PeopleSoft®

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Upgrade Assistant

February 2005

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Upgrade Assistant
SKU PT846UGA-B 0205
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Contents

About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

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

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

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Additional Resources

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

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

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements Used in PeopleBooks

As of Date The last date for which a report or process includes data.

Business Unit An ID 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 Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, 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.

Once, Always, and **Don't Run** Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Process Monitor Click to access the Process List page, where you can view the status of submitted process requests.

Report Manager Click to access 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).

Request ID An ID that represents a set of selection criteria for a report or process.

Run Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

SetID An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

Short Description Enter up to 15 characters of text.

User ID An ID that represents the person who generates a transaction.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.46 PeopleBook: Using PeopleSoft Applications

PeopleSoft Upgrade Assistant Preface

This preface discusses PeopleSoft Upgrade Assistant.

PeopleSoft Upgrade Assistant

PeopleSoft Upgrade Assistant helps organize the steps necessary to complete your upgrade. Some steps can run automatically, while others may require you to make changes manually.

You must be familiar with all the tools used during the upgrade process, for example, PeopleSoft Application Designer, Data Mover, SQR, Application Engine, and so on. You also need to understand the configuration necessary to use these tools.

Note. If the software you plan to upgrade was developed on PeopleTools 8.46, use Change Assistant to perform the upgrade instead of PeopleSoft Upgrade Assistant. If you are not sure, see the upgrade page on PeopleSoft Customer Connection for your licensed product.

Chapter 1

Using PeopleSoft Upgrade Assistant

This chapter provides an overview of PeopleSoft Upgrade Assistant.

Understanding PeopleSoft Upgrade Assistant

To use PeopleSoft Upgrade Assistant, you run a process using an upgrade job and upgrade template. The upgrade job is a set of filtered steps that are specific to your upgrade and relevant only to the release, platform, and products you are using. For PeopleSoft supported upgrades, PeopleSoft provides predefined upgrade templates on Customer Connection. These templates comprise the steps necessary to complete an upgrade for a supported upgrade path. Depending on your configuration, some of the steps in the template may not apply to you.

In addition to managing the steps required to complete your upgrade, the PeopleSoft Upgrade Assistant presents the documentation associated with each particular step.

The Upgrade Template View

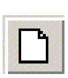
You use the upgrade template view to import the upgrade template and set the step properties. The template tree section displays the chapter, tasks, and steps for your selected upgrade product.

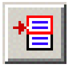
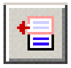
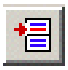
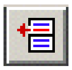
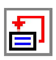
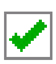
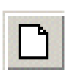
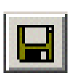
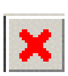
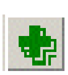
Selecting the Upgrade Template tab enables menus with which you can create new templates, open existing templates, specify step properties, view options, and specify general settings.

The Job Status View

In the job status view, you configure the upgrade to run the upgrade process. On this tab, you can create a new upgrade job, open an existing upgrade job, run the upgrade process, and view the job status of each step in the upgrade.

Common Elements in this Book

	Creates a new template.
	Opens a new template.
	Saves a template.

	Inserts a task into a template.
	Deletes a task from a template.
	Inserts a step into a template.
	Deletes a step from a template.
	Indicates that PeopleSoft Upgrade Assistant runs this step or process. These are known as automated steps.
	Indicates that PeopleSoft Upgrade Assistant stops on this process.
	Restarts or continues the step. You would set an automatic step to *restart* if it failed, you've corrected the problem, and now you want to restart the step.
	Indicates that the process is running.
	Indicates an error.
	Indicates that the step is finished.
	Creates a new job.
	Opens a new job.
	Saves a job.
	Starts processing the steps that are defined to run in the upgrade job.
	Cancels processing of the steps that are defined to run in the upgrade job.
	Expands all chapters, tasks, and steps in the upgrade job.
	Collapses all chapters, tasks, and steps in the upgrade job.
New Upgrade Template	Creates your own upgrade template. After creating your own template, you can insert steps, scripts, and procedures to configure your upgrade.
Open Upgrade Template	Opens an existing template.

Save Upgrade Template	Saves your upgrade template and the properties and configurations you have designated for the template.
Save Upgrade Template As?	Saves your upgrade template as a filename with the properties and configurations you have designated for the template.
Close	Closes the current template.
Print	Prints the current template.
Find	Searches for a chapter, task, or step within the current template by entering a search string.
Find Next	Enables you to search for the next occurrence of the target text that you entered.
Insert Chapter	Inserts a chapter into an upgrade template. A chapter serves as a section head for multiple tasks.
Delete Chapter	Deletes a chapter from an upgrade template.
Insert Task	Inserts a task into an upgrade template. A task serves as a section head for one or more steps.
Delete Task	Deletes a task from an upgrade template.
Insert Step	Inserts a step into an upgrade template.
Delete Step	Deletes a step from an upgrade template.
Step Properties	Sets step properties for each step in the upgrade. On the Step Properties dialog box, you specify properties that determine the conditions that apply when you run the upgrade process.
Rename	Renames an existing chapter, task, or step in an upgrade template.
Set Documentation Directory	Specifies the directory into which your upgrade documentation is saved. The PeopleSoft Upgrade Assistant loads the documentation for viewing during the upgrade process.
Upgrade Assistant (Option tab)	Enables you to specify the default log and script editor, HTML browser, and email settings.
Merge Templates (Option tab)	Enables you to merge an existing upgrade template with a new upgrade template.
Database Configuration (Option tab)	Enables you to set the database configuration, specify directories and products, set profiles and run locations, and specify import and export settings.
Start (Run tab)	Starts processing of the steps that are defined to run in the Upgrade Job.
Cancel	Cancels processing of the steps that are defined to run in the Upgrade Job.

CHAPTER 2

Installing PeopleSoft Upgrade Assistant

This chapter discusses how to install PeopleSoft Upgrade Assistant.

Note. Windows XP or Windows 2000 workstations are required to use PeopleSoft Upgrade Assistant to perform your upgrade. Additionally, you must install Microsoft Internet Explorer version 5.0 or higher on the workstation.

Installing PeopleSoft Upgrade Assistant

If you have previously installed PeopleSoft Upgrade Assistant, you must first uninstall it before you can install the correct version of PeopleSoft Upgrade Assistant.

See Chapter 2, "Installing PeopleSoft Upgrade Assistant," Uninstalling PeopleSoft Upgrade Assistant, page 5.

To install PeopleSoft Upgrade Assistant:

1. From the PS_HOME/Setup/psua directory, run Setup.exe. The Welcome screen appears.
2. Accept the default Destination Folder or specify another Destination Folder.
3. Select Next.

   The Start Copying Files screen appears.
4. If you want to review or change any settings, click Back.

   When you are satisfied with your settings, click Next to begin copying files. PeopleSoft Upgrade Assistant copies files to the designated directory.
5. Click Finish to complete the Setup process.

Accessing PeopleSoft Upgrade Assistant

Open PeopleSoft Upgrade Assistant by selecting Start, Programs, PeopleSoft 8, Upgrade Assistant.

Uninstalling PeopleSoft Upgrade Assistant

To uninstall the PeopleSoft Upgrade Assistant:

1. From the PS_HOME/Setup/psua directory, run Setup.exe. The Welcome screen appears.
2. Select Remove and click Next.
3. Click OK on the Confirm File Deletion dialog box.
4. Click Finish on the InstallShield Wizard.

   Proceed with installing the new version of the PeopleSoft Upgrade Assistant.

CHAPTER 3

Using the Upgrade Template

This chapter provides overviews of the upgrade template and process types and discusses how to:

- Load the upgrade template.
- (Optional) Edit templates.
- (Optional) Create templates.
- (Optional) Merge templates.
- (Optional) Modify step properties.

Understanding the Upgrade Template

PeopleSoft Upgrade Assistant uses an upgrade template for each product line and release. The upgrade template contains the chapters, tasks, and steps for the upgrade and consists of SQL scripts, Data Mover scripts, SQR processes, Application Engine processes, and Application Designer procedures.

Note. The steps within the upgrade template contain delivered step properties. You do not need to modify these step properties unless you want to modify the step (for example, if you choose to run the step on a server).

Understanding Process Types

A process type must be assigned for each step in the upgrade process. The following table describes each process type contained in PeopleSoft Upgrade Assistant.

Process Type	Definition
Application Engine	Runs the Application Engine process indicated by the Script/Procedure value under Step Properties. You can run your Application Engine process on the client or the server. You may need to adjust these to reduce the amount of time needed for the actual Move to Production part of the upgrade.
Build Project	Builds the project specified in the Step Properties parameter as #Project= (for example, #Project=ALLTABS). The project is built through the PeopleTools command line. You can set the project build options by clicking Build Options in the Step Properties dialog.

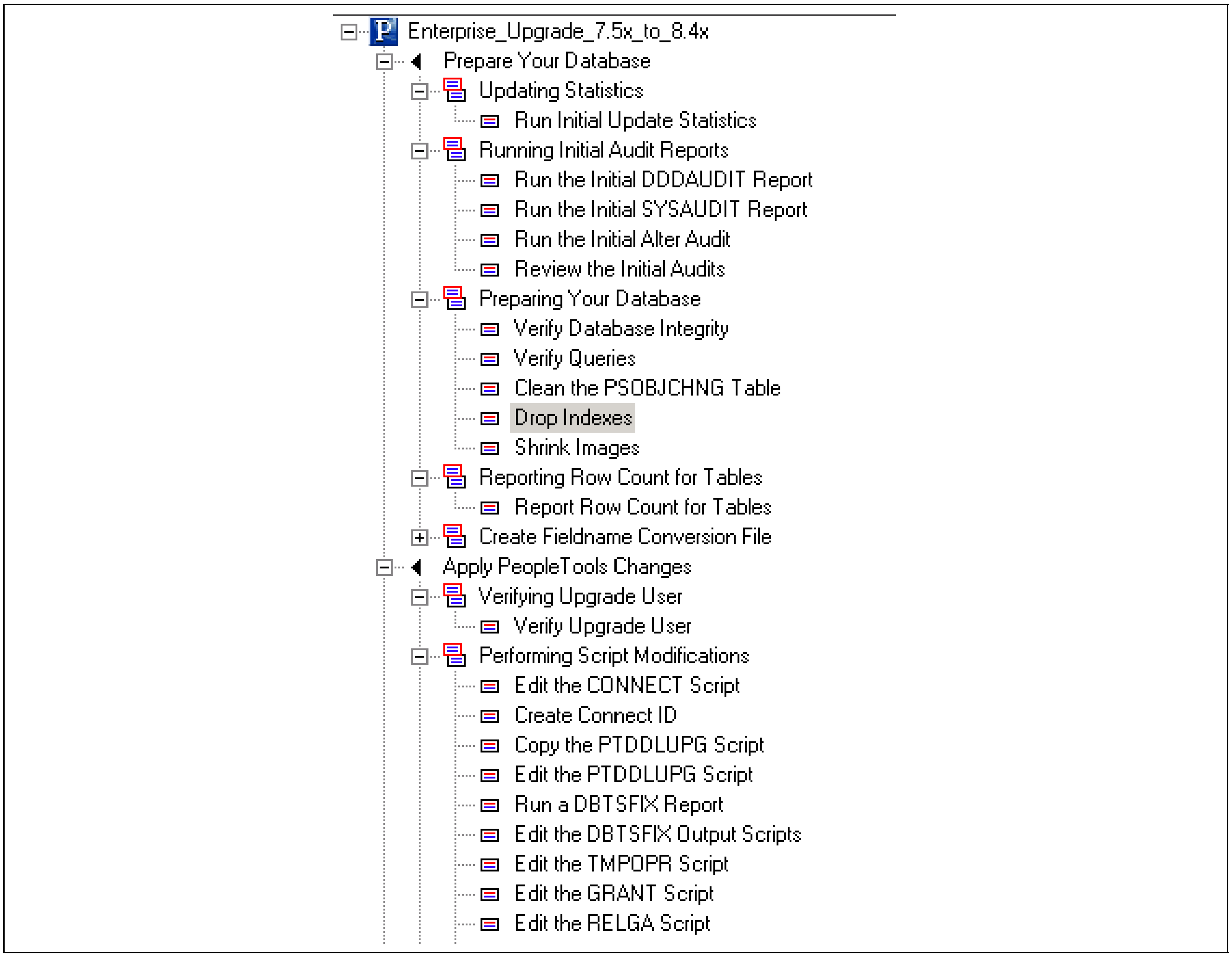
Process Type	Definition
Compare and Report	Runs the Upgrade Compare Process using the project specified in the Step Properties parameter as #Project= (for example, #Project=ALLTABS). You set the Upgrade Compare Options (for example, the Report Filters) by clicking Upgrade Options, Options in the Upgrade Assistant. PeopleSoft Upgrade Assistant uses the options, from the Upgrade Compare, when running the process.
Convert Application Engine	Converts Application Engine processes to the current PeopleSoft release format.
Convert Fieldnames	Converts FieldNames to the current PeopleSoft release format.
Convert PeopleCode	Converts PeopleCode programs to support the newly-supported Unicode format.
Convert Workflow	Converts Workflow objects to the current PeopleSoft release format.
Copy Database	Runs the Upgrade Copy Process using the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS). You can modify the Upgrade Copy options (for example, Language options or Objects to Copy) through PeopleSoft Upgrade Assistant. PeopleSoft Upgrade Assistant uses the options, from the Upgrade Copy, when running the process.
Copy From File	Copies a project from a file. This is used in conjunction with the Copy To File. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS). You can modify the Upgrade Copy options by clicking Upgrade Options, Options in the Step Properties dialog.
Copy To File	Copies a project to a file. This is used in conjunction with the Copy From File option. It uses the project specified in the Step Properties parameter as #Project= (for example #Project=ALLTABS).
Create Project	Enables you to select the type of records (#Type=) to insert into a project (#Project=). For example, #Project=ALLTABS #Type=Table).
Custom Defined Process	Enables you to include custom added processes, such as Batch files, that you can run through the Upgrade Assistant. You need to start this process with `cmd /c` for the process to run; for example: *Cmd /c c:\backup.bat*
Data Mover/Bootstrap	Runs Data Mover scripts as the Access ID specified in the Database Configuration (bootstrap mode).
Data Mover/User	Runs Data Mover scripts as the User ID specified in the Database Configuration (non-bootstrap mode).

Process Type	Definition
DBTSFIX	Runs the DBTSFIX.sqr for database platforms that utilize tablespaces (DB2, Informix and Oracle. The SQR edits the rel8xx.sql scripts to sync the tablespace information in the scripts with the target database server. PeopleSoft Upgrade Assistant determines your source and target releases and decides which rel scripts need to be run for your upgrade.
Load Base Data	Runs scripts conforming to the PTXXXTLS.DMS naming convention that are greater than the target database's current PeopleTools release. PeopleSoft Upgrade Assistant determines your source and target releases and decides which Base Data scripts need to be run for your upgrade.
Manual/Stop	Defines a task you must run manually. PeopleSoft Upgrade Assistant automatically sets the run status to *Stop*. After you have manually completed the step, you must change the Job Status to *Complete*.
SQL Command	Runs the SQL command defined in the Parameters value under the Step Properties. PeopleSoft Upgrade Assistant runs the command using the SQL Query tool specified in the Database Configuration dialog box. For most SQL Query Tools, PeopleSoft Upgrade Assistant stops on an error. Following is the list of query tools used for each platform: • DB2: *DB2CMD.EXE* • Informix: *SQLEDITOR400.EXE* • Microsoft SQL Server: *OSQL.EXE* • Oracle: *SQLPLUS.EXE* • Sybase: *ISQL.EXE*
SQL Script	Runs the SQL script defined in the Script/Procedure value under the Step Properties. PeopleSoft Upgrade Assistant runs the script using the SQL Query tools specified on the Database Configuration. For most SQL Query Tools, PeopleSoft Upgrade Assistant stops on an error. Following is the list of query tools used for each platform: • DB2: *DB2CMD.EXE* • Informix: *SQLEDITOR400.EXE* • Microsoft SQL Server: *OSQL.EXE* • Oracle: *SQLPLUS.EXE* • Sybase: *ISQL.EXE*

Process Type	Definition
SQR Report	Runs SQRs using the pssqr command line. If parameters are included in the Parameters section of the step properties, Upgrade Assistant will obtain the SQR settings from Configuration Manager for the Profile selected in the Job Database Configuration.
Upgrade PeopleTools	PeopleSoft Upgrade Assistant determines your source and target releases and decides which release scripts and other miscellaneous scripts need to be run to upgrade your PeopleTools tables to the latest release level.

Loading the Upgrade Template

You can download the templates and documentation for your application from the upgrade documentation database on Customer Connection. You must download the upgrade template and the HTML upgrade documentation to the same machine on which the PeopleSoft Upgrade Assistant is installed. After the upgrade template file and documentation have been downloaded, detached, and unzipped, you can open the template in PeopleSoft Upgrade Assistant.



Template Tree structure

Note. The PeopleSoft Upgrade Assistant uses the HTML documentation. The PDF documentation is intended for print use and is the same documentation as the HTML file.

Loading a Template to the Upgrade Assistant

To load the upgrade template:

1. Start PeopleSoft Upgrade Assistant.
2. Select File, Open Upgrade Template.

   The Open Upgrade Template dialog box appears.
3. Select the directory in which you stored the upgrade template that you downloaded from Customer Connection.
4. Select the template for your product and path.

   PeopleSoft Upgrade Assistant loads the template for your upgrade product.

Setting the Documentation Directory

PeopleSoft Upgrade Assistant enables you to view the upgrade documentation relevant to the step you are viewing or performing.

To set the documentation directory:

1. Select Edit, Set Documentation Directory.

   The Documentation Directory dialog box appears.

2. Enter or browse to the folder in which you placed your HTML documentation.
3. Click OK.

   When you select a chapter, task, or step in the Upgrade Assistant template tree, PeopleSoft Upgrade Assistant displays the corresponding upgrade documentation in the documentation pane.

(Optional) Editing Templates

This section discusses how to:

- Add steps.
- Edit steps.
- Delete chapters, tasks, or steps.
- Rename chapters, tasks, or steps.

Note. When using PeopleSoft-delivered templates, adding custom steps, modifying existing steps, or deleting existing steps is optional.

Adding Custom Steps

You may need to add custom steps to the template—for example, steps for dropping and adding indexes or running a backup of the target database.

To add a step:

1. In the Upgrade Assistant template tree view, highlight the location where you want to add the step, then select Insert Step.

   The Step Properties dialog box appears.

2. Enter a unique name in the Step Description field.
3. Enter the step properties for the new step.

   See Chapter 3, “Using the Upgrade Template,” (Optional) Modifying Step Properties, page 16.

4. Click OK.
5. Save the template.

Editing Steps

You can modify the delivered settings by changing the step properties. Setting these properties determines the conditions that apply when you run the upgrade process.

To modify the step properties:

1. In the template tree view, highlight the step for which you want to modify the step properties, then select Edit, Step Properties.
2. Verify that the step description corresponds to the step you selected.
3. Modify the step properties as necessary.

   See Chapter 3, “Using the Upgrade Template,” (Optional) Modifying Step Properties, page 16.
4. Click OK on the Step Properties dialog box.

   The step properties you defined for the current step are displayed in the task details section of the Upgrade Assistant template view.
5. Save the template.

Deleting Chapters, Tasks, or Steps

To delete a chapter, task, or step:

Note. If you delete a chapter, PeopleSoft Upgrade Assistant deletes all the tasks and steps within the chapter. If you delete a task, PeopleSoft Upgrade Assistant deletes all the steps within the task.

---

1. Access PeopleSoft Upgrade Assistant.

   Verify that the Upgrade Template view is selected.
2. Select File, Open to select your template.
3. Highlight the chapter, task, or step you want to delete.
4. Select from the following:
   - If you want to delete a chapter, select Edit, Delete Chapter.
   - If you want to delete a task, select Edit, Delete Task.
   - If you want to delete a step, select Edit, Delete Step.
5. PeopleSoft Upgrade Assistant deletes the chapter, task, or step and updates the template.
6. Save the template.

Renaming Chapters, Tasks, or Steps

To rename a chapter, task, or step:

Note. If you rename an existing chapter, task, or step in a PeopleSoft-delivered Upgrade Template, you lose the link to the Documentation Window for that chapter, task, or step.

---

1. Access PeopleSoft Upgrade Assistant.

   Verify that the Upgrade Template view is selected.
2. Select File, Open and select the template.

3. Highlight the chapter, task, or step you want to rename.
4. Select Edit, Rename.
5. Enter the new name.
6. Save the template.

(Optional) Creating Templates

This section discusses how to:

- Create custom templates
- Create new chapters.
- Create new tasks.
- Create new steps.

Creating Custom Templates

You can create a custom template for your upgrade. When you create a custom template, you also insert chapters, tasks, and steps. In addition, you specify step properties.

To create a custom template:

1. Access PeopleSoft Upgrade Assistant.
2. Select the upgrade template view.
3. Select File, New Upgrade Template.
4. Enter the name of the new template.
5. Click OK.

   PeopleSoft Upgrade Assistant displays the name of your new template in the Template Tree. You can insert chapters, tasks, and steps, and assign step properties for the new template.

Creating New Chapters

You can add a chapter to a new or existing upgrade template. A chapter is a section heading for a group of tasks.

To insert a chapter:

1. In the template tree view, highlight the location where you want to add the chapter.

   If this is the first chapter in the template, highlight the top node (template name) at the top of the template tree.
2. On the toolbar, select Edit, Insert Chapter.
3. Enter a unique name for your new chapter.

   Note. Each chapter in the upgrade template must have a unique name.

4. Click OK.

Note. After you save the template, any job based on this template is automatically updated to reflect this change.

Creating New Tasks

You can add a task to a new or existing upgrade template. A task is a section heading for a group of steps.

To insert a task:

1. In the template tree view, highlight the location where you want to add the task.

   If you are adding a task to an existing template, put your cursor where you want to insert the task.
2. On the toolbar, select Edit, Insert Task.
3. Enter a unique name for your new task.

   Note. Each task in the upgrade template must have a unique name.

   ---
4. Click OK.

Note. After you save the template, any job based on this template is automatically updated to reflect this change.

Creating New Steps

You can add a step to a new or existing upgrade template. A step can be any process needed to perform the upgrade.

To insert steps:

1. In the template tree view, highlight the task or step where you want to add the new step.

   If you are adding a step to an existing template, put your cursor where you want to insert the step.
2. From the toolbar, select Edit, Insert Step.
3. Enter a unique name for your new step.

   Note. Each step in the upgrade template must have a unique name; also, ensure that each step name is different from its log file name.

   ---
4. Click OK.

   PeopleSoft Upgrade Assistant displays the Step Properties dialog box.
5. Define the step properties for the new step.

   See Chapter 3, "Using the Upgrade Template," (Optional) Modifying Step Properties, page 16.
6. Continue creating steps until the template is complete.

Note. After you save the template, any job based on this template is automatically updated to reflect this change.

(Optional) Merging Templates

This option enables you to merge your existing template with a new template.

To merge templates:

1. Select Options, Merge Templates.
2. Enter the path and file name of the existing upgrade template.

   This is the path you selected when you installed the upgrade template.
3. Enter the path and file name of the new upgrade template.
4. You can accept the default Log File Name or specify a different log file name.
5. Click Next.

   PeopleSoft Upgrade Assistant merges the two templates. It then displays the new merged template for you to review.
6. Review the merged templates in the Upgrade Assistant - Merge Templates dialog box.
7. When satisfied, click Finish.

(Optional) Modifying Step Properties

This section describes fields and options on the Step Properties dialog box. You can modify step properties for a step when adding or editing steps in the upgrade template.

Note. When you have completed defining the properties for a step and click OK on the Step Properties dialog box, the template reappears with the modified step properties in the step details area of the template.

Access the Step Properties Dialog box.

Step Description

Displays your current step.

Script/Procedure

Enter the script or procedure name associated with this step. A script or procedure name is required for all process types except *Manual Stop.* For SQL scripts, Data Mover scripts, SQRs, and Application Engine programs, the script or procedure name should be the same name as the script, SQR or AE program to be run. For other step types, the script name is used to name the output log.

For example, if you select *SQL Command* as the process type, you can enter any name for the script/procedure because the SQL command is included in the Parameters field. The name you enter for the script/procedure is used as the output log for the SQL command.

Type

Select a process type. This selection defines the type for the script or procedure you selected. Types of scripts and procedures are defined earlier in this chapter.

See Chapter 3, “Using the Upgrade Template,” Understanding Process Types, page 7.

Following is a list of the process types and the effects of selecting some of them:

Application Engine

Build Project: When you select this a Build Options button appears. Click the button to select options based on the instructions in the upgrade documentation for your product and path.

Compare and Report: When you select this, the Upgrade Options button appears. Click the button to select options based on the instructions in the upgrade documentation for your product and path.

Convert Application Engine

Convert FieldNames

Convert PeopleCode

Convert Workflow

Copy Database: When you select this, the Upgrade Options button appears. Click the button to select options based on the instructions in the upgrade documentation for your product and path.

Copy From File: When you select this, the Upgrade Options button appears. Click the button to select options based on the instructions in the upgrade documentation for your product and path.

Copy to File

Create Project: If you select this, you must set the #Type= and #Project= parameters in the Parameter field.

Custom Defined Process

Data Mover - Bootstrap

Data Mover - User

DBTSFIX

Load Base Data

Manual - Stop

SQL Command

SQL Script

SQR Report

Upgrade PeopleTools

Parameters Enter additional parameters you may need to run the step. For SQL commands, you enter the actual SQL command in this field.

The additional parameters are:

Parameter	Description
#Project=	Required for steps that refer to a project name; for example, Build Project, Upgrade Compare or Upgrade Copy.

Parameter	Description
#Directory=	Used when you need to run a script that is not located in the %PS_HOME% \scripts directory, for example, STOREPT. In this case, you could enter: #Directory=#PT_PSHOMEsrc\cbl\base\
#P1= through #P5=	Used to pass prepend parameters to SQR reports, for example, DBTSFIX.sqr. In this case, you would pass the necessary value, such as #P1=#OutputDirectory. You must group all #P1 through #P5 parameters together.
#A1= through #A5=	Used to pass append parameters to SQR reports. In this case, you would pass the necessary value, such as #A1=#OutputDirectory. You must group all #A1 through #A5 parameters together.
#Rename=	Used primarily for the Convert FieldNames step type. It automatically copies the CONVERT-XXXX.INF file from the %PS_HOME%\scripts directory into c:\temp\ and renames the file to CONVERT.INF.
#PTPS_HOME=	Used to specify the %PS_HOME% variable that is defined in the Database Configuration window.
#OutputDirectory=	Used to specify the Output Directory variable that is defined in the Database Configuration window.
#NT=	Used for DB2 Command Center, for Non-Terminated SQL Scripts.
#Type=	Enables you to specify the type of record to insert into the project. Select from the following record types: *All Records, Table, View/Query View, Derived, SubRecord, Stored Procedure, Temporary Table, Dynamic View*
#RCID=	Enables the user to override the Run Control ID used for Application Engine processes.

Run Location

Select *Client* or *Server.* This enables you to indicate whether to run the particular step, script, or procedure on the Client or a Process Scheduler server.

If you select *Server,* PeopleSoft Upgrade Assistant checks the database configuration for the name of the process scheduler. You specify the process scheduler during the database configuration steps.

Note. Selecting a Run Location applies to Application Engine processes only.

Database Orientation

Select *Source* or *Target.* This enables you to indicate whether to run the step, script, or procedure against the source or target database, as defined by the database configuration.

Note. The default orientation is *Target,* but in certain steps, such as the Export and Copy or the Project Compare, you are required to log into the source first. In these cases, set the database orientation to *Source*.

Products

Click Products to display the Products dialog box. From the lists in the Products dialog box, select the product type (for example, FIN/SCM) and the products your step should be run against (for example Asset Management).

After you select your products, the PeopleSoft Upgrade Assistant displays your selection on the Step Properties dialog box.

Note. This feature is used primarily for data conversion processes.

Platforms

Click Platforms to select the platforms that you want to run against your upgrade step. After you select your platforms, the PeopleSoft Upgrade Assistant displays your selection on the Step Properties dialog box.

Language

Click Languages to select languages you have loaded in your database. The selections you make here work together with the selection you make in the Language Type group box. After you select your Languages, the PeopleSoft Upgrade Assistant displays your selection on the Step Properties dialog box.

Type of Upgrade Step

Indicate when to use the step, script, or procedure in the upgrade process.

Initial Upgrade

Indicates the initial upgrade part of the upgrade process.

Move to Production

Indicates the move to production part of the upgrade process.

Both

Indicates both the initial upgrade and the move to production parts of the upgrade process. This is the default selection.

Language Type

The language type works in conjunction with the languages selected for the step in the Language field.

Installed Language

If you select Installed Language, the step will be run if the you indicate in the Language tab of Database Configuration that one or more of these languages is installed on the target database. For example, if you select English, French and German in the Language field for the step properties and select Installed Language, the step will appear in a job if you indicate that English, French, or German is installed on the target database.

See Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29.

Base Language

If you select Base Language, the step will be run if you select a Target Base Language in Database Configuration that corresponds to the step properties Language selection. For example, if you select Spanish for the step properties and select Base Language, the step will appear in a job only if you select Spanish as the Target Base Language in Database Configuration.

See Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29.

Allow for Errors

In the Allow for Errors group box, select one of the following options:

Yes

Select to allow for errors in the step. If you select this option, PeopleSoft Upgrade Assistant continues the run the process if it encounters an error.

No

Select to allow for no errors in the step. If you select this option, PeopleSoft Upgrade Assistant stops the upgrade process if it encounters an error. You can configure PeopleSoft Upgrade Assistant to notify you, by email, if an error occurs.

See Chapter 7, "Configuring and Editing Options," Specifying General and Email Settings, page 37.

Note. The default setting is *No.*

Run Concurrently

PeopleSoft Upgrade Assistant can run certain upgrade steps concurrently; for example, you can run several Application Engine, SQR, or SQL scripts simultaneously.

In the Run Concurrently group box, select one of the following options:

Yes

Select to run the step concurrently. If you select this option for two or more steps, PeopleSoft Upgrade Assistant starts those processes concurrently, until it reads a step that has been set to *No* or a step of type *Manual-Stop.*

No

Select to run the step individually.

Note. The default setting is *No.*

CHAPTER 4

Adding Custom Documentation

This chapter provides an overview of documentation and discusses how to add custom documentation to a template.

If you have added chapters, tasks or steps to a delivered upgrade template, you may want to add custom documentation. In order to do this, you need to edit or copy existing .htm files included in the delivered upgrade documentation.

Understanding Upgrade Documentation

Each chapter within a PeopleSoft delivered template has a corresponding .htm file as shown in the following table. The .htm files are in the directory where you installed the upgrade documentation.

Documentation Chapter	.htm files in Directory
Chapter 1, Plan Your Upgrade	ch01.htm
Chapter 2, Prepare Your Database	ch02.htm
Chapter 3, Install The Software	ch03.htm
Chapter 4, Apply PeopleTools Changes	ch04.htm
Chapter 5, Complete Database Changes	ch05.htm

How Chapters, Tasks and Steps are Tagged in HTML

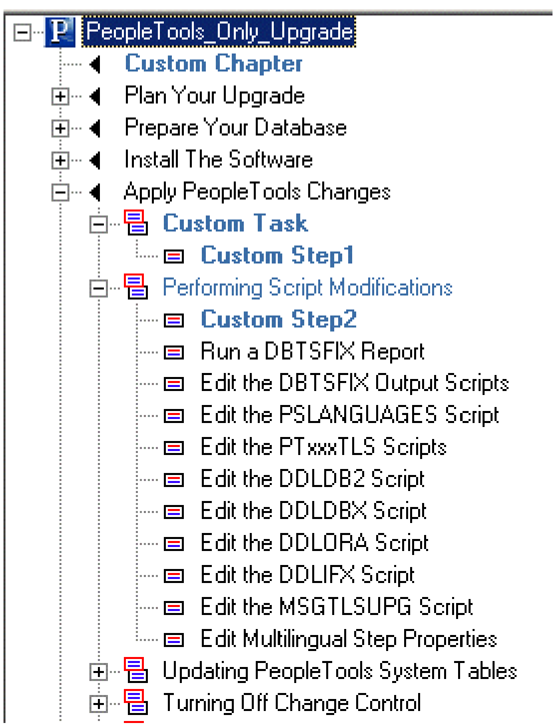
Chapters, tasks, and steps have special tags in HTML code that you will insert (or copy) into your custom documentation. Open any .htm file in an HTML editor to view the HTML code associated with the corresponding chapter. As you scroll through the file, you can see the documentation text associated with the chapter, tasks and steps. The tags are H1, H2, H3, and H4, as follows:

- H1 labels, `<H1>Chapter 1</H1>` correspond to the chapter label.
- H2 labels, `<H2>Plan Your Upgrade</H2>`, correspond to chapter level names.
- H3 labels correspond to task level names.
- H4 labels correspond to step level names.

To see how the .htm file corresponds to a particular item in the Upgrade Assistant template, open the template and select View, Documentation. As you select an item in the template, the corresponding documentation text appears; then, you can locate that item and text in the corresponding .htm file. (You can have the .htm file open in an HTML editor at the same time Upgrade Assistant is accessing it.) You can also see the HTML code used to draw tables and reference .jpg files.

Adding Custom Documentation to the Template

The following screen shows a template to which a custom chapter, task and step within an existing chapter, and a custom step within an existing task has been added.



Example of adding custom documentation

The following sections describe how to add steps, tasks, chapters, graphics and tables.

Adding Custom Step Documentation

To add custom step documentation (the following procedure describes adding documentation to the Custom Step2 within the existing task called Performing Script Modifications):

1. Open your template and add the custom items (chapter, step, task) where it's appropriate for your system. Save the template.
2. Open the .htm file for the chapter to which you want to add custom documentation.
3. Search the file for the step name that follows the new custom step.

   You will insert custom documentation above this step since the new custom step was added above this step.

   In the example, it's Run a DBTSFIX Report: `<a name="RunaDBTSFIXReport"></a><H4>Run a DBTSFIX Report</H4>`

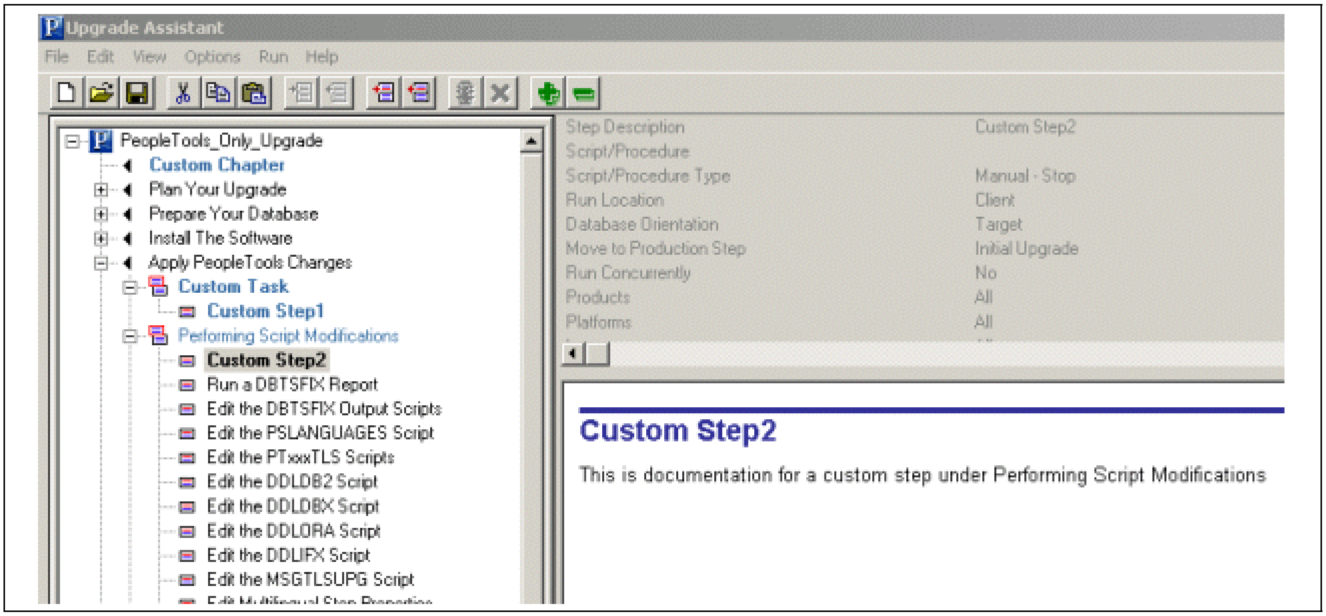
4. Add two lines—one to tag the step name and the other for its associated text.

   It's easiest to copy the existing text and customize as appropriate. Note that the space has been removed from the step name for the <a name=> tag and the <H4> is used for a step. `<a name="CustomStep2"></a><H4>Custom Step2</H4> <P>This is documentation for a custom step under Performing Script Modifications. </P>`

5. Save the .htm file.

Viewing the Added Documentation

To view the newly added custom documentation, click on the step within the template. You should see the following:



Viewing Custom Step documentation

Adding Custom Task Documentation

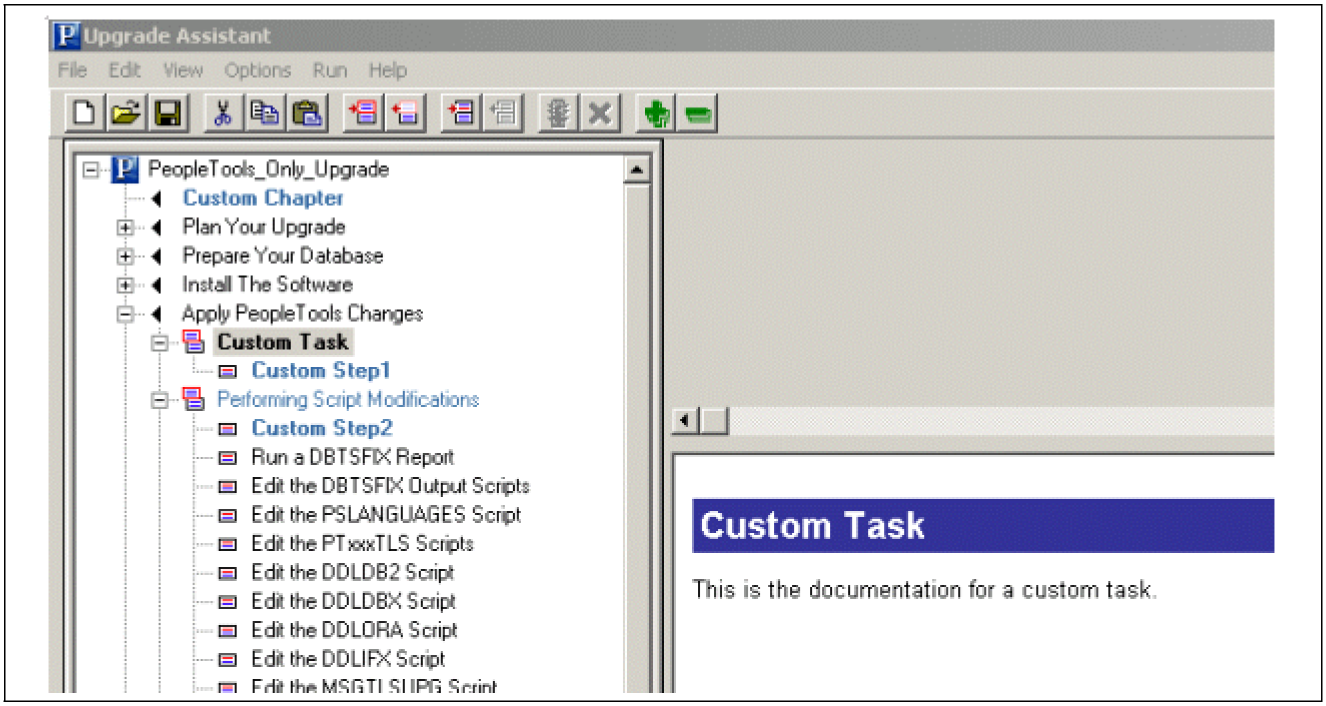
Adding custom task documentation is the same as adding custom step documentation except that you do it at the task level. This section describes adding custom documentation to the Performing Script Modifications task.

- Edit the ch04.htm file and locate the Performing Script Modifications. You will add the documentation for Custom Task and Custom Step1 immediately above this line (`<a name="PerformingScriptModifications"></a><H3>Performing Script Modifications</H3>`).
- It's easiest to copy and paste the HTML code associated with the Performing Script Modifications task. Then just edit the names and text content, removing spaces and commas from the <a name=> tags :

```
<a name="CustomTask"></a><H3>Custom Task</H3>
<p>This is the documentation for a custom task.</P>
<a name="CustomStep1"></a><H4>Custom Step1</H4>
<p>This is documentation for a custom step under Custom Task. </P>
```

- Save the .htm file.

To view the newly added custom documentation, select the custom task in the template. Verify that the custom documentation appears similar to the following:



Viewing Custom Task documentation

Adding Custom Chapter Documentation

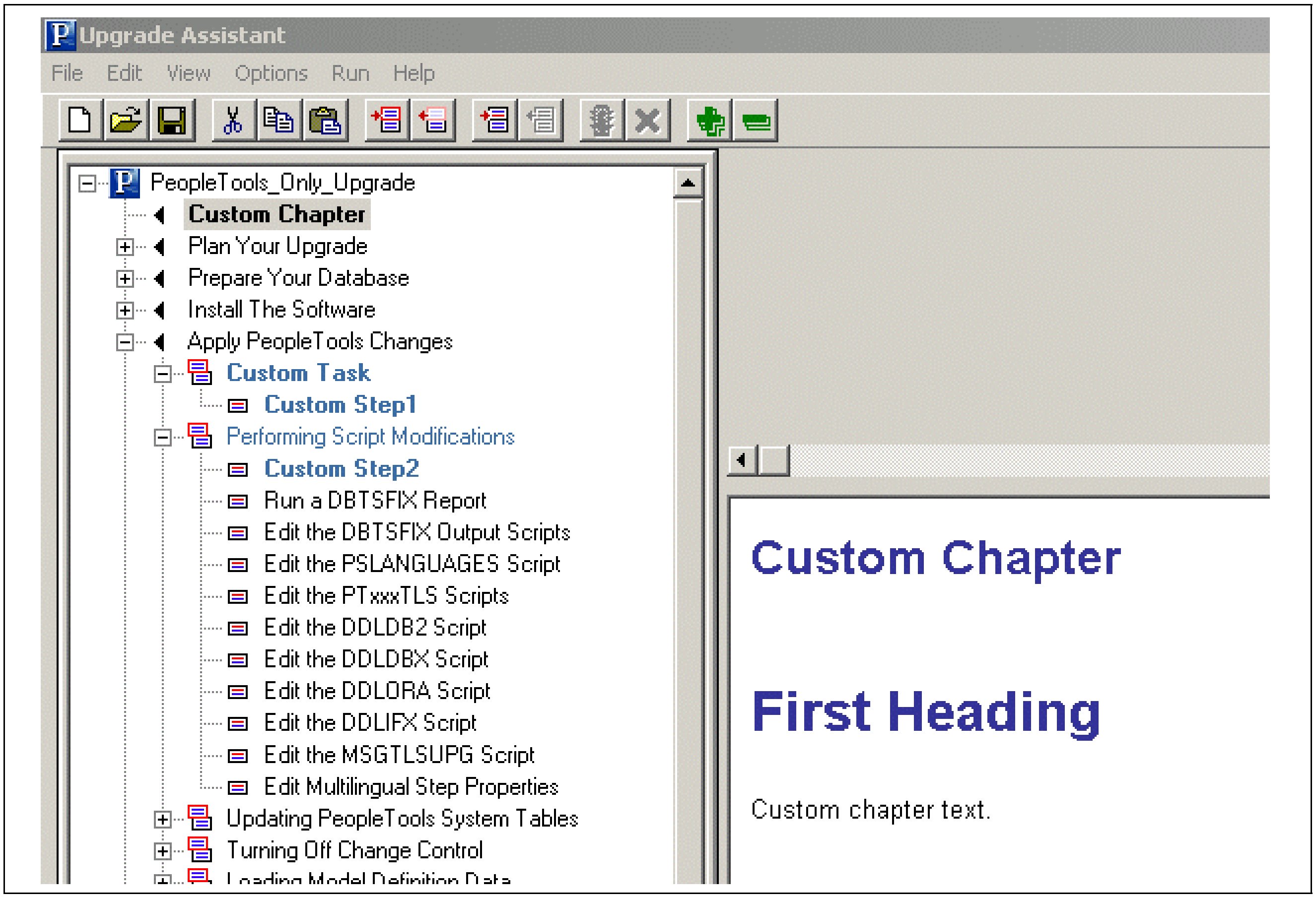
This section describes how to add documentation for a custom chapter.

- You must create a new .htm file to add documentation for a custom chapter. Again, it's easiest to make a copy of an existing .htm file. For example, make a copy of ch01.html and save it as *customchapter.htm*.
- Open *customchapter.htm* in an HTML editor and edit it so that the text corresponds with the newly added chapter.
- Using the previous example, modify the chapter tags and associated text and delete the task or step tags and text that are not needed. The simplest file would look like this:

```
<html>
<head>
<META http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
<SCRIPT LANGUAGE="JavaScript" SRC="commonvars.js"></SCRIPT>
<SCRIPT LANGUAGE="JavaScript" SRC="booklist.js"></SCRIPT>
<LINK REL="StyleSheet" HREF="content.css">
<title>Custom Chapter</title>
</head>
<BODY onLoad="CheckPrint()" onFocus="AfterPrint()">
<P><A NAME="topofpage"></A> <a name="CustomChapter"></a><H1>Custom Chapter
</H1> <a name="FirstHeading"></a><H2>First Heading</H2> <p>Custom chapter
text. </P>
</body>
</html>
```

- Save the .htm file.

To view the newly added custom documentation, select the custom chapter in the template. Verify that the custom documentation appears similar to the following:



Viewing Custom Chapter documentation

Adding Custom Tables or Graphics

If you want to add custom tables or graphics to your documentation, it's easiest to copy existing code and then modify the content as needed. You can look in the delivered .htm files for sample code to use.

Tables

To view the HTML code associated with a table, open ch02.htm in an HTML editor. Search for <a name="UpdatingStatistics">. The following HTML codeblock appears for this task: You can copy this HTML code and modify it as needed to create your own table.

```
<table border=1 cellspacing=0 WIDTH=100%>
 <tr>
  <td WIDTH="20%" valign=top style='background:navy;padding:6.0pt 2.0pt 6.0pt⇒
 2.0pt'>
  <P CLASS=TABLEHEAD><b>DB   Orientation</b></P>
  </td>
  <td WIDTH="20%" valign=top style='background:navy;
  padding:6.0pt 2.0pt 6.0pt 2.0pt'>
  <P CLASS=TABLEHEAD><b>Initial/MTP</b></P>
  </td>
  <td WIDTH="20%" valign=top style='background:navy;
  padding:6.0pt 2.0pt 6.0pt 2.0pt'>
```

```
      <P CLASS=TABLEHEAD><b>Products</b></P>
      </td>
      <td WIDTH="20%" valign=top style='background:navy;
      padding:6.0pt 2.0pt 6.0pt 2.0pt'>
      <P CLASS=TABLEHEAD><b>Platforms</b></P>
      </td>
      <td WIDTH="20%" valign=top style='background:navy;
      padding:6.0pt 2.0pt 6.0pt 2.0pt'>
      <P CLASS=TABLEHEAD><b>Languages</b></P>
      </td>
     </tr>
     <tr>
      <td WIDTH="20%" valign=top style='padding:6.0pt 2.0pt 6.0pt 2.0pt'>
      <P CLASS=TABLE>Target</P>
      </td>
      <td WIDTH="20%" valign=top style='padding:6.0pt 2.0pt 6.0pt 2.0pt'>
      <P CLASS=TABLE>Both</P>
      </td>
      <td WIDTH="20%" valign=top style='padding:6.0pt 2.0pt 6.0pt 2.0pt'>
      <P CLASS=TABLE>All</P>
      </td>
      <td WIDTH="20%" valign=top style='padding:6.0pt 2.0pt 6.0pt 2.0pt'>
      <P CLASS=TABLE>All</P>
      </td>
      <td WIDTH="20%" valign=top style='padding:6.0pt 2.0pt 6.0pt 2.0pt'>
      <P CLASS=TABLE>All</P>
      </td>
     </tr>
    </table>
```

Graphics

To add graphics to your custom documentation, it's easiest to find an existing graphic (.jpg file) and then view the associated HTML code.

For example, in PeopleSoft Upgrade Assistant, select Run the Initial Alter Audit step, located in the Prepare Your Database chapter, under Running Initial Audit Reports task. Scroll down to step 12 in the documentation window to find the graphic icon. To view the HTML code associated with this step, open ch02.htm in an HTML editor. Search for ch02_0002.jpg (or any .jpg file).

The following HTML code appears for this task:

```
<P CLASS=EXHIBIT><SCRIPT LANGUAGE="JavaScript">PopupLogic('<img src=ch02_0002.jpg⇒
 WIDTH=369 HEIGHT=350>','','popup')</SCRIPT>  <P CLASS=CAPTION>Build dialog box</P>
```

You can copy this block of code and modify it to reference a custom .jpg file.

See Also

a general HTML reference guide.

CHAPTER 5

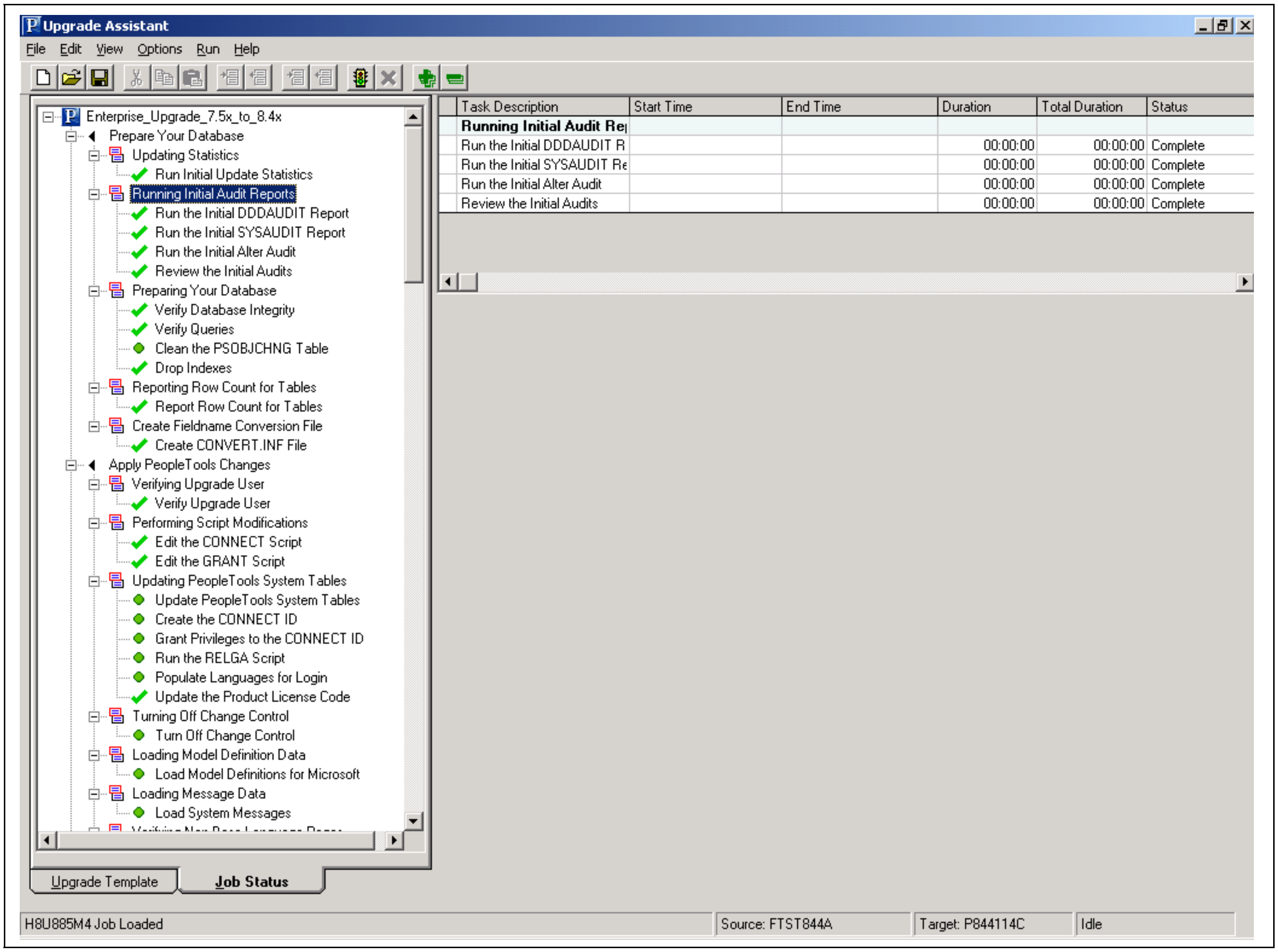
Creating and Running the Upgrade Job

This chapter discusses how to:

- Create a new job.
- Configure the database.
- Open a previously saved job.
- Run the job.

Creating a New Job

The following screen shows the job status view.



Job Status view

Note. You can create multiple upgrade jobs for each upgrade template.

To create the upgrade job:

1. Open the desired template in the PeopleSoft Upgrade Assistant.
2. Select the Job Status tab.
3. Select File, New Upgrade Job.

   The Create New Job File dialog box appears.
4. Enter a name for your upgrade job, for example, the name of your target database.
5. Click Save.

   The Database Configuration dialog box appears.
6. Configure the database on the tabs of the Database Configuration dialog box.

   See Chapter 5, "Creating and Running the Upgrade Job," Configuring the Database, page 29.
7. When configuration is complete, click OK.

Configuring the Database

PeopleSoft Upgrade Assistant uses your configuration information to filter the upgrade path. Proper database configuration is the key to being able to successfully run an Upgrade Assistant job. Step failures are often due to incorrect information in the Database Configuration dialog box.

This section discusses how to:

- Enter source and target database information.
- Specify directories.
- Select products.
- Select Languages.
- Import and export database configuration.
- Enter general settings.

Entering Source and Target Database Information

Click the Database tab.

Database Type

Select the platform. Based upon sign on requirements for the database platform that you select in this field, other fields become available or unavailable for entry. For example, if you select DB2/UDB For UNIX/NT, then Host Name, Database Server Name, and Owner ID are unavailable in the Source and Target group boxes because they are not required for this platform.

Note. You cannot change the database type once the database configuration has been saved. If you made a mistake entering the database type, you will need to create a new job.

SQL Query Executable

Browse to where you've installed the .exe file. It's important to select the correct executable for the database platform.

Note. PeopleSoft Upgrade Assistant uses the commandline version of the .exe, *not* the GUI version. For example, upgrade assistant uses *sqlplus.exe* for Oracle rather than *sqlplusw.exe.*

The following lists the valid SQL query executable for each platform:

- DB2: *db2cmd.exe*
- Informix: *sqleditor400.exe*
- Microsoft SQL Server: *osql.exe*
- Oracle: *sqlplus.exe*
- Sybase: *isql.exe*

Unicode and Non-Unicode

These radio buttons are enabled for all platforms except Informix.

Target Base Language

Select the target base language. If there are any steps that are to be run for a specific base language, they will be filtered based upon what is selected here.

	The target base language is the language associated with the LANGUAGE_CD in PSOPTIONS on the target database.
Database Server Name	Database server names can be up to 256 characters.

Entering User ID and Access ID Information

The access ID has full access to all objects in the database. Your access ID is *not* a user ID. Examples of user IDs are *VP1* and *PS*. Examples of access IDs are *sa* or *sysadm*. The IDs and passwords can be case-sensitive.

Source and target user IDs and passwords can be up to 30 characters in length.

Specifying Directories

Click the Directories tab.

PS_HOME Directory	Enter or browse to your PS_HOME directory. PS_HOME contains files, in subdirectories, that are run in the upgrade process. For example, PS_HOME contains the files of the release you are going *to*.
Upgrade Script Staging Directory	Enter or browse to your staging directory. The path to the staging directory cannot contain any spaces. This directory should be a local directory and should NOT point to a pre-existing directory within your PS_HOME.
Upgrade Output Directory	Enter or browse to your output directory. The path to the output directory cannot contain any spaces. This directory should be a local directory and should NOT point to a pre-existing directory within your PS_HOME.

Selecting Products

Click the Products tab. After selecting the product line, select the products that you’re upgrading. You must select at least one product. PeopleSoft Upgrade Assistant filters jobs for product-specific steps.

Selecting Languages

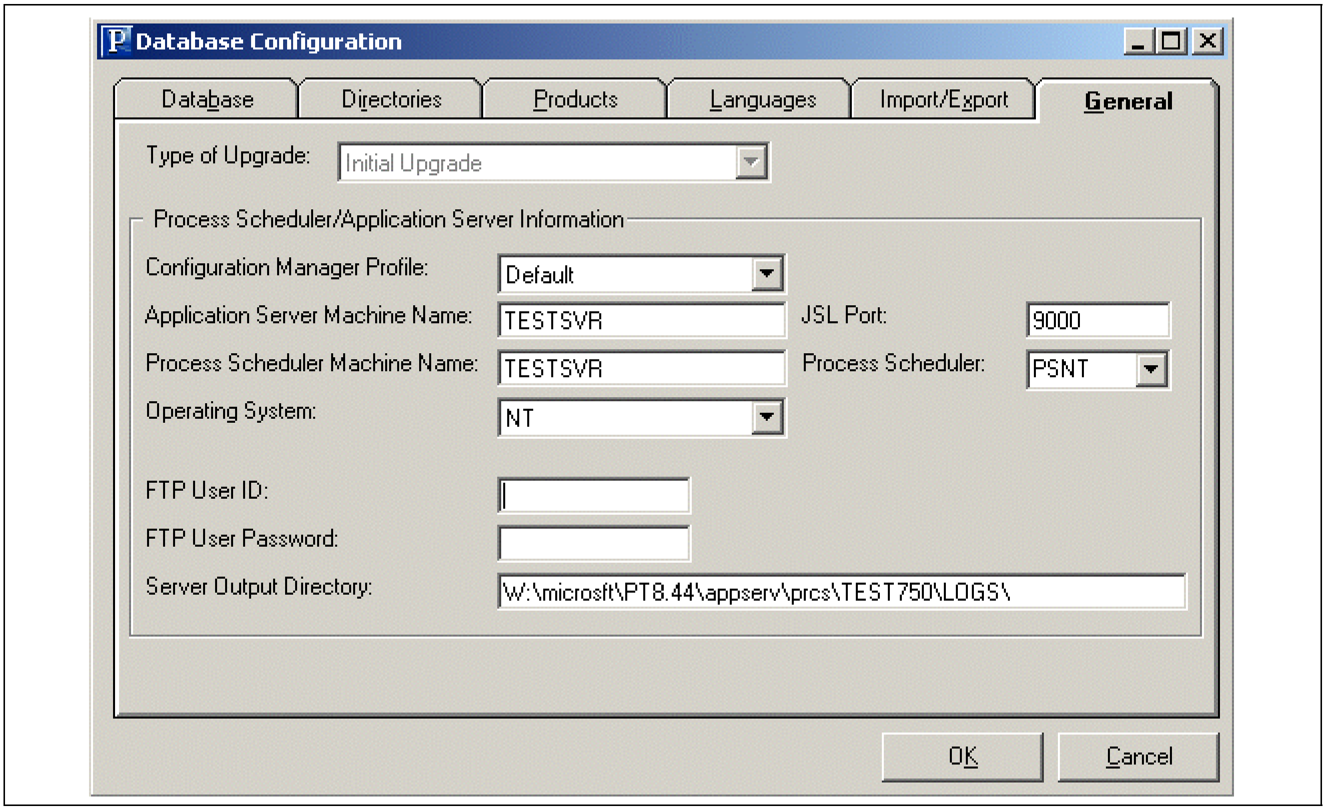
Click the Languages tab. Select all languages that are installed on the database. You must select at least one language.

Importing and Exporting Database Configuration

Click the Import/Export tab. To save time when creating other jobs, you can export the configuration to a file after you’ve finished entering the configuration information. You can then import that configuration and modify it as necessary when you need to create another job.

Entering General Settings

Click the General tab.



Database Configuration - General tab

Type of Upgrade

Select either *Initial Upgrade* or *Move to Production.* In the job, the PeopleSoft Upgrade Assistant will display only those steps needed for the selected upgrade type.

Note. You cannot change the type of upgrade once the database configuration has been saved. If you made a mistake entering the type of upgrade, you will need to create a new job.

Configuration Manager Profile

Select the configuration manager profile that contains all the settings appropriate to your upgrade. Some of the configuration manager settings that must be set correctly are DBBIN, SQRBIN, PS_HOME, datamover input/output directories, and so forth.

Entering Server Information

The remainder of the settings need to be configured only if you are running processes on the server through the PeopleSoft Upgrade Assistant.

See Also

Enterprise PeopleTools 8.46 PeopleBook: System and Server Administration, “Setting Application Server Domain Parameters,” PSAPPSRV Options

Opening a Previously Saved Job

To open a previously saved job:

1. Select the Job Status tab.
2. Select File, Open Upgrade Job.

   The Upgrade Assistant Signon dialog box appears.
3. Enter the user ID and password that you specified for the target database on the Database Configuration - Database tab.
4. Click OK.

Running the Job

After you have created or opened the upgrade job, click the Run button on the PeopleSoft Upgrade Assistant Job Status view to run the automated upgrade steps. You can also monitor the progress of the upgrade in the status grid on this view.

See Also

Chapter 6, "Running Application Engine Processes on the Server," page 33

CHAPTER 6

Running Application Engine Processes on the Server

PeopleSoft Upgrade Assistant uses the PROCESSREQUEST component interface object to submit jobs to run on the PeopleSoft Process Scheduler server. You must configure your environment for PeopleSoft Upgrade Assistant to submit processes.

This chapter discusses how to:

- Configure the PeopleSoft Process Scheduler and application server.
- Configure the portal.
- Build the PROCESSREQUEST component interface.
- Edit component interface security.
- Edit step properties.

Configuring Process Scheduler and Application Server

You must first configure and run a Process Scheduler and Application server against the target database.

See Also

Enterprise PeopleTools 8.46 PeopleBook: System and Server Administration, “Setting Application Server Domain Parameters”

Configuring the Portal

You must configure the portal to update user security.

See the PeopleTools 8.46 Installation Guide for your platform, "Setting Up the PeopleSoft Internet Architecture."

Building the PROCESSREQUEST Component Interface

To configure the PROCESSREQUEST component interface:

1. Open PeopleSoft Application Designer.

2. Select File, Open.
3. For the definition, select Component Interface.
4. Click Open to display a list of component interfaces.
5. Select PROCESSREQUEST and click Open again.
6. Select Build, PeopleSoft APIs.

   The PeopleSoft API Bindings dialog box appears.
7. Select the Build check box in the COM Type Library group box.
8. In the Target Directory field, enter the directory in which you want the COM type library to be created: typically <PS_HOME>\bin\client\winX86. It must be a local directory.
9. In the COM Server DLL Location field, enter the server location to specify where the PeopleSoft API Adapter (psapiadapter.dll) is located: <PS_HOME>\bin\client\winX86.
10. (Optional) Select the AutoRegister check box to execute the registry file immediately upon building the API. This causes your client machine registry to be immediately updated without having to register it manually.
11. (Optional) Select the Clean-up Registry check box to clean up the registry if you've applied previous versions of Peoplesoft_Peoplesoft.reg.

    This is needed so that the older registry settings don't remain and conflict with settings made by the latest version.

    Note. Make sure the Build check box in the Java Classes group box is not selected.

    ---
12. Click OK to build the bindings that you selected.

    The system builds the PROCESSREQUEST component interface object to the location that you specified (<PS_HOME>\bin\client\winx86 directory). If the operation was successful, a done message appears in the PeopleSoft Application Designer Build window.

Setting System Variables

You must also set up the workstation running PeopleSoft Upgrade Assistant to access the component interface API using COM.

Setting Up Windows 2000 Workstations

To set system variables for Windows 2000 workstations:

1. Select Start, Settings, Control Panel, System, Advanced, Environment Variables.
2. Append the <PS_HOME>\jre\bin\client directory to your system variable Path.
3. In addition, append the <PS_HOME>\class directory to the system variable CLASSPATH to include the psjoa.jar file.

Setting Up XP Workstations

To set system variables for Windows XP workstations:

1. Select Start, Control Panel, System, Environment, System Variables.
2. Include a path to the bin directory.

This must be the same directory that you specified as the Target Directory on the Build PeopleSoft API Bindings dialog box.

3. In this same location, set the system variable CLASSPATH to include the psjoa.jar file.

Editing Component Interface Security

You must edit security permissions to run the PROCESSREQUEST object.

To set up component interface security:

1. Log in to PeopleSoft through the browser.
2. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
3. Select the permission list for which you want to set security.

   The Permission List component appears.
4. Access the component interfaces page and select the PROCESSREQUEST component interface.
5. Click Edit.

   The Component Interface Permissions page appears, showing all of the methods (both standard and user-defined) in the component interface and their method access.
6. Set the access permission for each method.

   Select *Full Access* or *No Access.* You must grant full access to at least one method to make the component interface available for testing and other online use.
7. Click OK when finished.
8. Click Save.

Editing Step Properties

Access the Step Properties page for the Application Engine process upgrade step.

Make sure that the Run Location of the Application Engine process is set to *Server.*

PeopleSoft Upgrade Assistant can then run Application Engine processes against a Process Scheduler located on your server.

See Also

Chapter 3, “Using the Upgrade Template,” Editing Steps, page 13

Chapter 7

Configuring and Editing Options

This chapter discusses how to:

- Edit your database configuration.
- Specify general and email settings.

Editing Your Database Configuration

You can modify the database configuration options you set for your upgrade steps.

To edit your database configuration:

1. Access PeopleSoft Upgrade Assistant.
2. Select the Job Status view.
3. Select File, Open Upgrade Job and select your upgrade job.
4. Select Options, Database Configuration.

   PeopleSoft Upgrade Assistant displays the Database Configuration dialog box.
5. Modify your selected options.

   Note. You cannot change the database type or the type of upgrade; you must create a new job if the database type or type of upgrade is incorrect.
6. When you are finished modifying your database configuration options, click OK.

   The Upgrade Template reappears in Job Status view.
7. Save your template.

See Also

Chapter 5, "Creating and Running the Upgrade Job," Configuring the Database, page 29

Specifying General and Email Settings

This section discusses how to:

- Specify general settings.
- Specify email settings.

Specifying General Settings

Use the Upgrade Assistant command on the Options menu to specify general and email settings for the upgrade template. You can access the Options, Upgrade Assistant menu from the Upgrade Template view or the Job Status view.

PeopleSoft Upgrade Assistant uses Notepad as the default editor for displaying logs and scripts. However, you can specify a different editor. You will also need to specify an HTML Browser if you want to filter upgrade documentation to file. Access Upgrade Assistant - General Settings tab.

Log and Script Editor Enter or browse to the executable for the editor, including the path name.

HTML Browser Enter or browse to the executable for the HTML browser, including the path name (for example, C:\Apps\Internet Explorer\iexplore.exe).

Add Upgrade Job Comments to Documentation Select to add comments to documentation that is viewed through the upgrade assistant or the filtered documentation produced by the upgrade assistant. Add your comments through the Edit Job Properties dialog box.

Specifying Email Settings

On the Step Properties dialog box, you specified whether to allow for errors during the upgrade process. If you selected *No* to the Allow for Errors option, you may want to configure PeopleSoft Upgrade Assistant to notify you by email if it encounters an error during the upgrade process. When you select this option, PeopleSoft Upgrade Assistant sets this notification process. In addition, PeopleSoft Upgrade Assistant sends you a completion message when it encounters a *Stop* in the upgrade process.

PeopleSoft Upgrade Assistant uses SMTP Mail Servers to send the error (failure) notifications and completion messages.

Access Upgrade Assistant - Email Settings tab.

Send Email Notifications Select the check box if you want PeopleSoft Upgrade Assistant to notify you of any errors encountered during the upgrade process.

SMTP Mail Server If you are not sure what your SMTP mail server is, contact your system administrator.

To Address Enter the address to which you want the email sent.

From Address Enter the address from which you want the email sent.

CHAPTER 8

Resolving Error Messages

This chapter discusses how to:

- Resolve PeopleTools upgrade messages.
- Resolve messages from Application Engine processes.

Resolving PeopleTools Upgrade Messages

The following are error messages you might see when running the PeopleTools upgrade process and the recommended actions:

Message	Recommended Action
Unable to login into the Target Database	Check the following items: • Confirm that the target database configuration information is correct. • Confirm that the upgrade assistant staging and output directories (found under the Database Configuration, Directories tab) does not contain spaces in the directory name: for example: Not Valid: C:\Program Files\PeopleSoft\Upgrade Assistant\staging\ (There is a space between *Upgrade* and *Assistant*) Valid: C:\PT844\staging\ • Check the <UA Output Directory>\TOOLSREL.log file for error messages. • Verify that you specified the correct query tool in the database configuration. See Chapter 5, "Creating and Running the Upgrade Job," Configuring the Database, page 29. • Verify that you can connect to the target database manually through PeopleTools and the query tool.

Message	Recommended Action
Unable to login into the Source Database	If your Upgrade Template *does not* contain the task titled “Organize Your PeopleTools Upgrade,” review the following: • Confirm that the Source Database Configuration information is correct. • Check the <UA Output Directory>\TOOLSREL.log file for error messages. • Verify that you specified the correct query tool in the database configuration. See Chapter 5, “Creating and Running the Upgrade Job,” Configuring the Database, page 29. • Verify that you can connect to the target database manually through PeopleTools and the query tool.
Target and Source Databases at the same release. No scripts to execute.	The Upgrade Assistant ran the TOOLSREL.sql query against both the Source and Target databases and determined that both are at the same release. Once the Source and Target releases have been determined, the database configuration is stamped with the releases. Also, once the database configuration is stamped, the database configuration cannot be changed. The only way to continue is to create a new job.
Run-Time error ’53’ File not found: PSAPI.DLL	Perform a Find/Search on the local drive (C: drive) for PSAPI.DLL. PSAPI.DLL is part of the NT operating system. If any other version of PSAPI.DLL is found, in addition to the version located in the C:\WINNT\SYSTEM32 directory, rename it and try again.
Cannot locate log file: c\temp\UA\75to840out \DBTSFIX_DBTSFIX800	Confirm that SQR parameters were set correctly.

Resolving Messages from Application Engine Processes

The following table lists possible error messages and recommended actions when you run Application Engine processes on the server and client :

Server Process Messages

Message	Recommended Action
Process fails but there is no log file	Confirm that the Server Output directory in the Upgrade Assistant Database configuration is correct. **Note.** The path should end with a back slash.

Message	Recommended Action
Error number –16	Check that the PROCESSREQUEST Component Interface has been properly configured and built. See Chapter 6, "Running Application Engine Processes on the Server," page 33.
Error number –17	Check to make sure that the Application Server and Process Scheduler are running and are properly configured. Check the application server configuration file to see what you set the JSL (Jolt Listener Port) to. Verify that you've entered that port in the database configuration. **Note.** JSL Port and WSL Port are not the same.
Error number –18	Upgrade Assistant failed to retrieve the PROCESSREQUEST component interface. Use the Component Interface Tester found in Application Designer to test. See *PeopleTools 8.44 PeopleBook: Component Interfaces.*
Error number –19	Upgrade Assistant failed to set the PROCESSREQUEST component interface properties. Use the Component Interface Tester found in the Application Designer to test. See *PeopleTools 8.44 PeopleBook: Component Interfaces.*
Error number –20	Upgrade Assistant failed to save the PROCESSREQUEST component interface properties. Use the Component Interface Tester found in the Application Designer to test. See *PeopleTools 8.44 PeopleBook: Component Interfaces.*

Client Process Messages

Message	Recommended Action
Run the Upgrade Assistant *Run* function but nothing happens.	Confirm that *C:\WINNT\SYSTEM32\PSAPI.DLL* exists.

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

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

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

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

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

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

billing career In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also *detailed business process.*
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

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

See also *course.*

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

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

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

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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

compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also *class.*
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

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

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

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

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

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

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

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

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

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

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

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

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

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

See also *update access.*

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

integration — A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point — An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set — A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

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

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

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

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

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

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

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

plan In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context
In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template
In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning
In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance
In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population
In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

portal registry
In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list
In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule
In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition
In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key
In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number
In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type
In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for *record output value-added tax flag.* See *record input VAT flag.*
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

speed key See *communication key.*

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

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

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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