hasn't passed (see Time Reporting).

Future Periods

The number of periods of future forecasts maintained by the PeopleSoft Demand Planning system.

G**Gang Reporting**

See Crew Reporting.

General Deduction

Any non-benefit deduction. Examples include charitable deductions, union dues, parking, garnishments, and bonds. General Deductions are calculated from the General Deduction Table; Benefit Deductions draw on one of the benefits tables.

General Ledger Distribution

The process and guidelines by which accounting information is transferred from your PeopleSoft Receivables or Deduction Management system to a general ledger system.

General Schedule (GS)

Compensation and pay plan used by the Executive Branch of the federal government.

Generation Control

Generation control elements allow you to indicate to the system whether to process an element based upon criteria you define. There are six parameters that control this function and comprise the definition of the generation control element—HR Status, HR Action/Reason, Segment Status, Frequency, Formula, and Run Types.

Generic Conversion Factor

A conversion factor that applies universally between two units of measure. The factor is used in the conversions between levels of PeopleSoft Demand Planning **Forecast Items** and Inventory Planning **Policy Item**.

Generic Process Type

This term applies to 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," "SQR Report," and so on.

Geo RSZ Code

This code is for Belgian employers to track the geographical location for RSZ codes.

Geographic Location Code

In Canada this code is prescribed by the government and refers to the location a business is in.

Giveaway Adjustment Type

In PeopleSoft Order Management, the price break tables are set up to indicate what product the user receives as a free premium based on defined quantities or prices. The giveaway item does not have to be the same product that the customer is purchasing. For instance, you may set up a price break that indicates that a purchase of 100 widgets entitles the customer to one or more free T-shirts. The system automatically adds an order line for the free item. Giveaways cannot be applied to the total order.

Goals Matrix

In PeopleSoft Workforce Analytics, a matrix used to create calculation rules for group or employee performance goals. You can combine and standardize multiple performance goals into a single, weighted, goal score, against which actual performance is compared. A Goals Matrix can be used to in conjunction with a pay out distribution plan called a Target Plan.

Grace Period

A period that is a number of hours or minutes before or after a scheduled punch where a time reporter's punch is accepted. For Stock Administration, the period of time an optionee has to exercise an option after termination and before the option expires.

Grade

A range of pay in a graduated scale that includes positions of different occupational groups. The work performed should be equivalent as to the level of difficulty and responsibility and the level of qualification requirements of the work. The levels are established and designated within a specific pay plan by law or regulation.

Graduate Education

Successfully completed education in a graduate program for which a bachelor's or higher degree is normally required for admission. To be creditable, such education must show evidence of progress through a set curriculum, i.e., it is part of a program leading to a master's or higher degree, and not education consisting of undergraduate and/or continuing education courses that do not lead to an advanced degree.

Grandfathered Benefit

A benefit that an employee was entitled to prior to a change in the plan and that defines the employee's new minimum level of benefits. The change might be caused by a plan merger, new legislation, or a plan amendment.

Grant

A contractual right giving an individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as an option.

Grant Agreement

The legal document issued by a company defining the number of shares granted, grant price, vesting schedule and other terms and conditions of the stock option or stock award.

Grant Date

The date the individual begins participating in a stock purchase offering. The date on which an option or other award is granted. The date the company enters into the grant agreement. The underlying stock's fair market value on this date generally derives the option price.

Grant Price

The price per share at which the stock option was granted. This is the price per share the individual must pay when exercising the option.

Gross Salary

The sum of an employee's salary and earnings defined as part of gross salary. The gross salary is used to calculate budget amounts for benefit plans defined as a percentage of an employee's salary.

Gross-up

The process used to calculate taxes and resultant gross pay from a check for an exact net amount.

Group

In PeopleSoft Billing, a specific term for a posting entity composed of one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

Group

Any set of records associated under a single name or variable in order to run various calculations in PeopleSoft Business Processes. In Time and Labor, for example, employees are placed in groups for time reporting purposes, while in Administer Variable Compensation, groups identify which employees are eligible for what forms of compensation. In PeopleSoft Pension Administration, you'll use Custom Statements to define criteria for grouping employees, then by associating calculation rules (Definitions) with specific Groups, you can vary rules for different classes of employees.

Group Asset

A financial asset with no cost information. It is used to depreciate the sum of the costs of its associated group member assets.

Group Asset Depreciation

The depreciation of a group asset calculated using an average service life set by a local regulatory agency and a calculated group depreciation rate.

Group Coverage (Or Generic) Qualification Standards

Standards prescribed for groups of occupational series that have a common pattern of education, experience, and/or other requirements.

Group Member Asset

A financial asset with cost information. Cost information for all group members of a group asset is summed up to the group asset level, where depreciation is calculated.

Group Security

The ability to grant or deny access to groups. You can set up group security by Group ID or by user ID.

Group Security [Time and Labor]

The ability to grant access to employee time, by providing security through Time and Labor's groups functionality. For example, you might want your employees to only access their own records, or allow your supervisors who handle all of the time input for have access to specific groups. You can restrict the user from accessing everyone, or allow the user to be able to access only their own records, or only a specific group. This feature also provides the ability for employees to report their own time.

Group Type

An indicator of the activity that created the billing group: billing, maintenance, payment, transfers, or unposted.

H

Handicap Code

A code that identifies a type of physical or mental impairment that substantially limits one or more of an employee's major life activities.

Hazard/Disposal Code

An inventory item group sharing a disposal routine.

Headcount

The number of people represented by a given Employee Survey record in the PeopleSoft Enterprise Performance Management product line.

Health and Safety Executive (HSE)

Health and Safety reporting for your UK operations is sent to the local office of the HSE per the requirements of the RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations).

Health Benefits Code

An alpha/numeric code that identifies each Health Benefit plan.

Health Benefits Effective Date

Date the health benefit plan goes into effect or the effective date of cancellation.

Hierarchy

Hierarchy refers to the relationship between the levels in a dimension.

Highly Compensated Employee (HCE)

An IRS employee category applied to employees who are considered “highly compensated” according to a federally set standard. This distinction is used for the purposes of nondiscrimination tests, to determine that Section 401 and Section 129 plans do not discriminate in favor of highly compensated employees.

HIPAA

The Health Insurance Portability and Accountability Act of 1996. PeopleSoft Benefits applications enable you to comply with this act, which requires that employers provide Certificates of Group Health Plan Coverage to employees who have their health coverage terminated. This certificate lists group health coverage an employee had for the twelve month period prior to the date coverage ended as a result of termination of coverage. The HIPAA certificate will be used by subsequent health coverage carriers to evaluate pre-existing condition clauses, if applicable.

Historical Periods

In PeopleSoft Demand Planning, a component that indicates the maximum number of periods of historical demand maintained for a **Forecast Item** within a **Forecast View**. Historical periods must be a minimum of two years in order to support the development of seasonal models based on an item's demand history.

Historical Rules

An element used to set up rules that retrieve data from prior periods. Historical rules can be used in formulas and fictitious calculations.

Historical Usage Calculation Method

In PeopleSoft Inventory Planning, a method that defines the set safety stock or minimum inventory level. The usage is based on the review of historical demand over the number of effective periods. The historical demand quantity is determined by one of four methods; maximum possible usage, Lead Time, estimated daily or period use, and static values calculations.

Hold Grade/Step

Grade/step the employee was in prior to receiving a temporary promotion.

Hold Last Equivalent Increase (LEI)

Date held by an employee for this event prior to receiving a temporary promotion. Necessary in order to establish the WGI due date if returning to original grade/step.

Hold Position Description

The new position description number that is the result of a reclassification action prior to the NOA being processed.

Hold Purchase

A flag that tells the system to keep this participant in the purchase process. The hold flag is maintained at the contribution page.

Hold Within Grade Increase (WGI) Due Date

WGI due date prior to an employee receiving a temporary promotion.

Holding Period

Typically refers to the holding period required for ISO's and Qualified Section 423 Purchase Plans, to receive preferential tax treatment on a disposition of shares. See Disqualifying Disposition.

Hours Counting Service

A service calculation that uses actual or generated hours to determine the service credited to a pension plan participant.

Hours Equivalence Service

A service calculation that uses hours to determine service, but that uses a set number of hours per day, week, or other period worked rather than counting actual hours.

HR Action/Reason Category

A group of related job actions—for example, hire and rehire—treated similarly for pension purposes in PeopleSoft Pension Administration.

HRMS Warehouse

See Warehouses.

I**Ignore Plan**

Complex event processing feature of PeopleSoft Benefits Administration that enables the user to designate plan types linked to a particular Event Rules/Event Classification combination as being unaffected by Benefits Administration processing.

Ignore Violations

The ability to report over capacity violations but not to score or repair them during the optimization process.

Imputed Income

Theoretical income that a company pays on behalf of an employee but the individual does not actually receive. This “theoretical income” must be added to the employee’s gross wages. In general, imputed income refers to the value of excess Group Term Life or Dependent Life coverage.

In Punch

Indicates start of a shift.

In the Money Option

When the fair market value of the stock is greater than the grant price of an option.

INAIL code

In Italy, the INAIL code is used to classify jobs according to the level of risk associated with the job and the related risk insurance required by the employer. INAIL codes are defined by the employer.

Incentive Pay Plans

In PeopleSoft Workforce Analytics, pay plans that are formula-driven based on the expected results defined at the beginning of a performance cycle. Incentive plans are designed for the individual worker, or for group levels such as teams, business units, divisions, or company-wide. Incentive plans are used for a variety of reasons; including cost control, alignment of employee and shareholder interests, and increased focus on specific performance indicators.

Incentive Plans

Pay plans that are formula-driven based on the expected results defined at the beginning of a performance cycle. Incentive plans can be designed for the individual worker or at group levels such as teams, business units, divisions or company wide.

Incentive Stock Option (ISO)

For an option to be considered an Incentive Stock Option, it must have the following characteristics:

- The option must be granted pursuant to a plan which includes the aggregate number of shares which may be issued under options and the employees (or class of employees) eligible to receive options, and which is approved by the stockholders of the granting corporation within 12 months before or after the date such plan is adopted;
- The option must be granted within 10 years from the date such plan is adopted, or the date such plan is approved by stockholders, whichever is earlier;
- The option is not exercisable after the expiration of 10 years from the date such option is granted;
- The option price is not less than the fair market value of the stock at the time such option is granted;
- The option is not transferable by such individual otherwise than by will or the laws of descent and distribution, and is exercisable, during his lifetime, only by him, and;
- The optionee, at the time the option is granted, does not own stock possessing more than 10% of the total combined voting power of all classes of stock of the employer corporation or of its parent or subsidiary corporation.

Incomplete Punch

A punch that cannot be processed (i.e. missing employee ID, invalid date or time).

Incremental Budgeting

A budgeting option during budget development that uses prior year actual or budget values as a basis and then applies a percentage that increments the base. PeopleSoft Budgeting-specific.

Incumbent

An employee currently assigned to a position.

Indirect Compensation

Typically involves non-cash types of compensation awarded to the individual in exchange for their contribution to the organization. Common types of indirect pay include health and welfare benefits (for example, medical, dental, vision, long-term disability, short-term disability, unemployment insurance), payment for time not worked (for example, holiday, vacation, sick), and employee services and perquisites (for example, club memberships, parking, holiday gifts).

Indirect Cost

A cost that is assigned by management to an activity or a cost object. An example is the cost of office space assigned to an activity.

Individual Occupational Requirements

Requirements, e.g., experience or education, for particular occupational series of positions within a series and are used in conjunction with a group coverage (generic) standard.

Individual Retirement Record (IRR)

Used by the Office of Personnel Management (OPM) as the basic record for determining the retirement benefits payable to separated federal employees and their survivors. Employees covered by the CSRS retirement plan require SF-2806. Employees covered by the FERS retirement plan require SF-3100. In addition, the SF-2806-1 and SF-3101 are used for corrections to the IRR. See also Correction to IRR.

Inherit Control Group Policies

In PeopleSoft Inventory Planning, a feature that controls whether the policy for an item is set explicitly or defaults from the associated **Policy Control Group**. A series of check boxes enable you to define which policies to inherit.

Initial COBRA Events

The event which makes an individual eligible for COBRA coverage. Typical initial COBRA events include loss of benefits eligibility due to termination, reduction in hours, retirement, and military leave, as well as divorce, death of employee, and Medicare entitlement. See COBRA and Secondary COBRA Events.

INSEE (National Institute for Statistical and Economical Studies) Codes

INSEE is an official statistics and economics organization in France. INSEE codes for your French company's organizations are used in regulatory reporting.

INSEE PCS (Classification par Catégorie Socio-Professionnelle) Code

Each PeopleSoft Human Resources French Jobcode is linked to a four-digit INSEE PCS, or social/professional classification code.

In-Service Date

In PeopleSoft Asset Management, the date upon which an asset is placed in service. In-service date is used in conjunction with an asset's prorate convention to determine Begin Depr Date.

Inservice Placement

Includes a noncompetitive action in which a position is filled with a current or former competitive service employee through promotion, reassignment, change to lower grade, transfer, reinstatement, reemployment, or restorations. Inservice placement also includes noncompetitive conversion of appointees whose Federal excepted positions are brought into the competitive service under Title 5 CFR 316.702, and Department of Defense/Nonappropriated Fund (DOD/NAF) and Coast Guard NAF employees whose positions are brought into the competitive service.

Insider

An officer, director or principal shareholder of a publicly owned company and members of his or her immediate family. This category may also include other employees of the company and people who obtain nonpublic information about the company.

Insider Trading

When a person trades a security while in possession of material non-public information in violation of a duty to withhold the information or refrain from trading. The securities law broadly prohibits fraudulent activities of any kind in connection with the offer, purchase, or sale of securities.

Instance

A row of data on the Positive Input table. Instances of positive input can be entered manually, or can be system generated. They can also be received from other applications, such as PeopleSoft Time and Labor.

Integration Level

The salary level in a defined benefit excess plan at which a higher benefit rate becomes applicable. For example, the following formula uses a \$10,000 integration level: 1% of Final Average Earnings up to \$10,000 plus 1.75% of Final Average Earnings over \$10,000.

Integration Template

A high-level template that defines the integration between PeopleSoft Projects and your other financial applications. Each integration template you create defines a specific set of business units from your other financial applications. Each project is then assigned an integration template containing this preset integration information. You can use Integration Templates to set up joint ventures, and new transactions added to that project will reflect the business units defined in the integration template.

Intensity

The cost for each unit of the activity driver.

Interest

Some companies pay interest on the monies that are being withheld from employees' paychecks. The interest plus the employees' stock purchase contributions are used to purchase stock at the end of the purchase period.

Interest Rate Modeling

An FSI feature that allows you to model interactively interest rate scenarios for Asset Liability Management, and to run rate scenarios and analysis in real time.

Interest Rate Sensitivity Model

In the financial services industry, this support module describes in granular terms how a group of customers holding a specific type of instrument with a particular interest rate will respond to changes in interest rates in the market.

Interface Loader

An SQR delivered with PeopleSoft Asset Management that is used to transfer load lines into the PeopleSoft Asset Management loader tables.

Internal Data

Data from PeopleSoft ERP systems, or other legacy ERP systems used by your organization.

Interpolation

To calculate a value of a function, or series, between two known values.

Interunit Account

The account for each business unit to which other business units in the same corporation refer when they need to distribute amounts across business units. These accounts are used to keep the individual ledgers in balance when a single transaction affects multiple business units.

Inter-Unit Drivers

Drivers that provide a means of establishing relationships between the cost objects of one organization with the supporting activities of the organizations that share business units and models.

Interunit Transaction

A transaction that involves moving amounts from an account in one PeopleSoft General Ledger business unit to an account in another General Ledger business unit.

InterUnit Transfer

A transfer that occurs between different business units.

IntraUnit Transfer

A transfer that occurs within one business unit.

Intrinsic Rewards

A reward that is generated by the worker internally such as job satisfaction, as opposed to Extrinsic Rewards which are tangible rewards.

Inventory Adjustment

A process that enables you to change the quantity of an item in the inventory system to match the actual physical quantity found in the **Storage Location**.

Inventory Business Unit

Usually a warehouse. You establish a separate inventory business unit (IBU) for any one of the following reasons: 1) You want on hand visibility to a specific location of your business that manages inventory. 2) You want to define replenishment rules for a specific location of your business that manages inventory. 3) You maintain standard and average costs in a specific location of your business that manages inventory.

Inventory Cost Element

A cost that can be associated with inventory items and inventory transactions. Examples include freight, overhead, and transportation. Each cost element has a unique cost code.

Inventory Item

A tangible commodity that is stored in an Inventory business unit (Ship From warehouse).

Inventory Location

See **Storage Location**.

Inventory Policy

In PeopleSoft Inventory Planning, a set of rules that controls how inventory policy values are calculated for items. Inventory policy is defined at the **Policy Control Group** and stockkeeping-unit levels. The elements that make up inventory policy are order quantity, safety stock, **Reorder Point**, and minimum and maximum policies.

Inventory Transaction

An event that moves inventory into, within, or out of the inventory business unit. Examples include material transfers, inventory adjustments, and standard issues.

Inventory Transaction Group

An identifier that categorizes transactions by type for costing purposes. For example, you can group all types of interunit transfers together.

Invoice Format Identifier

An identifier for the formatting options that determine the sorting and summarization levels of invoice information.

IRC 423 (Internal Revenue Code 423)

The section of the IRC that defines a Qualified Employee Stock Purchase Plan.

IRR Fiscal Data Accumulation

This report accumulates all retirement deductions for employees, as well as any LWOP and any basic pay that was received when an employee was not covered by the CSRS or FERS retirement plans.

IRR Remarks

Special remarks that are documented on an employee's IRR. IRR Remarks can be set up ahead of time and can be system-entered text or employee-specific.

IRR Status

IRRs can be in pending or final status. Those in pending status can be updated and corrected. A final status indicates that the IRR has been processed and can't be updated or corrected except through a Correction IRR or a Supplemental IRR.

IRR Worksheet

A preliminary IRR form that enables an agency to print a pending IRR for a separated employee, review it and make corrections, if necessary. Agencies can also use the IRR Worksheet to view a current IRR for an active employee.

ISO IRS \$100K Limit

The limit the IRS places on the exercisable value of Incentive Stock Options (ISOs) of \$100K per calendar year based upon the fair market value at the time of grant (Section 422 of the Internal Revenue code).

ISO to NQ Grace Period

The period of time after which an Incentive Stock Option is treated as a Non-Qualified Stock Option for tax purposes upon the termination of employment according to Internal Revenue Code Sections 421 and 422. Depending on the termination reason the option is treated:

- If the termination reason is for any reason other than death or disability, and an exercise occurs more than three months from the termination date, the system withholds taxes as if the option is a non-qualified stock option.
- If the termination reason is disability, the system withholds taxes if an exercise occurs more than twelve months from the termination date.
- If the termination reason is death, the system always treats the option as an ISO.

Issue

See **Material Issue**.

Issuer

A legal entity that has the power to issue and distribute a security.

Item

See **Inventory Item Planning Item** or **Receivables Item**.

Item Content Provider

Third-party software consisting of web-based catalogs of item and price information. These systems benefit the design and purchasing of new products by accelerating item location, maximizing design reuse, and reducing acquisition costs. PeopleSoft Purchasing, Engineering, and Inventory integrate to Item Content Providers, and the information is used by many other PeopleSoft applications.

Item Rounding Rules

A set of rules determining how fractional values are rounded so that calculations result in whole numbers. Rounding rules are used in conjunction with **Quantity Precision Rules**.

Item Simulation

In PeopleSoft Demand Planning, a process that enables you to interact with the forecast in a manageable manner and perform "what-if" analysis by comparing the effects of different forecast models.

Item Type

An identifier that defines inventory items at a very high level, and may include sets of Item Families. For example, the families Computer Items and Office Furniture might be categorized by types like Outside Manufacturing, Finished Goods, and Work In Progress.

Item-Specific Conversion Factor

A conversion between the same two units of measure when the measurements have a different value for an item. For example, a conversion between packaging unit and stocking unit.

Iterative Processing

Refers to a concept on only re-calculating those payees who have had changes and need to be recalculated (if you choose to run your payroll multiple times before actually finalizing it). This concept saves you a lot of time as you only have to recalculate those payees who have had a data change or who you indicate you would like to be recalculated.

J**Java Server Handlers (JSH)**

The JSH manages network connectivity, making service requests from the Jolt Repository, and translating Tuxedo buffer data into the Jolt buffer.

Java Station Listeners (JSL)

The JSL handles the work of the client connection, tracking client messages, and session handoff.

Job Code

An ID for a job as defined on the Job Code table.

Job Code Components

The pay components assigned to a job code by associating rate codes with job codes on the Default Compensation page or the Non-Base Compensation page of the Job Code table.

Job Code Cost

Evaluation of salaries for specific job codes.

Job Compensation Rate

The compensation rate of the corresponding job row.

Job Events

Actions relevant to an employee's employment—such as a hire, transfer, or termination—that can affect benefit program or plan eligibility. Used by PeopleSoft Benefits Administration. See Event Class.

Job Order Cost Accounting

A cost accounting method that attempts to develop a discrete cost for each job performed or product produced. Only the material, labor, and overhead required to complete the job are attributed to the job cost.

Joint and Survivor Payment Option

A form of pension payment in which benefits are paid for the life of the participant and a beneficiary. Should the beneficiary outlive the participant, the benefit continues (often in a reduced amount) for the life of the beneficiary.

Joint Staffing Report

In the United Kingdom governmental agencies are required submit the Joint Staffing Report. Although it is mainly designed for government sector organizations, commercial organizations may also use this SQR to provide a summary of their staffing by department, job code, gender and full/part time employment status.

Jolt

A BEA/Tuxedo companion product that runs on an application server domain and is used to listen for Web Client Java requests and transfer them to Tuxedo.

Journal Code

The second highest level of three categories for defining a financial transaction (or document), necessary when using document sequencing. Examples of journal code are domestic sales and export sales. This category is preceded by journal type and followed by document type.

Journal Generator Template

A table containing defaults to be used in journal generation. PeopleSoft Asset Management and Billing require one journal generator template for each transaction type.

Journal Line

A record storing a double-sided, balanced entry for a given journal. A single journal usually includes multiple lines. The sum of the monetary amounts for the journal lines in one journal totals zero (debits = credits).

Journal Template

A list of the characteristics of the general ledger journal entries that will be created from your PeopleSoft Receivables system.

Journal Type

The highest level of three categories for defining a financial transaction (or document), necessary when using document sequencing. Examples of journal types are sales journal and purchase journal. This category is followed by journal code, then document type within the journal code.

Journal Voucher

A PeopleSoft Payables voucher that enables you to make accounting entry modifications while keeping your PeopleSoft General Ledger and Payables systems in sync. Like the adjustment voucher, the journal voucher is linked to an existing voucher.

K**Kanban ID**

A unique identifier used to track Kanban cards and replenishment requests when using PeopleSoft Flow Production.

Keep Ledgers in Sync

An option in PeopleSoft General Ledger that defines how a transaction should be posted—to all ledgers in a ledger group as opposed to only a single specified ledger.

Key

See **ChartKey**.

Key

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.

Key Performance Indicator (KPI)

KPI is used by the PeopleSoft Performance Management analytical applications. KPIs are high-level measurements of how well an organization is doing in achieving critical success factors. A KPI defines the data value or calculation from the Data Warehouse tables upon which an assessment is determined.

KPI (Key Performance Indicator)

See Key Performance Indicator.

Knowledge, Skills, And Abilities (KSA)

Also known as Competencies, these are attributes required to perform a job and are generally demonstrated through qualifying experience, education, or training. *Knowledge* is a body of information applied directly to the performance of a function. *Skill* is an observable

competence to perform a learned psychomotor act. *Ability* is competence to perform an observable behavior or a behavior that results in an observable product.

L

Labor Costs

Actual expenditures associated with *salary* portion of time reporter expense.

Labor Dilution

A process that occurs after the Labor Distribution process in PeopleSoft Time and Labor. The labor dilution process takes the costs that the payroll system has calculated for payable time, determines an average or rate per hour, and applies the average amount evenly across all reported hours for the day.

Labor Distribution

The process of distributing payroll expense to the corresponding payable time entries generated in PeopleSoft Time and Labor.

Labor Distribution Amount

An actual labor cost associated with reported time.

Last Equivalent Increase (LEI)

Reflects the effective date of the last step received in grade or the last promotion, whichever is most current (does not include QSI). Used as the basis to establish an employee's WGI due date.

Last Physical Counting Event

The last date the inventory item was counted. This information is stored with each inventory item.

Last Purchase Date

The item's most recent purchase date in the inventory business unit.

Last Putaway Date

The item's most recent putaway date in the inventory business unit.

Last Putaway Document Number

The item's most recent putaway document identification number in the inventory business unit.

Last Receiving Date

The item's most recent receipt date in the inventory business unit.

Last Shipping Date

The item's most recent ship date in the inventory business unit.

Last Shipping Document Number

The item's most recent shipping document identification number in the inventory business unit.

Law Enforcement Officers (LEOs)

Positions within the Federal government involving law enforcement. Under FEPCA, many of these positions are entitled to additional special pays.

Lead-Time Estimated Usage

An inventory planning method for calculating historical usage of an item. The historical demand is prorated on a daily basis and then multiplied by the number of days lead time for each effective historical period. The maximum period value is then used as the safety stock or minimum stock level. This method should be used for items that have a steady demand pattern throughout each period.

Lead-Time Period Usage

An inventory planning method for calculating historical usage of an item. The purchase lead time is rounded up to a specified number of periods. The historical demand is calculated as the maximum usage during these periods and the safety stock or minimum-stock level is set to this value.

Leave

Time entitled to an employee as a benefit, such as, Sick, Vacation, STD, and LTD. This process is managed by HRMS (see Time Reporting).

Leave Accrual Processing

Processing of leave accruals is used to maintain employee leave balances. All leave benefit plans accrue leave by length of service or number of hours worked. Leave accrual processing is used to determine the employee's leave accrual award and resulting leave balance.

Leave Accruals

Hours that employees earn to use at another time, such as annual leave and sick leave.

Leave Plan

A method for earning and managing leave time.

Leave Without Pay (LWOP) Total (Cumulative)

An employee's cumulative number of hours of leave without pay (LWOP).

Ledger Group

In PeopleSoft General Ledger, a group of ledgers consisting of one primary ledger and secondary ledgers.

Ledger Mapping

Ledger mapping is a process that enables you to relate expense data from your general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as rates) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In the PeopleSoft Enterprise Warehouse (EW), Ledger Mapping enables you to map general ledger accounts to the EW Ledger table.

Ledger Template

A table containing records and fields common to all ledgers that ensures that all ledgers specified in a ledger group share the same physical layout.

Ledger Type

The unique combination of a single ledger, scenario, and fiscal year. Multiple ledger types make up a ledger type set.

Ledger Type Set

A collection of ledger types, the members of which will represent the members of your ledger type dimension.

Legend ID

A way of recording information that is displayed upon the Issuance Instruction Report. Can be used to record a notice that should appear on the back of a stock certificate indicating that the shares represented are "Restricted Securities." Can also be used to indicate how shares should be processed, as in the case of Swaps, Trades, Repurchases and SAR Exercises.

Level

A section of a tree that organizes groups of nodes.

Defines a set of **Forecast Item** with a common key structure. Each level is related in a hierarchical definition with other levels in the view. A level definition contains descriptive and control data that relates to the operation of the forecast at each level within the view.

Level

The section of a tree that organizes groups of nodes.

Level Income Payment Option

An annuity form of pension payment in which payments are increased in early years (prior to eligibility for Social Security benefits) and decreased in later years when Social Security benefits are also received. The goal is to provide a relatively constant total retirement income both before and after Social Security eligibility.

Life Profile

In PeopleSoft Demand Planning, a feature that enables you to establish product forecasts based on predefined patterns in an item's life cycle.

Lifecycle (of Reported Time)

A representation of time through the various stages of Time and Labor; includes processing of current, future, and previous period time from scheduling and time capture through Time Administration and distribution.

LIFO (Last In First Out)

Method used by companies to record Disqualifying Disposition Income. If a company uses this method they record the optionees disposition of shares by attributing the shares to the most recent exercise, purchase or release dates for which shares remain available for sale.

Line-Item Budgets

The budget amounts associated with ChartField distributions that make up an organization's budget. Line-item budgets include personnel costs as well as operating and maintenance costs. They also include revenue estimates. PeopleSoft Budgeting-specific.

Line Schedule Editor (LSE)

PeopleSoft Production Planning utility or tool that displays production tasks for multiple products on multiple resources across multiple periods of time.

Literal Mapping

In PeopleSoft Demand Planning, a mapping option for formatting data that is common to all records being imported. This enables you to set an available field value for all the loaded rows.

Load

The feature that initiates a process to automatically load information into a PeopleSoft application—for example, populating the PeopleSoft Benefits database with plan-level election information.

Load Activation

Load Activation enables you to specify exactly which part of your Data Mart to build, including security. You set up load activation on the Load Activation page.

Load Planning

The PeopleSoft Inventory feature that picks, packs, and ships orders by Load ID. Load Planning is also used to estimate shipping weight, volume, and charges.

Loader Table

Any table in PeopleSoft Asset Management used to store load lines before they are loaded into the system as open transactions. The loader tables comprise INTFC_FIN, INTFC_PHY_A, and INTFC_PHY_B.

Loan Exercise

A form of cash exercise, typically requiring a loan agreement and a promissory note.

Local Code

In PeopleSoft Demand Planning, a type of validation used for a user-defined field code. If a user-defined field is marked to require local table validation, **User-Field Code** are used to determine the list of valid values for the field.

Local Functionality

Local functionality is the set of information in PeopleSoft HRMS that is available for a specific country. You can access this information when you click on the appropriate country flag push button in the global window, or when you access it by a local country menu.

Location Accounting

An accounting method that captures and records material movement within the warehouse, providing accounting visibility based on where the inventory resides. You can designate certain **Storage Area** as raw material, WIP, or finished goods by assigning the corresponding account ChartField (account, department, product, and project ID) to the storage area. All inventory locations in a storage area use the storage area account.

Location Code

Locations enable you to indicate the different types of addresses a company has—for example, one to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each of these addresses has a different location number. Every customer role must have a primary location, which will be used throughout the system on all panels that display a customer address. The primary location—indicated by a *1*—is the address you use most often when contacting the customer, and may be different from the customer's main address.

Location Summary

A Picking Plan option that sorts the picking plan according to the highest-level sort options defined and prints the order lines and the total item quantity to pick from each **Storage Location**. Because the layout of the printed report reflects the actual positions of stock to be picked, personnel can follow a serpentine path through the warehouse, fulfilling all orders on the picking plan without revisiting locations.

Lock for Confirm

A flag on the Pay Line record that enables users to access the database 7 days a week, 24 hours a day, without affecting or interrupting payroll processing. Issues a warning message "A payroll is currently in process for this employee. This data will not be processed until the next payroll."

Log file

One way that you can monitor the build process is to review the log files that the build process automatically generates. Keep in mind that the log file is entirely separate from the script file; do not confuse the two. How much information that the log file contains is up to you. You can set up your logging so that all status (both good and bad) appears in the log, or you can specify that just the errors or warnings appear in the log. This section describes the options you can specify in regards to the Build log file.

Long-Term Variable Compensation

In PeopleSoft Workforce Analytics, a component of direct compensation that consists of long-term payments to an employee in the form of stock programs, and deferred compensation.

Lookup Codes

In the financial services industry, these are user-defined codes that enable the system to define and categorize incoming Instrument table information. They also provide a means for you to report on specific data, such as treasury position, balance type, and ledger account.

Lot Status

The status assigned to a lot. In PeopleSoft Inventory, a lot's status can be Hold, Open, Rejected, or Restricted.

Lump Sum

A tax method that determines withholding based on the Canadian Lump-Sum tax table.

Lump Sum Payment Option

A form of pension payment in which some or all of a participant's benefit is paid as a single sum.

Lump Sum Reporting

A Time and Labor process that enables you to report time in a lump sum of hours or units for a single Time Reporting Code, and quantities of time. The system uses a batch process to gather the information you enter, perform edits, and update the daily time tables. The system uses the default assignments you establish for workgroups, taskgroups, shifts and so on.

M***Maintenance Worksheet***

A work space for creating write-offs, matches, or adjustments to clean up posted items.

Manage Base Pay Structure

See Base Pay Structure

Manage Compensation Planning

A PeopleSoft Workforce Rewards module that facilitates modeling and analysis of compensation costs across organization units, specific job classifications, or groups. You can focus on the impact of changes to workforce size, or on changes to fixed and variable compensation elements, and determine their effects on current and future payroll costs.

Manage Market Compensation

A PeopleSoft Workforce Rewards module you use to match your company's jobs to similar jobs found in published market compensation surveys. You then calculate a target market rate based on a weighted average from multiple surveys. This market rate is then used to assess your company's gap to market and to perform cost impact analysis.

Manage Retention Planning

A PeopleSoft Workforce Rewards module that enables organizations to analyze the factors that lead to employee turnover, and how retention of key employees affects business performance and goals.

Manual Checks

Any checks calculated and prepared outside of the PeopleSoft Payroll system that you must enter into the system manually.

Manual Count

A PeopleSoft Inventory procedure in which you enter the actual count data and then create the counting event with its header, item records, and count quantities.

Manual Events

Events that are inserted by the user manually through the BAS Activity table. Events are actions that occur, which potentially change employee benefit coverage eligibility—see Event Class for more information. Used by PeopleSoft Benefits Administration.

Manufacturing Cost Element

A particular category of an item's cost. For example, when you produce a subassembly that has a cost of \$100, the cost can be broken down further into material costs, labor costs, and overhead costs.

Manufacturing Execution Systems (MES)

Third-party system that enables detailed planning and execution of production activities from production order release to completing finished goods. PeopleSoft Manufacturing integrates to MES.

Manufacturing Task

Any job that can be performed within your manufacturing facility. A manufacturing task is associated with the work center in which the task is completed.

Map File

A file that defines the relationship between fields in a third-party system and PeopleSoft Demand Planning tables.

Mapper Type

This defines whether you are mapping actual or budgeted general ledger line items to resource ID within PeopleSoft Enterprise Performance Management.

Marginal Tax Rate

The tax rate that applies to the next dollar of income generated.

Market Compensation

A compensation review process in which you match your company's jobs to similar jobs found in published market compensation surveys, for the purpose of establishing new target market rates. Also referred to as Market Based Pricing or Market Analysis.

Market Capitalization

The value of a corporation as determined by the fair market value of its issued and outstanding common stock. It is calculated by multiplying the number of outstanding shares by the current fair market value of a share. Analysts look at market capitalization in relation to book, or accounting, value for an indication of how investor's value a company's future prospects.

Market Rate

Compensation rates, usually for regular base compensation or total cash compensation, found in published salary surveys. You use the Market Compensation module in PeopleSoft Workforce Rewards to age and weight this data, to create market rates you can compare against your organization's current pay rates.

Mark-to-Market (MTM) Model

In the financial services industry, the reevaluation of a portfolio's position at current market levels.

Market Variance

A comparison of the difference between an individual's, or group's, actual compensation, and available market compensation data for a comparable population in industry. Market compensation data is usually tied to job codes, and comparisons are usually made between similar jobs. Although the variance to market can be evaluated for any of the compensation components in the Compensation tree hierarchy (such as Total, Direct, or Base), market compensation data is most typically available for, and used in evaluating Base Pay (Base Salary). The main point of reviewing the market variance is to evaluate how well your workforce is paid in comparison to both prevailing compensation in industry, and your own organization's compensation strategy.

Mass Adjustment

A process of applying an amount or percentage change to one or many line item budgets at once. PeopleSoft Budgeting-specific.

Mass Cancellation of Requisitions and Purchase Orders

A utility that allows you to select and cancel groups of requisitions and purchase orders. You can use this utility during the year as well as at year-end in preparation for closing. The utility enables you to specify ChartField criteria for selecting documents for cancellation. For example, you can select all requisitions or purchase orders for a particular fund and organization, which have a remaining balance. Then you may select a subset of those records to approve for cancellation.

Mass Change

A user-configurable entity that defines the movement of data between the tables that store your business information. Mass Changes enable you to define the criteria by which you move or replace data in your tables. Based on the configuration of your system, Mass Change dynamically builds data access and gives you complete control over your system processing.

Mass Change Template

The foundation for defining mass changes. Mass change templates enable you to control which fields will be available for the operator to specify when defining a mass change, and whether those fields will be used as selection criteria or defaults.

Mass Change Type

The building blocks used in defining mass change templates. Mass change types specify which records the resulting mass change will select from the database, alter, and subsequently write back to the database. They also set up system field defaults that run behind the scenes to ensure that this mass change is processed correctly.

Mass Validate Metadata Utility

A PeopleSoft Enterprise Warehouse utility that enables you to validate, but not compile, Metadata objects. Mass Validate certifies all “as of dates” created for Filters, Constraints and DataSets for the specified run date. This utility helps ensure that your Metadata is valid at run time and increases your chance of a successful engine run.

Match

A process in PeopleSoft Workforce Planning, by which the system compares the roles, competencies, and accomplishments in the current competency inventory, with the requirements of a given competency strategy.

Matched Punches

A period between two consecutive punches during which some activity happens measured intervals.

Match-Funding

In the financial services industry, Match Funding refers to funding an asset with a like (term to maturity) liability. This helps an organization apply the appropriate funds transfer price. Although the actual asset might be funded with shorter-term liabilities, it does provide a better measure of financial performance for that asset, such as Risk Adjusted Return on Capital.

Material Costing

An inventory accounting method that assigns a cost to items in inventory. These costs can be assigned equally across all items or tracked individually for each item.

Material Issue

An event that triggers stock fulfillment requests for items in inventory.

Material News

Company news that could be expected to affect the value of a company's securities or influence investors' decisions. Material news includes information regarding corporate events of an unusual and non-recurring nature, news of tender offers, unusually good or bad earnings reports, and a stock split or stock dividend.

Material Release

A PeopleSoft Manufacturing process that—after material has been picked—decrements on hand inventory balances for the inventory storage areas and increments inventory to the WIP

locations defined by the routing or production area. The process also changes the production ID's or production schedule's status from Released to In Process.

MAX Method

See Maximum Method Policy.

Maximum Compensation Hours

The greatest number of hours to be paid for a specified TRC (see Time Reporting).

Maximum Lead-Time Usage

In PeopleSoft Inventory Planning, a policy control value that sets the safety stock level to the maximum quantity required during the lead time. This method is normally used when the demand for an item is low or intermittent but sufficient stock must always be available.

Maximum Method Policy

In PeopleSoft Inventory Planning, a policy that controls the way in which the system determines a reasonable high limit for the maximum inventory level of an item. The system provides warning messages when the inventory level exceeds the maximum level.

Maximum Taxable Wage Base

An annual earnings threshold used for Social Security purposes. Pension plans sometimes provide different levels of pension benefits for earnings above and below the Maximum Taxable Wage Base.

Measure

A measure represents the amounts brought into a cube—the numerical data.

In data warehousing, a Measure is a field type used interchangeably with fact. Measures are types of amounts. Any numeric field you want to apply a Data Manager rule against should be a measure.

Measure ID

In the Define Market Compensation module of PeopleSoft Workforce Rewards, a Measure ID is the identification code for a measure. For market compensation surveys, the Measure ID describes the percentile for each type of pay, as well as the regression statistic type. In PeopleSoft Workforce Analytics, for Benchmark Surveys, the Measure ID describes the type of benchmark.

Measure Value

In PeopleSoft Workforce Rewards, Measure Value is the calculated market rate value from market compensation surveys for a given percentile of a market rate, and for a given scenario and job code. This is the annual rate you compare against the compensation paid for similar jobs in your company. The Measure value can also be the regression statistic value used for

Regressing Market rates. In PeopleSoft Workforce Analytics, for Benchmark Surveys, the Measure Value is the delivered Benchmark Ratio.

Member

A member is the OLAP equivalent of a node or detail value on a PeopleSoft tree. A member is a single item within a dimension, such as a single product name, department ID, or part number. Member names must be unique, even across dimensions. Cube Manager uses the term Dimension Field Mapping to identify members, dimension parents, and label mappings.

Merchant

In PeopleSoft eStore and Mobile Order Management, a level of online (web or wireless device) display and order processing controls set by the seller. See also Merchant Variant.

Merchant Variant

Associated with a user ID, a subordinate level of merchant controls that enable customers to access different variations of the same PeopleSoft eStore website. In PeopleSoft Mobile Order Management, variations are primarily used to differentiate order processing options and fulfillment methods or locations.

Merit Matrix

In PeopleSoft Workforce Analytics, a matrix used to define the amount rules for base compensation increases for your workers. A Merit Matrix provides the salary increase parameters for each review rating in a rating scale. The salary increase parameters are expressed in terms of a percentage. The percentage increase amounts are usually structured to express the company's pay strategy relative to employee performance, and the employee's degree of range penetration in their salary range.

Merit Matrix Increase

In PeopleSoft Workforce Analytics, an increase to an employee's base pay awarded based upon a Merit Matrix.

Message definition

The object definition specified in Application Designer which contains message information for PeopleSoft's Application Messaging system.

Metadata

Information about data. Metadata is the information a database or application stores to describe your business data. At its simplest, metadata defines the structure of a data field—its data type and size, for example. Metadata can also describe more complex data relationships, such as the rollup structure for a chart of accounts. Reporting and analysis tools should be able to use this metadata to let users access data just as they would from within the application, without having to understand how it is stored.

For Enterprise Performance Management, metadata is used to describe the data stored in the PeopleSoft Enterprise Warehouse. There are different types of metadata, for example, TableMaps, DataMaps, and constraints. You typically define these when you set up the warehouse; however, Metadata (particularly constraints and DataMaps) is used to develop business rules that manage aspects of the dimensional models. Metadata enables technical users to define relationships between warehouse tables and enables business users to easily identify the data that interests them without having to know the database structure.

Meta-SQL

Meta-SQL: Meta-SQL constructs expand into a platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, Application Engine programs, and so on.

Metastring

Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

Method

A method can only be executed from an object, using dot notation. You have to instantiate the object first, before you can use the method.

For Enterprise Relationship Management, a method is the algorithm or formula that defines how the budget amount for a line-item budget is calculated or how it is derived if a calculation is not necessary. Types of methods include amount per FTE, itemization, annual percent growth rate based on a historical figure, and number of units multiplied by cost per unit. PeopleSoft Budget Planning-specific.

Method Amount

The amount for a line item budget resulting from the application of a method. It represents the budget amount after the method is applied to a line-item budget but before any adjustments or allocations are applied. PeopleSoft Budgeting-specific.

Method Base

The defined value to which a method is applied, if applicable. Not all methods require a base. PeopleSoft Budgeting-specific.

Method Driver

The factor used in a method's algorithm. For the method, amount per FTE, FTE is considered the driver. PeopleSoft Budgeting-specific.

Method of Payment

In PeopleSoft Grants, designates whether a payment is to be through a cost invoice or a Letter of Credit.

Method Parameter

A defined and derived value within a method, which drives an expense or revenue calculation. For the method, Amount per FTE, the number of FTEs is considered the driver parameter. PeopleSoft Budgeting-specific.

Metric

A metric is a calculation of facts. A metric is usually a number, but can be anything you want to measure.

Metric Object Security

Metric Object Security determines whether an individual can see a metric object in a Data Mart.

Midpoint (Pay Range Midpoint)

In PeopleSoft Workforce Analytics, the middle value in a pay range, halfway between the minimum and the maximum, calculated as $(\text{Minimum} + \text{Maximum})/2$.

Midpoint Progression

In PeopleSoft Workforce Analytics, the percentage difference from one grade midpoint to the next higher-grade midpoint, calculated as $(\text{Midpoint2} - \text{Midpoint1})/\text{Midpoint1}$.

MIN Method

See Minimum Method Policy.

Minimum Benefit

See Grandfathered Benefit.

Minimum Compensation Hours

The lowest number of hours to be paid for a specified TRC (see Time Reporting).

Minimum Method Policy

In PeopleSoft Inventory Planning, a policy that controls the way in which the system determines a reasonable low limit for the minimum inventory level of an item. The system provides warning messages when the inventory level drops below the minimum level.

Missed Punch

A punch that is not entered at the scheduled time (see Time Reporting).

mkvdk

Verity's command-line tool used to index a collection, insert new documents, perform simple maintenance tasks like purge and delete a collection, and control indexing behavior/performance.

MLS

Multilingual support.

Modal transfer

Modal transfers allow you to transfer an operator from one component to another component (the modal component) modally; that is, requiring the operator to OK or Cancel the modal component before returning to the originating component.

Modal transfers give you some control over the order in which the operator fills in pages. They are useful for finite tasks related to the main transaction. They are particularly useful in cases where data in the originating component can be derived from data entered by the operator into the modal component.

Model Equivalency Factors

In PeopleSoft Demand Planning, factors that adjust model errors to allow a fair comparison. During the Model Reset process, the errors associated with each of the models are multiplied by their associated factors. The factored errors are then compared to select the model with minimum errors.

Models

In the PeopleSoft Enterprise Warehouse, Models enable replication of an organization's business processes for analysis of cost flow through customers, departments, and channels.

Model Recalculation

In PeopleSoft Business Planning, users may checkout slices of the entire model for their appropriate role. This requires the entire model to be periodically recalculated to incorporate the users changes for dependencies in other areas of the model.

Morphing

Morphing is a technique of automatically transforming the look and feel of an interface based on the needs of an active object. The Application Designer toolbar and menus dynamically transform based upon the type of object definition that is active.

Mortality Table

A table showing rates of death by age. Mortality tables are part of a pension plan's actuarial assumptions.

Moving Average

In PeopleSoft Demand Planning, a model that averages a selected number of the most recent demand periods and creates a forecast of demand for the next and subsequent periods.

Multibook

A functionality supporting the requirement of a company to carry one set of books in their local currency (functional currency) and another set of books in the currency of their parent company (reporting currency). In PeopleSoft General Ledger, multibook functionality is multiple ledgers having multiple-base currencies defined for a business unit, and the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers). Also commonly known as dual-book.

Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.

Multicurrency

The ability to process transactions in a currency other than the business unit's base currency.

Multidimensional Analysis

A type of analysis that enables you to look at data from many different dimensions, or attributes. You identify the dimensions of the data, then combine the dimensions in various ways. For example, you might identify five dimensions of your sales data: sales, region, channel, product line, and time. Once you've identified the dimensions, you can "slice and dice" the data based on combinations of these dimensions, such as sales in the Western region for the last quarter.

Multidimensional Database (MDDB)

A database that stores data for multidimensional analysis in a proprietary multidimensional format. Users access MDDBs exclusively for reporting and analysis, never transaction processing, so they are optimized for retrieval speed.

For Enterprise Performance Management, a Multidimensional Database stores data for multidimensional analysis in a proprietary multidimensional format. These databases are used exclusively for reporting and analysis, and never transaction processing, so they are optimized for retrieval speed.

Multiple Jobs

Multiple jobs allow you to hire an employee into more than one concurrent job and have them processed through Payroll, Benefits, and Pension. In order to enable this feature, the Multiple Jobs check box must be selected in the PeopleTools Options page.

Multiple-table dynamic tree

The user drills down through a hierarchy of parent and child records.

Multivariate Forecasting Techniques

In Enterprise Planning and Simulation, this is a forecasting method that uses both the recorded history for the target value and the history and forecasts for other variables (causal factors) to infer, not only a forecast for the target value, but also a functional relationship between the causal factors and the target value.

N***National Association of Securities Dealers, Inc. (NASD)***

Self-regulatory organization of the securities industry responsible for the regulation of The NASDAQ Stock Market and the over-the-counter markets. The NASD operates under the authority granted it by the 1938 Maloney Act Amendment to the Securities Exchange Act of 1934.

National ID Number

Different countries track some form of National ID for payroll, identification or benefits purposes. For example, German workers are assigned a Social Insurance Number, UK workers have a National Insurance Code, and US laborers have a Social Security Number. Each of these different types of National IDs has unique formatting requirements associated with them as well.

Nature Of Action (NOA) Code

Indicates the type of personnel action being processed.

Nature Of Action Description

Describes the NOA code.

Nature Of Action Effective Date

The date the personnel action is effective.

Negative Amortization

Occurs when a loan payment does not cover the interest due on the loan payment, resulting in an increase of the principal amount.

Net-To-Zero Adjustment

A prior period adjustment where no compensation affecting fields on the pre-existing (original) record are changed by the adjustment.

New Hire Report

In the United States the Personal Responsibility and Work Opportunity Act of 1996 (the so-called Deadbeat Dads law) requires employers to report new hires to specified agencies within a pre-determined number of days from the hire date.

Next Level Item

In PeopleSoft Demand Planning, the **Forecast Item** at the next level that contains the current item as a child. This is the key of the group item at the next level up and is always within the same view.

Next Year

PeopleSoft Benefits term referring to the next open enrollment processing year.

NIC (Numéro Interne de Classement) Code

In France NIC numbers identify the entities inside the same enterprise, and represent an Internal Filing Number.

No Control

A target control that allows the user to submit a budget even if it is not within the planning target and the tolerance levels. The system tracks the budget against the defined planning targets but does not generate any warnings or validations. Users can still compare their planning targets against their budget amounts on the Planning Targets page in Line Item Budgeting.

Node

An individual item on a tree. Nodes summarize detail values or other nodes, and may or may not roll up into other nodes or levels.

Node

A node is a name that you can use to refer to some source of HTML content. In more practical terms, a node is a URI string that defines the database and server to be used when the portal servlet attempts to retrieve content, proxy addresses, and assemble pages.

Non-Base Pay

A pay component not included in the job comp rate calculation. It is used by payroll only in the paysheet calculation. For example, non-base pay can be set up for additional work, holiday pay, bonuses, and so on.

Non-Benchmark Jobs

See Benchmark Jobs.

Noncompetitive Action

An appointment or placement in a position in the competitive service that is not made by selection from an open competitive examination, and that is usually based on current or prior Federal service. A noncompetitive action includes:

- All of the types of actions described under inservice placement, above
- Appointments of non-Federal employees whose public or private enterprise positions brought into the competitive service under Title 5 CFR 316.701; and
- Appointments and conversions to career and career-conditional employment made under special authorities covered in 5 CFR 315, Subpart F.

Nondiscrimination Tests (NDT Tests)

Tests used to help employers ensure that their organization's 401(k), 401(m), and Section 129 dependent care reimbursement plans do not discriminate in favor of highly compensated employees. See Highly Compensated Employees.

Non-Employee

Those workforce resources hired to perform a specific job and/or hired for a specific period of time. Although non-employee time will be entered into Time and Labor for the purposes of managing their Task time, non-employee earnings will not be updated to Payroll and they will not be paid through the Payroll system.

Non-HR Employee [Time and Labor]

An individual employed by the corporation who is administered outside of the PeopleSoft Human Resources system.

Non-Job Event

Actions which result in changes to an employee's personal or demographic information that also affect benefit program and plan eligibility—such as an a state or postal code change, a family status change like a divorce, or a birthdate change. Used by PeopleSoft Benefits Administration. See Event Class.

Non-Productive Time

Any employee scheduled work time spent on tasks (or non-tasks) other than those which the employee was hired to perform. This could include time spent in training, time spent in meetings, travel time, and time spent reporting time.

Non-Qualified Dependent

Dependents such as domestic partners, their children, and other people who do not meet the definition of qualified dependents as presented in IRS Section 152. PeopleSoft Benefits applications enable the creation of benefit programs that offer health and life coverage to non-qualified dependents.

Nonqualified Plan

A plan that doesn't conform to ERISA rules. Employers cannot take a tax deduction for contributions to a nonqualified plan; instead, plan benefits are generally paid directly from the employer's assets.

Nonqualified Stock Option (NQ)

Any option that does not satisfy the conditions of a statutory stock option under the Internal Revenue Code and therefore does not qualify for preferential tax treatment. Generally, companies can design nonqualified options in almost any way they like. Features are:

- The grant price may be less than fair market value (with some exceptions under state law).
- Grants are not limited to employee of the company or subsidiary.
- No taxable income is recognized at the time of grant.
- Options can be granted to anyone (Employees, Consultants and Board of Directors).
- Difference between the fair market value on the date of exercise and the grant price is treated as compensation income.
- In the U.S., withholding tax obligation arises at the time of exercise.
- Company receives a tax deduction equal to the compensation income recognized.

Nontaxable Benefits

Any employer contributions that are not subject to Federal Withholding Tax, such as an employer's portion of a 401(k) plan.

Normal Form of Payment

The payment form associated with the amount calculated by the benefit formula. Pension Administration uses it as a basis for converting to optional forms of payment.

Normal Hours

The hours an employee is normally expected to be at work for any given workweek.

Normal Line Of Promotion (Career Ladder)

The pattern of upward movement from one grade to another for a position or group of positions in an organization.

Normal Retirement Date (NRD)

The date on which an employee is eligible to retire and begin receiving pension benefits. Eligibility for normal retirement is typically based on age only.

Normalized database

A normalized table adheres to certain standards designed to improve the productivity of the database user. Normalization makes the database much more flexible, allowing data to be combined in many different ways.

The standards for a normalized database are called forms, such as first normal form, second normal form, and so on.

Normalized Loss

In the financial services industry, Normalized Loss is the expected loss on a loan and is netted out of the profit and loss statement for management accounting or profitability measurement purposes. Similar to the bank's loan loss reserve, it enables the institution to analyze and account for expected losses on a more detailed level, by financial product.

Northern Ireland Report

In the United Kingdom the Fair Employment (Northern Ireland) Act of 1989 requires private sector employers with more than 10 employees to submit the Northern Ireland report to the Fair Employment Commission annually. The report indicates the religious composition (referred to as Community Background—Catholic, Protestant, Other) of the workforce, job applicants and appointees.

Not To Exceed (NTE) Date

Types are as follows:

- Appointment NTE Date: Indicates the length of time a person may serve in a position.
- Classification Temporary NTE Date: Established temporary date that is used for a temporary classification of a unique position.
- Hospitalization coverage.
- LWOP NTE Date: NTE date is the last day the employee is in leave without pay status. The employee is scheduled to return to duty the next workday.
- Position NTE Date: Indicates the length of time a position is available for use.
- Promotion NTE Date: Specific NTE Date: Specific time for an increase in grade on a temporary basis.
- Suspension NTE Date: Specific time an employee is to be on suspension. No salary is paid for the period.

nPlosion

A PS/ nVision feature that enables you to expand rows and columns in your spreadsheet to underlying details, as in drilldown.

Numeric constant

Numeric constants are any decimal number used in PeopleCode.

O**Object-Based Modeling**

Object-Based modeling technology enables you to create parent and child models. In the PeopleSoft Enterprise Warehouse, you set up such models using the Scenario Manager.

Object reference

An object reference is one that uses the current object. For example, in the case of a component, pages within the component are related objects. The menus that use the component are its object references.

Occupant Of Position/Vice

Indicates new position or former occupant of a position.

Occupational Series Code

Designates a grouping of positions similar in work and qualification requirements. They are designated by a title and four digit number (e.g., the Accounting Series, GS-0510).

Off Date

A specific date that is defined as an off day (see Scheduling).

Off Day

A 24-hour period rounded by daybreaker with no associated shifts (see Scheduling).

Off Day Type

A classification of off days (i.e. holiday, plant shutdown) (see Scheduling).

Off-Cycle Processing

The process of calculating and creating a paycheck for one or more employees aside from the normally-scheduled (*on-cycle*) payroll run for their pay group. You typically use off-cycle payroll processing for employees who are being terminated, new hires who weren't entered into the system in time for the last on-cycle payroll run, and employees who received an incorrect paycheck during a normal on-cycle payroll.

Offer Period

This is the period of time in which an employee's ESPP share price is determined.

Officer

An insider who sits on the Board of Directors and who is also an employee of the corporation. Examples include CEO, CIO, CTO, CFO, COO, Corporate Secretary, and Treasurer.

Official Forwarding Address

An employee's mailing address following separation.

Official Languages Act (OLA)

Canadian federal institutions are required to report on the official languages used in their departments, in accordance with the Official Languages Act (OLA).

Official Personnel Folder (OPF)

The repository of a Federal employee's official documents related to Personnel history.

Official Personnel Folder (OPF) Address

Indicates the address where the Official Personnel Folder is maintained.

Off-Invoice Discount (OI)

A per unit discount deducted from the customer invoice and given by a manufacturer for promotional activities. Off-invoice discounts can originate from a National Allowance or Customer Promotion, and are passed to PeopleSoft Order Management so the discounts are applied correctly during order entry.

Offset Plan

A pension plan where the benefit formula includes an offset of a portion of the participant's Social Security benefits.

OLAP

Online Analytical Processing. OLAP is the multidimensional analysis of application data, performed interactively. The acronym contrasts with OLTP (Online Transaction Processing), which is what most production business application systems do.

OLTP (Online Transaction Processing)

OLTP refers to the applications that perform the business transactions that keep your company running, such as processing invoices or enrolling employees in benefits programs.

Ontario Employment Equity Commission (OEEC)

The OEEC requires employers in Ontario to complete workforce surveys.

Open Enrollment

The scheduled annual re-enrollment of plan participants into appropriate benefit programs and, within those programs, benefit options.

Open Price

The price at which a security starts a trading day.

Open Season

A time period during which Federal employees are open to re-enroll in a specific benefit plan and option. Open Seasons can be scheduled at varying times throughout the year and multiple Open Seasons can occur concurrently with each other. For FEHB processing, it is generally the time period from mid-November through mid-December. For Thrift Savings Plan (TSP) processing, these are semi-annual and are generally held from May 15 - July 31 and November 15 - January 31. Open seasons for FEGLI are infrequent and special notification from the OPM would be issued to all Federal employees should they occur.

Open Transaction

A transaction that has not yet been processed in PeopleSoft Asset Management.

Operation

In PeopleSoft Manufacturing, a job or task performed in a specified amount of time, done in one work center, and using one or more resources.

Operational Data Store (ODS)

A staging area in PeopleSoft Enterprise Warehouse for source application data and pre-processed data for tables optimized for reporting.

OPF Code

Indicates where the OPF is maintained.

OPM

Office of Personnel Management.

Optimization

In PeopleSoft Demand Planning, the process of evaluating and improving forecast model parameters.

Optimize

The process of creating a new PeopleSoft Planning schedule by repairing the violated constraints in a schedule automatically. The Optimizer can be prioritized for meeting due dates, for minimizing overtime costs, and so on.

Option

A contractual right that gives the individual the option to purchase a specified number of shares of stock through an Equity Compensation Plan. Also known as a grant. Regulatory agencies also refer to an option as the right to purchase stock in an employee stock purchase plan. These options are considered granted on the offering begin date.

Option Adjusted Cost (OAC)

In the financial services industry, the difference in the average expected return between an instrument without embedded options that are otherwise identical to the fully loaded instrument and the instrument fully loaded with embedded options.

Option Adjusted Spread (OAS)

In the financial services industry, the average return expected for an instrument, over the short-term risk-free rate, for all projected interest rate paths generated using Monte Carlo simulation.

Option Types

Types of stock options. PeopleSoft Stock Administration supports the following stock option types. Incentive Stock Options (ISO), Nonqualified Stock Options (NQ), Tandem Incentive Stock Options/Stock Appreciation Right (ISO/SAR), Tandem Nonqualified Stock Option/Stock Appreciation Right (NQ/SAR), Restricted Stock Award (RSA).

Optional Forms of Payment

Any alternative forms of payment available to a participant retiring under a pension plan. These can include: annuity options paid over the participant's (and possibly a beneficiary's) lifetime; certain term options paid over a specified number of years; and lump sum options paid out in a single payment.

Options Outstanding

The total number of option shares held by optionees. It is the number of Grants less the number of Exercises, Cancellations, and Expirations.

Order Group

Order groups link order terms that default into sales orders and quotes when you select an order group code.

Order Line Number

The line associated with an order identification number. The order line identifies an item and the requested quantity.

Order Quantity Policy

In PeopleSoft Inventory Planning, a policy that determines how replenishment order quantities are calculated for an item. For example, you can use a static number, provide upper and lower limits, or use an economic order quantity calculated by the system.

Ordinary Income Tax

An individual's tax on earnings from wages, tips, and all other sources except capital gains. Includes option profits upon exercise of non-statutory options.

Origin ID

A code that identifies the location of a payment deposit in PeopleSoft Billing. Origin ID also distinguishes the method of the payment's entry: online, external, or lock box interface. Billing origin ID identifies the remit to origin for billing. This function is mainly used for specifying where the customer should send payment.

Original Option

A stock option that is eligible for repricing. This option has a grant price greater than the current FMV.

OSHA 200 Occupational Injury and Illness Recordkeeping Log

In the United States this record-keeping logbook meets reporting requirements for reporting occupational injuries and illnesses to the Occupational Safety and Health Administration (OSHA). It lists the case numbers and details of each injury and illness that occurred during a calendar year.

Out Punch

Indicates the end of a shift.

Out-of-the-Money

A term used to describe an employee stock option when the current market price is below the option grant price. When an option is out-of-the-money, it costs more to exercise than the underlying stock is worth. Such options are also described as being "underwater."

Output Result Tables

Refer to the database tables that are populated with information at the end of each pay calculation.

Output VAT

VAT collected on sales or outputs.

Outside Scope of VAT

A transaction determined as not subject to VAT. No VAT code is associated with this type of transaction. The transaction is still logged in the VAT transaction table, but no tax is applied.

Outside The Register Appointment

An appointment in the competitive service made under an agency's applicant supply system because either there is not a sufficient number of eligibles on the appropriate register or no competitor inventory exists. Agencies are also authorized to make temporary limited appointments outside the register at grades GS-12 and below.

Outstanding Option

A stock option that still has unexercised (vested or unvested) uncancelled or unexpired shares. Options with a "pending" status are not included. Only options with a status of 'active' or 'suspended' are considered outstanding.

Overlapping Promotions

Multiple customer promotions related to the same customer, and the same product, at the same time.

Override Rate

Cost per hour or unit reported with time used to replace the time reporter's default rate. (see Time Reporting)

Override text

Text not derived from field descriptions.

P***Package level***

The top level of organization is the package level. The package is the entire transaction set file, addressed to your company much as a mail package would be.

Page

A page defined in Application Designer as part of a PeopleSoft Internet Architecture application.

Page Assembly

Page assembly is one of the functions of the portal servlet. Page assembly involves intercepting the user's content request, retrieving the content, and properly formatting it using a pre-defined portal template. To complete the page assembly process, the portal servlet merges content from any HTML documents that it retrieves along with the defined template

HTML. The assembled page is then sent back to the user's web browser as a single HTML document.

Page buffer

Consists of rows of buffer fields that hold data for the various records associated with page controls, including the primary records, related display records, derived/work records, and translate table records.

Pagelet

A page designed to appear on a customized homepage. A pagelet is smaller than the typical page dimensions in many PeopleSoft applications. It can be based on either a page designed in Application Designer or on an iScript.

Paired Punches

Two punches for the same employee in chronological order that exists for the purpose of determining the duration between the punches.

Par Value

The nominal or face value of a security. It establishes a price floor below which shares may not be issued. With common stock, the company issuing the stock sets par value. Par value has no relation to fair market value. Some companies issue no par value stock.

Parallel Processing

In the PeopleSoft Enterprise Warehouse, parallel processing is a system function that "locks in" the information you use for processing. This enables the system to run identical or similar processes at the same time without impacting your results. Running concurrent processes greatly reduces the amount of time it takes to run within the system.

Parent Budget

In commitment control, you can build a hierarchy between different budgets, such as summary and detail budgets. Specifying a relationship of parent and child between a summary and a detail budget for purposes of budget inquiries enables you to retrieve information about either budget through the other.

Parent/Child Models

Object based modeling technology enables you to create parent and child models. In the PeopleSoft Enterprise Warehouse, you set up such models using the Scenario Manager.

Parent node

A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

Parent Task

A higher-level Planning task in a schedule's hierarchy that drills down into subtasks. Its start time is the start time of its earliest subtask, and its end time is the end time of its latest subtask. Planning tasks are distinct from Manufacturing tasks.

Partial Pay

The pay processed whenever a job record has an effective date in the middle of a pay period. Typically, this happens whenever you hire, terminate, transfer, or change the rate of pay for an employee mid-period.

Participants

Individuals who elect to participate in the stock purchase plan.

Participation

The PeopleSoft Pension Administration function that determines whether an eligible employee has met the plan's rules for joining the plan. Generally, these rules are based on age and service criteria.

Participation ID

In the financial services industry, this is a lookup code used by the financial analytic applications to identify the participants (syndicators) involved in, or responsible for, a financial instrument or group of instruments.

Passive Control

A target control allowing the user to submit a budget even if it is not within the planning target and tolerance rules. The system responds by sending an email to the user of the next budget center level indicating that the budget exceeded planning target tolerance levels.

Passive Events

Events that are initiated by a change that has taken place over time, rather than by a direct data entry action. Events are actions that potentially change benefit coverage eligibility. Examples of passive events include an employee's reaching the age of retirement. See Event Class for more information.

Pattern Reporting

A Time and Labor process that enables you to report a start and stop date, a pattern of one or several time reporting codes, associated hours, amounts, or units and task information once for an employee. The system transforms the information into instances of daily time for each scheduled employee work day based on the employee's schedule.

Pay

Types of "pay" are as follows:

- **Basic Pay:** generally, the total amount of pay received during any one calendar year at the rate fixed by law or administrative action for the position held by the employee or judicial official prior to any deductions and not including any special payments or premium pay.
- **Gross Pay:** total compensation earned by an employee, annuitant, or survivor of a judicial official prior to any deductions. Includes basic pay plus locality pay; availability pay (if any) for LEOs; special payments (if any); an annuity (if any); plus awards (if any).
- **Premium Pay:** pay provided to an employee as a regular addition to basic pay (e.g., administratively uncontrollable overtime (AUO), availability pay, overtime, night differential, holiday pay, etc.).

Pay Basis

A code indicating the principal condition in terms of time, procedures or criteria, that serves as a basis for computing an employee's pay.

Pay Calculation

Formula that calculates an employee's gross to net.

Pay Calendar

Payroll processing cycle for a given pay group.

Pay Components.

Rows in the compensation record. They build the compensation packages in the compensation record.

Pay Confirmation

Process in which the system updates all to-date totals on the database for earnings, deductions, and taxes for pay groups assigned to a given Pay Run ID.

Pay Entity

A pay entity is the organization responsible for making payments to payees. You can also use a pay entity to define the type of currency to be used when processing calculations. The pay entity is a legal definition of an organization from a payroll perspective. In many cases, an organization and a pay entity are the same. However, PeopleSoft Global Payroll does not define a relationship between an organization and a pay entity.

Pay Frequency

Defines how often employees in a pay group are paid—weekly, biweekly, monthly, and so on.

Pay Group

A set of employees grouped together for payroll processing. It's a way of "bundling" payees for more efficient processing. A pay group is made of payees that the system processes at the same time during a pay run.

Pay Period

The established time segments for which employees in a pay group are paid. Pay Periods are defined by their beginning and ending dates.

Pay Plan

A code that denotes the pay schedule under which an employee is paid , e.g., JS, UG, UJ, etc.

Pay Slip

Either an actual check or an advice notice of a direct deposit. You build these to match your organization's needs. A pay slip is the details of a payment you've made.

Pay Structure

In PeopleSoft Workforce Analytics, Pay Structure consists of a series of pay ranges or grades, each with a minimum and maximum. You develop pay structures to support and reinforce your company's pay strategy (for example, to target the market 50th percentile).

Payable Date

The date that a corporate distribution, such as a dividend, is payable to the record holders of a corporation's securities.

Payable Time

Time that is ready to be collected by the payroll system (see Time Reporting).

PayCycle

A set of rules that define to PeopleSoft Payables the criteria by which it should select scheduled payments for payment creation.

Payee

Any payroll recipient. A payee can be an employee or a non-employee of an organization.

Payee Process Stat Record

A record created for each payee during the payroll process. The system creates one Process Stat record per payee for each calendar.

Payee Section

Type of section that can be added to a process list. A payee section defines a set of elements that is to be resolved for a particular payee.

Payline

Record containing standard payroll information for an employee, such as the amount of regular pay, number of regular hours, additional pay (if any), and tax information and job data.

Payment Interface

An Application Engine process that loads payment information from the Banks Statement tables and the Staging tables to the Application tables and performs various checking and default operations.

Payment Predictor

PeopleSoft Receivables' automatic cash application feature that pairs open items with unapplied payments based on predefined algorithms.

Payment Schedule

A schedule of payment dates for leased assets.

Payment Selection

A process by which PeopleSoft Payables selects scheduled payments that are eligible to be paid in a pay cycle.

Payment Worksheet

The work space in which open items are paired with unapplied payments.

Payroll Certifying Officer

The individual with the delegated authority for approving all items relating to payroll for those employees under his/her authority.

Payroll Process Tables.

Records holding data necessary to process a payroll, such as employee, company, and tax information.

Paysheets

Repository for the raw data necessary to calculate pay for employees, including earnings, hours, deductions, taxes, and accounting data.

PBGC Rates and PBGC Grading

The interest rates published monthly by the Pension Benefit Guaranty Corporation. There is an "immediate" rate that applies once benefits commence as well as a series of "graded" rates—calculated based on the immediate rate—that are used during the time between benefit determination and a deferred benefit commencement.

Pegged Chain

A method the PeopleSoft Enterprise Planning and Production Planning solvers use to determine feasible plans. The method ties tasks together in order to explicitly record which supplies are being used to satisfy which demands. Through this process, the Planning engine first determines which independent demand has the highest priority. Then, it determines the lateness preference ranking for dependent demand tasks.

Penalty

A user-assigned value for constraints that can be violated, determining how the schedule's score will be calculated. Setting the penalty configures the constraint to your priority. Use the Control Page to assign a higher penalty to violations that are more critical to your schedule or a lower penalty to constraints that you can deal with externally.

Pending Exception

Any known exception to an employee's scheduled workday. Pending Exceptions are future dated (future is defined to be for a date under report beyond the last date of the employee's current pay period).

Pending Item

Information in PeopleSoft Receivables that has been entered in or created by the system, but hasn't yet been posted. During the Receivable Update process, the system uses the pending items to update customer balances—either by creating new items or by adding item activity lines to existing items.

Pending Time

Time that has been reported or is assumed to have been reported (based on employee work schedule and calendar date) that has not been used by the business entity. Pending Time may be for past, current, and future pay periods. It is the label for those time transactions that are waiting to be used by the business (for example, approved and unapproved time not yet updated to Paysheets).

Pension Status

An employee's standing with regard to a particular pension plan. For example, employees can be active participants, terminated deferred vested, or in pay status.

PeopleCode

PeopleSoft's proprietary language; it is executed by the PeopleSoft Application Processor. PeopleCode generates results based upon specific actions, based upon existing data or the

actions of a user. Business Interlink Objects are executed by calling the execute() method from PeopleCode. This makes external services available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode Event

An action that an end-user takes upon an object, usually a Record Field, that is referenced within a PeopleSoft page.

PeopleSoft Activity-Based Management (ABM)

A PeopleSoft Analytic Application that aligns organizational costs with operational activities, enabling a coordinated approach to expense and PeopleSoft Activity-Based Management. PeopleSoft Activity-Based Management identifies and assigns operational activities to products, customers, or services.

PeopleSoft Analytic Applications

These are applications within Enterprise Performance Management (EPM) that help you enrich the data in the PeopleSoft Enterprise Warehouse and perform forward looking simulations and scenarios. These applications include: PeopleSoft Activity-Based Management (ABM), PeopleSoft Asset Liability Management (ALM), PeopleSoft Balanced Scorecard (BSC), PeopleSoft Funds Transfer Pricing (FTP), PeopleSoft Risk Weighted Capital (RWC), and PeopleSoft Workforce Rewards. PeopleSoft Funds Transfer Pricing and PeopleSoft Risk Weighted Capital are applications that target the financial services industry (FSI).

PeopleSoft Asset Liability Management (ALM)

PeopleSoft Asset Liability Management provides financial service institutions with the analytical tools to define, measure, monitor and manage interest rate risk, liquidity risk, options risk, and to some extent exchange rate risk. The primary audience for PeopleSoft Asset Liability Management is the financial institution's Asset/Liability Committee (ALCO).

PeopleSoft Balanced Scorecard (BSC)

PeopleSoft Balanced Scorecard converts an organization's vision and strategy into a comprehensive set of performance and action measures that provide the basis for a strategic management system.

PeopleSoft Budgeting

A budgeting application that is a combination of Education and Government (E&G) Budget Planning and Budgets (commercial). This application resides on the EPM database, primarily using the ODS layer of the PeopleSoft Enterprise Warehouse for its data.

PeopleSoft Business Analysis Modeler (BAM)

A multi-dimensional modeling tool used to support several analytic applications.

PeopleSoft Business Planning

A planning application that enables financial executives to model various alternatives and set corporate financial targets to achieve their strategic goals. PeopleSoft Business Planning integrates with PeopleSoft Analytic Forecasting, PeopleSoft Activity Based Management, PeopleSoft Workforce Analytics, and PeopleSoft Budgeting applications.

PeopleSoft Customer Behavior Modeling

A PeopleSoft application that enables you to: a) create a customer profile by extracting customer data from the Enterprise Warehouse; b) create segments and samples from the profile to efficiently target marketing campaigns and further analyze customer behavior; c) append to it additional data from external sources such as demographic, credit or psychographic information; d) use a data mining tool to create a predictive model; e) score the customers in your profile using the predictive model. You can then publish the results to another transactional application.

PeopleSoft Customer Scorecard

A product that provides a pre-defined set of customer-oriented key performance indicators (KPIs), to help you build a scorecard specific to your organization. This scorecard facilitates the measurement and communication of customer satisfaction, customer activity, and objectives across your organization.

See also PeopleSoft Balanced Scorecard

PeopleSoft Enterprise Performance Management (EPM)

Enterprise Performance Management is a comprehensive, integrated analytic business solution designed to increase the value of organizations by enabling people to make better decisions. The PeopleSoft Enterprise Performance Management product line consists of the PeopleSoft Enterprise Warehouse and optional analytic applications and Data Mart products.

PeopleSoft Enterprise Warehouse (EW)

PeopleSoft's data warehousing solution. The PeopleSoft Enterprise Warehouse provides the tools necessary to query, analyze, and present information to provide the optimal environment for business intelligence. It is the central repository for data that will be used with the analytic applications in the Enterprise Performance Management product line, and can also serve as a standalone data warehouse. The PeopleSoft Enterprise Warehouse consists of dimension, fact, reference, and error tables, reporting and ETL tools (Informatica PowerMart), as well as the Operational Data Store (ODS). The tables in the PeopleSoft Enterprise Warehouse are maintained separately from your transaction-based systems to allow for comprehensive analysis of data originating from any Online Transaction Processing (OLTP) or legacy system.

PeopleSoft Funds Transfer Pricing (FTP)

A PeopleSoft Analytic Application that enables an institution to accurately measure and tune profitability. PeopleSoft Funds Transfer Pricing is an interest rate that represents the value of an asset or liability to the institution. PeopleSoft Funds Transfer Pricing is based on market rates, adjusted for risk and cost variables, specific to the institution. By assigning PeopleSoft Funds Transfer Pricing to each item on the balance sheet, the institution can remove the

effects of interest rate volatility from business units, so that profitability measurements are based on factors within their control, that is, credit quality, pricing and product strategy.

PeopleSoft Operations Data Stores (PODS)

See Data Warehouse Tables

PeopleSoft Marketing Insight

A tool that helps you analyze your marketing campaigns and activities. It helps you determine the effectiveness of marketing events based on factors such as number of leads generated, profiles of respondents, campaign return on investment, and campaign forecasted costs to complete.

PeopleSoft Risk Weighted Capital (RWC)

A PeopleSoft Analytic Application that enables the financial services industry to accurately measure capital that has accounted for risk. RWC allocates capital to various levels within a financial institution according to risk, providing the opportunity to measure performance based on how well each business unit, product, customer, or transaction generates income given its perceived level of risk as quantified by the allocation of capital.

PeopleSoft Sales Activity Insight

A tool that helps you analyze key components of the sales process, such as pipeline status, discount analysis, and sales process.

PeopleSoft Support Insight

A tool that helps you determine the effectiveness of your customer service organization. It helps you answer questions such as: Are we effectively handling customer issues? Has contact center performance changed from last year to this year? Which product quality issues are most prevalent?

PeopleSoft Workforce Analytics (WFA)

PeopleSoft's complete workforce analysis solution, which includes the PeopleSoft Workforce Rewards analytical application and the PeopleSoft Workforce Analysis Insight. The complete solution set includes the PeopleSoft Enterprise Warehouse and PeopleSoft Balanced Scorecard products. It helps to manage strategic employee compensation, goals, and competencies, as well as retention.

PeopleSoft Workforce Rewards

PeopleSoft Workforce Rewards is an analytical application you use to align your workforce compensation and retention initiatives with the strategic objectives of your organization. Modules include Market Compensation, Base Pay Structure, Compensation Planning, Workforce Simulation, and Retention Management. You integrate data from multiple internal and external sources, enrich it using rules you define based on any data in your PeopleSoft Enterprise Warehouse, and simulate multiple scenarios of future workforce compensation and

retention activity. You then analyze and evaluate your scenarios, and make actionable decisions you can communicate back to your PeopleSoft ERP systems for execution.

PeopleSoft Portal

The portal bundled with every PeopleSoft 8 application. It provides a simple navigation system, based on existing menu definitions that have been imported into the portal registry. Navigation to content outside of PeopleSoft applications is not provided.

Percent Cycles Without a Shortage

In PeopleSoft Inventory Planning, a method used with safety stock policies. The value is derived from the percentage of replenishment cycles that will complete without a stockout.

Percent Demand Fill

In PeopleSoft Inventory Planning, a method that can be used with safety stock policies. This method defines the percentage of the total quantity ordered that must be filled without a backorder.

Percentage Tolerance

The acceptable percentage difference between expected cycle count quantities and actual quantities counted in PeopleSoft Inventory. This value provides a margin of error for an item during cycle count reconciliation count quantities.

Performance Appraisal Code

Indicates the level of performance of an employee.

Performance Appraisal Due Date

Date established based on the WGI or LEI for the yearly appraisal of an employee.

Period Closing Offset

In Time and Labor, the closing date beyond which this pay period is not considered current any longer, if the period's closing date is different from its end date. You can enter a positive or negative number of days.

Period Method

In PeopleSoft Inventory Planning, a method used to determine how a single static policy value is to be calculated from time-phased results with static policies.

Period of Interest

The maximum period of time containing the data needed to run all the rules in a rule program (see Batch Processing)

Period Segmentation

When an element (like compensation rate) changes mid-period, requiring all other elements in the process list to be calculated multiple times on either side of the date on which the change took place, period segmentation is used. The system calculates each element more than once, using the components that were effective during the different time slices. The system keeps the results of these calculations separate with the object of creating two gross-to-net result sets.

Periodic Processing

In PeopleSoft Pension Administration, any of several batch processes that a plan administrator must run on a regular basis—for example, consolidation of payroll data.

Personal List

A user-created list of products defined in PeopleSoft eStore, used to quickly populate the shopping cart when creating a new order in either PeopleSoft eStore or Mobile Order Management.

Personal Register (Registre Unique du Personnel)

In France, companies are required to be able to produce, at any given time, a Personal Register. For a given establishment, this report lists current employees and employees who left up to 5 years ago.

Personnel Action

Personnel actions are changes to employee data or status resulting from such activities as promotions, transfers, terminations, salary increases, and leaves of absence.

Personnel Representatives (Délégués du personnel)

In France it is mandatory for companies with more than 11 employees to elect personnel representatives who will represent all of the employees before management.

Perspective

In PeopleSoft Balanced Scorecard, a category for organizing critical success factors and key performance indicators. Usually there are four: financial, customer, internal process, learning and growth.

PF Ledger

The PF Ledger (PF_LEDGER_F00) is an important fact table within the PeopleSoft Enterprise Warehouse. The primary function of the PF Ledger table is to support PeopleSoft Enterprise Performance Management reporting. The data that gets posted to the PF Ledger must be accurate and clean.

PF Business Unit

PF Business Units differ from other PeopleSoft Business Units in that they represent functional or strategic areas of an organization, rather than separate legal entities.

Phase Type

A label for the different phases you want to define for a project. Costs can then be calculated by project phases. Examples include planning, startup, construction, and cleanup.

Physical Accounting

The PeopleSoft Inventory feature that updates tables based on count result input, regardless of how the count was created or the data collected.

Physical Inventory Process

In PeopleSoft Asset Management, the process by which you extract asset data from the Asset Management database to load into your bar code scanning device. You then scan the assets and load the data gathered during the actual physical inventory into Asset Management, enabling you to generate physical inventory results for review. You perform matching and generate transactions to reconcile the data in Asset Management with the results of your physical inventory.

PIA

PeopleSoft Internet Architecture. This is the fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a web server, and a browser.

Piece Work

Method of compensating time reporters based on units completed rather than hours worked

PIN

Technical term for an element. In PeopleSoft Global Payroll, PIN is often referred to in the online object names and within the batch code. PIN stands for Pay Item Name.

Placeholder

A temporary location designator in an engineering bill of material for a component item that has yet to exist. These temporary placeholders have to change into approved items before transferring engineering bills of material (EBOM) to manufacturing bills of material (MBOM).

Plan Administrator

The person selected by the employer to perform the administration of a plan under PeopleSoft Pension Administration.

Plan Eligibility

The PeopleSoft Pension Administration function that uses job data to determine whether an employee may participate in a pension plan. An employee can be eligible based on job data but not be participating because of an unmet service or age requirement.

Plan Type

A unique ranges of codes used during payroll calculation to determine deduction processing rules. See also Benefit Plan Type.

Plan Year

The annual period that a pension plan uses to measure service, earnings, and benefits. Generally, the pension plan year will match the fiscal year of the plan sponsor.

Planning Item

A non-inventory item 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 or planning routing, and can exist as a component on a planning bill of material. A planning item cannot be specified on a production or engineering BOM or routing, nor used as a component in production. Quantity on hand will never be maintained.

Planning Level

The level on a dimension's tree used for planning. Typically, a customer will choose not to plan at the lowest level of available detail, such as the individual product level. Instead, the individual products are mapped to their corresponding product group and the planning is done at the product group level.

Planning Targets

The amount the budget must equal, such as a budget spending limit or cap for expenses where users can not exceed the amount. Planning Targets are presented at a summary level. This term is interchangeable with Spending Limits.

Planning Target Tolerance

The percentage and/or amount a user can be over or under the planned budget target.

Planning Target Control

Values set at the user role level, including no control, active control, and passive control. For more information see no control, active control, and passive control.

Planning Task

Any activity in PeopleSoft Planning that creates a schedule.

PODS (PeopleSoft Operations Data Stores)

See Data Warehouse Tables

POI. Personnel Office Identifier.

Also known as Submitting Office Number (SON). These are codes assigned by the OPM to the office(s) delegated authority within an agency to process personnel actions on Federal employees.

Pointers

A pointer is an "address" of a driver quantity, or value, within the Enterprise Performance Management product line. Pointers are used as a means of defining where driver quantities exist in tables that reside in the PeopleSoft Enterprise Warehouse. Pointers enable you to extract values from any location in the warehouse and then use these values as driver quantities. There are three different kinds of pointers: explicit, implicit, and multidimensional.

Policy Control Group

In PeopleSoft Inventory Planning, a feature for setting up order quantity, safety stock, reorder quantity, and maximum and minimum policies. The **Control Group** is assigned to a set of **Planning Item**. The policies of the associated planning items can be set explicitly or defaulted from the policies on the policy control group.

Policy Generation

In PeopleSoft Inventory Planning, a set of run options used to control the functions and behavior of the Policy Generation program.

Policy Item

An item record which is related to a location and for which **Inventory Policy** is held. A policy set, **Planning Item** ID, and Location ID uniquely identify a policy item. The combination of an item and a location is called a stockkeeping unit.

Policy Set

Defines a set of the items for which **Inventory Policy** is to be calculated. Each policy set is assigned a unique ID and includes information that defines, for example, the associated **Forecast View**, time periods, and planning horizon.

Policy Simulation

In PeopleSoft Inventory Planning, a feature that simulates the effects of various stocking scenarios, compares current policy with simulated policy, and determines the best inventory investment strategy.

Population

A Population is defined on top of DataMaps created using Enterprise Warehouse metadata. The Population builder allows you to easily format a SQL statement, using filters, to select

rows from one or more tables joined together in a DataMap. You can view the results of a Population directly from the browser.

Pop Up Payment Option

A variation on a joint and survivor payment option under which the benefit payable to the participant is increased if the beneficiary should die prior to the participant.

Portal

A portal is a web site that helps you navigate to other web-based applications and content. Users often consider a portal their “entry point”—the place they typically visit first after launching their web browser.

Portal Registry

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.

Portal Registry API

The Registry API is provided for accessing each portal registry from PeopleCode, COM, Java, or C programs. Providing the same kind of registry management capability as the online administration pages, it can be used by external systems to update the registry to reflect changes in the content reference URL, taxonomy, and effective dates. The Registry API is fully described in the PeopleCode documentation.

Portal Servlet

A Java servlet that runs on a web server. The portal servlet intercepts user requests for content, retrieves content, and builds a single HTML document to be displayed in the user’s browser.

Portal Solutions

Portal Solutions are separate product offerings from PeopleSoft that consist of pre-built, packaged solutions focused at different audiences (customers, suppliers, and employees). Because they are both pre-built, supported application products, Portal Solutions can be deployed swiftly and easily, saving significant resources when compared to other custom-built solutions.

Position

The officially assigned duties and responsibilities that make up the work performed by an employee. Positions are linked to Job Codes, which can be considered the electronic version of the Position Description. There can be a many-to-one relationship between the Position and Job Code.

Position Budgeting

The budget amounts (salary, benefits, and earnings) associated with positions within an organization. Position budgeting can be calculated based on position information loaded from a human resource system. Position budgets are used to generate line-item budgets for personnel costs. PeopleSoft Budgeting-specific.

Position Change

A move by an employee to another position during the employee's continuous service under the same appointment within the same agency.

Position Date Created

Date the position was created for use in the agency.

Position Description (PD)

In accordance with OPM guidelines, an official description, authorized and approved by an agency official, describing duties and responsibilities to be performed. Position classification standards are used to describe the work, classify the work components by occupational series, and factors (e.g. supervisory control, scope, complexity, competencies required) are used to determine the grade level (i.e., salary range) for the position.

Position Description Number

A number assigned to identify various types of Position Descriptions.

Position Description Required

Identifies those positions for which a position description must be maintained.

Position Number

A number that identifies an authorized Position.

Positive Input

Data such as hours worked or a bonus amount entered for elements that change each pay period. Positive input can be entered manually, generated by the system, or received from other applications.

Positive Task Reporting

A method of time reporting in which all required task elements must be provided (see Time Reporting)

Positive Time Reporting

A method of time reporting in which all elements of time must be provided (see Time Reporting)

Post Differential Percent

Additional compensation that may be paid to certain employees who work in Guam or the Northern Mariana Islands.

Post Differential, Non-Foreign

A differential payable to an employee at a location in a non-foreign area if conditions of environment differ substantially from conditions of environment in the contiguous United States and warrant its payment as a recruitment incentive.

Post-56 Military Deposit

The OPM provides guidelines to Federal agencies on how to calculate and process these voluntary employee deductions from pay toward the employee's current retirement fund for those periods of eligible military service.

Posting

In PeopleSoft the process by which accounting entries are created or updated based on user transaction input and accounting entry templates. In PeopleSoft Receivables, posting is also known as Receivable Update.

These posted accounting entries in the feeder systems, such as accounts receivable or accounts payable, must be further processed by the Journal Generator to create journal entries before posting to the General Ledger occurs.

Post-Tax Deductions

See After-Tax Deductions

Pre-encumbrance

An encumbrance that occurs before an employee/employer relationship exists. You encumber funds for an employee you have on staff; you pre-encumber funds for an employee that you anticipate hiring. For example, you would pre-encumber funds for a new position that has just been approved but not filled.

Pre-encumbrance Ledger

Stores pre-encumbrance amounts. Updated by posting pre-encumbrances, such as purchase- or hiring-requisition source transactions (including journal entries).

Premium

Any additional compensation for extra hours worked, often expressed in terms of factor-above-normal-per-hour pay, such as time and a half (where one-half is premium pay), double time or triple time. Also, any additional pay provided to a time reporter based on compensation rules (see Time Administration in your *PeopleSoft Time and Labor PeopleBook*).

Prenote

A prenotification or waiting period requested by banks before processing payroll direct deposits.

Pre-Retirement Survivor Annuity (PRSA)

A benefit paid to a beneficiary if a pension plan participant dies before commencing benefits. Qualified plans must offer a pre-retirement survivor annuity, although the employee can be required to pay for the coverage with a reduction in the benefit.

Pre-Tax Deductions

See Before-Tax Deductions

Previous Day's Close

The previous trading day's last reported trade.

Price Break

Defined in PeopleSoft Order Management, and linked with price sets, a price break defines the actual adjustments that are made to the list price. They are valid only within a time frame you establish.

Price Rule

Used in conjunction with price sets, rules are essentially a decision tree that establishes the search order the system uses in reviewing sets for a match on the variables they reference for price adjustments.

Price Set

Linked with price breaks, a price set specifies the parameters for your price adjustment. It establishes selection criteria, determines whether the break is based on quantity or price, and defines how the adjustment is applied.

Price Source

A service provider or publication that reports the trading activity for a stock traded on stock exchanges. Examples include Wall Street Journal and Bloomberg.

Primary event code

Primary event codes, also called purpose codes, specify the status of the transaction: whether it's a new transaction, a cancellation, a duplicate, a status request, and so on. Every transaction has a primary event code assigned to it.

Primary Insurance Amount (PIA)

The benefit amount calculated under the Social Security benefit formula.

Primary scroll record

Primary scroll records are the principal SQL table or view associated with a page scroll level. A primary scroll record uniquely identifies a scroll level in the context of its page: each scroll level can have only one primary scroll record; and the same primary scroll record cannot occur on more than one scroll at the same level of the page.

Prior Period

In Time and Labor, any payroll period before the current one.

Prior Period Adjustment

A change or correction to previously reported time or task information, or an insertion of time or task information. Often requires the original report to be offset (reversed) and the correct information to be recorded. (see Time Reporting)

Priority Rank

The numeric value assigned to inventory **Demand Priority Rules**. The lower the number, the higher priority of the rule and the orders matching that rule.

Private

A tracking method used by a privately held company to track their daily prices. The Board of Directors typically establishes a price for a period of time. Stock of a privately held company is not traded on an exchange.

Private Views

User-defined views available only to the user who created them. For more information, *see* Budget Views.

Process

See Batch Processes.

Process Definition

Process Definitions are created in the Process Scheduler Manager pages to define each specific run request. A Process Definition is comprised of a variety of variables including panels associated with a request, Process Groups, output parameters, run locations, and many more.

Process Group

Used to associate specific Process Definitions with a Class Profile in Security Administrator. This allows administrators to restrict an operator's ability to initiate requests.

Process Instance

A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

Process Job

Multiple Process Definitions can be logically linked into a job request to process each request serially or in parallel, and optionally initiate subsequent processes based on the return code from each prior request.

Process List

The set of instructions the system uses during a payroll process to determine which elements to resolve. A process list is comprised of sections that identify the sets of elements to be resolved. You build process lists and attach them to calendars.

Process List Manager

The program used during batch processing that reads the Process List and calls the PIN Manager to resolve elements on the list.

Process Request

A single "run request," such as an SQR, a COBOL program, or a Crystal report that you run through Process Scheduler.

Process Run Control

A PeopleTools variable used to retain Process Scheduler-defined values needed at runtime for all requests referencing a run control ID. This is not to be confused 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.

Process Scheduler

A PeopleTool that performs tasks behind the scenes of your application. It can run several kinds of processes, such as COBOL, SQR, and Application Engine programs. You can schedule processes to run on a regular schedule or at your request. Processes can run on your workstation or on a server.

Process Scheduler Server Agent

The server-based program (PTPUPRCS) that manages the selection, validation, and initiation of all queued requests for each defined server within your batch environment (Process Scheduler).

Process Type

A global process definition under which related process definitions are grouped. This allows for easy maintenance of Process Definitions that share common parameters.

Processing group

In order to partition application processing between the client and the application server, it is necessary to define units that, as a whole, run in one location or the other. We call these units processing groups.

Processing groups can encompass one or more PeopleCode events. Some processing groups can run either on the client or on the application server, such as Component Build and Component Save.

Product

A commodity primarily defined in PeopleSoft Order Management. It may be: 1) The Order Management view of an inventory item that has attributes the same as or different from those of its inventory counterpart. 2) A commodity that is not a stocked inventory item such as a product kit or a service. 3) A tangible commodity that is drop shipped from another vendor and is never stocked in inventory.

Product Alternate

Alternative products that can replace the product ordered when it's out of stock or a problem with a particular product temporarily prevents shipment.

Product Catalog

A configurable list of available products that may be of interest to a specific customer. You can create two types of catalogs—inclusive catalogs that contain all the products you want made available to a customer and exclusive catalogs that contain the products you want to withhold from your customer. By attaching product catalogs to a Sold To customer, you define the products they can buy.

Product Definitions

This support module describes how other support modules process the instruments that belong to a particular product. For example, different products have different cash flow characteristics and may be stratified differently, or may react differently to changes in interest rates. This module enables you to specify each of these actions for each instrument.

Product Kit

A commodity that consists of a fixed set of components that are sold together. It appears as a single line on an order, but is represented by multiple lines on shipping documents. Product kits may comprise inventory items, non-stockable products, or a combination of both.

Product Kit Component

A commodity that is part of a product kit. It may be an inventory item or a non-stockable product such as a service.

Product Pricing Model

In the financial services industry, this defines models that describe indices upon which future rates are paid or charged for an individual product.

Product Tree

A user-defined graphical representation of a company's product structure. A product tree defines how products are promoted and determines what users have authority to promote those products.

Production Maintenance Spreadsheets

A set of spreadsheets generated by an nVision process, containing production ID and production schedule data extracted from PeopleSoft Production Management. You can add and maintain production quantity data using these spreadsheets and then import the data back to Production Management.

Production Option

Effective-dated combinations of BOM codes and routing codes. You can create multiple effective-dated BOM code/routing code combinations (or production options) for an item. These combinations can be extracted to PeopleSoft Production Planning. They enable the specification of multiple production variations for an item and provide control of seasonal variations by effective date.

Production Option Cost

A cost based on a specific BOM/routing combination (also known as a production option). The Production Option Cost utility rolls up production options costs based on specific BOM/routing combinations, enabling you to cost individual production options and later to have the DataLink pass this cost to the Planning engine. If this utility isn't run, the Planning engine will use the standard item cost based solely on the primary BOM and routing instead.

Productive Time

Employee scheduled time spent performing any task for which a position was created; work performed on behalf of a business entity that is required for that entity to fulfill its business purpose. Employees doing the work they or someone else was hired to do.

Productive Unit

In Italy employers organize employees into productive units based on agreements between the unions and the employer.

Profile

A data set that you aggregate from the Enterprise Warehouse, according to the filters you specify, the Key Performance Indicators you select, and the 3rd party demographic data you include.

Profile Factor

In PeopleSoft Demand Planning, the weight index assigned to each **Forecast Period** to take into account seasonal fluctuations in demand. The factor or index typically measures the percentage of difference between the base demand and the expected actual demand in the period.

Profiles

Group of employees defined according to a list of job codes and departments. You can use these profiles to ascertain training demands within your organization based on set criteria.

Profit Manager

The Profit Manager is a set of integrated tools that enable true profitability reporting. Profit Manager features are tightly integrated with the PeopleSoft Analytic Applications and provide you with ways to ensure data integrity, edit data, and post data to the Performance Ledger table.

Project

The highest level of hierarchical organization within PeopleSoft Projects. Projects provide the structure to which activities and resources are added. Each node on a Projects tree represents a project. Projects can contain other projects as well as activities and resources. This provides a hierarchical relationship between projects and facilitates cost roll-ups.

In Enterprise Performance Management you use a Project to create or modify a Profile. A Project contains pointers to data elements that you include in a Profile.

Project

In PeopleSoft Time and Labor, a specific endeavor undertaken to achieve a specific goal. Typically, projects are approved and undertaken with level of cost, schedule, and performance already agreed upon. A project is composed of a set of tasks, each of which requires staffing, provisioning, and/or scheduling. Project progress is often measured in terms of task completion.

Project ID

The name or number by which a project is to be identified in all tables and pages.

Project Type

A user-definable grouping of projects. Project types are optional.

Projected Run Date

In PeopleSoft Demand Planning, a calculation made that projects a life volume for a period based on a calculated run rate or performance ratio.

Projection.

An estimated pension benefit calculated as of a future date or any estimated data used as the basis for such a calculation.

Promotion

- For positions under the same type job classification system and pay schedule, a promotion changes the employee to a higher grade level or makes permanent a Promotion NTE;
- When the old and new positions are under different job classification systems and pay schedules, a promotion changes the employee to a position with a higher rate of basic pay or makes permanent a Promotion NTE.

Promotion Pattern

In PeopleSoft Demand Planning, an **Event** function that enables you to apply weights to promotions across a range of **Forecast Period**.

Prompting Profile

A task profile usually used by account managers as a way of creating task profiles for employees who report task time differently by customer. For example, you might have an account manager who has fifty customers; when the account manager comes in each day to report time, the system will display all the customers, and indicate which customers it will use as a default if she doesn't manually report time.

Prorated

In Enterprise Planning and Simulation, prorated is when the computed forecast and the summarized forecast are two different versions of the statistical forecast. In addition, the forecast at the product family level can be allocated down to the individual products. Usually this allocation is done in proportion to the calculated product forecasts at that level. This version of the (statistical) forecast is called the allocated or prorated statistical forecast.

Pro-Rate Purchase

A purchase in which the number of shares to be purchased is prorated according to a specified factor. This may occur when the total number of shares to be purchased is greater than the number of shares allocated to the stock plan from the treasury.

Prorated Forecast

In PeopleSoft Demand Planning, a forecast developed by factoring the group forecast down one level at a time to make the sum of the item forecast equal to the aggregate forecast. The prorated forecast tends to be more accurate than the **Statistical Forecast**.

Proration Rule

Element that defines how you want to prorate an item. You use proration rules in numerous places—for instance you could prorate an earning, deduction, or many of the elements that make up an earning or deduction.

Proration Threshold Ratios

In PeopleSoft Demand Planning, the upper and lower ratios used as thresholds for **Reasonableness** checks when a forecast is developed using proration.

Provider

An entity, such as an insurance company, that provides one or more of the benefits your company offers. For example, Metropolitan Life Insurance Company is a provider to companies that use a Metropolitan life plan.

Proxy Person

A highly compensated executive. Corporations must include information regarding the most highly compensated executive officers in their proxy reporting.

Proxy Statement

The document that must accompany a solicitation of proxy appointment under SEC regulations. The purpose of a proxy statement is to provide shareholders with the appropriate information to make an intelligent decision.

PSADMIN

A PeopleSoft utility providing a menu interface to create, configure and administer application server domains and the Process Scheduler Server Agent (Batch Server).

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A PeopleSoft utility providing a menu interface to create, configure and administer application server domains and the Process Scheduler Server Agent (Batch Server).

PSAPPSRV

PSAPPSRV is the main server process running within a domain. PSSAPPSRV performs the functional requests, such as building and loading components. It also manages the memory and disk-caching for PeopleTools objects on the application server. Each PSAPPSRV process maintains its own memory and disk cache.

It provides authentication services for incoming users. For instance, it checks the PeopleSoft OPRID against the directory server or PSOPRDEFN table.

PSQCKSRV

Essentially, PSQCKSRV is a copy of the PSAPPSRV. It performs quick, read-only SQL requests. It is an optional Server Process designed to improve performance by handling items in the PSAPPSRV transaction request queue.

PSQRYSRV

Like the PSQCKSRV server process, PSQRYSRV is designed to alleviate the workload of PSAPPSRV. PSQRYSRV is designed to specifically handle all user-generated queries submitted by PeopleSoft Query (PSQED.EXE). This server process is designed to improve overall application server performance whether or not you have PSQCKSRV configured. It is specifically, and exclusively designed to process PeopleSoft Query transactions, which can be very SQL intensive.

PSSAMSRV

It processes conversational SQL transactions primarily for Application Designer.

Public Company

A company that has held an initial public offering and whose shares are traded on a stock exchange or in the over-the-counter market. Public companies are subject to periodic filing and other obligations under the federal securities laws.

Public Views

Coordinator-defined views, available to anyone using the application. For more information, *see* Budget Views.

Publish/Subscribe

Publish/Subscribe type messaging is performed with PeopleTools Application Messaging technology. You can send data from one PeopleSoft system to another in an asynchronous mode—meaning the two systems don't have to be sending and receiving at the same time. This is possible because the message transfer is accomplished through a Web server with an "http: gateway."

Pull List

Similar to a pick list, a pull list contains multiple replenishment requests, including the location, quantity, and item quantity required in a specific sorting sequence. You use pull lists in PeopleSoft Flow Production with Inventory replenishment.

Pull Ticket

A document containing the details of a single request replenishment request, including Kanban ID, item, quantity, source, and To locations. You use pull tickets in PeopleSoft Flow Production with Inventory replenishment.

Punch

Precise instances of date and time recorded for a user and measured in seconds, minutes, hours, day, month and year and time zone (see Time Reporting)

Punch Duration

Length of time between two punches in increments of hours or partial hours (see Time Reporting)

Punch Matching

Area of the application which converts paired punches to punch duration by processing rounding rules and assigning the tasks to the appropriate logical day based on rules established by the user

Punch Restriction

The facility to constrain a time reporter's ability to create a punch that deviates from the schedule (see Time Reporting)

Punch Type

A user defined classification of punches, i.e. In, Out, Start, Stop (see Time Reporting)

Purchase

The issuance or purchase of shares through a stock purchase program. The purchase is made using current contributions from a participant and any carry-forward remaining for the participant from previous purchases.

Purchase Price

The discounted price paid for the shares at the end of a purchase period.

Purchase Price Variance

A PeopleSoft Payables matching feature that compares purchase order and inventory prices for any variance in the prices.

Purge Rules

The rules that define criteria to clear data you no longer need from previous open enrollment processing cycles in PeopleSoft Benefits Administration.

Pyramiding

A computer calculation enabling an individual owner of one share of stock to use the stock-swap technique to exercise a stock option of any size without using cash. Not many corporations permit pyramiding.

Q**QDRO**

See Qualified Domestic Relations Order.

QDRO Alternate Payee

A former spouse who is entitled to a portion of a participant's pension benefits as a result of a court order.

QJSA (Qualified Joint and Survivor Annuity)

A post-retirement death benefit for a spouse. Plans subject to this requirement must provide an annuity for the life of the participant with a survivor annuity for the life of the participant's spouse.

QMCSO (Qualified Medical Child Support Order)

A QMCSO is a court order that requires a group health care plan to provide benefits to the child of a participant as part of a child support arrangement on the behalf of that participant. Base Benefits enables the tracking of QMCSOs for dependents.

Qualified Domestic Relations Order (QDRO)

A court order ordering a division of a participant's pension benefits. This is normally the result of a divorce and gives a portion of the pension benefits to the former spouse.

Qualified Plan

A pension plan for which the employer can take tax deductions for contributions to the plan. Investment income of the plan trust fund is not taxable to the employer. Tax law places restrictions on the plan rules.

Qualifying Dispositions

A transaction whereby a participant sells shares acquired through a stock purchase plan two years after the grant date and one year after the purchase date.

Quality Function

A level of configuration that enables you to define the fields and attendant information that provides a base level for inspection plan and integration. Quality functions enable you to map process-specific field information into PeopleSoft Quality for identification, tracking, and analysis.

Quality Ranking Factors

Knowledge, skills, and abilities that could be expected to enhance significantly performance in a position, but are not essential for satisfactory performance. Applicants who possess such

KSAs may be ranked above those who do not, but no one may be rated ineligible solely for failure to possess such KSAs.

Quality Server

A PeopleTools-based analysis and graphing program.

Quality Step Increase (QSI)

A step increase awarded to an employee for sustained high quality performance.

Quantity Allocation Method

In PeopleSoft Inventory, the method used to determine how available quantity will be allocated to prioritized demand lines when using the online reservations page.

Quantity Precision Rules

A set of rules specifying whether item quantities for a given unit of measure are expressed as whole numbers or as decimals. Quantity precision is set at the inventory **SetID** and item-UOM levels.

Query

A set of data members that are selected from a Class catalog (provided by the Business Interlink Plug-in) as well as a generic form of Criteria. The criteria are composed of <left-hand-side> <Relational Operator> <right-hand-side> statements that can be concatenated using a set of logical operators. All operators and class catalogs are dynamically provided through the Business Interlink Plug-in.

R

Race And National Origin Code

A code that identifies the employee's basic racial and national origin category.

Range of Dates Reporting

A Time and Labor process that enables you to report a start and stop date, a time reporting code and task information for a single employee. The system transforms the information into instances of daily time based on the employee's schedule or default work schedule, replacing the scheduled time with the entered Time Reporting code and the number of scheduled hours on a day-to-day basis.

Range Penetration

In PeopleSoft Workforce Analytics, Range Penetration is the degree to which an employee's actual pay has progressed through their salary grade, and is expressed as a percentage. The calculation is:

Range penetration = (Employee Base Pay – Range Minimum)/(Range Maximum – Range Minimum).

Range Width

In PeopleSoft Workforce Analytics, the difference between the maximum and the minimum values of the pay range calculated using the following formula (and expressed as a percentage):

(Maximum – Minimum)/Minimum.

Rapid Time Entry

The process that enables you to enter daily time for single employees without the system editing your field entries. The system populates temporary tables, which are used by a batch process that reads, edits and moves the data into the appropriate time and labor tables. You cannot prompt for valid values in any of the fields, and the online system does not edit any of the data you enter against other tables.

Rate Code

Alphanumeric reference to the cost per hour or unit of time reported to a specific TRC.

Rate Code [Global Payroll]

IDs for pay components. Rate codes define rates of pay and are set up in the Comp Rate Code table. Rate codes are then used to represent pay components in pages and when you configure compensation packages in the compensation record.

Rate Code Group

A rate code group is a number of pay components (represented by rate codes) bundled into a subset of a compensation package. The rate code group is used to calculate percentage-based components that do not apply the percentage to all pay components in the compensation package. Rate code groups are constructed on the Rate Code Groups page.

Rate Code Type

Defines how the monetary value of the rate code is calculated. The compensation rate code type is defined on the Comp Rate Code table. Valid values are Flat Amount, Hourly Rate + Flat Amount, Hourly Rate, Percent, and Points.

Rate Combinations

The combination of rate types and conversion rates with account types that is linked to your budgeting model. Typical rate types are current, commercial, floating, average, and historical. Effective dates define different rates for different budget periods. There are several conversion rates for any pair of currencies including not only the current rate, but others rates such as average, historical, asking, and so on. These different types of rates are appropriate for different types of accounts.

Rates

The arrays of values used to calculate the cost of a plan to an employee. Rates can be age-graded, service-related, or general, depending upon the benefit plan type. Any number of benefit program and benefit plan combinations can use each set of rates.

In Enterprise Performance Management, a rate is determined by the user and specifies the dollar amounts to be calculated for each model. This is a financial services industry term.

Rating Model

The scale used by your company to measure competency proficiency. The default rating model is the PSCM (PeopleSoft Competency Management) Rating Model that PeopleSoft delivers with your PeopleSoft Human Resources System.

Raw Punches

See Actual Punch; typically this is distinguished from a rounded punch (see Time Reporting)

Reason Code

Reason Codes provide explanations for occurrences such as returned stock and changes to order headers, lines, or schedules.

Reason Code

A code describing employee time such as comments for sick time or travel time.

Reasonableness

In PeopleSoft Demand Planning, a technique that checks the trend and projected annual growth to make sure that a forecast is realistic. If a forecast falls outside either boundary, the system automatically adjusts it and sends a warning message.

Reassignment

Change of an employee from one position to another without promotion or change to lower grade.

Recalculate Forecast

In PeopleSoft Demand Planning, a forecasting feature that uses the existing model and its associated parameters to create a new forecast.

Recalculate VAT at Payment

Allows the VAT amount to be adjusted at the time of payment if an early payment discount is taken. This calculation option is only valid when VAT is calculated at Gross.

Receipt Cost Method

Determines how you cost receipts. Receipt cost methods include Actual, Non-Cost, and Standard.

Receipt Line

A line associated with a Receipt ID that identifies an item and quantity. If the respective tracking is activated, the lot, lot suffix, and serial number are also identified.

Receivable Update

See **Posting**

Receivables Item

An individual receivable. An item can be an invoice, credit memo, or debit memo. Items and payments combined comprise a customer's balance.

Reconciliation

Within PeopleSoft Enterprise Performance Management, reconciliation differs slightly when it is performed within the PeopleSoft Enterprise Warehouse and when it is performed within the PeopleSoft Analytic Applications.

In PeopleSoft Funds Transfer Pricing (FTP) and PeopleSoft Risk Weighted Capital (RWC), reconciliation identifies differences between Performance Ledger balances and the instrument or position balances, which are risk weighted according to the basis rules you have assigned. The first step in reconciling basis rule balances is to reconcile the individual balances for accounts, instruments, and positions. Reconciling the total balances is the second step. This means that you reconcile the difference between Account/Instrument balances, and the difference between Account/Position balances.

In the PeopleSoft Enterprise Warehouse, reconciliation is a period-end process that posts journal entries to the Performance Ledger for the discrepancies found when you reconciled the individual balances. Typically, you'll run the PF Reconciliation engine after a period to compare "to and from amounts" between tables such as REVENUE_F00 and PF_LEDGER, or the GL_LEDGER and the PF-LEDGER.

Record Date

The date a stockholder must officially own shares in order to vote at the meeting or to derive an adjustment resulting from a stock split or a stock dividend. The Board of Directors sets the Record Date.

Record Definition

A logical grouping of data elements.

Record field

Once a field is inserted into a record definition it becomes known as a Record Field within the record.

Record Group

A set of logically and functionally related control tables and views. Record groups exist for two basic reasons:

- To save you time—with Record Groups, TableSet sharing can be accomplished quickly and easily, eliminating an enormous amount of redundant data entry
- To act as a safety net—Record Groups ensure that that TableSet sharing is applied consistently across all related tables and views in your system.

Record Input VAT Flag

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

Record Output VAT Flag

For certain transactions within PeopleSoft Purchasing, Payables, and General Ledger, it may be necessary to record both input VAT and output VAT on the same transaction. Generally, this would be a situation where the purchaser was required to self-assess VAT. Within these situations, this flag indicates that you are recording output VAT on the transaction. This flag, in conjunction with the Record Input 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. This flag is not used in Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in Employee Expenses, where it is assumed that you are always recording only input VAT.

Record Owner

The "Stockholder of Record" of the stock. This may be different from the "Beneficial Owner" of the stock.

Record Suites

Record suites are temporary tables that enable the system to track how many processes are running. These temporary tables leave the fact tables accessible for processing other jobs simultaneously without impacting your processing.

Reduction In Force (RIF)

Method used to reduce the number of government workers in an agency.

Reemployed Annuitant

An employee who has retired from Federal employment and is receiving an annuity. His/her salary is reduced by the amount of the annuity.

Reference Designators

A user-defined alphanumeric identifier that determines where a component is placed in an assembly.

Reference Transaction

In People Soft 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.

Referential Integrity

Issues that occur when an update to an instance of one object invalidates one or more instances in a related object. In other words, when you make a change to one area of the application, referential integrity makes sure the changes do not adversely affect another area of the application.

Refresh Time

The process that retrieves the appropriate current version of objects related to employee time (such as task profiles or work schedules) and associates them with that time.

Region Codes

Regions may or may not be physical entities, they may simply be another way to geographically categorize an area. When a region does represent a physical entity, the region code has the same characteristics as a business, that is, an address and a language spoken.

Register of Separations and Transfers (ROST)

The ROST is a regulatory compliance document used by federal agencies to summarize the information in an employee's Individual Retirement Record (IRR). The ROST is a one-page cover sheet that accompanies a batch of IRRs being submitted to the Office of Personnel Management (OPM) at the time of an employee's separation from a federal agency. Employees covered by the CSRS retirement plan require SF-2807. Employees covered by the FERS retirement plan require SF-3103.

Registration

The name or names that appear on the stock certificate to indicate who owns the stock.

Registration Statement

The document that must be filed to permit registration of an issue of securities under the Securities Act of 1933. A major component of the registration statement is the prospectus that is to be supplied to prospective purchasers of securities.

Regression Analysis

A statistical technique that determines the relationship between two or more variables. Regression predicts the value of one variable (the dependent variable) based on one or more independent variables.

Regular Base Compensation

In PeopleSoft Workforce Analytics, the annualized, quoted, compensation rate for a job. Consists of fixed compensation, does not include variable compensation.

Regular Time

An employee's normal (scheduled/shift) work hours.

Regular Time

In PeopleSoft Workforce Analytics, an employee's normal (scheduled/shift) work hours.

Regulation T

Federal Reserve Board regulations governing the extension of credit by brokers or dealers, including their participation in same-day sale transactions and sell to cover exercise.

Regulatory Region

The Regulatory Region functionality in PeopleSoft HRMS is designed for use in performing regulatory and regional edits. You'll use Regulatory Region to drive PeopleCode edits, perform set processing, and control what codes and values the operator sees. A Regulatory Region can be any country (or province or state) where there are specific laws and regulations addressed by functionality in PeopleSoft HRMS.

In Enterprise Performance Management, a Regulatory Region is a region with a common regulatory framework; such as a country (CAN for Canada), or a smaller state or provincial entity (CANBC for British Columbia).

Related Education

Education above the high school level that has equipped the applicant with the KSAs to perform successfully the duties of the position being filled. Education may relate to the duties of a specific position or to the occupation, but must be appropriate for the position being filled.

Release

An industry standard term associated with the lifting of a company's Repurchase Option from a portion or all shares from a Restricted Stock Award (RSA). RSA's are subject to release schedules, similar to vesting schedules.

Relevant Constraint

A constraint PeopleSoft Planning considers when it calculates a score and when it optimizes the schedule. See also **Scorecard** and **Optimize**.

Reloads

Some stock option plans provide for the grant of a "reload" stock option in connection with stock option exercises, typically by means of stock swaps. A reload option feature provides that upon a stock exercise, the employee will receive an automatic grant of a new stock option at the then-current fair market for the shares that they exercised or for the shares that they used to swap.

Remark Codes

Codes that cause the printing of pre-set text passages on a notice of action form. Some passages are general purpose and others are specific to the personnel action being processed.

Remit From Customer

A customer who is responsible for payments billed to other customers. During cash application, it's useful to look at open items for the Remit From group.

Remittance Worksheet

A work space in PeopleSoft Receivables used to select drafts for remittance to the bank.

Reorder Point

The identifier that automatically locates a replenishment need for an inventory item. When the physical quantity in a location falls below the reorder point, a replenishment request can be created.

Reorder Point Policy

In PeopleSoft Inventory Planning, a policy that determines when a replenishment order is launched for an item. The policy has several methods that include days supply, lead time demand, and **Fixed Quantity**.

Replacement Option

The "new" "replacement" stock option that will replace the original stock option. This option will have a grant price lower than the original stock option.

Replenish

A process that indicates when items need to be resupplied from external sources. In PeopleSoft Inventory, the process can occur on an ad hoc basis or at predefined reorder points.

Replenishment Request

In PeopleSoft Flow Production, an online request for material made when the material is needed. You can generate replenishment requests manually or automatically using backflushing. You can communicate that request using pull lists, pull tickets, or Workflow notifications.

Report Scope

A feature that creates multiple instances of an nVision report using a single report request. Each instance contains data specific to an individual ChartField, such as a business unit or department, or for a group of ChartFields, such as all sales departments. Using Scope, each report instance can share the same layout while containing data unique to these particular ChartFields.

Reported Time

Clock time or elapsed time provided to the system by the user (see Time Reporting)

Reporting Person

An insider that is regularly considered by the SEC to have material information and policy-making authority for the corporation. These individuals are subject to the reporting requirements promulgated by Section 16 of the Securities Exchange Act of 1934. Reporting Persons typically include Directors, Officers, and shareholders with 10% holding interest in the equity of the registrant's securities.

Repricing

An agreement between the corporation and the optionee that allows the optionee to cancel an outstanding high-priced, usually "Out-of-the-Money" stock options for lower-priced options.

Repricing Election

Eligible optionees can choose (elect) to accept the corporation's repricing offer or choose to decline the offer.

Repurchase

The reacquisition of shares of stock from an individual by a corporation. This usually occurs when an individual fails to meet the vesting requirements on a RSA or option that is exercised before it vested. The corporation might pay the original cost of the shares to the individual or the fair market value of the shares at the time of repurchase.

Repurchase Option

An irrevocable, exclusive option to repurchase up to the number of shares that constitute Unreleased Shares at the original purchase price per share. The Company shall exercise said option. The repurchase of outstanding shares is regulated under the laws of all states (except Massachusetts). Under some laws, as under the Model Business Corporation Act, the repurchase is prohibited unless the corporation remains solvent, in both the equitable and bankruptcy senses of insolvency and after taking any liquidation preferences of other outstanding stock into account.

Repurchase Right

A company's contractual right to buy back from an employee any stock resulting from the exercise of the option. The buy back can be at fair market value, book value, or the original purchase price.

Reservation Method

The method used to reserve soft reservation items — either batch COBOL reservations or on-line allocation and reservation.

Reserved

A flag indicating that the inventory item is reserved for stock fulfillment in the inventory business unit.

Reserved Orders

Orders that have been reserved against on-hand available quantity at the business unit-item level. Reserved orders are found in the DEMAND_INV table.

Reset

In PeopleSoft Demand Planning, a function of the **Forecast Calculation Process** that determines which forecast model will produce the best forecast, meaning the model with the lowest ratio of error.

Resolution

An activity that closes or partially closes a deduction, such as matching it to a deduction authorization, writing it off, or sending it back to PeopleSoft Receivables.

Resolution Entry Type

Code that identifies how to process activities for items in PeopleSoft Deduction Management and how to create accounting entries.

Resolution Method

A set of rules that defines how to automatically match or write-off deductions in PeopleSoft Deduction Management.

Resolution Worksheet

The workspace in which deduction items are paired with offset items and resolved or written off in PeopleSoft Deduction Management.

Resource

In PeopleSoft Manufacturing, any crews, machines, and tools that can optionally be used at work centers to complete tasks. In PeopleSoft Performance Measurement, any homogeneous grouping of general ledger line items.

Resources

Resources are the economic elements that are required to perform the activities associated with your business. Resources are consumed in the performance of these activities, and thus denote operating costs. In PeopleSoft Activity-Based Management, resources are typically regarded as the groupings of one or more general ledger accounts. In a service business, resources might include salaries, office rentals, and costs of capital such as information systems, depreciation, real estate taxes, and other associated costs.

Resource Amount

The monetary amount of a single, specific resource transaction. The Resource Amount maps to the Posted Total Amount when posted to the general ledger.

Resource Category

A field for defining individual resource types more specifically. For example, if you have a resource type of labor but want to break it down further for tracking purposes, you might define resource categories of architect hours, carpenter hours, plumber hours, and electrician hours. Resource categories are optional.

Resource Driver

In Activity-Based Management, a Resource Driver defines the quantity of resources used by an activity.

Resource Group

A category of resource types. You can define relationships between the resource types within a resource group to facilitate analysis of project costs. For example, if you had resource types for standard labor and overtime labor, you could group them together in a resource group to calculate total labor.

Resource Planning

In PeopleSoft Activity-Based Management, Resource Planning focuses on resources allocations that create expected results like driver rates and cost object costs.

Resource Quantity

A field on each resource transaction that identifies nonmonetary quantity. For example, on a resource line for 12 ball valves the quantity would be 12.

Resource Source

A field on each resource transaction that identifies the system in which the cost originated. For example, PeopleSoft Payables would be the resource source for a resource transaction created from a voucher in that system.

Resource Subcategory

A field for defining individual resource types and categories more specifically. For example, if you have a resource type of labor, and resource categories of architect hours, carpenter hours, and plumber hours, you might want resource subcategories of regular hours and overtime hours. Resource subcategories are optional.

Resource Supplied

An attribute that enables you define a resource as committed or flexible. A committed resource is one that will not likely change in the short term. A flexible resource is more likely to change within the short term.

Resource Transaction

An individual cost line within PeopleSoft Projects. It is through resource transactions that individual costs and types of costs are tracked. Each resource transaction contains a cost and a quantity and as many identifiers of that cost as necessary. Resource transactions are created when you receive information from other systems, run allocations with project resources as the target, or perform internal transactions such as billing, project closure, or adjustments.

Resource Type

The resource transaction field in PeopleSoft Projects that identifies the resource associated with a given cost. Resource types may be very general or very specific depending on your needs; they are used in conjunction with resource categories, resource subcategories, and resource groups.

Resource Use

Resource Use defines the behavior of a resource within PeopleSoft Enterprise Performance Management. An intermediate resource is a grouping of general ledger line items that may be allocated to another intermediate resource or to a primary resource.

Restricted Punch

A punch which is not accepted because it occurs outside of the predefined number of hours and minutes before or after a scheduled (Understanding Time Collecting Device)

Restricted Securities

Securities issued privately by the company, without the benefit of a registration statement. Restricted securities are subject to a holding period before they can be sold under Rule 144.

Restricted Stock Awards (RSA)

An award of shares of stock to an individual, typically granted at the par value or for no consideration. The shares are awarded on the basis of some future performance goal, either the passage of time (vesting) or the attainment of a specific goal. When the goal is achieved, the vesting occurs. The individual, typically, has all other shareholder rights over these shares such as, voting and dividend rights. The shares are issued in the name of the individual at the time of the award and are held in escrow until vesting occurs. If an employee terminates prior to the vesting of the shares then the company normally repurchases the unvested shares.

Retained Grade Effective Date

Date employee became eligible or began receiving a retained grade and pay.

Retained Grade Expiration Date

Expiration date of an employee's retained grade and pay.

Retest Date

In PeopleSoft Inventory, the date a lot should be inspected to determine whether it is still acceptable for fulfillment or consumption. (Retest Date = Creation Date + Retest Lead Time)

Retirement

Types of retirement are:

- Mandatory Retirement.
- Disability Retirement.
- Voluntary Retirement.
- Special Option Retirement.
- ILIA (In Lieu of Involuntary Action) Retirement.

Retirement Coverage Code

A code used to denote an employee's retirement coverage. The major ones include the following:

- Civil Service (CSRS)
- Federal Employees Retirement System (FERS) and FICA
- Foreign Service (FS)

- CSRS Offset
- CSRS - Special (for LEOs)
- FERS and FICA - Special (for LEOs)
- Social Security System
- None

Retroactive Benefits/Deductions

Deductions taken or benefits granted due to a recalculation of previous benefits and deductions. Late or modified union contracts, late paperwork, and delays in benefit enrollment processing may all result in a need for benefit/deduction recalculation.

Return Type Code

A designator on returned material authorizations (RMAs) that indicates what actions the return initiates. This may include replacement of the product or the creation of a credit memo in PeopleSoft Billing.

Reverse Split

A reduction in the number of outstanding shares of a corporation's stock, with a corresponding increase in the stock's value.

Reversionary Annuity

A form of pension payment where the retiree foregoes all benefit during his or her lifetime so that the entire benefit is paid as an annuity to a beneficiary after the retiree's death. If the beneficiary predeceases the retiree, the benefit is forfeited.

RIDDOR (Reporting of Injuries, Diseases, and Dangerous Occurrences Regulations)

Health and safety regulations in the United Kingdom requiring employers to report certain types of health and safety incidents to the Health and Safety Executive (HSE).

Rider

A special court-ordered or regulatory provision that may be applied to an enrollment to expand or limit any dependent or beneficiary coverage.

Risk Function

In Risk Weighted Capital, this is a user-defined formula that the system uses to derive risk weights.

Risk RuleSet

Used to assign a number of rules to a basis, for processing by the PeopleSoft Risk Weighted Capital Application. Used to group together a number of rules that frequently apply to the same type of balance.

Risk Type

In Risk Weighted Capital, this defines the types of risk associated with your business or activity. For example catastrophic, credit, legal, operational, regulatory, foreign exchange, market, interest rate.

Risk Weight

In Risk Weighted Capital, the risk weight is assigned by risk type, and is used to calculate capital allocation or normalized loss for the account or activity.

Risk Weighted Capital (RWC)

See PeopleSoft Risk Weighted Capital

RIZIV Code

This code is for Belgian employers to track the Federal Institute for Illness and Disability Insurance category.

ROE (Record of Employment) Reason Codes

ROE codes are defined by the Canadian government for employers to record employment actions such as Return to School or Pregnancy Leave.

ROLAP (Relational Online Analytical Processing)

ROLAP refers to the analytical processing and analysis of a relational Data Mart cube. ROLAP, is a form of OLAP that leverages the power and flexibility of relational databases.

Role

A role consists of a designated set of tasks, competencies and accomplishments required for a job code or a position.

Role user

A PeopleSoft Workflow user. A person's Role User ID serves much the same purpose as their Operator ID does in other parts of the system. It allows the system to uniquely identify the user and to determine what data the user has access to.

PeopleSoft Workflow uses Role User IDs rather than Operator IDs because it needs different kinds of user information than the rest of the system does. Specifically, it needs to know how to route work items to the user---an email address, for example---and what role the user plays in the workflow. Plus, you can include role users in your workflow who aren't PeopleSoft application users and who don't have Operator IDs.

Roles

Roles describe how people fit into the 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.

Roll Forward

In commitment control, rolling budget balances forward from the budget ledger you are closing (the source budget ledger) into the new (target) budget ledger.

In PeopleSoft Enterprise Planning and Production Planning, a utility that moves tasks from the past to a valid point in the future using time periods rather than fixed dates.

Roll Up

The act of totaling sums based on information tree hierarchies. You can roll up data for any group of details that you have defined as dependent with the Tree Manager.

Rolling Plan

An ESPP offering period where the purchase date is measured from the offer start date. If at the purchase date, the current stock price is lower than the last stock purchase price, you may elect to reset your employees to the new lower purchase price. The offering period is now based of the new purchase date.

Rollup

In PeopleSoft Demand Planning, the process of adding up the demand and forecast **Array** from one level to the next from child to parent. Information such as caption, description, and unit of measure can also be rolled up. The process is also referred to as summarization.

Rounded Punch

A punch that has a company's rounding requirements applied to it (see Time Administration)

Rounding Rule

Defines a rounding rule. You use rounding rules in numerous places—for instance you could round an earning, deduction, or many of the elements that make up an earning or deduction.

Routing (Manufacturing and Engineering)

A set of information detailing the method to manufacture a particular item. It consists of sequentially numbered operations that reference the task to be performed, the work center in which the task is to be performed, the resources to be used, and the time required to complete the task. Engineering Routings differ from Manufacturing Routings in that they are not visible within Production Planning or Production Management and are isolated from Manufacturing.

Routing Option

In PeopleSoft Planning, a valid method for replenishing supply for an item. There are two types of routing options: build options and purchase options. An item may have more than one routing option.

Routing Transit Number (RTN)

A number that identifies the financial institution to which an electronic payment should be sent for deposit.

Routings

Routings connect the activities in the workflow. They are the system's means of moving information from one place to another, from one step to the next. Routings specify where the information goes and what form it takes—email message, electronic form, or worklist entry.

RSZ (Rijksdienst Sociale Zekerheid) Category Codes

These government defined Social Insurance category codes are used to maintain social security records for your Belgian employees. RSZ Categories are associated with a Contract Type, Statute and Substitute for Claeys Formula calculations.

Rule

Representation of a company's compensation, task allocation, or exception requirements (see Creating Rule)

Rule 10b-5

A SEC rule that prohibits trading by insiders on material non-public information. This is also the rule under which a company may be sued for false or misleading disclosure.

Rule 144

A SEC rule that applies to public re-sales of restricted securities as well as all sales by affiliates. The requirements include (1) current public information about the issuer, (2) a one-year holding period for "Restricted Securities," (3) unsolicited brokers' transactions, (4) an amount limitation. the greater of 1% of the outstanding stock or the average weekly trading volume may be sold during any three-month period, and (5) a Form 144 filing.

Rule Actions

Functions that can be used in the creation and application of a rule (see Time Administration)

Rule Elements

Customer defined pieces of information which are passed to Time Administration in order to apply and evaluate rules (see Time Administration)

Rule Period

A Time & Labor period used in the evaluation and application of a rule (see Time Administration).

Rule Program

Specifies the set of rules the Time Administration process will execute and the order in which it will execute the rules.

Rule Results

Net effect of the application of a rule; for instance, the creation of time, initiation of workflow, modification of reported tasks (see Time Administration)

Rule Templates

Templates used to quickly create a variety of rules for the Time Administration program to execute when processing reported and/or scheduled time. Some examples are. compensation rules for overtime and holidays, notification rules for irregular attendance, and rules for just about any other time-reporting situation that requires special processing.

Rules

Rules are your company's business practices captured in software. Rules determine what activities are required to process your business data.

Rule Set

Rule Sets enable you to apply basis rules to your PeopleSoft Analytic Application in the sequence that you prefer. This is particularly helpful if there are multiple basis rules for the same account node, product node, or position source code. Rule Sets can control the execution sequence of your rule combinations, filter combinations, or both. The first occurrence on the node will be applied and any other occurrence will be ignored. Rule Sets are also used with the Data Manager, and with the Currency Conversion engine.

Rules/Time Administration

A physical implementation or execution of a company's compensation, exception and task rules (see Time Administration)

Run Control

A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start some type of program that manipulates data in some way.

Run Control ID

A unique ID to associate each operator with their own run control table entries. Process Scheduler.

Run ID

Code that uniquely identifies a Run Control for batch processes.

RWC (Risk Weighted Capital)

See PeopleSoft Risk Weighted Capital

S**Safety Stock Policy**

In PeopleSoft Inventory Planning, a policy that determines how safety stock quantities are calculated for an item. The policy has several methods that include days supply and percentage of demand fill.

Salary

Rate of compensation received by an employee.

Salary Group

Part of a group of defaults assigned to job codes. A salary group may include items such as steps and grades dependent on individual company parameters.

Salary Plan

A plan of salary defaults, grades, and step components

Salary Step Components

Pay components assigned to a salary step by entering the corresponding rate codes on the Salary Step Components page.

Salvage Value

An estimate of the amount of money one might receive upon selling an asset once that asset reaches its useful life. Salvage value is used in several depreciation calculations, including Straight Line.

Sales Order Rebate and Penalties

Rebates or penalties that are calculated against sales orders independent of **Buying Agreement**.

Sales Person

A required field used in PeopleSoft Receivables, Billing, Order Management, and Deduction Management when working with items. Each item must be assigned to a credit analyst. If no

credit analyst is assigned to an item, the credit analyst assigned to the customer is used as the default.

Sales UOM

The only units of measure that can be referenced on sales orders and quotes. You establish them on the Product Attributes by UOM page.

Same-Day Sale

An exercise and sale occurring on the same day. The exercise of the option and sale of the underlying shares take place simultaneously. The broker uses the proceeds of the sale to pay the company the exercise price and any tax withholding and the optionee the net cash (less any brokerage commission/fees).

Sample Method

One method of entering characteristic readings for a quality control plan. Using this method, for one given control plan you inspect all the characteristics for the first sample, then all the characteristics for the next sample and so on.

Scale

On a Goals Matrix (In PeopleSoft Workforce Analytics), a scale that defines the lowest, middle, and highest levels of performance needed to achieve associated minimum, midpoint, and maximum levels of compensation pay out. These are referred to as the Threshold, Target, and Stretch levels, respectively. The scale can be used to standardize multiple performance goals to a common scale of measurement.

Scenario

A scenario is a particular outcome you are analyzing when you run in Scenario Manager. Scenarios enable you to study various changes in organization models you created. For each parent and child model you want to study, you create a scenario ID that you use with all run controls.

There are two types of scenarios defined in the Scenario Manager: Historical and Forecast. In the case of an Historical Scenario all future looking fields will be display only and the Scenario Manager component serves as a wrapper to run any analytic engines. In the case of a Forecast Scenario, the Scenario Manager refers to all the business rules, forecasts, and economic assumptions that make up the scenario.

In PeopleSoft Budgeting a scenario is a ChartField used in PeopleSoft Budgeting to identify different budget iterations that use different assumptions.

Schedule

Specific task, date, and time to be worked by a Time Reporter (see Scheduling)

Schedule 13D or 13G

Disclosure forms required to be filed with the SEC and the company by a shareholder (or shareholders) that own(s) more than 5% of a public company. Schedule 13G is a short-form version of the 13D and may generally (but not always) be used only by institutional investors.

Schedule Group

A category of employees or employee groups associated for purposes of time scheduling.

Schedule Line Number

The line associated with an Order ID. The schedule line identifies an item and scheduled ship quantity that may be different from the requested quantity due to item availability.

Schedule Number

A number identifying the salary table form that an employee's pay is computed. Also has a second meaning related to the Payment Voucher processing for the ECS.

Schedule Reconciliation

In PeopleSoft Payables, the process of reconciling scheduled payments by Payment Schedule ID. Schedule Reconciliation helps U.S. federal agencies meet their requirement to schedule or group together payment orders for submission to the Treasury Disbursing Office.

Schedule Template

An ordered pattern of workday(s) and/or off day(s) used in scheduling (see Scheduling)

Schedule Type

In PeopleSoft Payables, an indicator of the nature of items purchased with a Payment Schedule.

Scheduled Punch.

A time reporter's expected punch (see Scheduling)

Scheduling

A function of PeopleSoft Time and Labor and PeopleSoft Global Payroll that enables you to create work schedules and assign them to employees.

Scorecard

A weighted sum of constraint violations in a schedule that evaluates the schedule's validity (that is, acceptability). The score is calculated by adding the value for each relevant violated constraint. See also **Penalty**, **Weight** and **Relevant Constraint**.

In PeopleSoft Balanced Scorecard, views of a strategy tree's components and Key Performance Indicators with red, yellow, or green scores that show its assessments.

Scrap

Any material outside of specifications and possessing characteristics that make rework impractical.

SearchIndex

A set of objects that give the programmer the ability to create, delete, insert, and update a search index and the items within it. Search index items contain a set of statistics about the document that has been indexed (keywords, number of occurrences, proximity to other words, and so on) as well as a key that can be used to point to the document (a URL, database key, or file path).

SearchQuery

A set of objects that allow the programmer to pass a query string and operators to the search engine and receive a set of matching results with keys to the source documents from the search index in return.

Seasonal Index

In PeopleSoft Demand Planning, measures the amount by which a forecasting period is influenced by seasonal effects. The index typically measures the percentage of difference between the base demand in the period and the expected actual demand in the period. An index of 100 indicates an average period in a seasonal cycle.

Seasonal Profile

In PeopleSoft Demand Planning, identifies the weight index assigned to a forecast time period to take in account seasonal fluctuations in the demand.

Seasonality Group

In PeopleSoft Demand Planning, a group of **Forecast Items** with a repetitive pattern of demand from year to year where some periods are higher than others. Typically a group of items is designated as a contributor to the seasonality group. Contributors are chosen because they are representative of the group, are stable, and have at least two years of demand history. The seasonality group profile is more stable than individual profiles of the contributors because the Aggregation process smoothes out random errors.

In Enterprise Planning and Simulation, a Seasonality group is a group of items with similar seasonal patterns. To determine if a forecast element is seasonal or nonseasonal, by averaging their history values over a year and determining where they were above and below average. Seasonality groups capture means seasonal behavior among related products.

Secondary COBRA Events

COBRA qualifying events that extend the amount of time a participant is eligible for COBRA coverage. For an event to qualify as a secondary COBRA event, it must fulfill the following qualifications: The participant must already be enrolled in COBRA coverage as a result of an initial COBRA event, the initial COBRA event must be one that is associated with a change to the employee's job status (such as a reduction in hours, termination, or retirement), and the

secondary event must be one of the COBRA event classifications that involves loss of coverage for the dependent (such as divorce, marriage of dependent, or death of employee). See COBRA and Initial COBRA Events.

Secondary event code

Secondary event codes, also called transaction codes, specify the type of transaction in detail. For example, a transaction's secondary event code could say that the transaction is a catalog order, a rush order, or a request for a sample. Not all transaction types include secondary event codes.

Section

A set of logically related elements that are to be resolved during the payroll process. You define your payroll process by creating sections and adding them to process lists. You can create four different types of sections: standard, generate positive input, sub-process, and payee.

Section 16(a)

Provision of the Securities Exchange Act of 1934 that requires company insiders to file changes in beneficial ownership of the company's equity securities and periodic reports disclosing their holdings.

Section 16(b)

Provision of the Securities Exchange Act of 1934 that requires that any profit realized by a company insider from the purchase and sale, or sale and purchase, of the company's equity securities within a period of less than six months must be returned to the company. It is also known as the "short-swing profit" rule.

Section 423

The Internal Revenue Code section that regulates Employee Stock Purchase Plans.

Section 83(b) Election

A tax filing within 30 days of grant that allows employees granted restricted stock to pay taxes on the exercise date, rather than the date when restrictions lapse. If an employee files the election, taxes are based on the fair market value on the exercise date, with any future appreciation taxed as a capital gain. If the employee does not file an election, taxes are based on the fair market value on the date the restrictions lapse, which will be higher assuming the stock has appreciated in value.

Securities Act of 1933

Often referred to as the "truth in securities" law, the act requires that investors receive financial and other significant information concerning securities being offered for public sale; and prohibits deceit, misrepresentations, and other fraud in the sale of securities.

Securities Exchange Act of 1934

The Congressional act that created the Securities and Exchange Commission. The Act empowers the SEC with broad authority over all aspects of the securities industry. This includes the power to register, regulate, and oversee brokerage firms, transfer agents, and clearing agencies as well as the nation's securities self regulatory organizations (SROs). The various stock exchanges, such as the New York Stock Exchange, and American Stock Exchange are SROs. The National Association of Securities Dealers, which operates the NASDAQ system, is also an SRO. The Act also identifies and prohibits certain types of conduct in the markets and provides the Commission with disciplinary powers over regulated entities and persons associated with them. The Act also empowers the SEC to require periodic reporting of information by companies with publicly traded securities.

Security Clearance

Security Clearances (Classified, Secret, Top Secret) are granted to employees by government agencies and are usually associated with jobs that bring employees into contact with classified government projects or sensitive technologies.

Security Event

In commitment control, events that trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

Segmentation

You can “segment” components of pay based on such events as changes in compensation, employee status, or job changes during a pay period. For example, if an individual changes jobs in the middle of a pay period and your organization has a practice of separating components earned in the first job from those earned in the second job, you can set up your system to trigger segmentation of earnings results on the pay slip when there is a change to the job change action/reason field.

Selective Factors

Knowledge, skills, abilities or special qualifications that are in addition to the minimum requirements in a qualification standard, but are determined to be essential to perform the duties and responsibilities of a particular position. Applicants who do not meet a selective factor are ineligible for further consideration.

Selective Merge

In PeopleSoft Enterprise Warehouse the selective merge allows for an additional WHERE clause when you delete a merge.

Self-Service Application

Another name for PeopleSoft's HRMS and ERP applications accessed using a browser.

Sell to Cover Exercise

When an optionee sells a portion of the option shares to cover the exercise cost and any applicable taxes.

Seniority Pay

A premium paid for seniority or for the length of time an employee works for an organization.

Seniority Pay Components

Pay components whose rate codes are assigned to the seniority rate code class SENPAY (provided by PeopleSoft) on the Comp Rate Code page, allowing you to access the seniority pay functionality.

Seniority Rate Codes

A premium paid for seniority or for the length of time an employee works for an organization.

Separate Debit and Credit

A feature in PeopleSoft General Ledger that captures and reports in greater detail the accounting information that resides in balance sheet accounts. It shows the gross debit/credit balances in addition to the net balance for each account stored in the ledger. This feature also supports reversing—debit and reversing—credit journal entries for error correction.

Server Process

A server process is executable code that receives incoming client requests on the application server. The server process carries out a client request by making calls to a service that executes SQL against the database.

Service

A service performs a particular task of an application. Examples of services are MgrGetObject, SQLAccess, RemoteCall, and so on. When a client workstation sends a request to the application server, it sends a service name and a set of parameters, such as "MgrGetObject + parameters". The application server associates the service request with the appropriate server process to complete the transaction.

Service

The PeopleSoft Pension Administration function that determines how much service credit an employee has accrued.

Service Buy Back

The process by which an employee repays a pension plan in order to restore service credit that was forfeited when the employee withdrawal previous contributions. Typically, employees withdraw contributions upon termination and initiate service buy back processing upon rehire.

Service Purchase

The process by which an employee gets additional pension service credit for periods not normally considered eligible. The employee “purchases” this service by paying into the plan.

Service Schedule

A table showing how much service an employee earns based on the number of hours the employee worked during the year or month.

SetID

The label that identifies a TableSet.

Sex Code

Used to indicate gender.

Shape

For a transaction, the set of inputs and outputs for that transaction. For a class, the data members of that class.

Share

A share of a company's stock. Stock options give you the option to purchase a certain number of shares of company stock.

Share Price

The price per share of a company's stock. See, also, "stock price."

Shareholder

Owner of one or more shares of stock in a corporation. Also known as a stockholder or investor.

Shares Available to Issue

The total number of shares authorized, less shares granted, plus cancellations that revert to the Plan pool.

Shares Cancelled

This is usually triggered by a specific event, such as termination of employment in which the unvested shares as of the date of termination are no longer available for future vesting and exercise. These shares are therefore canceled from the option and can be returned to the plan, retired to treasury or allocated back to a group.

Shares Exercisable

The number of shares that are vested and available for exercise.

Shares Exercised

The number of shares purchased upon exercise of a stock option.

Shares Expired

Option shares that no longer are exercisable at the end of the option term. The length of the option term is defined in option agreement. This date is usually the earlier of the exercise period for vested shares after termination of employment or the full length of the option term.

Shares Outstanding

The number of company shares currently held by shareholders, as tracked by the transfer agent

Shift [Time and Labor]

The block of hours that an employee works in a day, such as nine to five, four to eleven, or ten to six. In PeopleSoft Time and Labor, Shift is used as a template of clock hours for scheduling an employee or group of employees to be at work or available to work (on call). Shifts may be constant, rotating, repeating, and/or split; any given shift may or may not have an associated Shift Differential or Bonus. A shift is always associated with a Work Schedule, and consists of clock hour Start and Stop times (two to allow for split shifts), meal periods (two) and relief periods (two).

In PeopleSoft Workforce Analytics, the block of hours that an employee works in a day such as nine to five, four to eleven, or ten to six.

Shift Bonus

A fixed amount (either a flat dollar figure or stated in terms of an employee's rate) paid for working a particular Shift.

Shift Code

A numerical shift identifier that is unique within a SetID.

Shift Differential

Additional compensation paid an employee for time worked during certain shifts. Typically, shift differential is administered as a flat amount per shift, hour worked, and/or as a percentage of the amount paid per shift hour or shift worked.

In PeopleSoft Workforce Analytics, a premium paid for work over regular pay, for which employees on certain shifts may be eligible, such as double-time for late night shifts. Shift differentials are usually stated as an additional rate or factor.

Shift Elements

Individual components of a shift such as TRC start and stop time, duration (see Scheduling)

Shift Name

Customer defined nomenclature for a shift (see Scheduling)

Shift Type

A customer-defined classification associated with a shift. The shift type can be used in the evaluation of rules or exceptions (i.e. On Call) (see Scheduling)

Shift Type [Time and Labor]

Time and Labor defined classification of shifts. Valid shift categories include Flex, General and Elapsed. Shift categories are used in the creation of time reporter schedules (see Scheduling)

Shipping Priority Code

Shipping Priority Codes act as tie breakers during order reservation in PeopleSoft Inventory when different orders are scheduled for the same delivery date and time. When the reservation process in Inventory encounters a situation where there are more orders than available stock, the system reserves the order with the highest priority. If schedules are encountered with the same priority, orders are then considered by order date.

Short Sale

The sale of a security that is not owned or is not delivered at the time of the trade, necessitating its purchase or delivery some time in the future to "cover" the sale. A short sale is usually made with the expectation that the stock value will decline, so that the short seller can eventually cover at a price lower than the original sale, thus realizing a profit. At the time of the short sale, the broker borrows stock to deliver on the settlement date. A short sale can be "naked," in which case the seller does not deliver the shares being sold short and must provide the broker with collateral. Or the short sale can be "against the box," in which case the seller delivers the shares being sold short for the broker to hold "in the box" until the seller chooses to close out the short position.

Short-Swing Transaction

A purchase and sale, or sale and purchase, of the issuer's equity securities by an insider within a period of less than six months. See "Section 16(b)" above.

Short-term Variable Compensation

In PeopleSoft Workforce Analytics, this is cash compensation paid to a worker that is not fixed; includes bonuses and commissions.

Sibling

A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

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Sick Leave

Sick leave is accrued by full-time permanent/seasonal employees at the rate of 4 hours every biweekly pay period; for part-time permanent/seasonal employees, it is accrued at one hour for every 20 hours worked.

Simulated Workforce

In the PeopleSoft Workforce Rewards product, Manage Compensation module, the calculated Simulated Workforce = Existing Employees + New Simulated Employees + Reduced-Employees.

Single Life Annuity

A benefit payable during the lifetime of the participant, with no payments made after the death of the participant. Also referred to as a “life only annuity” or a “straight life annuity.”

Single Signon

This refers to the process by which a user can, after being authenticated by one PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

SIREN Code (Système Informatique pour le Répertoire des Entreprises)

This stands for the Electronic List of Enterprises. The SIREN code is assigned to a company when it registers as a business with the French government, and identifies the purpose of the establishment for regulatory reporting purposes in France.

SIRET (Système Informatique pour le Répertoire des Établissements)

This stands for Electronic List of Entities. In France the SIRET is an identifying number given to a French business by the INSEE, an official statistics and economics organization in France. The SIRET number is a combination of the SIREN and NIC numbers. This number is used by the tax and social security authorities to identify a business enterprise and its entities.

Site Tree

In PeopleSoft eStore, a hierarchical structure that controls navigation, as well as content and behavior within the header, footer, and left margin areas of the web page template.

Slice

The span of time into which an element is segmented as a result of element segmentation. Unlike a segment (or period), a slice does not represent a separate gross-to-net process since it affects only a limited set of elements within a period or segment. Like segments, slices have their own begin and end dates.

Slice Dimension

A model dimension used to restrict user access to the system. For example, a product manager's access to the system can be restricted to only the products he or she is responsible for by defining "Products" as a slice dimension, and assigning this person the members of the "Products" dimension he or she can access.

Slice and Dice

Another term for multidimensional analysis. When your data has three (or more) dimensions, you can think of it as being arranged in a cube (or hypercube), with each side representing a dimension. When you analyze the data, you "slice" off part of the cube or "dice" it to get to an individual cell.

Slotting

In PeopleSoft Workforce Rewards, a process by which the system establishes the target market compensation rates to use for compensating workers in non-benchmark jobs.

Social Security Number

Nine numeric digits assigned to an individual by the Social Security Administration. Also known as a Taxpayer Identification Number (TIN).

Source

The Source table stores valid journal entry and posting sources. These can include job titles (such as CFO), user IDs (such as CLERK123), PeopleSoft General Ledger processes (such as Consolidations), or other applications (such as PeopleSoft Payables).

Source Transaction

In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control, and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue or collected revenue transaction.

Sparsity/Density

A multi-dimensional concept of whether data exists at intersections of dimensions. If a cube has many dimensions, but little or no data in some of those dimensions, the cube is considered sparse. Sparse cubes take up unnecessary disk space and reduce calculation performance. The goal is to create dense cubes and only use dimension intersections where data actually exists.

Special Accumulator

A device that accumulates earnings from different sources for a specific purpose. 401(k), pension and retirement plans use special accumulators. A 401(k) plan might use a special accumulator to calculate a deduction using regular, vacation, and overtime earnings. Special accumulators can add to or subtract from a pool of earnings.

Special Payments

A payment that occurs once or under special circumstances (e.g., back pay interest, lump sum leave, bond refund, longevity bonus, compensatory time reimbursement, death payment, severance pay, separation bonus, etc.).

Special Rates

Higher salary rates for specific grade levels and occupational groups determined by OPM for employees working in specific geographic areas. Each area is assigned a separate Schedule Number.

Specialist

A member of a stock exchange who maintains a fair and orderly market in one or more securities. A specialist or specialist unit performs two main functions. executing limit orders on behalf of other exchange members for a portion of the floor broker's commission, and buying or selling for the specialist's own account to counteract temporary imbalances in supply and demand, preventing wide swings in stock prices.

Specialized Experience

Experience that has equipped the applicant with the particular knowledge, skills, and abilities to perform successfully the duties of the position and is typically in or related to the work of the position to be filled.

SpeedChart

A user-defined shorthand key designating several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a speedchart definition.

SpeedType

A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

Spending Limits

See Planning Targets.

Split and Join

In PeopleSoft Demand Planning, the process of subdividing a forecast so that multiple users can make changes to their portions of the forecast. After changes are complete, the portions are joined back into a single forecast.

Split Deduction

Deduction that you create by splitting an existing deduction into two deduction items. The new deduction retains the original item ID with an added suffix number.

Split Shift

Periods of productive time split up by period of non-working time; example. a time reporter comes to work as a busboy for the lunch shift from 12-2 p.m. and then returns to work from 6-8 for the dinner shift (see Scheduling)

Split Stream Processing

The matching of a payment's cash information with the payment advice information when they have been received as separate transmissions through EDI and lockbox.

The uniting of the payment cash with the payment advice when they have been received as separate information through EDI.

Spokesmen Committee (Sprecherausschusse)

In Germany the Spokesmen Committee represents the interest of the management in your company before the ownership. The Spokesmen's Committee is consultative in nature, although they play a co-determination role on individual employment contracts, hiring, and dismissals. They also play a role in monitoring employment fairness, equity, and non-discrimination in terms of nationality, race, religion, sex, and age.

Spouse Demonstration J&S

In the PeopleSoft Pension Administration system, an informational-only form of pension payment that tells what the spouse's total benefit would have been if the retiree had chosen the spouse as the beneficiary rather than a nonspouse beneficiary. You cannot pay pension benefits based on this form because it is informational only.

Spouse Eligibility Alias

In PeopleSoft Pension Administration, a Custom Statement that defines any criteria that must be met before the plan will provide an Automatic Spouse Benefit. For example, the plan may require that the employee and spouse be married a full year before they are eligible for an automatic spouse benefit.

Spouse Eligibility Statement

See Spouse Eligibility Alias.

Spread

Depending on the context, either (1) the difference between the bid and asked prices for an over-the-counter stock, or (2) the difference between an option's exercise price and the market price at the time of exercise (i.e., the profit component of the exercise).

SQL Objects

Used to create rules that are more complicated than templates or actions and conditions allow—select statements, insert statements, table joins, and sub-queries

ST (Strategic Trust)

See Strategic Thrust

Staged Date

The date an item was received into the inventory business unit.

Staging ID

An identifier for a putaway plan. The inventory system sequentially assigns Staging IDs when it creates the putaway plan.

Standard Cost

A predetermined, fixed cost associated with an **Inventory Item** or **Forecast Item**, representing detailed estimates of each element of cost entering into the purchasing or manufacturing of an item. Standard cost is used when minor variations in an item's cost are not needed. The use of standard costs also enables management to determine how much an item should cost (Standard), look at how much it does cost (Actual), analyze the differences between the two and their causes (Variances), and compute economic order quantity.

Standard Form (SF)

A standardized form for interagency use by the Federal government. The SF prefix is the most common but not exclusive one in usage.

Standard Price

In PeopleSoft Demand Planning, the standard selling price associated with a **Forecast Item**. The price can be introduced into the system directly in forecast item maintenance or indirectly using the demand transfer interface. At higher levels in the view where there is no standard price available, the summarization function can be set up to develop one.

Standard Unit of Measure

The smallest unit of an item that a PeopleSoft application tracks.

Startup Data

In PeopleSoft Pension Administration, accrued Service, Cash Balance Account, or Employee Account data loaded into the system in the form of an opening balance and “as of” date. The alternative would be to load the entire accrual history.

State Record

The State Record is a PeopleSoft record, keyed by process instance, that must be created and maintained for each Application Engine program. The State Record defines the fields that an Application Engine program uses to pass values from one SQL statement to another.

Static Group

An employee group in Time and Labor that enables you to control its creation and maintenance. The group remains the same at all times until you change it.

Static Policy Controls

Determines how a static (versus time-phased) **Inventory Policy** is to be calculated. Static controls use period and average methods and their arguments.

Statistical Account

An account that has an associated unit of measure, used for tracking and monitoring statistical data. For example, the Workstations account uses EA (each) as a generic unit of measure, while the Floor Space statistical account might use square feet and the Work Days account would use days.

Statistical Code

The unit of measure used for tracking and monitoring statistical data. For example, using a statistical code of WS may represent the number of Workstations.

Statistical Forecast

In PeopleSoft Demand Planning,, a forecast developed at each level of the forecast pyramid and that considers the item’s history in isolation.

Status Checking

In PeopleSoft Projects, a control feature that can be applied to transactions coming into Projects from cost feeder systems. If the incoming transaction does not conform to predetermined status and analysis conditions, an online warning will display or the transaction will be rejected.

Status Position Code

A code that identifies the various conditions of a position, e.g., frozen, classified, etc.

Statutory Account

Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

Step

A secondary level or subcategory within the primary pay level (depending upon pay plan, different employees may have a different number of steps within their primary pay level).

Step Progression

In PeopleSoft Workforce Analytics, a pay increase granted to an employee or group whose salary plan includes steps within grades. Each step increase is a step up the pay range for the employee.

Stock

In corporate finance, the form in which an owner's interest is represented, distributed in units known as shares.

Stock Administrator

An individual who administers and manages the corporation's benefits and/or equity compensation plans. This individual serves as the contact for transfer agent and broker inquiries. Stock Administrators manage Stock Option Plans, Employee Stock Purchase Plans, Restricted Stock Award Plans, and Stock Bonus Plans.

Stock Appreciation Rights (SAR)

A contractual right to receive, either in cash or employer stock, the appreciation in the value of the employer's stock over a certain period of time. A SAR can be used alone or in tandem with Incentive Stock Options (ISO/SAR) or Nonqualified Stock Options (NQ/SAR). PeopleSoft Stock Administration supports only tandem SAR's.

Stock Awards

Stock allocations that are processed in the Manage Variable Compensation business process. Stock Administration creates stock grants from finalized stock awards.

Stock Exchange

An organized marketplace in which bonds, stocks, and common stock equivalents are traded by members of the exchange, acting as agents (brokers) and as principals (dealers or traders). Such exchanges have a physical location where brokers and dealers meet to execute orders to buy and sell securities. Each exchange sets its own requirements for membership.

Stock Option

A contractual right granted by the company, generally under a stock option plan, to purchase a specified number of shares of the company's stock at a specified price (the exercise price) for a specified period of time (generally five or ten years). Assuming that the exercise price is the

same as the fair market value on the grant date, the option will become more valuable if the fair market value goes up, because the option effectively gives the optionee the right to buy stock in the future at a discount.

Stock Price

The price per share of a company's stock. See, also, "share price."

Stock Purchase Participant

An individual who participates in the corporation's Stock Purchase Plan.

Stock Purchase Plan

A type of broad-based stock plan that permits participants to use payroll deductions accumulated over a period of time to acquire stock from the company.

Stock Split

A change in the capitalization of an issuer that increases or decreases the number of securities outstanding, and adjusts the value of the securities accordingly, without a corresponding change in the assets or capital of the issuer. For example, if an employee has options to purchase 25 shares at \$10 per share and the company has a 2-for-1 stock split, the employee thereafter has the option to purchase 50 shares at \$5 per share.

Stock Swaps

A payment method that can be used to cover the cost of the exercise price and taxes depending on whether it is allowed by the plan. When an employee elects to exercise a stock option by means of a stock swap, they surrender already-owned shares of stock to pay the total required option exercise price and/or taxes for the option being purchased. The surrendered shares are usually valued at the fair market value of the company's stock on the date of exercise.

Stock Trading Symbol

The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "ticker symbol".

Stock Withholding

A cashless method of satisfying the withholding taxes due upon the exercise of a stock option by authorizing the company to withhold from the shares being exercised a number of shares equal to the taxes.

Stockholder of Record

Person or entity, often a broker or the Depository Trust Company, named on the issuer's or transfer agent's stock record books as the owner of shares held in "street name." The stockholder of record acts in part as a way of safekeeping stock certificates that might otherwise be lost by the beneficial owner, and also in order to keep the identity of the beneficial owner confidential from the company.

Stock-In Probability

A replenishment option for defining transfer parameters for PeopleSoft Demand Planning or Inventory Planning upload files. The option is the percentage of time you want to have the item on hand for the **Business Unit** and is used to calculate safety stock.

Stop Time

Out punch

Storage Area

A division of a **Business Unit** used to store material and to track **Inventory Transaction**. Storage areas might include shipping and receiving docks, staging areas, warehouse zones, and inspection and quality control departments. Each storage area can be divided into a maximum of four levels, with each level representing a physical subdivision of the area.

Storage Level

A hierarchical subdivision of a storage area.

Storage Location

The combination of a storage area and that area's most detailed storage level. This is the smallest definable physical space within an **Inventory Business Unit**.

Strategic Initiatives

In PeopleSoft Balanced Scorecard, actions the organization must take to implement strategy. May be temporary or short-term in nature.

Strategic Thrust (ST)

In PeopleSoft Balanced Scorecard, four to five statements or paragraphs that summarize the core components of an organization's strategy. Strategic thrusts describe the key areas across which a scorecard is balanced. They are themes or goals your organization is striving to achieve; more specific descriptions of what you must do to achieve that goal are defined by critical success factors. Key performance indicators may be attached to strategic thrusts as long as there aren't critical success factors below them, but typically strategic thrusts aren't directly associated with key performance indicators.

Strategy Tree

In PeopleSoft Balanced Scorecard, the hierarchical relationships of the objectives your organization is striving to achieve. Used as the foundation for a scorecard, and typically balanced across four major categories: Financial, Customer, Learning and Growth, and Internal Processes. These are made up of Vision, Strategic Thrusts, and Critical Success Factors.

Stratification Engine

A support module that structures the volume of financial accounts and balances at a large financial institution to a manageable scale for processing by the PeopleSoft Funds Transfer Pricing (FTP) and PeopleSoft Risk Weighted Capital (RWC) applications. It categorizes data by a range of values and summarizes data based on rules you define for FTP and RWC.

Stratification Wizard

Stratification Wizard is a tool you can use to quickly create new stratification rules or update the existing rules. Stratification Wizard prompts you for each of the possible source and destination fields, grouping operations, and summarization actions to be performed. Stratification Wizard enables you to stratify your data according to tiers, discrete values, periodic increments, and numeric increments. It also enables you to leave the data aggregated.

Streams

An optional feature that enables you to reduce processing time by processing groups of payees simultaneously.

Street Name

See "Stockholder of Record".

Stretch

In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the level of performance for which an employee achieves maximum pay out. Performance above this level receives no greater pay out.

Strike Price

The price per share which must be paid in order to exercise the stock option. The strike price is typically the fair market value of the stock on the grant date. Also known as the "exercise" or "grant" price.

String constant

String constants are delimited in PeopleCode by using either single (') or double (") quote marks.

Strip Funding

One of several methodologies used by PeopleSoft Funds Transfer Pricing (FTP) to derive maturity when calculating FTP rates based on matched maturity funding. This approach matches the projected cash for the instrument in each time period, with a specific cost of funds rate for that cash flow. The FTP rate for the instrument is then calculated by weighting the cost of funds rate for the cash flow in each time period by the term of the cash flow.

Structured Query Report (SQR)

A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

Style File (Verity)

Collection style refers to a set of configuration options that are used to create the indexes associated with a collection. A collection has one collection style and it is defined in a set of style files before creating the collection.

SubCustomer Qualifier

A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Sub-Process Section

A type of section you can add to a process list. Sub-process sections are especially useful for performing iterative processes such as gross ups (calculating the gross amount for a given net amount). You can include conditional logic within a sub-process section.

Subscription

The process of mapping fields, selecting data parameters and submitting the information to an outside vendor.

Substitute Item

In PeopleSoft Manufacturing, an item that can be used when there are no primary components available in inventory or when there is a long-term shortage of the original item. The substitute item can be defined at three levels: setID, business unit/item, and bill of material/engineering bill of material.

Subtask

A lower-level Planning task in a schedule's hierarchy that rolls up into a parent task. For example, an operation performed on a production ID would be a subtask of the production order.

Summarization Process

See Rollup.

Summary ChartField

A feature for creating summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

Summary Forecast

In PeopleSoft Demand Planning, a type of forecast that results from adding up the adjusted forecast totals from the next lower level, meaning the sum of the children's forecasts for the parent. The summary forecast at level one (1) is always zero since there is not a logical lower level.

Summary Ledger

An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. They increase the speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

Summary Tree

A tree used to roll up accounts for each type of report in summary ledgers. In effect, summary trees enable you to define "trees on trees." In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

Summed Adjustment Type

When the system finds multiple summed discounts, they are added together, and applied once.

Super Tree Utility

A PeopleSoft Enterprise Warehouse utility that enables you to combine multiple effective dates of a tree into one. This super tree contains all tree changes for a certain period of time enabling you to analyze effective dated trees more easily.

Supplemental IRR

An IRR type used when a federal employee's retirement deductions were originally under-reported. An agency can create a Supplemental IRR to report the difference in the retirement deduction amount to the Office of Personnel Management (OPM).

Supplemental Tax Method

A payroll tax calculation method that uses a straight percent rather than allowances. The percentage depends on state requirements.

Supply Chain Warehouse

See Warehouses.

Support Costs

Activity costs not directly connected to production.

Support Modules

The support modules are a collection of engines and analysis models that derive values, rates, financial calculations, and prices. PeopleSoft Analytic Applications take this data and use it for further processing. The support modules perform processes that are used in the financial services industry. They are only utilized by two of the PeopleSoft Analytic Applications: Risk Weighted Capital (RWC) and Funds Transfer Pricing (FTP).

Support Team

A group of people working together to sell to and/or support a customer. You can assemble support teams and associate them with ship to customers, quotes, sales orders, and **Buying Agreement**.

Supporting Element Overrides

Provide a mechanism to override various supporting element types, such as brackets, dates, durations, formulas, and variables, at various different levels.

Supporting Elements

Supporting elements are building blocks for other elements. In PeopleSoft Global Payroll, they are used in combination with other elements to create rules. They are not stand-alone. Typical supporting elements are arrays, brackets, rounding rules, and fictitious calculations.

Suspend Exercise

As a condition of a leave of absence, a company may stipulate to restrict the exercise of shares during the leave or for a period of time. Only applicable if the Stock Action is LOA.

Suspend Vesting

As a condition of a leave of absence, a company may stipulate to suspend vesting of shares. Only applicable if the Stock Action is LOA. If a company does not Suspend Vesting then the Vest Deferral Grace Period and Service Rule are not applicable.

Suspended Item

In PeopleSoft Demand Planning, an item suspended by the system. The suspension is due to the lack of demand for the number of periods defined for the item's **Control Group**.

System Element

In PeopleSoft Global Payroll, system elements are delivered and maintained by Peoplesoft. There are two types of system elements: database system elements and system-computed elements. Database system elements contain payee-related data that can be used frequently in a calculation, such as department ID, location, and personal data. System-computed elements are automatically populated by the payroll process.

System Functions

A list of all activities that the system supports, along with their associated General Ledger distributions.

System-Defined Count

The PeopleSoft Inventory feature that employs user-defined criteria to begin the count creation process.

System-Defined History

Any statistical information updated by the posting and aging programs, maintained to reflect customer credit standing.

T**T+3**

The obligation in the brokerage business to settle securities trades by the third day following the trade date. "Settlement" occurs when the seller receives the sales price (less the broker's commission) and the buyer receives the shares.

Table

The underlying format in which data is stored by columns (fields) and rows (records, or instances).

Table Lookup

A utility in PeopleSoft Pension Administration that finds an unknown value based on a known one in your data set. For example, you can look up an interest rate based on a year, or an actuarial factor based on an employee's age.

TableMaps

In the PeopleSoft Enterprise Warehouse, TableMaps define the physical relationships between related tables. TableMaps allow you to define "families" of related tables and the columns that define the key relationships between the tables.

TableSet

A group of rows across control tables identified by the same SetID.

TableSet Sharing

Specifying the control table data for each business unit so that redundancy is eliminated.

Tardy

The circumstance when a time reporter reports for work after the scheduled start time

Target

In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the performance level your organization establishes as the norm for performance and pay out.

Target Cost

A desired target cost (for production, engineering or marketing) is found by subtracting the desired profit margin from a competitive or estimated price.

Target Currency

The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

Target End Date

The intended end date for employee schedules in Time and Labor reporting. You establish a target end date, and depending on the work schedule templates, the application determines what the actual end date should be.

Target Grade

Highest obtainable grade for a position.

Target Matrix

In PeopleSoft Workforce Rewards, the Target Matrix defines the level of award to be paid based upon a predetermined level of performance that a defined measure is evaluated against.

Target Plan

In PeopleSoft Workforce Rewards, a plan for distributing compensation awards, in which the level of the award is linked directly to a predetermined level of performance that a defined measure is evaluated against. For example, a Target Plan for a Sales group might be as follows: “As a group, increase the business unit’s net income by 10% and each member of the group will be eligible for an award equal to 5% of base pay.”

Target Rate

In PeopleSoft Workforce Rewards, calculated market rates you choose to use as new target pay rates for the jobs in your organization. Think of these target rates as pay guidelines, in support of your company’s overall pay strategy.

Target View

In PeopleSoft Demand Planning, the of the views being reconciled during the **Cross-View Reconciliation** process. During the process, fields for reconciliation are defined for both a source and target view.

Tariff

In Germany a Tariff is a contract between the employee's unions and the employers' association, defining labor agreements on issues such as standard working hours, income, and vacation. This contract is valid for all of Germany for the business or industrial sector the company is working in (such as **Banking** or **Metal**).

Tariff Area

In Germany, additional labor agreement terms beyond those in the Tariff, such as salary plans or employee reviews, can also be applied based upon the Tariff Area. The Tariff Area is often split along regional lines (such as **Bavaria** or **Berlin**).

Task

See **Manufacturing Task** and **Planning Task**

Task

A piece of work assigned to or demanded of a person; a unit of work (see Time Reporting)

Task Entity

Individual component of a task; for example, Project ID, Activity ID, Work order, Department, Company, Business Unit (see Time Reporting).

Task Profile

A way of viewing or establishing where to allocate employee task information for a day and time. The task profile fields that appear on the page are established by the *Task Profile Template*.

Task Profile

Entity that establishes the default values for optional and required task elements. This can be for single or multiple tasks. (i.e. default values based on hours allocation, percentage distribution, equally distributed or by prompt) (see Time Reporting)

Task Rules

A methodology that is applied to scheduled, reported and payable time to allocate or redistribute task assignments (see Time Administration)

Task Transfer

Department transfer

Task Values

The customer defined value for a specific task element i.e. Customer 1, project 1, etc (see Time Reporting)

Taskgroup

Identifies the default time reporting templates, task template, and task profile(s) for time reporters that share the same task reporting requirements.

Taxable Benefits

Any employer contributions that are subject to Federal Withholding Tax.

TDS (Transfert de Données Sociales)

In France the TDS is a social security transfer report, submitted on magnetic media to the government.

Team Member

An individual who is part of a support team. Each team member may be in a commissionable or non-commissionable role.

Technical Scenario

In PeopleSoft Enterprise Warehouse technical scenarios allow you to set up the object type values that the Resolver uses to chunk the record/TableMap you'll resolve. Technical scenarios allow technical users to define chunking criteria that enable chunks to run in parallel. This allows for parallel data processing.

Template

A portal template is simply HTML code, associated with a web page, to define the style and layout of the page. Templates allow a developer to build an HTML page by combining HTML from a number of sources. Templates do two basic things: define the layout of the page, and define where to get HTML for each part of the page.

Template Pagelet

One piece of an overall template. For example, in a given template, there may be one template pagelet for the universal navigation header and one template pagelet for the target content.

Temporal Constraint

A relationship between Planning tasks that defines their sequence and timing in a schedule. Temporal constraints cannot be violated by the Optimizer. PeopleSoft Planning constraints include finish to start, start to start, finish to finish, start to finish.

Temporary Continuation of Coverage (TCC)

The TCC program, as prescribed by the OPM, requires Federal agencies to provide to separating Federal employees the opportunity to temporarily continue their FEHB coverage for up to 18 months (unless involuntarily separated because of gross misconduct), provided the individual pays the full cost of coverage, including both the employee and government share and a two percent administrative charge. Agencies may elect to provide this service in-house or enter into cross-servicing agreements with another Federal agency.

Tenor

Used by the PeopleSoft Funds Transfer Pricing (FTP) application to refer to the maturity of an instrument. It represents the length of time an instrument is available as either a source or use of funds. The FTP application calculates the transfer price for an instrument, based on the marginal cost of funds of similar liquidity and tenor.

Term Certain and Continuous Payment Option

See Certain and Continuous Payment Option.

Term Certain Payment Option

See Certain Only Payment Option.

Termination

A transaction in which an employee ceases to be an employee of the corporation.

Threshold

In a Goals Matrix performance scale (In PeopleSoft Workforce Analytics), this is the minimum threshold for adequate performance, the designated level of performance below which it is inappropriate to pay incentives.

Think-time process

Think-time functions suspend processing either until the user has taken some action (such as clicking a button in a message box), or until an external process has run to completion (for example, a remote process).

Three-Tier

A three-tier architecture introduces an intermediary application server between the client workstation and the database server to improve performance. Within PeopleSoft, the application server sends the SQL to the database and then returns results to the client in the form of lightweight Tuxedo messages.

Threshold Checking

In PeopleSoft Projects, a control feature that can be applied to transactions entered directly into Projects or integrated into Projects via the INTFC_PROJ_RES table. If the transaction exceeds a predefined tolerance, a warning will display or the transaction will be rejected.

Thrift Savings Plan (TSP)

A voluntary retirement savings and investment plan for Federal employees administered by the Federal Thrift Investment Board.

Ticker Symbol

The three or four letter symbol used to identify a company's stock on the stock exchange where it trades. Also known as a "stock trading symbol".

Tiers

In the financial services industry, Tiers are ranges that you set up for stratifying your instrument data (such as amounts, rates, and numbers) into specific groups. You define Tiers within Stratification Engine.

Time Administration

A process which provides four [separate] different online tools for creating, maintaining, and applying an organization's compensation, task, and exception rules to both reported and scheduled time. templates, actions and condition, SQL objects, and user exits

Time and Labor Period

A distinct, configurable period of time used by all the PeopleSoft Time and Labor processes (see Time Reporting)

Time and Labor User

Either a Time Reporter or a Time Manager

Time Capture Device

Third party system or methodology for collecting elapsed or time capture device time, i.e., time capture device, IVR, Fax, etc. (see Time Reporting)

Time Collection

A Time and Labor feature that collects positive and exception time reports, applies appropriate business rules and edits to the reported time to ensure validity and reasonableness, and returns errors and questionable items to the time reporter for correction or scrutiny. Time collection is also responsible for scrutinizing future (previously) posted time information for correctness when those reports are ready for use.

Time Collection Device

A group of time collection device lumped together and named for ease of assignment to employees. In other words. clock group 1 is made up of clock 1, and clock 2. Employee 123 is assigned to clock group 1 and can then punch in at either clock 1 or clock 2. (see Understanding Time Collection Device)

Time Collection Device time

Reporting time by recording actual starts and stop times (see Time Reporting)

Time Dimension

Determines how date-related information is presented in a **Cube View**. This dimension defaults to a two-level hierarchy consisting of the **Inventory Policy** year and a standard period, such as monthly.

Time Fence

In PeopleSoft Planning, a user-defined parameter that specifies the business rules to be used in the generation of the plan. PeopleSoft Planning time-fence types include start of time, end of time, planning close date (demand time fence), purchase order fence, leveling fence, action message cutoff, and planning time fence.

Time Manager

An individual who supervises Time Reporters

Time Period

A period of Time used in Time and Labor rules processing. You can categorize time periods in terms of days, weeks, or months. You establish day, week, or month-type periods for use when you apply rules for compensation, holidays, and so on.

Time Report

A payroll time and/or labor distribution time report for an employee for any date within the employee's current period.

Time Reporter

Any employee or contractor for who time is reported or generated in PeopleSoft Time and Labor.

Time Reporter Information

Values associated with the Time Reporter that are displayed when entering or viewing reported time and facilitate the processes of Time Reporting and Time Management (see Time Reporting)

Time Reporting

Any information required by a business unit that can be attributed to an individual employee (worker/contractor) and can be expressed in hours.

Time Reporting Code

A hybrid of two PeopleSoft objects: the Payroll Earnings Type and the Human Resources Absence Type. The Time Reporting Code represents the level at which a business actually needs to track employee time to support all of its administrative and compensation needs.

Time Reporting Code Type

Categorization of a time reporting code. Valid categories include. units, amounts, hours or a combination of hours and amounts (see Time Reporting)

Time Reporting Group

See Group [Time and Labor].

Time Segment

For Service, Cash Balance Accounts, and Employee Accounts, employees can accrue benefits differently at different times. The period of time during which employees use a particular rule is that rule's time segment.

TimeSpans

Relative periods, 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.

Tolerance

In PeopleSoft Projects, a value that is defined at either the project or activity level as either a percentage of a project's funding or an actual amount.

In commitment control, the percentage over budget that you allow, excluding revenues applied to increase budget limits, before the system creates an exception.

Total Authorized But Unissued

The combined total number of shares from Shares Available to Issue plus Total Options Outstanding.

Total Compensation

In PeopleSoft Workforce Analytics, this is generally the officially recognized compensation provided an employee in the course of their employment with an organization; includes both direct compensation and benefits compensation.

Total Compensation Management

The ability to track and report on all types of cash programs, non-cash programs, benefits and deferred compensation for all current workers, ex-workers and individuals associated with ex-workers who receive compensation due to the employment of the ex-worker.

Total Non-Compensation

In PeopleSoft Workforce Analytics, generally, this is the often unrecognized compensation an employee receives in the course of their employment with an organization; it includes Learning and Development compensation such as training, and Workplace Environment Compensation such as telecommuting privileges or other prerequisites.

Total Options Outstanding

The number of company shares currently held by shareholders as tracked by the transfer agent. Derived by using the number of Prior Outstanding plus Grants, less Exercises and less Cancellations.

Total Rewards

In PeopleSoft Workforce Analytics, this is the total rewards provided to an employee by their employment with an organization; it includes their officially recognized total compensation, and less often recognized total non-compensation.

Tour of Duty

The scheduled days and hours per day of attendance at a duty station for an employee.

Tracking Signals

PeopleSoft Demand Planning, a forecasting tool that detects bias in the forecast and provides an early warning of an unstable forecast. There are six tracking signals associated with each **Forecast Item** that correspond to the six most recent historical periods.

Trade Payment

An authorization for a customer deduction in a Promotion application.

Training Report 2483

The Training Report 2483 is a French regulatory report used to declare vocational training your company has provided to your employees. It is also known as the Declaration 2483 Report. The purpose of the report is to receive tax deductions from the government based upon the amount of money your company has spent on training.

Transaction

A named command with optional named and typed inputs and outputs. The associated external system or the Business Interlink Plug-in understands this command. The types of inputs and outputs are based on a set of generic types.

Transaction

A named command with optional named and typed inputs and outputs. The associated external system or the Business Interlink Plug-in understands this command. The types of inputs and outputs are based on a set of generic types.

See also **Inventory Transaction** or, for PeopleSoft Projects, **Resource Transaction**.

Transaction catalog

Lists transactions used to interface to the external system.

Transaction Code

In PeopleSoft Projects, an additional field on each resource transaction that is used in conjunction with accounting entry templates. Transaction codes enable you to deal with exceptions to your accounting entry templates without having to create additional transaction types. You can set up separate accounting entry templates for resource transactions containing the transaction codes you create. The accounting entry templates for those resource transactions lines can then use the same transaction types, but specify different accounts.

In PeopleSoft Asset Management, transaction codes identify special asset transactions and are used in conjunction with transaction type to create accounting entries.

Transaction Code

Identifies what action has taken place against the position.

Transaction Costing

See Multidimensional Costing

Transaction Currency

In the financial services industry, the original currency in which a company conducts its business activities. When a company has multinational operations, it may use different transaction currencies. These are translated to the base currency for consolidation and reporting of financial results.

Transaction Date

The date a transaction actually occurred as opposed to the date the transaction is recognized—the accounting date (although the two dates can be the same).

Transaction Dated

Data aggregated over a date range.

Transaction group

The package can contain one or more transaction groups. Each transaction group is a set of transactions of the same type, with the same trading partners involved.

Transaction Loader

The SQR in PeopleSoft Asset Management that transfers load lines from the Loader tables into the PeopleSoft Asset Management Tables as assets and open transactions.

Transaction Tables

In the PeopleSoft Enterprise Warehouse, these are tables that contain dynamic information and are keyed by business units.

Transaction Type

The building blocks of accounting entry templates in PeopleSoft Asset Management and Projects. For each transaction type you create you define specific transaction lines. The transaction lines are then transferred into accounting entry templates. In the accounting entry templates each transaction line is assigned a specific general ledger account.

Transactional System

A business application for performing the business transactions that keep your company running. Transactional applications, and the databases that support them, are optimized for quick transaction processing. Because they are constantly changing and are not optimized for data retrieval, transactional system databases are not usually the best source of data for analysis.

Transfer Agent

An individual or firm who that keeps a record of your shareholders and the number of shares they own. Transfer Agents also issue new share certificates and cancel old certificates. Unlike Brokers, Transfer Agents are not responsible for selling stocks. Instead they are primarily concerned with maintaining records on all stocks which your company has issued.

Transfer Forecast

In PeopleSoft Inventory Planning, a Generation process option that transfers the forecast from the target view in Demand Planning forecasts. The process only transfers items from Demand Planning that have been set to update the **Inventory Policy**.

Transfer Punch

The start of a work period that specifically denotes a change in task and usually compensation-related characteristics

Transfer Type

An interunit transfer setting PeopleSoft Production Planning and Enterprise Planning use to determine where it will obtain item data for transfer tasks. If the type is a supply or demand transfer task, the Planning engine only processes the transfer item for a single location, reducing the time for plan processing. If the transfer type value is both, the Planning engine processes the transfer item using data from both the To and From units.

Transfer Worksheet

A work space for transferring an open item from one customer to another.

Transferable Stock Options

Options that may be transferred by the optionee, generally only to a family member or to a trust, limited partnership or other entity for the benefit of family members, or to a charity.

Translate Table

A system edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own.

Translate Table

A system edit table that stores codes and translate values for the miscellaneous fields on the database that do not warrant individual edit tables of their own. In most cases PeopleSoft maintains the Translate Table.

Transport Rate

The Transport is a statutory deduction in France. Each establishment has a rate, and the URSSAF notifies establishments of this rate on a yearly basis. This deduction is used by the region to subsidize transportation, and maintain and build roads.

Transportation Lead Times

The transportation lead time is the in-transit interval from the date and time a shipment leaves your warehouse (**Inventory Business Unit**) to the date and time it arrives at your customer's receiving dock. The transportation lead time is used in calculating the scheduled shipment and scheduled arrival dates on the order when you enter either a requested arrival date or a requested shipment date.

Travel And Relocation Date

Length of time an employee must remain in the Government after the Government has paid to relocate him/her from one official duty station to another or for initial appointment.

TRC Program

A program that runs the level at which an organization actually needs to track employee time to support all of its administrative and compensation needs. TRCs are assigned to TRC Programs, which are ultimately assigned to workgroups. Multiple Workgroups can share these TRC Programs.

Treasury Interface files

These are DOS-based files generated by PeopleSoft in accordance with FMS file layouts for transmission of payment data to one of the FMS' Regional Financial Centers.

Treasury Position Code

In the financial services industry, this is a lookup code used for off-balance sheet treasury position accounts, such as foreign exchange, derivatives, precious metals, or any other account position that is the result of trading room and treasury operations.

Treasury Stock

Shares of a company's stock that have been repurchased or otherwise reacquired by the company and are "held in treasury." Whether the treasury shares count as "issued" or as "outstanding" shares of the company is a matter of state corporate law. Generally, a company may not vote its own shares held in treasury.

Treasury Stock Method

The method of calculating primary and fully diluted earnings per share when common stock equivalents such as unexercised stock options exist. Required under generally accepted accounting principles.

Tree

The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

Tree Compare Utility

A PeopleSoft Enterprise Warehouse utility that enables you to compare effective dates for trees. The results page shows nodes that have been added, deleted, or moved from one parent to another. You may also view the detail objects that have changed.

Tree control

Tree Control is a hierarchical search tool that you can embed in a panel. Tree Controls give the user a view of hierarchical data structures and enable them to drill down through the hierarchy to a particular row of data.

Tree Denormalizer

The Tree Denormalizer Application Engine process converts trees into multi-column data format so they can be used by third-party OLAP or ROLAP tools.

Trigger

See Event Trigger.

Trustee Extract

A PeopleSoft Pension Administration data extract containing data that a third party needs in order to produce pension checks.

Turnover Costing

In PeopleSoft Workforce Analytics, this is a calculation of the cost to the organization of employee turnover, in dollars.

Turnover Rate

In PeopleSoft Workforce Analytics, the rate that employee's are leaving the company.

TUXEDO

BEA's middleware product used to manage transaction queues, server process initiation, system administration, time-outs, data encryption, compression, logging and other application server processing.

Two-Tier

A two-tier architecture refers to the traditional client/server model in which a client workstation connects to and sends SQL directly to the database server.

Type of Appointment

Indicates the specific type of appointment, e.g., part-time permanent, full time temporary, etc.

U**Underlying Security**

The security underlying a stock option that an optionee has the right to buy, or the security underlying a convertible security.

Underpayment Adjustment Limit

The maximum amount or percent above which underpayment adjustments are not allowed for a given business unit.

Underwater Option

When the current market price is below the option exercise price. When an option is underwater, it would cost more than the underlying stock is worth to exercise the option. Such options are also described as being "out-of-the-money."

Underwriter

An investment banking firm that actually buys the shares from the company in a public offering and then resells them (at a slightly higher price) to its customers.

Unexpected Losses

In the financial services industry, these occur when the economic capital is exhausted and the insolvency rate is exceeded. Unexpected losses are determined by a targeted insolvency rate (confidence level); for example, a 99.7% confidence level indicates that there is a 0.03% estimated probability that the unexpected losses will exceed economic capital (or shareholder equity).

Union Code

Part of a group of defaults assigned to job codes. Union code may be used by human resources to group similar jobs or bargaining units together, dependent on individual company parameters.

Unit Code

In the financial services industry, Unit Code is used as an alternate means of measuring the relative size of companies participating in external surveys. A typical measure would be the number of employees in a company. The concept of unit is generic enough that the units can be other measures besides number of employees. For example, in the hospital industry the unit could be the number of hospital beds. Or in the hotel industry the unit could be the number of rooms.

Unit of Measure (UOM)

A type of unit used for quantifying in PeopleSoft systems. Depending on the application, units of measure might describe dimensions, weights, volumes, or amounts of locations, containers, or business activities. Examples include inches, pounds, workhours, and standard cost dollars.

Unit of work

Each transaction group includes one or more individual units of work. A unit of work is a single transaction that you want to commit or rollback as a whole.

Unitize Assets

The process of unitizing a single load line, usually originating from a different application, into multiple assets in PeopleSoft Asset Management.

Univariate Forecasting Technique

In Enterprise Planning and Simulation, the Univariate Forecasting Technique is a forecasting method that uses only the recorded history for the value to forecast its future.

Universal Navigation Header

Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

Unscheduled Punch

A punch that is made by a time reporter who was not scheduled (see Time Reporting)

Unvested Shares

Unvested stock options are options that have not vested and, therefore, are not exercisable.

URI

A URI does not include the query string (the text following a ? on the URL). You can think of it as a subset of the URL that points to the resource, but does not include any parameters being passed to that resource. From the above example, the URI portion of the URL is as follows:

`http://serverx/InternetClient/InternetClientServlet`

URL

In this document, the term URL refers to the entire query string. The following is an example of a URL:

`http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=W
EBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k`

URSSAF Code

The URSSAF is the body responsible for ensuring payment of Social Security contributions by all French employers.

Useful Life

The amount of time an asset may be depreciated.

User Data

PeopleSoft Demand Planning, data held in user-defined fields. These fields provide for storage of additional data that is not supplied by the standard set of fields in the system. The fields can also become part of the key for the **Forecast Item** at each level within the **Forecast View**.

User-Defined History

A summary of customer receivables activity that is defined by the user.

User-Field Code

PeopleSoft Demand Planning, a definition of a set of user-defined fields that contain data specific to the installation.

V**Valuation**

The way a company represents the value of a non-monetary award such as stock.

Value allocation

A process in PeopleSoft Workforce Planning, by which you assign an overall monetary value to a competency strategy for your organization, and assign a weight or importance to the roles,

competencies and accomplishments in the strategy. The system then allocates a breakdown of the value to roles, competencies, and accomplishments in the strategy based on their relative weighting or importance.

Value Object

In the PeopleSoft Enterprise Warehouse, Value Objects are a metadata layer that provides descriptive information about fields and values. Value Objects are used as constants in Data Manager target object definition.

Variable

Temporary storage for use or defined information used in the creation and application of rules (see Time Administration)

Variable [Global Payroll]

An element type that defines and stores values such as a character, date, or number. You can use variables to create generic formulas for situations where you use the same values over and over again in a calculation.

Variable Compensation

In PeopleSoft Workforce Analytics, direct compensation that is not fixed, that is paid out in variable amounts, such as bonuses and commissions.

Variable Plan.

A plan in which either the number of shares and/or the price at which they will be issued is not known on the grant date.

VAT Account Type

A code that identifies the different types of accounting entries that must be created for VAT transactions. These codes are also used to categorize transactions in the VAT transaction table. The account type is used in conjunction with the VAT code and VAT transaction type to determine the VAT ChartFields used for a given VAT accounting entry.

VAT Apportionment

For mixed activity, VAT apportionment is the mechanism that allows you to specify the ratio of taxable activity to exempt activity for individual ChartFields.

VAT Calculation Method

Options are Net or Gross. When calculating VAT at net, the early payment discount is applied to the goods amount before calculating the VAT. The amount of VAT calculated using this method is the amount that is to be paid, regardless of whether the early payment discount is actually taken at time of payment. When calculating VAT at gross, the VAT is initially calculated based on the gross transaction amount. The early payment discount is not taken

into account at this point. However, in some countries an adjustment is made to the VAT amount at the time of payment, if the early payment discount is taken.

VAT Calculation Type

Options include Exclusive or Inclusive. If exclusive, the VAT amount is stated separately from the goods amount. If inclusive, the VAT is not stated separately but is included with the goods amount.

VAT Code

The tax code used to define a percentage the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions. The tax authority tied to the VAT code generally consists of a single authority, and the ChartFields for a VAT code don't reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.

VAT Declaration Point

When VAT transaction information is declarable for reporting purposes. Options include Invoice or Payment. If you choose invoice, the system will recognize VAT at invoice time; if you choose payment, the system will recognize VAT at the time of payment.

VAT Entity

The level or entity within an organization at which VAT reporting is performed. VAT entities can be registered for VAT in multiple countries, but only one country can be designated as the VAT entity's home country. VAT and Intrastat reporting information and VAT default information are defined for each country in which the VAT entity is registered. You may also specify any VAT exceptions—either exoneration or suspension from paying VAT—for any country in which the entity is registered.

VAT Exempt Supply or Purchase

A transaction where the product or item is non-taxable or exempt from VAT. No VAT code is associated with the transaction. Although no tax is applied to the transaction, the transaction is still logged in the VAT transaction table.

VAT Exonerated

A transaction where the purchaser has been determined as not subject to VAT. For these cases, there may be an exoneration certificate number tied to the purchasing entity (either the customer or the VAT entity) as proof of exoneration. A zero-rated VAT code should be associated with transactions where exoneration applies. The transaction is still logged in the VAT transaction table, but no tax is applied.

VAT Rebate Percent

Within Canada, for Public Service Bodies, the percentage of VAT that is not normally recoverable but which may be refunded in the form of a tax rebate.

VAT Recoverability Percent

The percent of VAT that's recoverable.

VAT Registration Countries

Country codes associated with a VAT registration number for a particular customer or VAT entity.

VAT Transaction Table

Stores detailed transaction information for VAT reporting. It is the primary source of information for all VAT reports. Each application is responsible for writing to this table and also to a cross-reference table used to link entries in the VAT transaction table with entries within each application.

VAT Transaction Type

Used to categorize VAT transactions according to particular VAT accounting and reporting requirements. The VAT code and the VAT transaction type are used in conjunction with the VAT account type to obtain the ChartFields for accounting entries.

VAT Treatment

A description of how the transaction must be treated for VAT purposes. This is used to determine how VAT defaults are applied, what accounting entries are required, and how and if the transaction is reported on the VAT return.

VAT Use ID

A code used to identify the type of activity in which a purchased good or service will be used, and therefore to determine a recoverability percent and a rebate percent (when applicable) that will be applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you may associate either the ratio of taxable activity to exempt activity directly with the Use ID, or you may indicate that this ratio is determined at the ChartField level.

VdkVgwKey

A key within a Verity BIF file for every document to be indexed. VdkVgwKey values must be unique across all collections that will be searched in any one application.

Vendor Draft

A draft issued by a vendor. PeopleSoft Receivables generates vendor drafts, provides a flexible worksheet environment for approval management, and enables discounted or standard submission for bank processing. PeopleSoft Payables receives vendor drafts and associates the appropriate vouchers.

Verity

The third-party search engine integrated with the PeopleSoft Portal.

Verity Fields

Verity fields are stored in the collection for retrieval and searching, and can be returned on a results list. Fields are defined in the BIF file and stored in the collection for retrieval and searching, and can be returned on a results list. Fields, like date and numeric fields can be used with the comparison operators (<,<=,>,>=).

Verity Thesaurus

The custom thesaurus consists of lists of synonyms defined in a synonym control file and can be used for synonym searching. After defining synonym lists in the control file, you use the `mksyd` utility to create a custom thesaurus (a control file which has the `.syd` extension) that the search engine uses.

Verity Topics

Verity applications can provide end users with predefined search criteria called *topics*. A topic is a named object that represents a concept, or subject area and can be used for synonym searching. It consists of words and phrases grouped together using the Verity query language in a tree-like structure. When provided, topics can be shared by all users.

Verity Zones

Zones are specific regions of a document to which searches can be limited. When the zone filter is used, the Verity engine builds zone information into the collection's full-word index. The index, enhanced with zone information, permits quick and efficient searches over zones. Searching a zone is faster than field searching. Zones are defined in the DAT file. The contents of a zone cannot be returned in the results list of an application.

Version

There can be up to five budget versions for each Budget Center level in a Budgeting Model. Budget versions are used to perform what-if analysis and comparisons of budget amounts before the user selects one version to submit as the Budget Center's budget plan. PeopleSoft Budgeting-specific.

Vest Deferral Grace Period

The specified period of time within which an optionee must return from leave to avoid having the vesting deferred. Only applicable if the Stock Action is LOA. Suspend Vesting must be selected for this rule to be applicable.

Vest Deferral Grace Period Service Rule

If the company provides a vest deferral grace period, they may stipulate that only certain individuals are eligible for the grace period based on service with the company. Only applicable if the Stock Action is LOA. Suspend Vesting must be selected for this rule to be applicable.

Vest Immediately

A stock option plan may provide that upon specific types of terminations, or upon a case by case scenario, all unvested shares held by an individual can be made immediately vested as of a specific date. Some companies' plans provide that under certain circumstances, such as retirement, the vesting of option shares accelerates upon termination of employment. When this occurs, you must modify the vesting schedule before you terminate the individual.

Vested Shares

Option shares that are free of any ownership restriction. Generally, vested exercised shares are fully owned by the optionee, free from restrictions and freely tradable.

Vested Termination

The termination of an employee who has a vested benefit. The benefit is deferred until the participant reaches retirement age. The employee is considered "Terminated Vested," "Term Vested," or simply "TV."

Vesting

The method by which a granted option becomes free of all restrictions and the Optionee has full rights to the shares.

Vesting Schedule (Template)

A convenient way to set up the framework for a vesting schedule that can be uniformly applied to individual options. When you grant stock options, you define a vesting schedule to determine the default-vesting schedule for the option.

Vesting Service

The service used to determine an employee's vesting percentage. Rules for accruing vesting service may be different from rules for accruing other plan service credits.

VEETS-100 Federal Contractor Report

This report is required of employers in the United States. It lists federal job classifications, and the number of employees and new hires in the last 12 months who are special disabled military veterans or Vietnam era military veterans. It also provides totals for each job classification of both veterans and non-veterans who hold these jobs.

View

PeopleSoft Demand Planning, a multilevel forecast structure. Each view is associated with a unique view ID and includes information that defines the view and structure type. The three types of views are working, disbursement, and dynamic.

For PeopleSoft Budgeting see Budget View.

Virtual Tasks

In Time and Labor, Virtual task data is associated with a taskgroup profile that defines common characteristics for a given Taskgroup and Task Profile ID. A single row of data is linked to multiple Earnings records for multiple employees. By minimizing the physical storage of daily task data we provide enhanced performance without limiting its functionality.

Vision

In PeopleSoft Balanced Scorecard, the overall mission of an organization. Usually the highest level on a strategy tree. Vision is optional; you aren't required to have a vision component on each strategy tree.

See also Strategy Tree

Volume

Total share volume traded in a stock during market hours.

W**WA (Workforce Analytics)**

See PeopleSoft Workforce Analytics

Waiver Of An OPM Qualification Standard

Involves setting aside requirements in a published standard to place an employee in a particular position, usually to avoid some kind of hardship to the employee, such as in cases of RIF or administrative error on part of the agency. Extra training and/or skills development may be needed to help the employee adjust to the new position. Waivers are granted by OPM or an agency, as appropriate, on a case-by-case basis, and do not directly affect other positions in the organization.

Warehouses

A warehouse reporting and analysis solution that supports the specific PeopleSoft business application that warehouse is using. It consists of predefined ETL maps, data warehouse tools, and Data Mart definitions. The warehouses we deliver are: PeopleSoft Financials Warehouse, PeopleSoft HRMS Warehouse, PeopleSoft CRM Warehouse, and PeopleSoft Supply Chain Warehouse.

Warning Exception

A transaction that exceeds the available funds but is allowed to continue to be posted against the budget. Warnings are informational only.

Warrant

A type of security, usually issued together with a bond or preferred stock, that entitles the holder to buy a proportionate amount of common stock at a specified price, usually higher than the market price at the time of issuance, for a period of years or to perpetuity. A warrant is usually issued as a sweetener, to enhance the marketability of the accompanying fixed income securities. Warrants are freely transferable and are traded on the major exchanges.

WCB

In Canadian provinces the Worker's Compensation Board (WCB) operates as an independent board, and thus would have different requirements in each province. For example, in British Columbia the organization is called the Worker's Compensation Board of British Columbia and in the Province of Quebec, the board is known as Commission de la Santé et de la Sécurité du Travail (CSST).

Weight

In PeopleSoft Planning, a user-defined value for the constraints that can be violated, determining how the schedules score will be calculated. Violations that are more critical to your schedule merit a higher weight.

Weight and Volume Pricing

You can price shipments by weight or volume to create price prices. Weight and Volume pricing requires using estimated shipments.

Weighted Average Cost of Funds

The projected principle payments for an instrument are used to derive a series of matched maturity funding rates, which in turn are used to calculate the overall base PeopleSoft Funds Transfer Pricing (FTP) rate. The Weighted Average Cost of Funds (WACF) method calculates a weighted average FTP rate where each of the funding rates is weighted by the principle payment amount and the term to maturity of the payment.

WFA (Workforce Analytics)

See PeopleSoft Workforce Analytics

WGI Due Date

Identifies the date of an employee's next within grade increase. Current policy is that the step increase is implemented on this date automatically unless prevented by the processing of an unsatisfactory performance appraisal.

WGI Non-Creditable Days

Total number of days that cause the WGI due date to be adjusted forward.

Whole Calendar Month

An instruction telling the system to use every day in each month for this time period. The system fills in the last day of the period according to the information you have entered.

Wildcard

You can replace the right-hand characters in a search field with a percent (%) wild card to query a range of values beginning with the remaining, left-hand characters. For example, by entering '2%' in a six-character field, you will receive a range of available values, such as 200000 through 299999 or 2aaaaa through 2zzzzz.

Window Period

The ten-day period, from the third to twelfth day after public release of a company's financial statement, when insiders may exercise their stock-appreciation rights without violating Securities and Exchange Commission rules for short-term trading.

Windows Client

Traditional PeopleSoft 32-bit client. Windows clients connect to the application server domain (Tuxedo) using a port number (or connection string) specified in PeopleSoft Configuration Manager.

WIP Replenishment Method

Designates how the PeopleSoft Flow Production request is communicated. For a replenishment method of Inventory, the Workflow, Pull Ticket, and Pull List replenishment methods are available. With feeder line replenishment, you can only use Pull Tickets.

WIP Replenishment Mode

Determines how PeopleSoft Flow Production is triggered to generate a replenishment request for an item. Replenishment options include Backflush, Manual, and Kanban Card.

WIP Replenishment Source

Determines where you send your PeopleSoft Flow Production replenishment request and what source supplies your WIP location. Options include Feeder, Inventory, and Vendor.

Withdrawal

An election not to continue participation in a stock purchase plan.

Withdrawal of Contributions

In a pension plan, the act of returning pension contributions, with interest, to an employee who is terminating. An employee who withdraws contributions typically forfeits all service associated with those contributions. If the employee is later rehired, repayment of contributions and interest typically reinstates the forfeited service.

Withholding

A deduction taken by employers out of taxable income of an individual. Typical withholding taxes include federal income taxes, federal social security, Medicare taxes, and state and local income taxes.

Within Grade Increase (WGI)

A longevity-based increase in salary based on predetermined time in grade requirements and acceptable performance.

Work Council (Comité d'Enterprise)

In France it is mandatory for companies with more than 50 employees to elect a Work Council to represent the employees in negotiations with management.

Work Effort

See Activity Type.

Worker

In PeopleSoft Workforce Analytics, workers are defined as anyone who performs functions for the organization, and receives compensation from the organization's operating expense funds in return. Workers can be direct employees or independent contractors. This includes individuals contracting business directly from the company or through an agency.

Work Group

In PeopleSoft Enterprise Performance Management, the work group is a grouping of employees that share a similar activity profile.

Work Period

A Days On/Days Off template; the smallest unit of time that a business uses to communicate with their employees regarding when to be and/or not to be at work (that is, time working and time not working). The work period can be any number of hours. Until clock hour reporting is implemented, the application does not care about the number of hours. The initial Time and Labor product will apply the work period to a calendar day.

Work Queue

In PeopleSoft Demand Planning and Inventory Planning, a feature for reviewing and working with exceptions created during the processing of forecasting and inventory data.

Work Schedule

A template consisting of a sequence of work periods (days) on and off, and the number of scheduled hours per work period. Work Schedules and Work Periods should not be confused with calendar days.

Worksheet

A way of presenting data to the user through a BAM interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

Work Templates

Work templates describe your employee's work patterns. Work templates could apply to individuals or entire organizations. For instance, 9 AM to 5 PM, Monday through Friday is a fairly standard working week in organizations.

Workday

A 24-hour period rounded by daybreaker with one or more associated shifts (see Scheduling)

Workday Override

A function that allows a Time Manager to override a Time Reporter's schedule for a single workday. For example, Jane's long-term schedule assignment is Monday – Friday, 8.00 to 17.00. Due to an increase in production demand, her manager needs to schedule her to work 7.00 to 18.00 on Thursday, 16 March 2000. Her manager needs to be able to make this change to her schedule in the PeopleSoft Time and Labor system, so when Jane checks her schedule for this week, she'll see the revised schedule.

Worker

Workers can be defined as anyone who performs functions for the organization and receives compensation from the organization's operating expense funds in return. Workers can be direct employees or independent contractors (includes individuals contracting business directly from the company or through an agency).

Workers Compensation

The days an employee is on LWOP due to sustaining an injury or illness while on the job.

Workflow

The background process that creates a list of administrative actions based on your selection criteria and specifies the procedure associated with each action.

Workflow

The background process that creates a list of administrative actions based on your selection criteria and specifies the procedure associated with each action.

Workforce Monthly Report (Déclaration Mensuelle Obligatoire des Mouvements de Main D'oeuvre)

In France, companies that employ 50 or more employees are required to submit the Workforce Monthly Report to the Administrative Division of the Ministry of Work and Social Relations. The report contains workforce information for a given establishment of a company, including

the total number of employees and details of employees who have joined or left the establishment during the month.

Workgroup

A user-defined group of employees who share identical compensation rules. A workgroup may be equivalent to all the employees in a business enterprise, all employees in a Paygroup, all employees belonging to the same Union or Union Local, or all employees who work at a specific work location.

Worklist

The automated "to do" list that Workflow creates. From the Worklist you can directly access the panels you need to perform the next action, and then return to the Worklist for another item.

Worklist

The automated "to do" list which 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.

Works Councils (Betriebsrat)

In Germany, the works councils for your company are internal committees elected by the employees that represent the interests of salaried and hourly paid employees, other than management. Every work location in your company has its works council (this would be the local works council) and the company as a whole has a central works council.

Work-Study Program

Government or non-government programs supervised work experience related to a student's course of study and are a part of, or a supplement to, education. Federal student-trainee programs are examples of such programs.

X

Y

Yearly Maximum Pensionable Earnings (YMPE)

Amount set by the government upon which Canadian Pension Plan (CPP) contributions are made.

Z***Zero-Based Budgeting***

A budgeting option that builds a budget from the ground up starting with zero values. This is in contrast to an incremental budget that is based upon using prior year actual or budget values as starting point. PeopleSoft Budgeting-specific.

Zero-Rated VAT

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.

Zip Code

The term for postal codes in the United States.

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